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.

		, IX 77039		DIVISI SERVI SALES SOUR	ION CE REGION 5 REP CE	DAYTON DAYTON OPEN MARKET Janet Bettcher - Major Account Coordinator (Sales) Call In					
	WARN Site:				? 😣	<u>HOUSTON CITY-H</u> Yes <i>()</i> No	ARRIS COUN	ITY-HOUSTON M	<u>ГА</u>		
			ОК								
FREQ	JENCY	SCHEDULE	PER UNIT RATE	RATE	WO	MIN. START DATE	END DATE	CONTRACT EXP.			
1x pe	r week	М	\$ 110.47	\$ 110.47 per month		04/29/22		04/25/23	•		
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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.

0	49232	Caribou Coffee							
		112 Chieftain St Osceola, WI 54020 US TERMS INVOICE DELIVERY	COD Printed		Active DIVISION ACCOUNT MGR CLASS BILL GROUP	QAWAST House A COMME	TE ccount - House Account RCIAL 4 Week Anniversary	(Sales)	
					ADVANCE -	Billed Th	ru Date Dec 17, 2024		
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	(()	-30.00	30.00	0.00	0.00	0.00	0.00	0.00) [
				WARNING			? 😣	Auto Pay Not	Enabled
HIGHLIGH				Account: Verify payment status	before scheduling add	itional servi	ice.		Paul Gor
				Site:					Lori Smi
				Extra PU \$65					House A
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							men	it Fee	House A
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					±	11426	Adjustment Test		Aliena S
					LS)) 1022	Mail Check Customer	Refund Req	Aliena S

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Add a 'Warning On Open' to a Site

49232001 Caribou Ca 1 of 2 Image: Constraint of the second secon	ife hieftain St la, WI 540: Right OURS / SER 8:00 AM	20 1 Click RVICE Edit To 7:00 PM	select	Active NEXT BI DIVISION SERVICE REGION SALES REP SOURCE GENERATOR SITE CLASS SURCHARGE GR	L DATE Jan 14, 2025 QAWASTE Delete Me House Acct non Sy Cold Call Not Applicable COM P Fuel Surcharge - C		
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z - QA Expert (Admin) Admin-NS (Admin) nt - House Account (nt - House Account (nt - House Account (nt - House Account (rs - Admin-NS (Admin) rs - Admin-NS (Admin)	12/31/2 11/12/2 11/12/2 01/15/2 12/23/2 12/27/2 11/01/2 11/08/2 11/14/2	NAME NAME 2 ADDRESS LINE 1 ADDRESS LINE 2 CITY/STATE/POSTAL CODE PHONE 1 PHONE 2 OLD ID PO# SIGNATURE REQUIRED	Caribou Cafe 112 Chieftain St Osceola (999) 999-9999 (999) 999-9999 LEED REPORTAB	WI - 54020 Office - LE	DIVISION SERVICE REGION () TAX REGION () ORIGIN SOURCE SALES REP SITE CLASS GENERATOR EPA STATE ID ADDITIONAL SERVICE MINUTES	QAWASTE Delete Me AGUA DULCE CITY CCMTA Cold Call Cold Call House Acct non System - House Acco COM Not Applicable EPA Value S	▼
	3	NOTE WARNING ON OPEN	Extra PU \$65				
	ACCESS INFORMATION BUSINESS HOURS / SERVICE WINDOW			Open 8:00 Al	M 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.

C	49232001 <u>1 of 2</u> () () () () () () () () () ()	Caribou Ca 112 Ch Osceol US ACCESS BUSINESS H WINDOW Weekdays	fe hieftain St la, WI 54020 East gate acc OURS / SERVICE 8:00 AM to 7:00	ess code 1234 PM	Active DIVISIO SERVIC SALES SOURC GENER SITE CL SURCH	NEXT BILL D ON E REGION REP E ATOR ASS ARGE GRP	DATE Jan 14, 2025 QAWASTE Delete Me House Acct non System - House Account (Sa Cold Call Not Applicable COM Fuel Surcharge - Commercial
i ionzale	ez - QA Exp	ert (Admin)	12/31/2024	Testing adding	TAX RE tasks to multiple acco	GION Unts	AGUA DULCE CITY CCMTA
mith - A e Accou e Accou	Admin-NS (int - House int - House	Admin) Account (Account (11/12/2024 11/12/2024 01/15/2025				

