

For Internal Testing - How to Add a Job Note in WeSuite

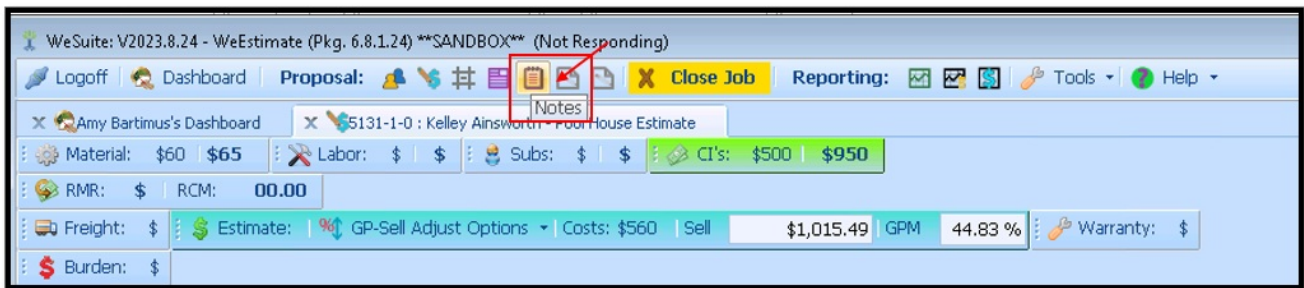
07/03/2024 9:01 am EDT

This article is meant to assist internal support reps testing in wesuite. Customers should instead review WeSuite's support documentation.

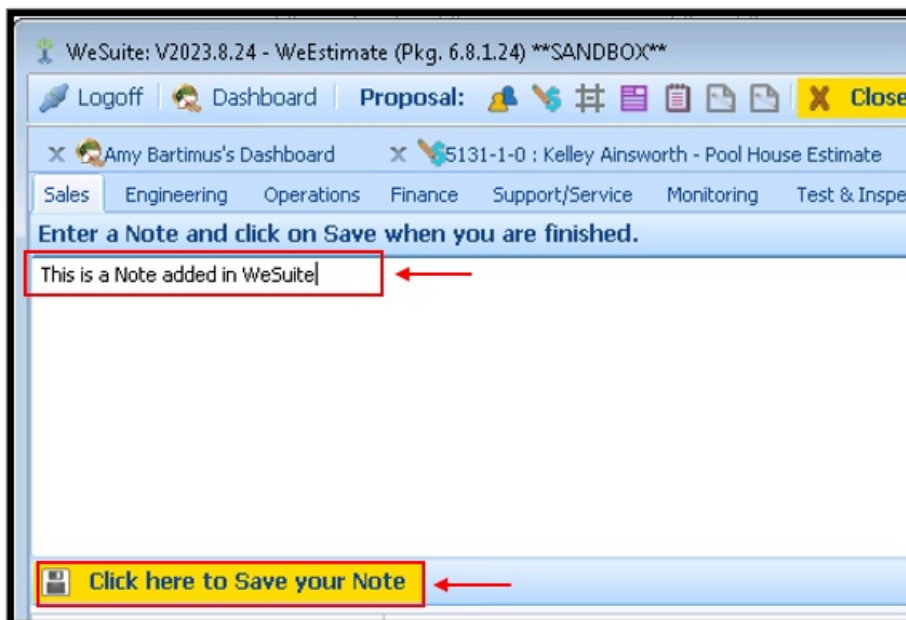
When creating a Job in WeSuite, you have the option to add a Note to the Job.

WeSuite

Once the Quote is Created in WeSuite, select the "Notes" Icon on the Top Toolbar in WeSuite.



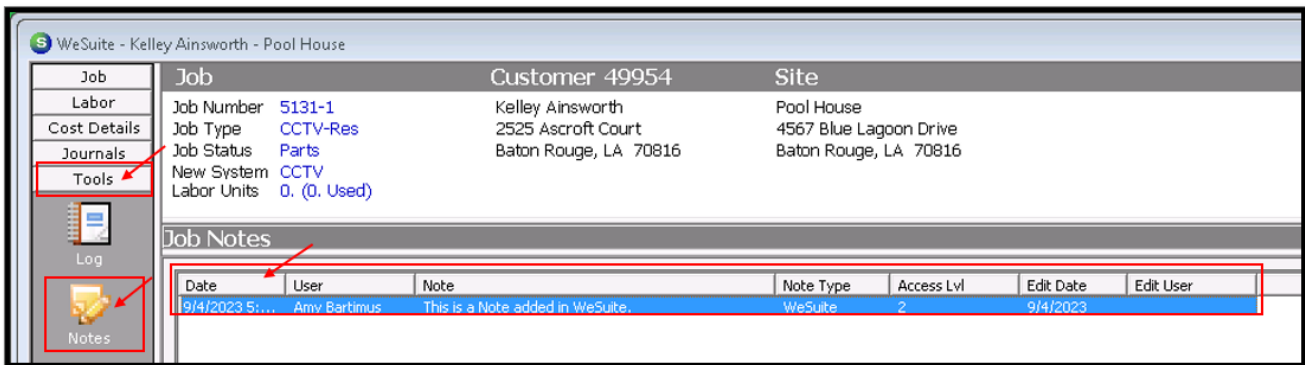
In the Top Section of the Screen enter your Note then select "Click here to Save your Note".



Sedona Office

Once the Job is created in Sedona Office, click on the "Tools" Tab within the Job.

Select "Notes"



If the Note needs to be edited you can highlight the Note
Then update the information as needed and Save.

