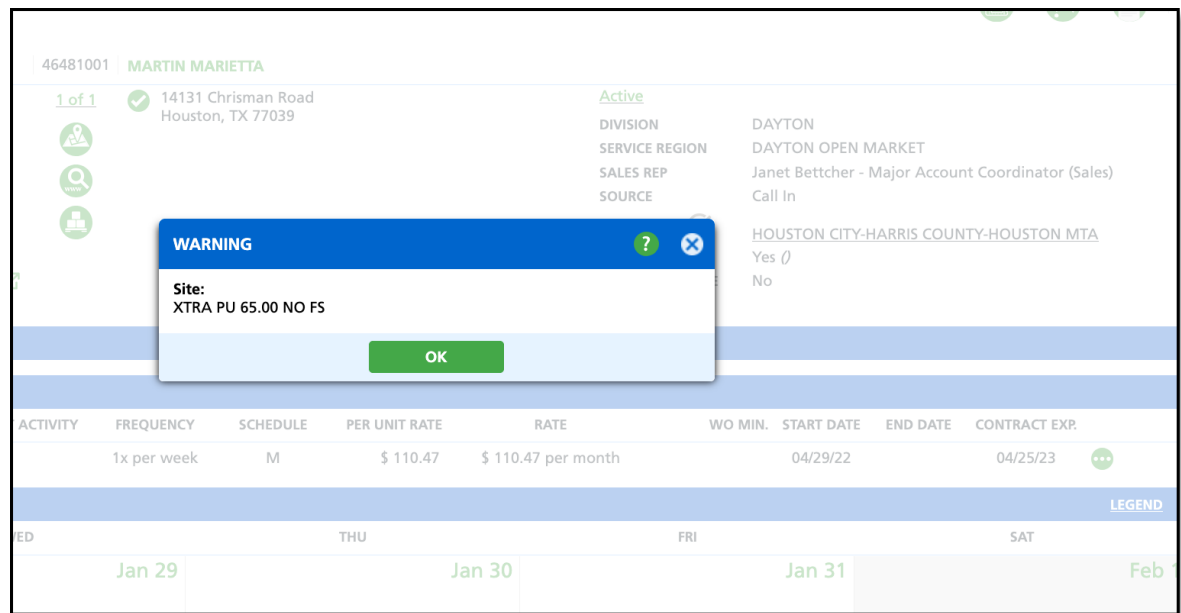


# Site Notes

Last Modified on 02/10/2026 11:23 am PST

**Pathway:** *Customer > Search - Account*

This article details notes that are available at the site level. Site Level notes will display **ONLY** on the site they were added to.



## Permissions

The following permissions are required to create and manage site-level notes, including those added by other users:

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

## Warning on Open

Add a 'Warning On Open' note to a site to alert users of a site specific issue or processes. Warnings entered here will display each time the site is accessed. If the **account** the site belongs to also includes a 'Warning On Open' note, the site's warning note will display below it.



To remove a warning note that no longer applies, follow steps 1-3 outlined above and delete the text from the Warning On Open field. Select Save when done.

## Access Information

Enter an Access Information note to communicate information the driver will need to access a service location. This will display on the service record for the driver, and in the Site Details section of the Customer Service screen.

49232001

Caribou Cafe

1 of 2

112 Chieftain St  
Osceola, WI 54020  
US

ACCESS

East gate access code 1234

BUSINESS HOURS / SERVICE WINDOW

Weekdays 8:00 AM to 7:00 PM

Active

NEXT BILL DATE Jan 14, 2025

DIVISION

QAWASTE

SERVICE REGION

Delete Me

SALES REP

House Acct non System - House Account (Sale

SOURCE

Cold Call

GENERATOR

Not Applicable

SITE CLASS

COM

SURCHARGE GRP

Fuel Surcharge - Commercial

TAX REGION

AGUA DULCE CITY CCMTA

Gonzalez - QA Expert (Admin)

12/31/2024

Testing adding tasks to multiple accounts

Smith - Admin-NS (Admin)

11/12/2024

Account - House Account (...)

11/12/2024

Account - House Account (...)

01/15/2025

## Add an Access Information Note

EDIT SITE

Basic Settings

Billing Settings

BIC Profile

Required Capabilities

NAME

Caribou Cafe

NAME 2

ADDRESS LINE 1

112 Chieftain St

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

Osceola

WI

54020

PHONE 1

(999) 999-9999

Office

PHONE 2

(999) 999-9999

OLD ID

PO#

SIGNATURE REQUIRED

☐

LEED REPORTABLE ☐

NOTE

WARNING ON OPEN

ACCESS INFORMATION

East gate access code 1234

BUSINESS HOURS / SERVICE WINDOW

Weekdays

Open 8:00 AM Close 7:00 PM

DIVISION

QAWASTE

SERVICE REGION

Delete Me

TAX REGION

AGUA DULCE CITY CCMTA

ORIGIN

SOURCE

Cold Call

SALES REP

House Acct non System - House Accou

SITE CLASS

COM

GENERATOR

Not Applicable

EPA

EPA Value

STATE ID

ADDITIONAL SERVICE MINUTES

1. Right-click under the site's address (right side of the Customer Service screen).
2. Select **Edit** from the pop-up to display the 'Edit Service Location' editor.
3. Select the **Basic Settings** tab.
4. Enter the access information into the **Access Information** field.
5. Select **Save** when finished.



