Customer Profile: Manage Notes

Under the **Notes Tab** of the Customer's Profile, you can make entries about communications with the customer or any other notes you need to make about the account. These Notes are categorized as Office, Jobs, or Site Notes.

Job and **Site Notes** are entries that Field Employees can see in their **IndusTrack** mobile app for tasks scheduled for the customer. These can be very useful if there are things like gate codes to access the property or parking area assignments.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	.O. REPOR	ſS					220 J	9 🔅
← BACK						5 Dollar Pi	ZZA Tags: Assign	ſ	nulti-location 🛞					C	EDIT CONTAC
Contact Info Customer Number: Contact name: Phone: Email:	102 Diana (218) 3	Bloomer 27-2223 5dollarpizza.com		Address: th Lane, Suite 101 N 55449		Service L Clifford Hig Waldorf, Ml	gh Way, 188		O ^{Await}	sing Payments	0	Invoice overdue \$ 0.00	J		ng Quotes \$ 0.00
Location Filter: Date	Estimat			cation: NT	eminders OFFICE	_	s SITE NOTES CLEA	s Messagin R FILTER	g Contracts		¢	User	≎ job.	+ ADD O Task Name	FFICE NOTES
10/25/2022	Haven's	Park - Crain High	Way, Hut #34, A	voca, MN, 56114, I	JSA	ite Notes laven's Manager av	vailable for site inspectio	on Wednesday a	at 3PM			elaineg@industrack.o	om	- Hanne	÷
10/25/2022	5 Dollar	Pizza - Clifford H	igh Way, 188, Wa	ldorf, MN, 30104, I	JSA T	he owner has secu	ured Mall Permits. Pick up	from Clifford sto	re manager			elaineg@industrack.	om		1
10/25/2022	5 Dollar	Pizza - Clifford H	igh Way, 188, Wa	idorf, MN, 30104, I	JSA	ite Notes ocated on the 3rd f	floor Construction/Maint	enance times: 12	vIN to 7AM Mall p	ermit required		elaineg@industrack.c	om		:
Show 10 🗸	entries													Previous	1 Nex

The **Notes List** contains a listing of all the different entries that have been created about the client's account and the jobs scheduled for them. The list is a combination of the **Office, Job, and/or Site Notes**.

The Job Notes and Site Notes will be visible to the field employees but not the Office Only Notes.

The details that are shown on the listing are:

- The note creation date
- · The Service Location where the note applies to
- The details of the note
- The email address of the one who created the note
- The Job Number associated with the note
- · The task(s) associated with the job

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPOR	TS					220	- 0 🔅 (9
← ВАСК						5 Dollar P	Dizza Tags: A	ssign	ſ	multi-location 🛞					[EDIT CONTACT
Contact Inf Customer Number: Contact name	102	Bloomer		Address: th Lane, Suite 101 N 55449			Location: igh Way, 188 MN 30104			O	iting Payments \$ 0.00	0	Invoice overdue \$ 0.00	J		ling Quotes \$ 0.00
Phone: Email: Location Filter:		327-2223 @5dollarpizza.com tes Jobs		equipment R	Reminders OFFICE			ofences CLEAR FILT	Messagin	ng Contrac	ts				+ ADD C	DFFICE NOTES
Date	Locatio	on			÷	otes						¢	User	≎ Job: #	Task Name	÷ ÷
10/25/2022	Haven	s Park - Crain High	n Way, Hut #34, A	voca, MN, 56114,	USA	te Notes aven's Manager a	vailable for site ins	pection on V	/ednesday i	at 3PM			elaineg@industrack.	:om		:
10/25/2022	5 Dolla	r Pizza - Clifford H	igh Way, 188, Wa	ldorf, MN, 30104,	USA Tr	he owner has secu	ured Mall Permits. F	Pick up from	Clifford sto	ore manager			elaineg@industrack.	.om		
10/25/2022	5 Dolla	r Pizza - Clifford H	igh Way, 188, Wa	ldorf, MN, 30104,	USA	te Notes ocated on the 3rd	floor Construction	Maintenand	e times: 12	MN to 7AM Mal	permit required	I	elaineg@industrack.	om		:
Show 10 🗸	entries														Previous	1 Next