Add an Access Information Note

DIT SITE													I	?	
Basic Settings	Billi	ng Settings	BIC Profil	le	R	lequire	ed Ca	apab	ilities						
NAME		Caribou Cafe						1	DIVISION			QAWASTE			
NAME 2									SERVICE RI			Delete Me		-	
ADDRESS LINE 1		112 Chieftain St					.	TAX REGIO	N 🝳 🏮		AGUA DULCE CITY CCMTA	-	8		
ADDRESS LINE 2									ORIGIN				-	\otimes	
CITY/STATE/POSTA	L CODE	Osceola		WI	-	5402	20	:	SOURCE			Cold Call	~	\otimes	
PHONE 1		• (999) 999-9999		Of	fice	-	:	SALES REP			House Acct non System - House	Accou	*	
PHONE 2		• (999) 999-9999				-	1	SITE CLASS	5		COM	-	\otimes	
OLD ID									GENERATO	R		Not Applicable	-	\otimes	
PO#									epa			EPA Value			
SIGNATURE REQUI	RED	LEED	D REPORTABLE					:	STATE ID						
								,	ADDITION	AL SERVICE N	INUTES				
NOTE															
WARNING ON OPEI	N														
ACCESS INFORMAT	ION	East gate acce	ess code 1234												
BUSINESS HOURS / SERVICE WINDOW	,	Wee	<u>ekdays</u>		Ор	en 8:0	0 AN	M Clo	ose 7:00 P	M					

- 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.



Add a Service Note When Adding A New Service

ADD ACTIVE	SERVICE								
REASON CODE	Add Svc - New Serv	vice 🔹 🛞	START DATE	05/06/22 F	riday	Week 19	(A)		
QTY	EQUIPMENT	SERVICE COD	E		FREQUENCY		PER UNIT	SVC FEES	٩
1	4 Yard FL	▼ ② 4 Yard Recy	le Service	- 🛛	1x per week	- 0	0.0000	0.00	Month
SERVICE DAYS REQUESTED BY SERVICE NOTES Drop containe	Mon Tue Dale	Wed Z Thu	Fri 📄 Sat 📄	Sun			H-oral	Map - Ily closed S C S Holly	s Sam's Cir Ry s
		ROUTE	DAT	Е				T	s
🗹 FL Delivery		COR 201	- 🛞 05.	/06/22 Friday				- 26	
WORK ORDER	NOTES							boogle	S Keybo

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

	<u>@</u>	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	C7					
	ACTIVE SERVICE	S (1) Sta	andard			•	් 🕂	- <	TOTAL RECUR	RING				
	QTY SERVIC	E CODE	SE	RVICE ID	FRE	QUENCY	SCHED	JLE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.	
-	1 10 Ya	rd Open 1	Тор	0925	0	n Call			\$ 0.00 per month	06/30/23				
	Jervic	.e	Paacan	SER	VICE ADI	DITIONAL	FIELDS					🕐 😵		
			Posted By:	A										
					REASON C	ODE	ADD-Ad	ld Svc - N	ew Service					
	CALENDAR 🧮		June, 2023	+		CD.								
	SUN		MO	N		EK							SAT	
	Mag	y 28		ſ	BLANKET	РО					~	Q	1	Jun 3
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	lur	n 11		-										lun 17
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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.



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									?	8		
Site 2 test	\bullet	WORK ORDER	R QTY	SE	RVICE CODE				ORDER TYPE			
3333 University Ave SE Minneapolis, MN 55414-3325		0303000	1	10 1	Service				Add Service			
CREATED BY		ORDER NOTES										
Aliena Somers on 6/30/23 9:21 am		Go to door 5										
ORDER REASON	DRDER REASON Last modified by Aliena Somers on 6/30/23 11:26 am											
•		PO NUMBER		EXT	ERNAL ID							
		SCHEDULED DA	ATE	R	OUTE		SEQUENC	E DESTINA	TION / ORIGIN			
		06/30/23 Frid	ау			- 🛞	0	-	~	\otimes		
		WORK STATUS			EXCEPTION REA	SON	POSTING STAT	TUS				
		Scheduled		-			- 🛞	Pending		-		
Charges Payments	Con	npletion	Attachme	ents	Inventory	Lat	pels	Photos				
 Charges must match Charges must match 	Equipm Materia	ent WO M	INIMUM \$									
GROSS LABELS NO CHA QTY QTY	RGE CH	IARGE UON QTY	/I CHARG	e codi	E PER UNIT	VENDO RATE	R MINI TYPE	MINI	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