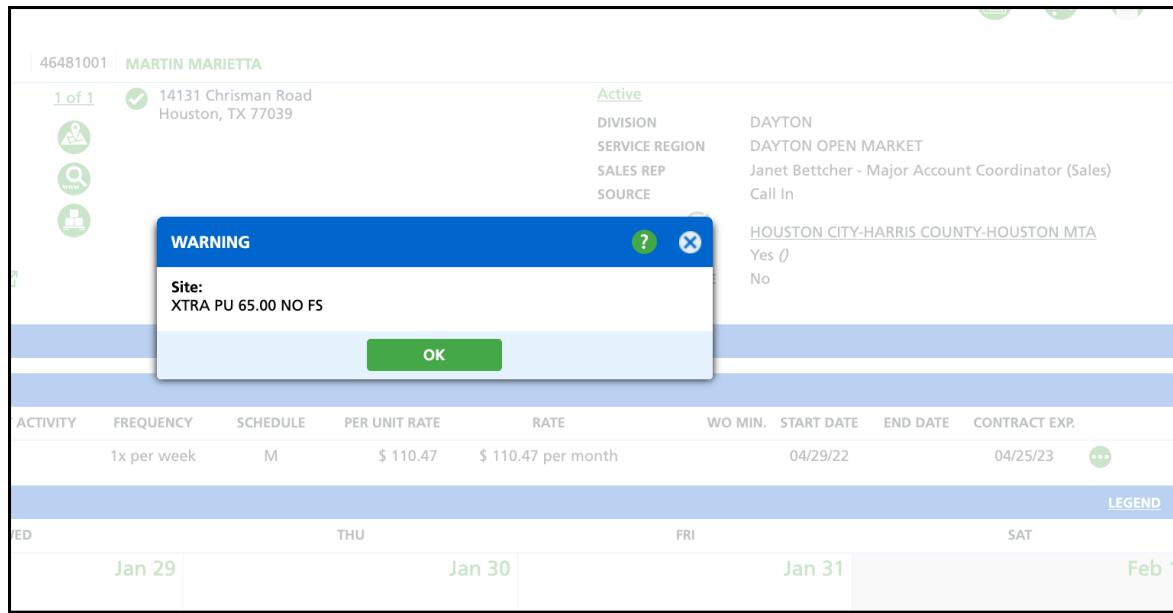


Site Notes

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.



The screenshot shows a software interface for managing site notes. At the top, it displays '46481001 | MARTIN MARIETTA'. Below this, there's a list of site details: '1 of 1' with a location pin icon, '14131 Chrisman Road Houston, TX 77039' with a checkmark, and status information: 'Active', 'DIVISION: DAYTON', 'SERVICE REGION: DAYTON OPEN MARKET', 'SALES REP: Janet Bettcher - Major Account Coordinator (Sales)', and 'SOURCE: Call In'. A 'WARNING' dialog box is centered, containing the text 'Site: XTRA PU 65.00 NO FS' and an 'OK' button. To the right of the dialog, there's a section for 'HOUSTON CITY-HARRIS COUNTY-HOUSTON MTA' with 'Yes ()' and 'No' options. Below this is a table with columns: ACTIVITY, FREQUENCY, SCHEDULE, PER UNIT RATE, RATE, WO MIN., START DATE, END DATE, and CONTRACT EXP. A single row is shown: '1x per week' (Frequency), 'M' (Schedule), '\$ 110.47' (Per Unit Rate), '\$ 110.47 per month' (Rate), '04/29/22' (WO Min.), '04/25/23' (Contract Exp.), and a small 'More' icon. At the bottom, there's a 'CALENDAR' section with a legend for days (MON, TUE, WED, THU, FRI, SAT, SUN) and a date range from 'Jan 29' to 'Feb 1'.

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.

49232 | Caribou Coffee

112 Chieftain St
Osceola, WI 54020
US

TERMS: COD
INVOICE DELIVERY: Printed

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

Active
DIVISION: QA WASTE
ACCOUNT MGR: House Account - House Account (Sales)
CLASS: COMMERCIAL
BILL GROUP: QA_Doc_4 Week Anniversary
ADVANCE - Billed Thru Date Dec 17, 2024

Auto Pay Not Enabled

HIGHLIGHTS

Paul Go...
Lori Sm...
House A...
House A...
House A...
House A...
Credit Hold Placement Fee
Adjustment Test
Mail Check Customer Refund Req...