To **remove** or edit an Access note, follow steps 1-3 outlined above then delete or edit the text from the Access Information field. Select Save when finished.

## Service Notes

Service Notes provide a way to communicate necessary information about the service for a location to the driver in the driver app. Notes entered here are also visible on the Customer Service screen by expanding the service, and are controlled using start and end dates.

32973

100

4

2

0

SAN ANTONIO, TX 78249-4007

HOME

CUSTOMER

DASHBOARD

SALES

OPERATIONS

ACCOUNTING

REPORTS

Active

DIVISION

ACCOUNT MGR

CLASS

BILL GROUP

OLD ID

INVOICE BY EMAIL

TERMS

AUDITOR

SOURCE

REBATE PAYMENT TYPE

CORPUS

ROLL OFF-TEMP

COR-ROLF BI-WEEKLY

COR-3638

No

Net 20

null

Not Applicable

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

QTY

SERVICE CODE

1

4 Yard Recycle Service

Reason:

Add Svc - New Service

Requested By:

Dale

Posted By:

Aliena Somers on 05/05/2022

Service

Drop containers on East side of parking lot.

Note:

### Add a Service Note When Adding A New Service

ADD ACTIVE SERVICE

REASON CODE

Add Svc - New Service

START DATE

05/06/22 Friday

Week 19 (A)

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SVC FEES
1	4 Yard FL	4 Yard Recycle Service	1x per week	0.0000	0.00 Month

SERVICE DAYS

☐ Mon
 ☐ Tue
 ☐ Wed
 ☒ Thu
 ☐ Fri
 ☐ Sat
 ☐ Sun

REQUESTED BY

Dale

SERVICE NOTES

Drop containers on right East side of parking lot.

☒ FL Delivery
 

ROUTE

COR 201

DATE

05/06/22 Friday

WORK ORDER NOTES

Map

When adding a new service, a Service Notes field is provided and defaults to the service start date. If an end date should be added, the following applies:

1. Save the new active service with the Service Notes entered. The Add Active Service window will close, and the Customer Service screen will display.
2. Expand the service from under the **Active Services** section.
3. Select the **green '...' icon** from the service line and the 'Service Additional Fields' editor will display.
  - Image available in the **Add/Edit a Service Note to an Existing Service** section below.
4. Enter a date into the **End Date** field.
5. Click **Save**.

### Add/Edit a Service Note to an Existing Service

The screenshot displays a software interface for managing services. At the top, there are tabs for 'HIGHLIGHTS' and 'PENDING'. Below these is a table of 'ACTIVE SERVICES (1)' with columns: QTY, SERVICE CODE, SERVICE ID, LAST ACTIVITY, FREQUENCY, SCHEDULE, PER UNIT RATE, RATE, WO MIN., START DATE, END DATE, and CONTRACT. A service line is shown with details like '2 YD FL Services' and a rate of '\$ 100.00 per month'. A red box highlights a green '...' icon on the right of this line, with an arrow pointing to the 'SERVICE ADDITIONAL FIELDS' pop-up.

The 'SERVICE ADDITIONAL FIELDS' pop-up has a blue header and contains fields for 'REASON CODE' (set to 'ADD-Add Svc - New Service'), 'PO NUMBER', and 'BLANKET PO'. Below these is a red warning message: 'Service Reversal Disabled -- Can not be reversed - Service has been billed.' At the bottom of this pop-up, a green '+' icon is highlighted with a red box and an arrow pointing to the 'ADD SERVICE NOTE' dialog.

The 'ADD SERVICE NOTE' dialog also has a blue header and contains fields for 'START DATE', 'END DATE', and a large text area for 'NOTE'. There is a 'DISPLAY CONFIRMATION' checkbox and a 'SAVE' button at the bottom.






If an end date is entered, the service note will no longer display after the end date has passed.



1. Navigate to the account's service location using your preferred search method.
2. Select the **green '...'** icon from the service line and the 'Service Additional Fields' editor will display.
3. Select the **green '+'** icon in the **Service Notes** section.
4. Enter a **Start Date**. Leave the End Date field null or blank and the note will continue to display until deleted, or an added end date has passed.
5. Enter the **Note** and select the **Display Confirmation** check box if the note should also appear as a pop-up when the user creates an on-call order or an inbound / receiving ticket.
6. Select **Save** when finished.


