Notes

There are a variety of Notes fields in II that can be used for various audiences, such as **Internal**, **Customer**, **Interpreter**, and at a variety of levels such as **Profile**, **Booking**, **Job** and **Interpreter Job**. This document will describe each of these and how they can be used.

Profile Level Notes

Customer Profile (Manage > Manage Customers)

Notes
On the top right hand side of a **Customer** Profile you will find a **Notes** section. These will be commonly used for Important instructions related to all **Bookings** for this **Customer**. These notes can be updated, removed etc. at any time via the **Customer** Profile.
Also Visible: In the **Customer Information** section of all **Bookings** for this **Customer** labelled **Customer Notes**.
Audience Visibility/Edits: These are visible and editable by **Internal** users only. These are not editable on a **Booking**, they can only be edited on the **Customer** Profile by **Internal** users.
Level: **Customer** Profile.
Exports: These notes are available under **Manage** -> **Manage Customers** -> **Export Customers**, labelled **Customer Notes.**

Special Instructions
These can be found under the **Special Instructions** section of a **Customer** Profile and are commonly used for important instructions related to all **Bookings** for the relative audience. These notes can be updated, removed etc. at any time via the **Customer** Profile. These notes can also be updated when creating **Bookings**, however, edits on the **Booking** will persist only at the **Booking** level, these will not update the **Special Instructions** at the **Customer** Profile level.

- **Customer Special Instructions -** notes in this section are intended for, and visible within **Bookings**, by **Customers** using the **Customer Portal**. They are also visible by **Internal** users.
- **Interpreter Special Instructions -** notes in this section are intended for, and visible within **Bookings**, by **Interpreters** using the **Interpreter Portal**. They are also visible by **Internal** users.
- **Internal Special Instructions -** notes in this section are intended for and visible by **Internal** users who can also view **Customer** & **Interpreter Special Instructions** as per above.

Also Visible: as above, **Special Instructions** are visible to the respective audience within all **Bookings** that they have access to.
Audience Visibility/Edits: as above, **Special Instructions** are visible to the respective audience within any **Bookings** that they have access to, however, only **Internal** users can edit

these at the **Customer** Profile level or within **Bookings**. As mentioned above, edits on the **Booking** level will persist only at the **Booking** level (i.e. all **Jobs** that share the same **Booking #**), these will not update the **Special Instructions** at the **Customer** Profile level.
Level: **Customer** Profile & **Booking** level, i.e. any edits at the **Booking** level will persist for all **Jobs** under this **Booking** such as Recurring, Follow-up and Team **Jobs**.
Exports: These fields are available under **Manage Jobs Bookings Export** by selecting the attributes **customer special instructions**, **interpreter special instructions**, and/or **internal special instructions.**

Billing Notes
These **Notes** can be found under the **Billing Information** section of a **Customer** Profile and are commonly used for general Billing instructions at **Customer** level.
Also Visible: These notes are not visible elsewhere.
Audience Visibility/Edits: These are visible and editable by **Internal** users only.
Level: **Customer** Profile.
Exports: These notes are available under **Manage** -> **Manage Customers** -> **Export Customers**, labelled **Billing Notes.**

Customer Profile - Clients
(Manage > Manage Customers> Clients)

Notes
On each and every **Customer Client** (**Clients** tab on **Customer** Profile) you will find a **Notes** box. This will be commonly used for internal notes related to this **Client**.
Also Visible: These notes are not visible anywhere else.
Audience Visibility/Edits: These notes are visible to **Internal** users only on the **Clients**. These are editable by **Internal** users only via the **Clients** tab on a **Customer** Profile.
Level: **Customer** Profile > **Clients**.

Special Instructions
Customer Special Instructions, Interpreter Special Instructions and Internal Special Instructions are also available at the **Client** level.
Client Special Instructions are visible to the respective audience within all **Bookings** that they have access along with any **Customer Special Instructions**.

Customer Profile - Service Locations
(Manage > Manage Customers> Service Locations tab)

Notes
On each and every **Customer Service Location** (**Service Location** tab on **Customer** Profile) you will find a **Notes** box. This will be commonly used for internal notes related to this location, for example if a **Service Location** is temporary and should be disabled on a specific date.
Also Visible: These notes are not visible anywhere else.

Audience Visibility/Edits: These notes are visible to **Internal** users only on the **Service Location**. These are editable by **Internal** users only via the **Service Location** tab on a **Customer** Profile.
Level: **Customer** Profile > **Service Location**.
Exports: These notes are available under **Manage** -> **Manage Customers** -> **Export Addresses**, labelled **Notes.**

Special Instructions
Customer Special Instructions, Interpreter Special Instructions and Internal Special Instructions are also available at the **Service Location** level.
Service Location Special Instructions are visible to the respective audience within all **Bookings** that they have access along with any **Customer & Client Special Instructions**.