Add a 'Warning On Open' to a Site

49232001 | Caribou Cafe

1 of 2

112 Chieftain St
Osceola, WI 54020
US

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

Right click

select

Active NEXT BILL DATE Jan 14, 2025

DIVISION: QA WASTE
SERVICE REGION: Delete Me
SALES REP: House Acct non System - House Account (Sales)
SOURCE: Cold Call
GENERATOR: Not Applicable
SITE CLASS: COM
SURCHARGE GRP: Fuel Surcharge - Commercial

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
DIVISION: QA WASTE
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:
NOTE:
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

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			DIVISION	QAWASTE	
NAME 2				SERVICE REGION	Delete Me	
ADDRESS LINE 1	112 Chieftain St			TAX REGION	AGUA DULCE CITY CCMTA	
ADDRESS LINE 2				ORIGIN		
CITY/STATE/POSTAL CODE	Osceola	WI	54020	SOURCE	Cold Call	
PHONE 1	(999) 999-9999	Office		SALES REP	House Acct non System - House Accou	
PHONE 2	(999) 999-9999			SITE CLASS	COM	
OLD ID				GENERATOR	Not Applicable	
PO#				EPA	EPA Value	
SIGNATURE REQUIRED	<input type="checkbox"/>	LEED REPORTABLE	<input type="checkbox"/>	STATE ID		
				ADDITIONAL SERVICE MINUTES		
NOTE						
WARNING ON OPEN						
ACCESS INFORMATION	East gate access code 1234					
BUSINESS HOURS / SERVICE WINDOW	Weekdays	Open 8:00 AM Close 7:00 PM				

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

HOME
CUSTOMER
DASHBOARD
SALES
OPERATIONS
ACCOUNTING
REPORTS

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+

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 <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun					
REQUESTED BY <input type="text" value="Dale"/>					
SERVICE NOTES <div style="border: 2px solid red; padding: 5px; margin-top: 5px;"> Drop containers on right East side of parking lot. </div>					
ROUTE <input type="text" value="COR 201"/>		DATE <input type="text" value="05/06/22 Friday"/>			
WORK ORDER NOTES <input type="text"/>					

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 shows the 'Service Additional Fields' editor. At the top, there is a table with columns: QTY, SERVICE CODE, SERVICE ID, LAST ACTIVITY, FREQUENCY, SCHEDULE, PER UNIT RATE, RATE, WO MIN., START DATE, END DATE, and CONTRACT... A green gear icon is next to the service line, and a red box highlights the green '...' icon. Below the table, a message says 'Reason: ADD-Add Svc - New Service' and 'Posted By: Aliena Somers - Admin-NS (Sales) on 01/13/2026'. A red box highlights the green '+' icon in the 'Service Notes' section. A red arrow points from this icon to a larger red box highlighting the 'ADD SERVICE NOTE' form. Another red arrow points from the 'ADD SERVICE NOTE' form to the 'END DATE' field.

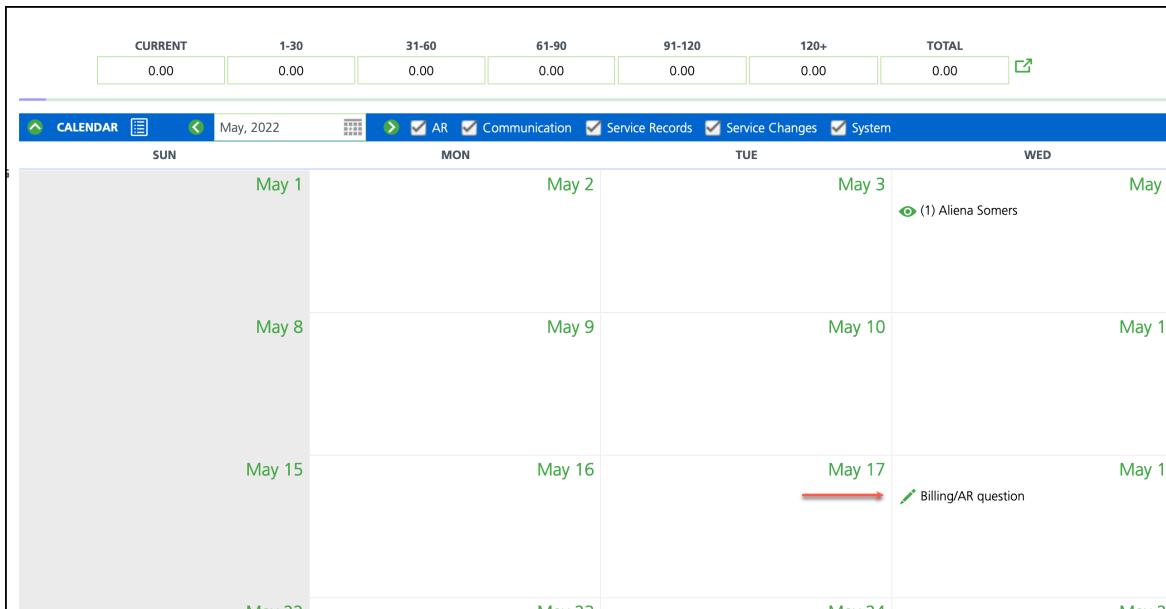


If an end date is entered, the service note will no longer display after the end date has passed.