Click on the table header to **Sort** the list alphabetically according to the selected header.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORT	rs					220 <u> </u>	2 🛛 🔅 🕲
← ВАСК						5 Dollar P	IZZƏ Tags: A	ssign	•	nulti-location 🛞					C	EDIT CONTACT
Contact Inf Customer Number: Contact nam Phone:	102 e: Dian	a Bloomer 327-2223		Address: Ith Lane, Suite 101 IN 55449			Location: gh Way, 188 IN 30104			O ^{Awa}	iting Payments \$ 0.00	0	Invoice overdue \$ 0.00	J		ing Quotes \$ 0.00
Email: Location Filter:	dian Estima	a@5dollarpizza.com ates Jobs	Invoices I	Equipment F	Reminders			ofences CLEAR FILT	Messagin, TER	g Contract	s				+ ADD O	FFICE NOTES
Date	Locati	on			≎ N	otes						[†] U	ser	≎ Job∷ #	Task Name	• •
10/25/2022	5 Doll	ar Pizza - Clifford H	ligh Way, 188, Wa	ldorf, MN, 30104,	USA TI	he owner has secu	ured Mall Permits. P	lick up from	n Clifford sto	re manager		el	laineg@industrack.o	com		1
10/25/2022	Haver	's Park - Crain Hig	h Way, Hut #34, A	voca, MN, 56114,	USA	ite Notes aven's Manager av	vailable for site insp	pection on V	Wednesday a	at 3PM		el	laineg@industrack.o	com		÷
10/25/2022	5 Doll	ar Pizza - Clifford H	ligh Way, 188, Wa	ldorf, MN, 30104,	USA	ite Notes ocated on the 3rd	floor Construction/	Maintenan	ce times: 12I	MN to 7AM Mall	permit required	e	laineg@industrack.o	com		÷
Show 10 V	entries														Previous	1 Next

Use the **Filter Bar** to quickly find a Note.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORT	S					220	0 🗘	\$ @
← ВАСК						5 Dollar P	IZZA Tags: A:	sign		ulti-location 🛞						EDIT CO	NTACT
Contact Info			Billing	Address:		Service I	Location:										
Customer Number: Contact name:	102 : Diana	Bloomer	2331 108 Blaine, N	3th Lane, Suite 101 1N 55449		Clifford Hig Waldorf, M	gh Way, 188 IN 30104			O	ting Payments \$ 0.00	0	Invoice overdue \$ 0.00	J		s 0.0	
Phone: Email:	1.1	327-2223 @5dollarpizza.com															
Location	Estima	tes Jobs	Invoices	Equipment F	Reminders	Notes Atta	chments Geo	fences	Messaging	g Contract	5						
Filter:			Ŀ	ocation: NT	OFFICE	ONLY JOB NOTES	5 SITE NOTES	CLEAR FILTE	R						+ ADD	DFFICE NO	TES
Date [©]	Locatio	in			¢ , N	otes						† u	ser	≎ Job∷ #	Task Name		
10/25/2022	5 Dolla	r Pizza - Clifford H	ligh Way, 188, Wa	aldorf, MN, 30104,	USA T	he owner has secu	ured Mall Permits. P	ick up from (lifford stor	re manager		e	laineg@industrack.c	om			
10/25/2022	Haven'	s Park - Crain Higi	h Way, Hut #34, A	woca, MN, 56114,	USA	ite Notes aven's Manager av	vailable for site insp	ection on W	ednesday a	t 3PM		e	laineg@industrack.c	om			
10/25/2022	5 Dolla	r Pizza - Clifford H	ligh Way, 188, Wa	aldorf, MN, 30104,	USA	ite Notes ocated on the 3rd	floor Construction/	Vaintenance	times: 12N	/IN to 7AM Mail	permit required	e	laineg@industrack.c	om			
Show 10 🗸	entries														Previous	1 N	lext

Use the Location Selector to filter the Notes according to location.

