

Job Notes

Last Modified on 01/11/2023 2:43 pm EST

Job Notes are entered and displayed from the Tools Toolbar / Notes button. Notes entered into this form are also viewable from the Customer Explorer under the Site Job Notes and Customer Job Notes folders.

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 Access 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.

When printing a Job Ticket, if selecting the option of including Job Notes on the printed ticket, only the 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 of codes created by and maintained by your company in SedonaSetup/Note Type setup table. Four Note Types are delivered with the software and are controlled by SedonaOffice: Customer, Install, QuoteWerks, and Sales. These values controlled by SedonaOffice may not be modified or deleted. Suggested Note Types your company may create are Billing, Purchasing, etc.

If your company is using the QuoteWerks application, four notes types may be imported from QuoteWerks into the Job record. It is a good idea to create these individual Note Types and then map them to the QuoteWerks note types. The QuoteWerks Note Types are: Introduction Notes, Closing Notes, Purchasing Notes, and Internal Notes. For assistance in mapping QuoteWerks Note Types, contact support@sedonaoffice.com for assistance.

To enter a New Note follow the steps below.

1. From the Main Application Menu navigate to Job Management and select the Job Queue menu option.
2. The Open Job List will be displayed. Highlight the Job within the list then click the Open button located at the lower right of the form or double-click on the Job line.
3. Click the Notes button on the Tools Toolbar.
4. Click the New button located at the lower right of the form. Select the appropriate Access Level, Note Type, then type in the note in the text box. Up to 1,024 characters are allowed for each note; click the Save button when finished typing the note. If you run out of space, save the note at an appropriate cut-off point, then create another note to continue the thread.

All notes entered are automatically date/time and User stamped; there is no need to enter this type of information into the note text.

Once a Note has been saved, only Users with appropriate permission are allowed to edit or delete a Job Note.

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