Tools Toolbar-Notes

Selecting the Notes button from the Tools Toolbar will display all notes previously entered for the Job and is used to enter new Job notes.

Notes entered into this form are also viewable from the Customer Explorer under the Job Notes notes folder for the Site.

When entering a new Job Note, you must select an Access Level and a Note Type.
The Access Level is linked to User Group Security Access. There are three possible Access Levels; 1-General, 2-Internal, and 3-Management. If the User entering the note has a User Group Access Level of 1 and the User selects the level 2 for the note, once the note is saved, the User will not be able to view the saved note. User's with a User Group Access Level of 2 will be able to see Notes saved with an Access Level of 1 or 2. User's with a User Group Access Level of 3 will be able to see Notes saved with an Access Level of 1, 2 or 3.

For SedonaOffice customers using SedonaWeb, all Job Notes saved with an Access Level of 1 will be viewable by your customer.
When printing a Job Ticket, if the User selects the option of including Job Notes on the printed ticket, all notes saved with an Access Level of 1 will print on the Job Ticket. Notes saved with an Access Level of 2 or 3 will not print on the Job Ticket.

The Note Type is a list which contains selections that are setup and maintained by your company in SedonaSetup/Note Type. There are three notes types that are controlled by SedonaOffice and may not be modified or deleted. These Note Types are:

- Customer
- Install
- QuoteWerks
- Sales