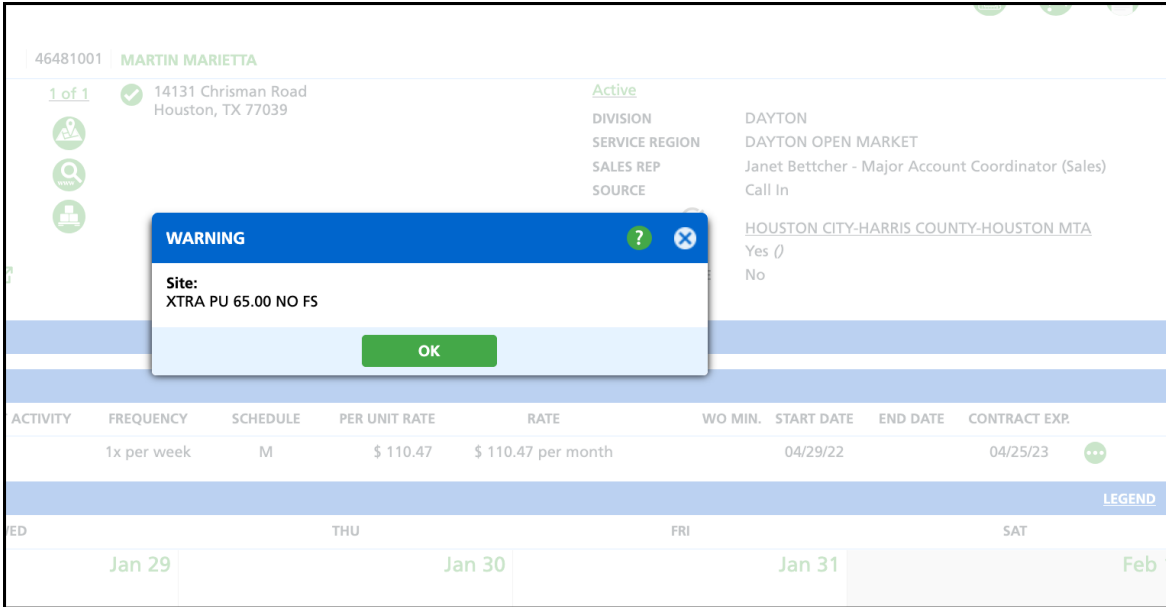


Site Level Notes

Last Modified on 02/04/2025 1:44 pm 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.

WARNING

Account:
Verify payment status before scheduling additional service.

Site:
Extra PU \$65

OK

Auto Pay Not Enabled

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-30.00	30.00	0.00	0.00	0.00	0.00	0.00

Add a 'Warning On Open' to a Site

EDIT SITE

Basic Settings | Billing Settings | BIC Profile | Required Capabilities

NAME: Caribou Cafe
 ADDRESS LINE 1: 112 Chieftain St
 CITY/STATE/POSTAL CODE: Osceola, WI, 54020
 PHONE 1: (999) 999-9999 Office
 PHONE 2: (999) 999-9999

DIVISION: QAWASTE
 SERVICE REGION: Delete Me
 TAX REGION: AGUA DULCE CITY CCMTA
 ORIGIN: [Dropdown]
 SOURCE: Cold Call
 SALES REP: House Acct non System - House Accou
 SITE CLASS: COM
 GENERATOR: Not Applicable
 EPA: EPA Value
 STATE ID: [Dropdown]
 ADDITIONAL SERVICE MINUTES: [Dropdown]

NOTE

3 WARNING ON OPEN: Extra PU \$65

ACCESS INFORMATION

BUSINESS HOURS / SERVICE WINDOW: Weekdays Open 8:00 AM Close 7:00 PM

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.

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

Sonzaletz - 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.

The screenshot displays the Customer Service interface for account 32973. The account is located at SAN ANTONIO, TX 78249-4007 and is currently **Active**. Account details include: 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, and 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

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

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.