IndusTrack MAP CUSTOMER	ESTIMATES SCHEDULE INVOIC	ES TIMESHEET SNOWTRACK P.O. REPOR	RTS		🚧 🗘 😯 🌼 🏻
← BACK		5 Dollar Pizza Tags: Assign	multi-location		EDIT CONTACT
Contact Info: Customer 102 Number: Contact name: Diana Bloomer Phone: (218) 327-2223	Billing Address: 2331 108th Lane, Suite 101 Blaine, MN 55449	Service Location: Clifford High Way, 188 Waldorf, MN 30104	Awaiting Payments \$ 0.00	Invoice overdue \$ 0.00	Pending Quotes \$ 0.00
Email: diana@5dollarpizza.com	Invoices Equipment Reminders	Notes Attachments Geofences Messagir	ng Contracts		
Filter:	Location: Not Selected	SUFE NOTES CLEAR FILTER	0		+ ADD OFFICE NOTES
Date Date	MN, 30104, USA	High Way, 188, Waldorf, gh Way, Hut #34, Avoca, MN,		[↑] User ‡ Jo	b) Task 0 0 Name
10/25/2022 5 Dollar Pizza - Clifford H	igh Way, 188, Waldorf, M., 56114, USA	all Permits. Pick up from Clifford sto	ore manager	elaineg@industrack.com	÷
10/25/2022 Haven's Park - Crain High	n Way, Hut #34, Avoca, MN, 56114, USA	Site Notes Haven's Manager available for site inspection on Wednesday	at 3PM	elaineg@industrack.com	÷
10/25/2022 5 Dollar Pizza - Clifford H	igh Way, 188, Waldorf, MN, 30104, USA	Site Notes Located on the 3rd floor Construction/Maintenance times: 12	2MN to 7AM Mall permit required	elaineg@industrack.com	÷
Show 10 🗸 entries					Previous 1 Next

Use the Note Type filters to show the entries according to a specific category.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORT	S					220	- 0 🌼 🕲
← ВАСК						5 Dollar P	IZZƏ Tags: A:	ssign		ulti-location 🛞						EDIT CONTACT
Contact Inf Customer Number: Contact nam	10 e: Di:	ina Bloomer		Address: th Lane, Suite 101 N 55449			L ocation: gh Way, 188 IN 30104			O	ting Payments \$ 0.00	0	Invoice overdue \$ 0.00	¢	Penc	ding Quotes \$ 0.00
Phone: Email: Location Filter:	dia	8) 327-2223 na@5dollarpizza.com nates Jobs		Equipment I	Reminders	_		fences CLEAR FILT	Messaging	g Contract	5				+ ADD	OFFICE NOTES
Date	Loca	tion			÷ N	lotes							User	≎ job #	Task Name	
10/25/2022	5 D d	illar Pizza - Clifford H	igh Way, 188, Wa	ldorf, MN, 30104,	USA 1	'he owner has secu	ired Mall Permits. P	ick up from	Clifford stor	e manager			elaineg@industrack.	.com		÷
10/25/2022	Hav	en's Park - Crain Higł	n Way, Hut #34, A	voca, MN, 56114,	USA	ii te Notes Haven's Manager av	vailable for site insp	ection on V	Vednesday a	t 3PM			elaineg@industrack.	.com		i.
10/25/2022	5 D c	illar Pizza - Clifford H	ligh Way, 188, Wa	ldorf, MN, 30104,	USA	ii te Notes .ocated on the 3rd	floor Construction/	Maintenan	ce times: 12N	/IN to 7AM Mall	permit required		elaineg@industrack.	.com		÷
Show 10 🗸	entrie	łs													Previous	: 1 Next

Use the Clear Filter button to remove the filter settings.