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.



Add a One-time Note to a Site

32973009

9 of 9 Corpus Christi, TX 78411

Active

DIVISION CORPUS

SERVICE REGION CORPUS OPEN MARKET

SALES REP

PO NUMBER

WED THU FRI

May 4 May 5 May 6

1 Right-click on a calendar date

2 Add Note

3 ADD NOTE

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

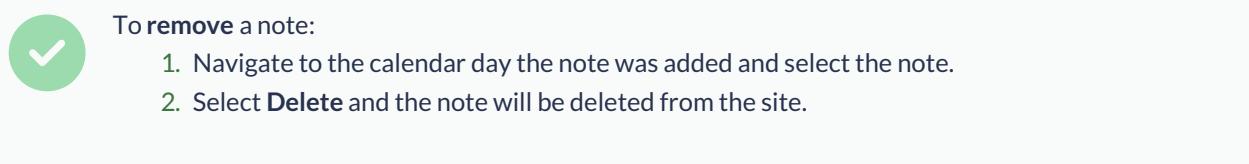
SAVE CANCEL

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.

- o 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.

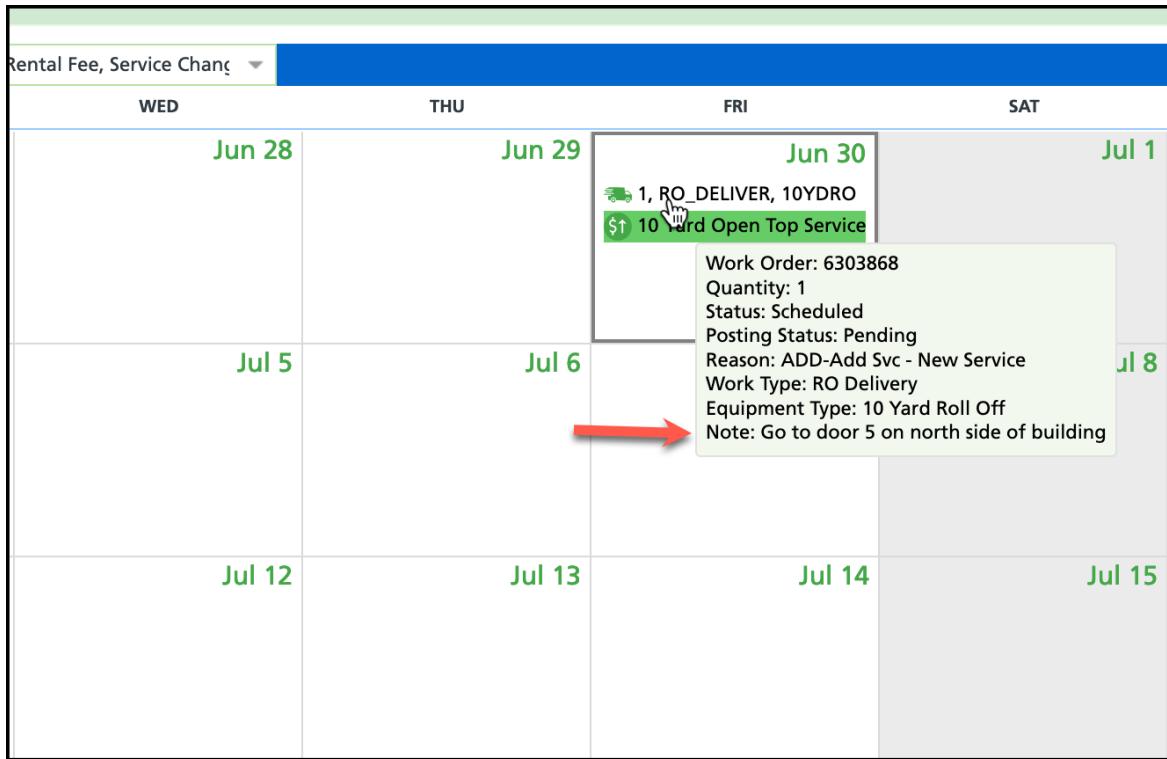
4. Enter the body of the note in the **Note** field.

5. Select **Save** when finished. The note will display on the 'Created On' date in the calendar.



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](#)

? 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 EXTERNAL ID

SCHEDULED DATE ROUTE SEQUENCE DESTINATION / ORIGIN

06/30/23 Friday X 0 X

WORK STATUS EXCEPTION REASON POSTING STATUS

Scheduled X 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
MIN... RATE
MIN... 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](#)