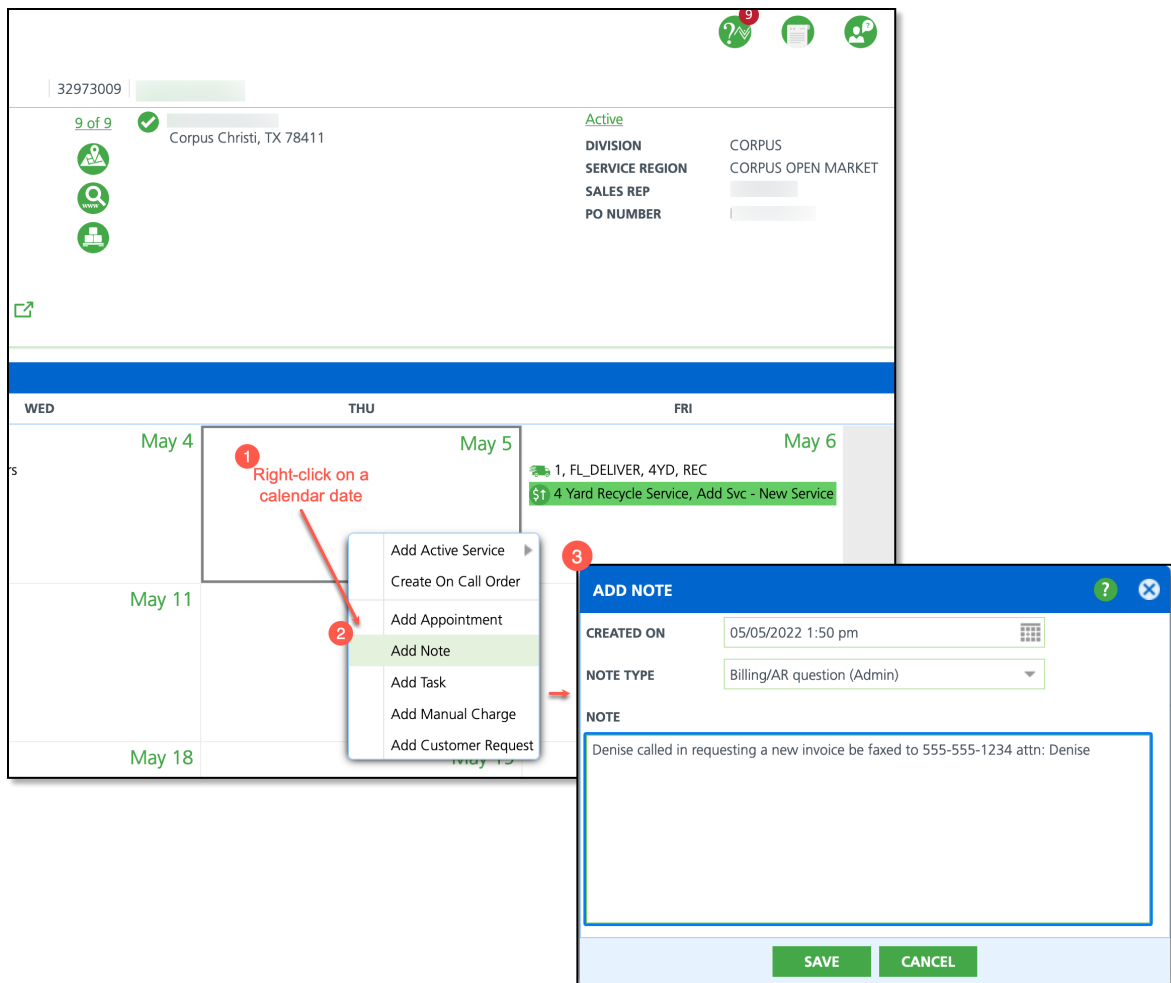
One-Time Note

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
May 1		May 2		May 3		May 4 (1) Aliena Somers
May 8		May 9		May 10		May 11
May 15		May 16		May 17 		May 18 Billing/AR question

Add a One-time Note to a Site



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.

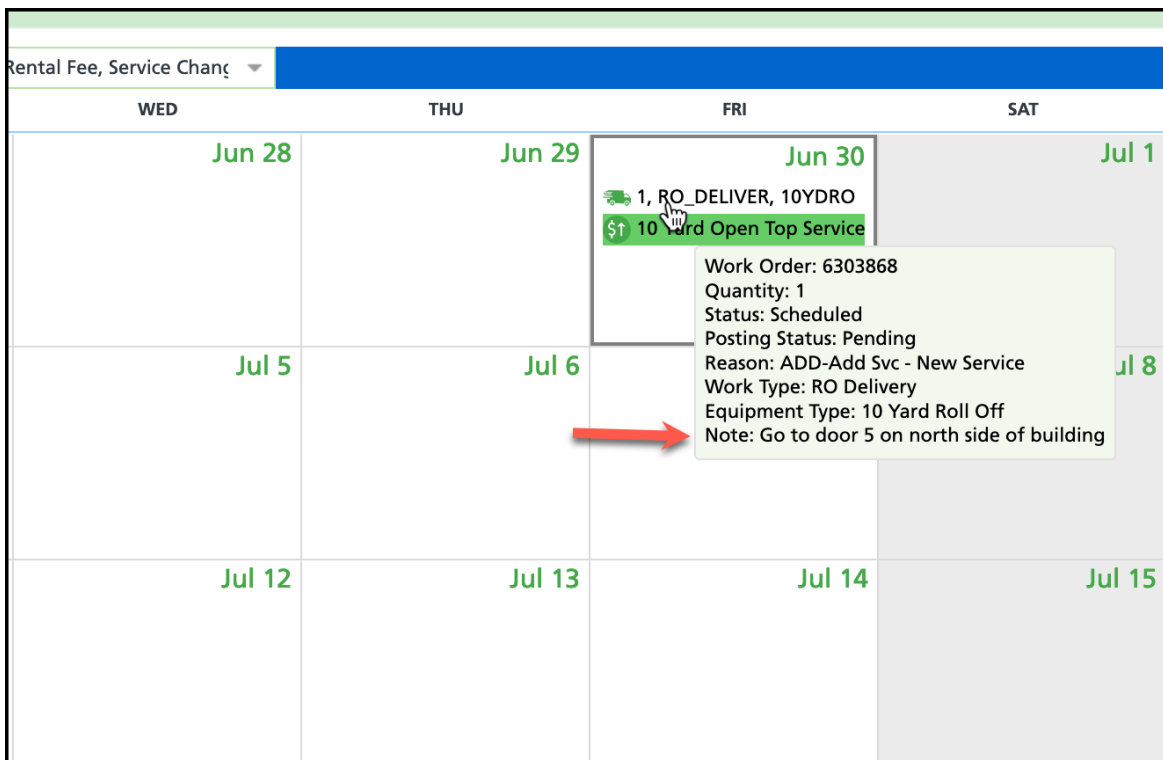


To remove a note:

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.



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	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	EXTERNAL ID		
<input type="text"/>	<input type="text"/>		
SCHEDULED DATE	ROUTE	SEQUENCE	DESTINATION / ORIGIN
06/30/23 Friday	<input type="text"/>	0	<input type="text"/>
WORK STATUS	EXCEPTION REASON	POSTING STATUS	
Scheduled	<input type="text"/>	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](#)