IndusTrack MAP CUSTOMER	ESTIMATES SCHEDULE INVOIC	ES TIMESHEET SNOWTRACK P.O. REP	ORTS		🕰 🖵 😯 🌼 🕲
← BACK		5 Dollar Pizza Tags: Assign	multi-location		EDIT CONTACT
Contact Info: Customer 102 Number: Contact name: Diana Bloomer Phone: (218) 327-2223 Email: diana@Sdollarpitza.com	Billing Address: 2331 108th Lane, Suite 101 Blaine, MN 55449	Service Location: Clifford High Way, 188 Waldorf, MN 30104	Awaiting Payments \$ 0.00	Invoice overdue \$ 0,00	Pending Quotes \$ 0.00
Location Estimates Jobs	Invoices Equipment Reminders	Notes Attachments Geofences Messa FICE ONLY JOB NOTES SITE NOTES CLEAR FILTER	ging Contracts		+ ADD OFFICE NOTES
Date Cocation		Notes		[†] User #	Name
10/25/2022 5 Dollar Pizza - Clifford H	High Way, 188, Waldorf, MN, 30104, USA	The owner has secured Mall Permits. Pick up from Clifford	store manager	elaineg@industrack.com	1
10/25/2022 Haven's Park - Crain Hig	gh Way, Hut #34, Avoca, MN, 56114, USA	Site Notes Haven's Manager available for site inspection on Wednesd	ay at 3PM	elaineg@industrack.com	÷
10/25/2022 5 Dollar Pizza - Clifford H	High Way, 188, Waldorf, MN, 30104, USA	Site Notes Located on the 3rd floor Construction/Maintenance times:	12MN to 7AM Mall permit required	elaineg@industrack.com	÷
Show 10 💙 entries					Previous 1 Next

Select the number of notes to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORT	S					220	0 🔅 🛛
← BACK						5 Dollar Pi	IZZA Tags: A	ssign	m	ulti-location 🛞					E	DIT CONTACT
Contact Info Customer Number: Contact name Phone: Email:	102 e: Diana Bl (218) 32		Blaine, MI	h Lane, Suite 101		Service L Clifford Hig Waldorf, M	gh Way, 188			O	sing Payments	0	Invoice overdue \$ 0.00	U		g Quotes
Location	Estimates	Jobs		quipment R	eminders OFFICE (fences CLEAR FILT	Messaging	; Contracts					+ ADD OFF	FICE NOTES
Date	Location				° No	otes							User	≎ job≎ #	Task 🌼 Name	
10/25/2022	5 Dollar P	izza - Clifford H	ligh Way, 188, Wal	dorf, MN, 30104, I	USA Th	ie owner has secu	ired Mall Permits. P	ick up from	Clifford stor	e manager			elaineg@industrack.o	com		4
10/25/2022	Haven's P	ark - Crain Hig	h Way, Hut #34, Av	voca, MN, 56114, I	JSA	te Notes aven's Manager av	vailable for site insp	ection on W	lednesday at	t 3PM			elaineg@industrack.c	com		÷
10/25/2022	5 Dollar P	izza - Clifford H	iigh Way, 188, Wal	dorf, MN, 30104, I	USA	te Notes cated on the 3rd f	floor Construction/	Maintenanc	e times: 12N	IN to 7AM Mall p	ermit required		elaineg@industrack.o	com		÷
Show 25 🗸	entries														Previous	1 Next

Use the Add Office Notes button to create a new entry or note.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPOR	TS					220	8 \$ 8
← BACK						5 Dollar P	IZZƏ Tags: As	sign	•	multi-location 🛞					E	DIT CONTACT
Contact Info):		Billing	Address:		Service L	Location:									
Customer Number: Contact name	102 : Diana	Bloomer	2331 108 Blaine, M	ith Lane, Suite 101 IN 55449		Clifford Hig Waldorf, M	gh Way, 188 1N 30104			O	iting Payments \$ 0.00	0	Invoice overdue \$ 0.00	U	Pending \$	0.00
Phone: Email:		827-2223 @5dollarpizza.com														
Location	Estimat	es Jobs	Invoices	Equipment I	Reminders	Notes Atta	chments Geo	fences	Messagin	ng Contract	s			_		
Filter:			Lo	ocation: NT	OFFICE	ONLY JOB NOTES	5 SITE NOTES	CLEAR FILT	ER						+ ADD OFF	ICE NOTES
Date	Locatio	n			[‡] N	otes							User	≎ Job∷ #	Task 0 Name	0
10/25/2022	5 Dollar	r Pizza - Clifford H	ligh Way, 188, Wa	ildorf, MN, 30104,	USA T	he owner has secu	ired Mall Permits. P	ck up from	Clifford sto	ore manager			elaineg@industrack.c	om		÷
10/25/2022	Haven's	s Park - Crain Higi	h Way, Hut #34, A	woca, MN, 56114,	USA	ite Notes Iaven's Manager av	vailable for site insp	ection on W	/ednesday	at 3PM			elaineg@industrack.c	om		÷
10/25/2022	5 Dolla	r Pizza - Clifford H	ligh Way, 188, Wa	ildorf, MN, 30104,	USA	ite Notes ocated on the 3rd f	floor Construction/l	Maintenanc	e times: 12	MN to 7AM Mall	permit required		elaineg@industrack.c	om		÷
Show 25 🗸	entries														Previous	1 Next

