

Site Level Notes

Last Modified on 12/03/2024 8:26 am PST

Pathway: Customer > Search - Account



Site Level notes display ONLY on the site they were added to.

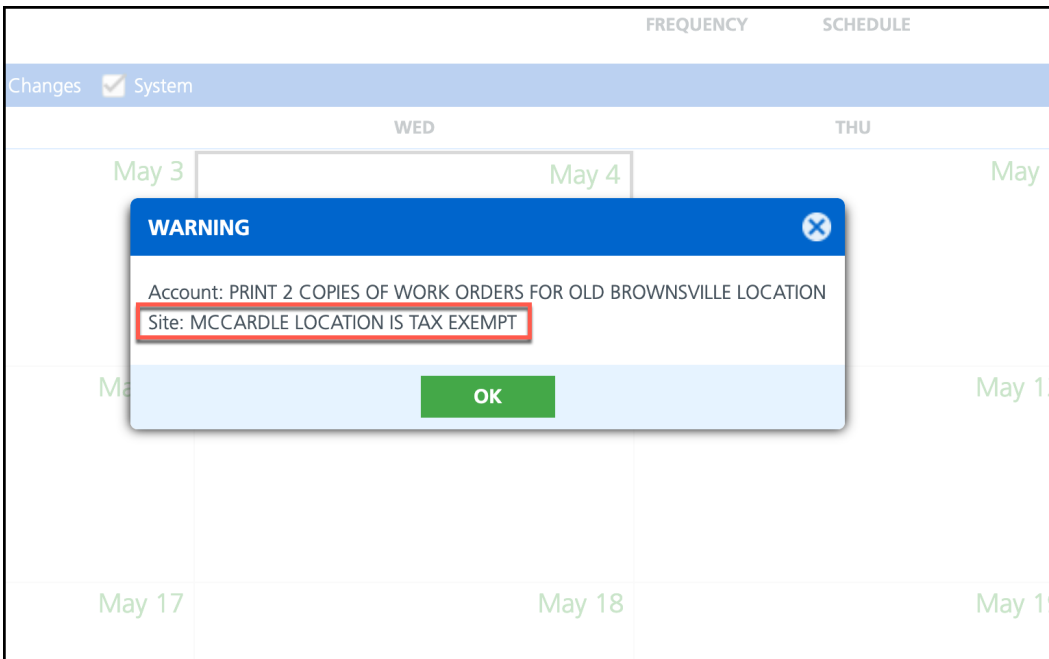
Permissions

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

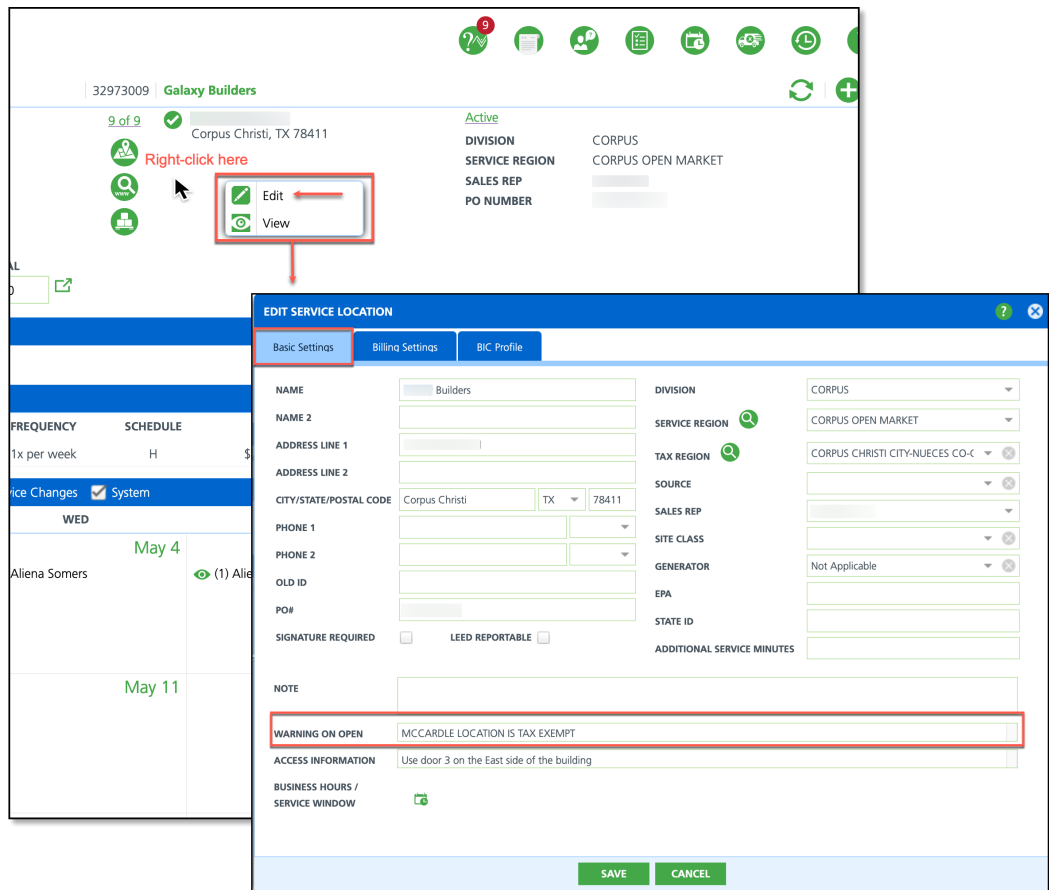
Permission ID	Permission Name
14	Add Note
15	Edit Note For Self
16	Delete Note For Self
17	Edit Note For Others
18	Delete Note For Others
19	Set Note Date And Time When Adding Note
20	Edit Note Date And Time For Self
21	Edit Date Note and Time For Others

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.



