

Add Note

Last Modified on 11/21/2024 12:00 pm PST

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 address (123 West Elm St, Houston, TX 54020-4042), status (Active), and contact information (Aliena Somers, COMMERCIAL, HOU-MANUAL INVOICES). A balance summary table shows a current balance of 187.33. Below this, a 'PENDING' section lists tasks like 'Confirm appointment' and 'Vacation Hold Services'. The 'ACTIVE SERVICES' section shows '10 Yard Trash Service'. The 'CALENDAR' view is set to July 2022, with a context menu open over June 27th. The 'ADD NOTE' dialog box is open, showing a note created on 06/27/2022 at 1:42 pm, with the type 'Billing/AR question (Admin)'. The note content reads: 'Called and requested a new invoice be mailed.'.

Permissions

The following permissions determine what a user can do with the Add Note feature:

Permission ID	Permission Name
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

100
2
1

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

SUN	MON	TUE	WED
Jun 26	Jun 27 ✎ Billing/AR question	Jun 28	
Jul 3	Jul 4	Jul 5 ✎ Other	