Create a Note

To create a note, click the **Add Office Notes button**.

IndusTrack	MAP CUSTOM	ER ESTIMATES	SCHEDULE IN	VOICES TIMESHEET	SNOWTRACK P	.O. REPOR	TS					22 <u>4</u> 🖵 😯 🌼
← ВАСК				5 Dollar F	IZZA Tags: Assign		multi-location 🛞					EDIT CONTAG
Contact Info: Customer	102		Address: Ith Lane, Suite 101	Clifford H	Location: igh Way, 188		Awai	ting Payments	0	Invoice overdue	()	Pending Quotes
Number: Contact name:	Diana Bloomer	Blaine, M	IN 55449	Waldorf, I	MN 30104		0	\$ 0.00	•	\$ 0.00	0	\$ 0.00
Phone: Email:	(218) 327-2223 diana@5dollarpizzi	a.com										
Location	Estimates Job	s Invoices I	Equipment Remin	ders Notes Atta	achments Geofence	s Messagir	ng Contracts				_	
Filter:			OFFICE ONLY JO	B NOTES SITE NOTES	CLEAR FILTER							+ ADD OFFICE NOTES
Date		Location		Notes		0 User		≎ Job #		Task Name		÷ ÷
					No data available in	table					/	
Show 10 💙 e	entries											Previous Next

The Add New Note window will come up.

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE INVOICES TIMESHEET SI	NOWTRACK P.O. REPORTS					🏧 📮 😯 🌼 🙁
← BACK			Add New Note			Х			EDIT CONTACT
			Note text *						
Contact Info:		Billing							
Customer Number:	102	2331 108 Blaine, N			11		Invoice overdue \$ 0.00	J	Pending Quotes \$ 0.00
Contact name: Phone:	Diana Bloomer (218) 327-2223			Site Note					
Email:	diana@5dollarpizza.com		Assign note to a service location	Not selected	-				
Location	Estimates Jobs	Invoices							
Filter:									+ ADD OFFICE NOTES
Date	† Location					CLOSE SAVE			
			4	No data available in table					
Show 10 🗸	entries								Previous Next

Fill in the details. Fields with * are required.

Key in the note specifics in the **Note Text* Field.**

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE	INVOICES 1	TIMESHEET SN	OWTRACK P.O. REPORTS				²² , 🖓 🖓 🌼 (9)
← BACK			Add New Note				Х			EDIT CONTACT
Contact Info Customer Number: Contact name:	102 Diana Bloomer	Billing 2331 108 Blaine, N			Note text *	Located on the 3rd floor. Construction/Maintenance times: 12MN to 7AM Mall permit needed		Invoice overdue \$ 0.00	(Pending Quotes \$ 0.00
Phone: Email:	(218) 327-2223 diana@5dollarpizza.com			Assign note to a	a service location	Site Note Not selected				
Location Filter:	Estimates Jobs	Invoices								+ ADD OFFICE NOTES
Date	† Location						CLOSE SAVE			
					No	data available in table				
Show 10 🗸	entries									Previous Next

To make the entry a Site Note, tick the **Site Note checkbox**.

• Only one **Site Note** per location can be created for the client. Creating another one will change the category of the older site note to an office note.

Leaving the checkbox unticked will automatically categorize the entry as an Office Note.