Add a 'Warning On Open' to a Site



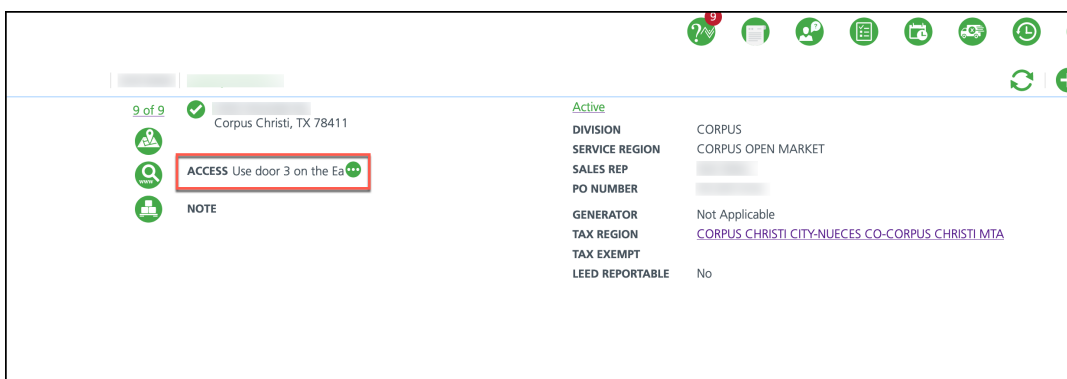
1. Navigate to the site using any of the available search methods.
2. Right-click under the service location's address (right side of the Customer Service screen) and select **Edit** for the 'Edit Service Location' editor to display.
3. Enter the warning note into the **Warning On Open** text box field.
4. Select **Save** when finished.



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.



Add an Access Information Note

ADD AN ACCESS INFORMATION NOTE

The screenshot shows the 'EDIT SERVICE LOCATION' interface. At the top, there are three tabs: 'Basic Settings' (highlighted with a red box), 'Billing Settings', and 'BIC Profile'. The form contains various fields for location details. The 'ACCESS INFORMATION' field, located below the 'WARNING ON OPEN' field, is highlighted with a red box and contains the text 'Use door 3 on the East side of the building'. At the bottom of the form, there are 'SAVE' and 'CANCEL' buttons.

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 SAN ANTONIO, TX 78249-4007

Active

DIVISION CORPUS

ACCOUNT MGR

CLASS ROLL OFF-TEMP

BILL GROUP COR-ROLF BI-WEEKLY

OLD ID COR-3638

INVOICE BY EMAIL No

TERMS Net 20

AUDITOR

SOURCE null

REBATE PAYMENT TYPE Not Applicable

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

OPERATIONS

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 Note: Drop containers on East side of parking lot.

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.

ROUTE COR 201

DATE 05/06/22 Friday

WORK ORDER NOTES

When adding a new service, a Service Notes field is provided and defaults to the start date of the the service. If an end date is required, 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 displays.
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.
4. Enter a date into the **End Date** field.
5. Select **Save**.

Add/Edit a Service Note to an Existing Service

The screenshot displays a software interface with a 'SERVICE ADDITIONAL FIELDS' dialog box open. The dialog contains the following fields:

- REASON CODE: ADD-Add Svc - New Service
- PO NUMBER: [Empty text field]
- BLANKET PO: [Empty dropdown menu]
- DESTINATION/ORIGIN: [Empty dropdown menu]

Below these fields is a 'SERVICE NOTES' section with a '+' icon highlighted by a red box. The background shows a calendar for June 2023 and a table of active services with columns: QTY, SERVICE CODE, SERVICE ID, FREQUENCY, SCHEDULE, RATE, START DATE, END DATE, CONTRACT EXP., and WO MIN.



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 heading.
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. 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						
SUN	MON	TUE	WED	THU	FRI	SAT
May 1		May 2	May 3 (1) Aliena Somers			
May 8	May 9	May 10				May 1
May 15	May 16	May 17 Billing/AR question				May 1

Add a One-time Note to a Service Location

The screenshot shows a service location page for '32973009' in 'Corpus Christi, TX 78411'. The page includes a calendar view for May 2022. A right-click on the date 'May 5' has opened a context menu with the following options: Add Active Service, Create On Call Order, Add Appointment, Add Note, Add Task, Add Manual Charge, and Add Customer Request. The 'Add Note' option is highlighted. An 'Add Note' pop-up window is open, showing the following details:

- CREATED ON:** 05/05/2022 1:50 pm
- NOTE TYPE:** Billing/AR question (Admin)
- NOTE:** Denise called in requesting a new invoice be faxed to 555-555-1234 attn: Denise

Buttons for 'SAVE' and 'CANCEL' are visible at the bottom of the pop-up window.

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 1, RO_DELIVER, 10YDRO \$ 10 Yard Open Top Service	Jul 1
Jul 5	Jul 6	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	Jul 8
Jul 12	Jul 13	Jul 14	Jul 15

Add a Work Order Note

? X
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	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE
6303868	1	10 Yard Open Top Service	10YDRO	RO_DELIVER	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

SCHEDULED DATE
06/30/23 Friday

WORK STATUS
Scheduled

EXTERNAL ID

ROUTE

EXCEPTION REASON

SEQUENCE
0

POSTING STATUS
Pending

DESTINATION / ORIGIN

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](#)