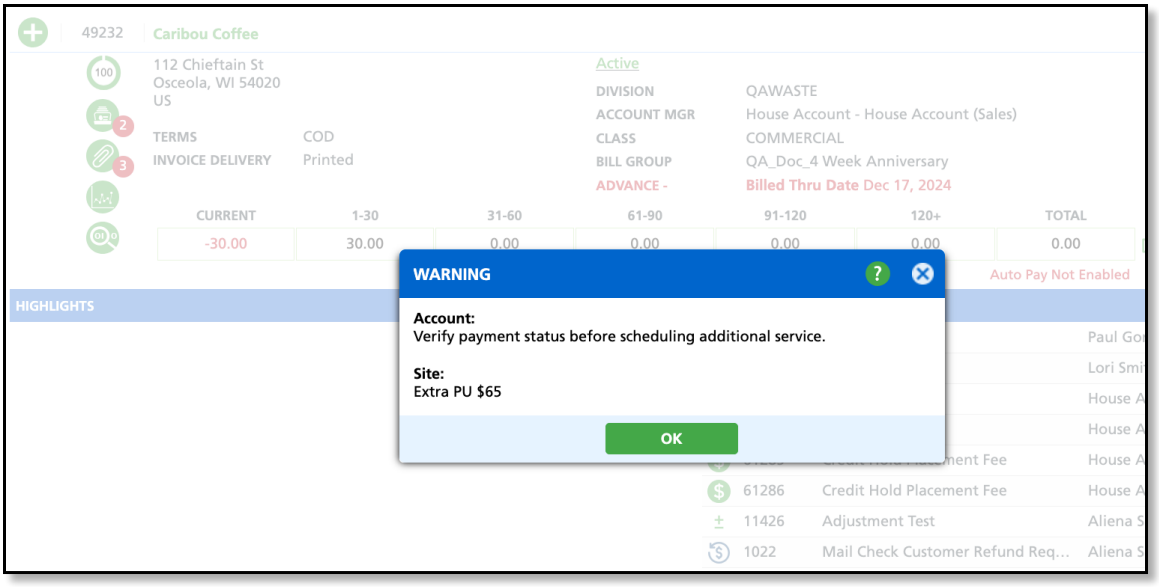
Overview of Note Types

Last Modified on 06/26/2026 1:51 pm PDT

Pathway: *Customer > Search - Accounts*

The Customer Service screen provides access to a variety of ways notes can be added to accounts, sites, services and work orders. This article provides an overview on the different note types with links to how to create them.



Permissions

The following permissions are linked to the creation and editing of notes:

Permission ID	Permission Name
14	Add Note
15	Edit Note For Self
16	Delete Note For Self
17	Edit Note For Others
18	Delete Note For Others
19	Set Note Date And Time When Adding Note
20	Edit Note Date And Time For Self
21	Edit Date Note and Time For Others
272	Edit/Delete Note Task

Overview of Note Types

Note Type	Description	Visible On...
Account Level Notes *Notes and warnings added at the **account level** will display for all sites linked to the account.*		

Note Type	Description	Visible On...
Related Article Link: Account Level Notes		
Warning on Open	Displays as a pop-up warning anytime the account is accessed. Warnings entered here will display for all service locations linked to the account. *Example: "Only Denise or Bill are authorized account contacts"*	Navusoft
One Time Note	Enter a one-time note at the account level and the note will display on the designated calendar day for each site. *Example: "Fax all site invoices for May to Bill (555)555-1234"*	Navusoft
Site Level Notes *Notes and warnings added at the **site level** will only display for the site the note was added.*		
Related Article Link: Site Level Notes		
Warning on Open	Displays as a site-specific pop-up warning anytime the site is accessed. *Example: "Only John D. can cancel a service"*	Navusoft
Access Information	Used for conveying information the driver will need to access a location. *Example(s): "Use door in back" or "Gate Code: (555589)"*	NavuNav (Driver App) Navusoft
One Time Note (Site)	Enter a one-time note at the site level and the note will only display on the designated calendar day for the site it was entered. *Example: "Billing inquiry to add an additional container"*	Navusoft
Service Notes	Notes that are specific to a service. These can be displayed as a one-time note using start and end dates, or a continual note by omitting the end date. *Example: "Always leave container on the right side of the property"*	NavuNav (Driver App) Navusoft
Work Order Notes	Add a note to a work order for the driver to see. *Example: "Drop-off one extra container"*	NavuNav (Driver App) Navusoft

Related Articles:

Note Type Setup
Account Level Notes
Site Level Notes