## One-Time Note




Add a one-time note at the site level, which will appear only on the specified day in the calendar for the selected site. These notes are versatile, often used to document interactions or key updates related to the site.

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

 CALENDAR 

 May, 2022 

 ☒ AR ☒ Communication ☒ Service Records ☒ Service Changes ☒ System

SUN	MON	TUE	WED
<div>May 1</div> <div>May 8</div> <div>May 15</div>	<div>May 2</div>	<div>May 3</div> <div> (1) Aliena Somers</div>	<div>May 4</div>
	<div>May 9</div>	<div>May 10</div>	<div>May 11</div>
	<div>May 16</div>	<div>May 17</div> <div>  Billing/AR question</div>	<div>May 18</div>

## Add a One-time Note to a Site

The screenshot illustrates the process of adding a one-time note to a site. At the top, the site details for '32973009' in 'Corpus Christi, TX 78411' are shown, including its status as 'Active' and associated division and region information. Below this is a calendar view for May 2022. A red arrow labeled '1' points to a right-click on the date May 4. A context menu appears with 'Add Note' highlighted, indicated by a red arrow labeled '2'. A third red arrow labeled '3' points to the 'Add Note' pop-up dialog. The dialog shows the 'CREATED ON' date as 05/05/2022 1:50 pm, the 'NOTE TYPE' as 'Billing/AR question (Admin)', and a text area containing the note: 'Denise called in requesting a new invoice be faxed to 555-555-1234 attn: Denise'. The dialog has 'SAVE' and 'CANCEL' buttons at the bottom.

1. Right-click on the relevant date in the calendar and select **Add Note**. The **Add Note** pop-up will appear, allowing you to enter your note (as highlighted by the three bubbles in the image).
2. Verify the date in the **Created On** field is the date you intended for the note to display. Select the calendar icon to edit the date if needed.
3. Select the **Note Type**. Site specific notes only use 'Site' designated Note Types.

- Note Types are established and can be referenced in *Setup > Customer > Note Type*.
  - Note Types differentiate what notes can be added at the account-level (displays across all sites), or at site-level, only displaying for a specific site.
- 4. Enter the body of the note in the **Note** field.
- 5. Select **Save** when finished. The note will display on the 'Created On' date in the calendar.



To **remove** a note:

1. Navigate to the calendar day the note was added and select the note.
2. Select **Delete** and the note will be deleted from the site.

## Work Order Notes

Add a note to a work order for when the driver needs to be alerted of a one-time change to a location's servicing. Hover over the work order from the customer service screen and an informational pop-up displays with the added note at the bottom.

Rental Fee, Service Change			
WED	THU	FRI	SAT
Jun 28	Jun 29	Jun 30	Jul 1
		<div>  1, RO_DELIVER, 10YDRO   10 Yard Open Top Service           </div> <div>             Work Order: 6303868              Quantity: 1              Status: Scheduled              Posting Status: Pending              Reason: ADD-Add Svc - New Service              Work Type: RO Delivery              Equipment Type: 10 Yard Roll Off              Note: Go to door 5 on north side of building           </div>	
Jul 5	Jul 6		Jul 8
Jul 12	Jul 13	Jul 14	Jul 15

Add a Work Order Note



EDIT SERVICE RECORD

Site 2 test

3333 University Ave SE  
Minneapolis, MN 55414-3325

CREATED BY

Aliena Somers on 6/30/23 9:21 am

ORDER REASON

WORK ORDER

6303868

QTY

1

SERVICE CODE

10 Yard Open Top Service

EQUIPMENT

10YDRO

WORK TYPE

RO\_DELIVER

ORDER TYPE

Add Service

ORDER NOTES

Go to door 5 on north side of building

Last modified by Aliena Somers on 6/30/23 11:26 am

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

06/30/23 Friday

ROUTE

SEQUENCE

0

DESTINATION / ORIGIN

WORK STATUS

Scheduled

EXCEPTION REASON

POSTING STATUS

Pending

Charges

Payments

Completion

Attachments

Inventory

Labels

Photos

+

☐ Charges must match Equipment
 ☐ Charges must match Material

WO MINIMUM

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR MINI... RATE	MINI... TYPE	TOTAL

1. Select the work order from the calendar of the Customer Service screen to display 'Edit Service Record'.
2. Enter the work order notes into the **Order Notes** field.
3. Select **Save** when finished.



Remove or edit a note by selecting the work order the note was added to and editing or deleting the text from the Order Notes box.

## Related Articles:

[Note Type Setup](#)

[Overview of Note Types](#)

[Account Level Notes](#)