

# Default Service Ticket Note Access Level in SedonaOffice

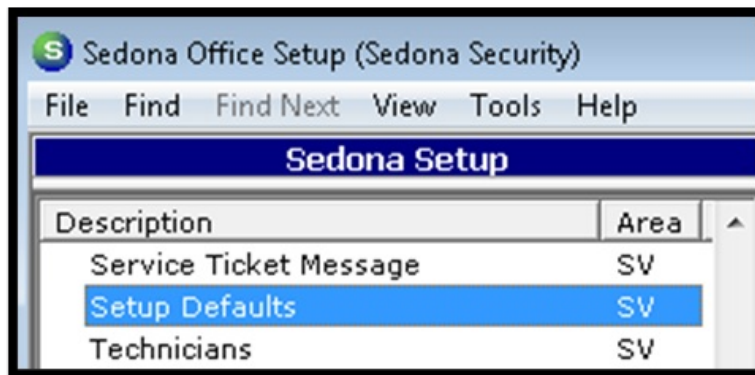
12/29/2023 12:53 pm EST

## Description of Issue:

Customer wants to set Service Notes Access Level to Customer Restricted by default so they aren't required to set the Access Level to Customer Restricted every time they enter a note they don't want the customer to be able to view in their portal.

## Fixes:

Open SedonaSetup. Go to Setup Defaults in the SV (Service) area.



In the Service Setup window, stay on the General tab.

Locate the Note Access Level. Select the desired level of access from the dropdown menu.

Service Setup

General Setup | GL Setup | GL Accounts for Misc Expense

**General**

Default Service Co. A RENEE COMPANY

Next Ticket # 9845

Ticket Printing  Print the System Account on Service Tickets

When Printing Tickets, break out the Trip Charge on the Summary

Note Access Level 2 - Customer Restricted

**Maintenance Contracts**

Warranty Type 90-P 30-L

Service Level T&M

**Invoice Defaults**

Invoice Category SVC T&M

Invoice Description Service Call

Parts Item Code SVC Part-NTX

Auto-Create Invoice Number

Click Apply to save the change.

Note: The two levels available are:

1 - No Restriction

2 - Customer Restricted

FYI: The Note Access Level can be overridden in the Service Ticket by going to Notes.

If you'd like to override the level, go to the Service Ticket.

Go to Notes. select the note you wish to update the Access Level.

Save to apply changes.

Ticket #9316

Ticket Central Station

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Journal Notes (1) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Legal Inactive System

Notifications

Customer: 48860 Secure U  
 Site: Secure U - inactive2  
 406 E Grove St  
 Greenville, MI 48838  
 Eastern Time

Created: 5/31/2022 12:00 AM  
 Created By: ashlee.simmons@outlo  
 Status: Scheduled

Contact: Ashlee  
 Phone:  Ext:   
 Notify: false

Notes	Level	Resolution	Entered	By	Edited	Edited By
Test Note. This is a test	2 - Customer Restrict...	<input type="checkbox"/>	7/21/2023 12:32 P...	asim	7/21/2023 1:38 PM	asim

Access Level: 2 - Customer Restricted

Notes Length: 0

Resolution Note

List Instructions New Save

1 - No Restriction  
 2 - Customer Restricted  
 3 - Management Only