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE INVO	ICES TIMESHEET	SNOWTRACK P.O. REPORTS				22 🖓 🖵 😯 🌼 🙁
			Add New Note			Х			
← BACK Contact Info: Customer Number:	102	Billing 2331 108 Blaine, N		Note text *	Located on the 3rd floor Construction/Maintenance times: 12MN to 7AM Mall permit required		Invoice overdue \$ 0.00	U	Pending Quotes \$ 0.00
Phone:	Diana Bloomer (218) 327-2223				Site Note				
Email:	diana@5dollarpizza.com		Assi	gn note to a service location	Not selected 🗸				
Location	Estimates Jobs	Invoices							
Filter:						CLOSE SAVE			+ ADD OFFICE NOTES
Date	† Location					CEOSE			
					No data available in table				
Show 10 🗸	entries								Previous Next

On the **Assign note to a Service Location** field, select the customer location where the note will apply if there is more than one. Leaving the field **Not Selected** will automatically set the reminder for the customer's primary service location.

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE		NOWTRACK P.O. REPORTS				🕰 📮 😯 🌼 @
← BACK			Add New Note	2		Х			EDIT CONTACT
Contact Info: Customer Number: Contact name:	102 Diana Bloomer	Billing 2331 108 Blaine, N		Note text *	Located on the 3rd floor Construction/Maintenance times: 12MN to 7AM Mail permit required		Invoice overdue \$ 0.00	()	Pending Quotes \$ 0.00
Phone:	(218) 327-2223				Z Site Note				
Email: Location	diana@Sdollarpizza.com Estimates Jobs	Invoices		Assign note to a service location	None Haven's Park - Crain High Way, Hut #34, Avoca, MN, 56114, USA				
Filter:						CLOSE SAVE			+ ADD OFFICE NOTES
Date	† Location								
				1	No data available in table				
Show 10 💙	entries								Previous Next

Save the note. This will be added to the list.

IndusTrack MAP CUS	STOMER ESTIMATES SC	HEDULE INVOICES TIMESHE	ET SNOWTRACK P.C	REPORTS				22 Ç 🗘 🔅
← BACK		5 Dolla	r Pizza Tags: Assign	multi-location &				EDIT CONTACT
Contact Info: Customer 102 Number: Contact name: Diana Bloom Phone: (218) 327-222 Email: diana@Sdolla	23	e, Suite 101 Cliffo	ice Location: rd High Way, 188 orf, MN 30104	0**	solution solutita solutita solutita solutita solutita solutita solutita sol	Invoice overdue \$ 0.00	()	Pending Quotes \$ 0.00
Location Estimates	Jobs Invoices Equipn		Attachments Geofences	Messaging Contra	cts			+ ADD OFFICE NOTES
Date 1	Location	Notes	User		🌲 Task Name			÷ ÷
10/25/2022	5 Dollar Pizza - Clifford High Way MN, 30104, USA	Site Notes r, 188, Waldorf, Located on the 3rd flo Construction/Mainter 12/MN to 7AM Mail pe required	ance times: elaineg@industra	ck.com				i
Show 10 🗸 entries								Previous 1 Next

Update a Note

Find the Note to be updated from the List. Go to the 3-dot menu to its right and select **Edit**.

IndusTrack MAP CUST	TOMER ESTIMATES SCHEDULE INVOI	CES TIMESHEET SNOWTRACK P.O.	REPORTS		²²⁰ 🖓 🗘 🤹 🧕
← BACK		5 Dollar Pizza Tags: Assign	multi-location		EDIT CONTACT
Contact Info:	Billing Address:	Service Location:			
Customer 102 Number: Contact name: Diana Bloomer Phone: (218) 327-2223		Clifford High Way, 188 Waldorf, MN 30104	O ^{Awaiting Payments} \$ 0.00	Invoice overdue \$ 0.00	Pending Quotes \$ 0.00
Email: diana@5dollar;					
Location Estimates Filter: Date Location	Jobs Invoices Equipment Reminder	S Notes Attachments Geofences I	Messaging Contracts	© User ≎	+ ADD OFFICE NOTES
10/25/2022 Haven's Park - C	Crain High Way, Hut #34, Avoca, MN, 56114, USA	Site Notes Haven's Manager available for site inspection on We	elaineg@industrack.com	·	
10/25/2022 5 Dollar Pizza - (Clifford High Way, 188, Waldorf, MN, 30104, USA	The owner has secured Mall Permits. Pick up from C	lifford store manager	elaineg@industrack.com	:
10/25/2022 5 Dollar Pizza - (Clifford High Way, 188, Waldorf, MN, 30104, USA	Site Notes Located on the 3rd floor Construction/Maintenance	times: 12MN to 7AM Mall permit required	elaineg@industrack.com	Edit d
Show 10 💙 entries					Previous 1 Next

Update the Note as needed. **Save** once done.

