

Site Notes

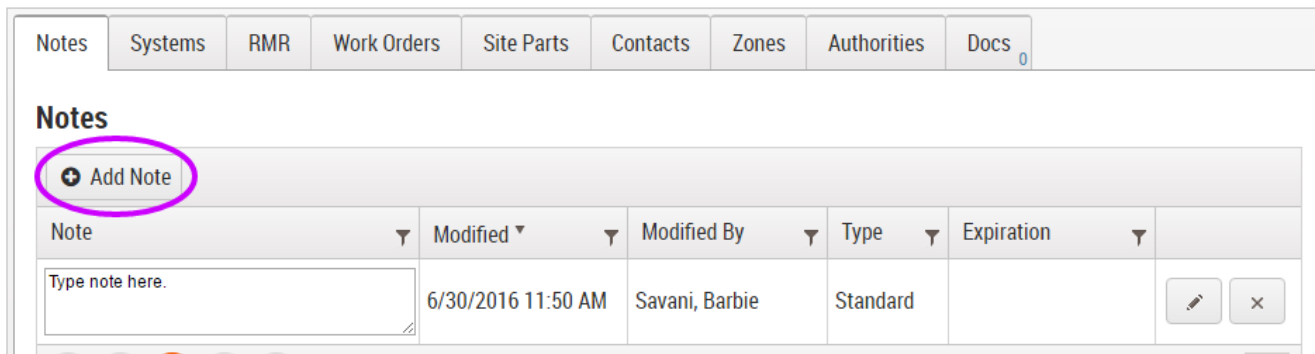
Last Modified on 11/07/2016 12:42 pm EST

Add internal notes about a site.

Adding a Site Note

1. Add Note

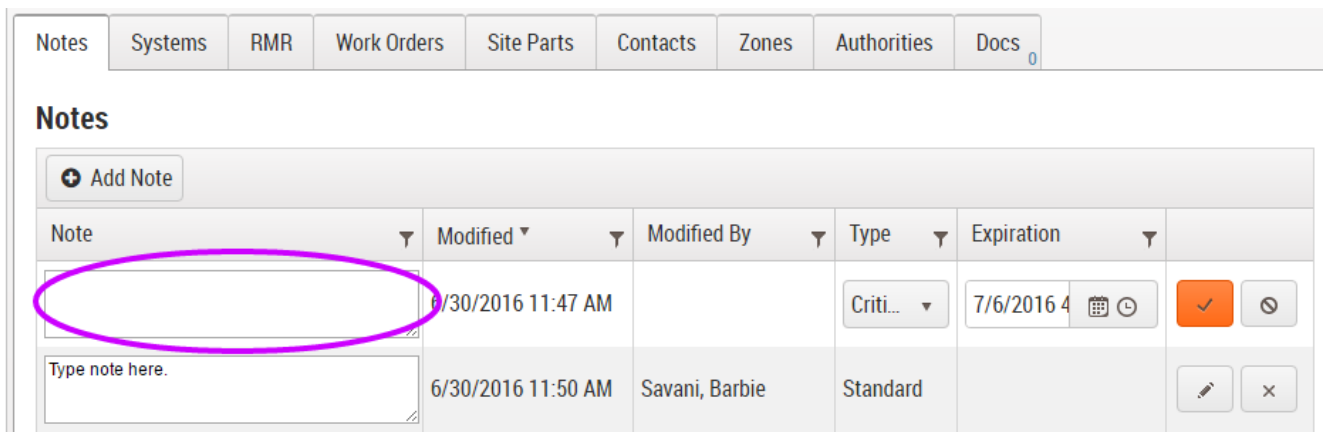
Click Add Note on the left side of the page.



The screenshot shows a navigation bar with tabs: Notes, Systems, RMR, Work Orders, Site Parts, Contacts, Zones, Authorities, and Docs (0). Below the navigation bar is a section titled "Notes". At the top left of this section is a button with a plus sign and the text "Add Note", which is circled in purple. Below the button is a table with columns: Note, Modified, Modified By, Type, and Expiration. The first row of the table has a text input field containing "Type note here.", a date and time "6/30/2016 11:50 AM", the name "Savani, Barbie", and the type "Standard". To the right of the input field are two small buttons: a pencil icon and an 'x' icon.

2. Note

Type out the note in the white box under the "Note" header.



The screenshot shows the same navigation bar as the previous image. Below it is the "Notes" section. At the top left is a button with a plus sign and the text "Add Note". Below the button is a table with columns: Note, Modified, Modified By, Type, and Expiration. The first row of the table has a text input field containing "Type note here.", a date and time "6/30/2016 11:50 AM", the name "Savani, Barbie", and the type "Standard". To the right of the input field are two small buttons: a pencil icon and an 'x' icon. The second row of the table has a text input field containing "Type note here.", a date and time "6/30/2016 11:47 AM", an empty "Modified By" field, a "Type" dropdown menu with "Criti..." selected, and an "Expiration" field with "7/6/2016 4" and a calendar icon. To the right of the input field are three buttons: a checkmark icon, a pencil icon, and an 'x' icon.

2. Type

Select the note type from the dropdown box.

Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs ₀
Notes								
+ Add Note								
Note	Modified	Modified By	Type	Expiration				
<input type="text"/>	6/30/2016 11:47 AM		Criti...	7/6/2016 4				
Type note here.	6/30/2016 11:50 AM	Savani, Barbie	Standard					

Standard

This is an internal note at the site level.

Critical

This is an internal note at the site level that will appear every time you open the Site Details Page.

3. Expiration

"Expiration" only applies to critical notes. Select the date and time you would like the note to expire. The note will no longer appear everytime you open the Site Details Page after this date.

Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs ₀
Notes								
+ Add Note								
Note	Modified	Modified By	Type	Expiration				
<input type="text"/>	6/30/2016 11:47 AM		Criti...	7/6/2016 4				
Type note here.	6/30/2016 11:50 AM	Savani, Barbie	Standard					

4. Save

Click the check mark on the right side of the screen to save.

Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs 0
Notes								
+ Add Note								
Note	Modified	Modified By	Type	Expiration				
	6/30/2016 11:47 AM		Criti...	7/6/2016 4				
Type note here.	6/30/2016 11:50 AM	Savani, Barbie	Standard					

Editing a Note

Click the pencil icon to the to the right of the note you would like to edit.

Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs 0
Notes								
+ Add Note								
Note	Modified	Modified By	Type	Expiration				
example	6/30/2016 12:06 PM	Savani, Barbie	Critical	7/6/2016 4:30 AM				
Type note here.	6/30/2016 11:50 AM	Savani, Barbie	Standard					