

Add Note

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Pathway: [Accounts](#) > [Search](#) > [Accounts](#)

Notes provide an option to record information or interactions with a customer that can be referred back to. Notes only display on the account calendar for the day it was added and do not generate followup notifications.

The screenshot displays the account management interface for 'Cascade Orthopedics'. At the top, account details include the address (123 West Elm St, Houston, TX 54020-4042), status (Active), and contact information (Aliena Somers, Alexis Garza). A financial summary table shows current and future payments. Below this is a 'PENDING' section with two items: '4143 Confirm appointment' and '1195 Vacation Hold Services'. The 'ACTIVE SERVICES' section lists '10 Yard Trash Service'. The 'CALENDAR' view shows the month of July 2022. A right-click context menu is open over the date July 3, with 'Add Note' selected. An 'ADD NOTE' dialog box is open, showing the note creation details and the text of the note.

Permissions

The following permissions apply to the Add Note feature:

| Permission ID | |
|---------------|---|
| 5 | View Account |
| 6 | View Site |
| 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 Note Date and Time For Others |

Field Descriptions

| Field | Description |
|------------|---|
| Created On | The date the note was created/applies. Select the calendar icon to change the date of the note. |
| Note Type | Indicates what the note is about. |
| Note | Text field to record a note. |

Add A Note

1. Right-click on the **calendar date** the note applies.
2. Select **Add Note** from the popup that displays.
3. From the Add Note popup editor, complete all necessary fields.
4. Select **Save** when finished.

Locations Where Notes Display

Notes are displayed on the calendar of the customer's account on the date they were created or assigned. The title of the note reflects the selected 'Note Type'.

45597 **Cascade Orthopedics**

123 West Elm St
Houston, TX 54020-4042

Active

DIVISION HOUSTON
ACCOUNT MGR Aliena Somers
CLASS COMMERCIAL
BILL GROUP HOU-MANUAL INVOICES

| CURRENT | 1-30 | 31-60 | 61-90 | 91-120 | 120+ | TOTAL |
|---------|------|-------|-------|--------|------|--------|
| 187.33 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 187.33 |

HIGHLIGHTS | **PENDING**

| | | |
|------|------------------------|---------------|
| 4143 | Confirm appointment | Aliena Somers |
| 1195 | Vacation Hold Services | Alexis Garza |

ACTIVE SERVICES (1) Standard

| QTY | SERVICE CODE |
|-----|-----------------------|
| 1 | 10 Yard Trash Service |

CALENDAR | July, 2022

AR
 Communication
 Service Records
 Service Changes
 System

| SUN | MON | TUE | WED |
|--------|---|--------|--------|
| Jun 26 | <div style="border: 1px solid #0070C0; padding: 5px; color: green;">Billing/AR question</div> | Jun 27 | Jun 28 |
| Jul 3 | Jul 4 | Jul 5 | |