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE I	NVOICES TIMESHEET SN	IOWTRACK P.O. REPORTS	х		
Contact Info Customer Number: Contact name: Phone: Email: Location	102 : Diana Bloomer (218) 327-2223 diana@5dollarpizza.com	Billing 2331 101 Blaine, N		Note text *	The owner has secured Mail Permits. Pick up from Clifford store manager		Invoke overdue \$ 0.00	Pending Quotes \$ 0.00
Filter: Date	Location	ι				CLOSE SAVE	User 🌣	+ ADD OFFICE NOTES job: Task © © # Name
10/25/2022	Haven's Park - Crain High	Way, Hut #34, <i>i</i>	voca, MN, 56114, USA	Site Notes Haven's Manager available	for site inspection on Wednesday at 3PM		elaineg@industrack.com	:
10/25/2022	5 Dollar Pizza - Clifford Hi	gh Way, 188, Wa	aldorf, MN, 30104, USA	The owner has secured Ma	Il Permits. Pick up from Clifford store manager		elaineg@industrack.com	:
10/25/2022	5 Dollar Pizza - Clifford Hi	gh Way, 188, Wa	aldorf, MN, 30104, USA	Site Notes Located on the 3rd floor Co	onstruction/Maintenance times: 12MN to 7AM Mall perr	nit required	elaineg@industrack.com	i
Show 10 🗸	entries							Previous 1 Next

Delete a Note

Delete a Customer Note that is no longer being used or referenced to or was created in error. It is wise to exercise caution when using this function. Deleting client notes may have an effect on other functions, settings or data. This action can not be undone.

Find the Note to be deleted from the List. Go to the 3-dot menu to its right and select **Delete**.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPOR	TS					220 <u> </u>	2 🛛 🌣 🕲
← BACK						5 Dollar P	IZZA Tags: A	ssign	ſ	nulti-location 🛞	1				C	EDIT CONTACT
Contact Info Customer Number: Contact name Phone:	102 e: Diana	a Bloomer 327-2223		Address: Ith Lane, Suite 101 IN 55449			Location: gh Way, 188 AN 30104			O	ting Payments	0	Invoice overdue \$ 0.00	¢		ing Quotes \$ 0.00
Email: Location Filter:	diana Estima	i@5dollarpizza.com ites Jobs		Equipment	Reminders			ofences	Messagin ER	g Contract	s				+ ADD O	FFICE NOTES
Date	Locatio	on			÷ 1	lotes							User	≎ Job #	Task Name	• •
10/25/2022	15/2022 Haven's Park - Crain High Way, Hut #34, Avoca, MN, 56114, USA Haven's Manager a						e Notes ven's Manager available for site inspection on Wednesday at 3PM						om	~	÷	
10/25/2022	5 Dolla	ar Pizza - Clifford H	igh Way, 188, Wa	ildorf, MN, 30104,	, USA 1	The owner has secu	ured Mall Permits. F	Pick up from	Clifford sto	re manager			elaineg@industrack.c	om		1
10/25/2022	5 Dolla	ar Pizza - Clifford H	igh Way, 188, Wa	ildorf, MN, 30104,	, USA	ite Notes .ocated on the 3rd	floor Construction/	Maintenan	e times: 12l	MN to 7AM Mall	permit required		elaineg@industrack.c	:om	Edit Delete	
Show 10 🗸	entries														Previous	1 Next

From the **Delete Confirmation window** that will come up, select **OK** to continue with the deletion. Select **Cancel** to abandon the action.

Deleting Confirmation					
You are about to delete some important content. Please confirm your choice by clicking OK button.					
	CANCEL				

The Note will be removed from the list.