Notes

Last Modified on 01/09/2023 12:28 pm EST

When the Notes tree option is expanded, five additional tree items appear below the Notes tree option; General, Collection, Job, Prospect and Service. General Notes and Collections notes may be manually added to the Customer's note list. A Collection Note may only be entered if the customer is currently in one of the Collection Queues. Each note allows an unlimited number of characters. All five tree options are explained below.

Important Note: Text may be pasted into the Note data entry form from outside sources, however some control characters from outside sources may not be recognized by the SedonaOffice application and may cause data issues. If copying in text from an outside source, review the text carefully and remove any foreign characters prior to saving the note.

Job and Service Notes are a display of notes entered on a Job, Service Ticket or Inspection Ticket; Job or Ticket notes cannot be manually entered from the Customer Explorer Notes option. If a note needs to be modified, it must be done through the Job record or the Ticket record.

When highlighting the Notes menu tree option, all note types will be displayed in the Active Pane. To view an entire note, double-click on the Note displayed in the Active Pane.

- General – When highlighting this menu tree option, a list of all General Notes entered will display in theActive Pane.
- Collection – When highlighting this menu tree option, a list of all Collection Notes will display in theActive Pane.
- Job – When highlighting this menu tree option, a list of all Notes entered on any Job for the customer will display in the Active Pane.
- Prospect – When highlighting this menu tree option, a list of all Notes entered on any Prospect for the customer will display in the Active Pane.
- Service – When highlighting this menu tree option, a list of all Service Ticket and Inspection Ticket Field Notes will display in the Active Pane.

Add Note is the only right-click option available for the Notes menu tree option. Selecting this option will open the Customer Notes form. If the Customer is currently in one of the Collection Queues, the option check box Note for Current Collection Queue, will be displayed at the lower right of this form. If the note being entered is a Collections related note, select this check box for the note to be saved as a Collection Type Note. If this option is not selected, the note will be saved as a General Note. If the Customer is not currently in a Collection Queue, this option check box will not be displayed.

The User may type an unlimited number of characters into the note field. All Notes entered are date/time and User stamped by the application, so there is no need to enter the date on which the note was created or the User's name into the note field itself. Click the Save button when finished.