

# Adding a Critical Note as Warning Not To Service

07/17/2025 4:26 pm EDT

## Issue:

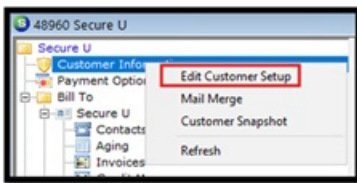
Users need to be prevented from adding Service Tickets to Service Hold customers.

## Resolution:

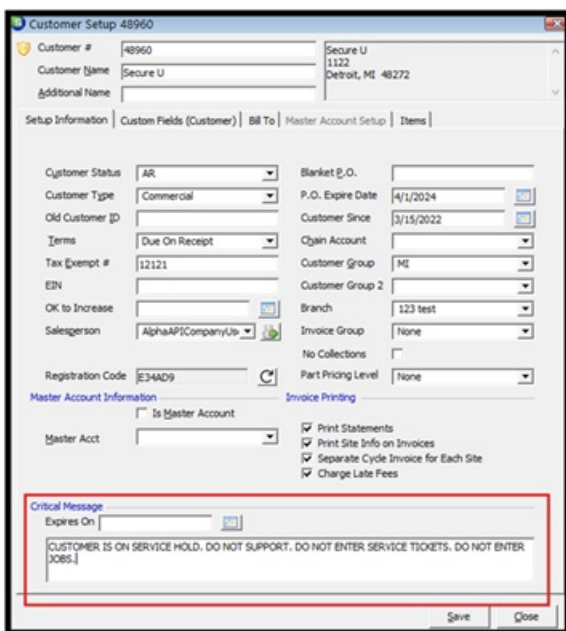
Service Tickets are all or nothing in terms of access. Users can either add Service Tickets or not, regardless of the circumstances surrounding the customer. The best preventative measure would be to add a Critical Note to the customer.

In the customer's account:

Right-click on Customer Information and select Edit Customer Setup



In the Customer Setup, add a note to the Critical Message section and Save the change.



Once that is saved, the next time a user opens the customer, the message will appear.

**Critical Message**

⚠ Entered By: asim  
Entered Date: 3/14/2025  
Expires: Never  
CUSTOMER IS ON SERVICE HOLD. DO NOT SUPPORT. DO NOT ENTER SERVICE TICKETS. DO NOT ENTER JOBS.

And the next time a new Service Ticket is created for the customer, that message will appear there as well.

New Ticket

Ticket Central Station

Service Ticket Appointments and Labor Billing Documents Equipment and Parts Journal Notes Other Items Purchase Orders Service History Ticket Log Ticket Group

Go To

Notifications Critical Messages (1)

|          |   |            |                    |         |   |
|----------|---|------------|--------------------|---------|---|
| Customer | 48960<br>Secure U   | Created    | 3/14/2025 10:38 AM | Contact | <input type="text"/>                          |
| Site     | AS Test<br>123 Test Lane<br>Pleasant Lake, MI 49272<br>Eastern Time | Created By | asim               | Phone   | <input type="text"/> Ext <input type="text"/> |
|          |   | Status     | Open               | Notify  | <input type="text"/> <input type="checkbox"/> |

**Customer Message**  
Entered By: asim  
Expires: Never  
CUSTOMER IS ON SERVICE HOLD. DO NOT SUPPORT. DO NOT ENTER SERVICE TICKETS. DO NOT ENTER JOBS.