Venue Information
On each and every **Customer Service Location** (**Service Location** tab on **Customer** Profile) you will find a **Venue Information** box. This will be commonly used for important instructions related to the **venue** for all parties, such as directions, security, parking etc., and this will automatically appear in the **Service Location** section on all **Bookings** for this **Customer** where this **Service Location** is selected.
Also Visible: In the **Service Location** section of all **Bookings** for this **Customer** where the appropriate **Service Location** is selected.
Audience Visibility/Edits: **Venue Information** details are visible to everyone who has access to the **Booking**, i.e. **Internal**, **Customer** and **Interpreter**. It is editable by **Internal** users only via the **Service Location** tab on a **Customer** Profile. **Venue Information** is also directly editable on a **Booking**, by **Internal** and **Customer users,** using the Pencil & Save icon; such edits persist only to the relevant **Booking** and not to the **Venue Information** on the **Service Location** itself.
Level: **Customer** Profile > **Service Location**.
Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **venue information**.

Contact Profile (Manage > Manage Contacts)

Notes - Active Note, Experience, Availability, Notes
Under the **Contact Information** on a **Contact** Profile you will find a **Notes** section which includes 4 different sections to add various notes relating to the **Interpreter** such as the history of their **Activation**, **Experience**, **Availability** and any general **Notes**.
Also Visible: These notes will also be visible under **Interpreter** lists such as the **Manage Contacts** table and **Interpreter list** on the **Assignment** page of **Jobs**.
Audience Visibility/Edits: These are visible and editable by **Internal** users only and can be edited on the **Contact** Profile by users or they can also be edited via the **Interpreter** lists such as the **Manage Contacts** table and **Interpreter list** on the **Assignment** page of **Jobs** by simply clicking on the relevant note cell and then clicking/editing the appropriate notes field on the pop-up box.
Level: **Contact** Profile.

Grids: **Active Note**, **Experience**, **Availability**, **Notes** are visible under the **Manage** -> **Manage Contacts** grid.
Exports: These notes are available under **Manage** -> **Manage Contacts** -> **Export** -> **Export Contacts** and **Export Interpreter Profile.**

Consumer Profile (Manage > Manage Consumers)

Notes - Notes, Comments
Under the **Consumer Details** on a **Consumer** Profile you will find a **Notes** section which includes a **Notes** and a **Comments** box, typically used to record any specific requirements for the **Consumer**.
Also Visible: These notes will be visible to users only on all **Bookings** for the relevant **Consumer** (after selecting the **Consumer**) and also visible under the **Manage Consumers** table.
Audience Visibility/Edits: These are visible and editable by **Internal** users only and can be edited on the **Contact** Profile by **Internal** users or they can also be edited via the **Manage Contacts** table by simply clicking on the relevant note cell and then clicking/editing the appropriate field on the pop-up box.
Level: **Consumer** Profile.
Grids: **Notes** & **Comments** are visible under the **Manage** -> **Manage Consumers** grid.
Exports: **Notes** & **Comments** are available under **Manage** -> **Manage Consumers** -> **Export Consumers.**

Booking/Job/Interpreter Job Level Notes

When Creating/Editing a **Booking/Job/Interpreter Job** there are a number of notes fields available, some of which are coming from Profile level Notes as outlined above.

Job Details Tab

Customer Notes
In the **Customer Information** section of a **Booking** you will find **Customer Notes**, these Notes are coming from the **Customer** Profile (see above).
Also Visible: as above, the source of these notes are the **Customer** Profile.
Audience Visibility/Edits: These are visible and editable by **Internal** users only. These are not editable on a **Booking**, they can only be edited on the **Customer** Profile by **Internal** users.
Level: **Customer** Profile.

Venue Information
In the **Service Location** section of a **Booking** you will find **Venue Information**, these notes are coming from the **Customer** Profile **Service Location** (see above).
Also Visible: as above, the source of these notes are the **Service Location** under **Customer** Profile.
Audience Visibility/Edits: These details are visible to everyone who has access to the **Booking**, i.e. **Internal**, **Customer** and **Interpreter**. These are also directly editable on a

Booking, by **Internal** and **Customer users,** using the Pencil & Save icon; such edits persist only to the relevant **Booking** and not to the **Venue Information** on the **Service Location** itself.
Level: **Customer** Profile > **Service Location**.
Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **venue information**.

Special Instructions
In the **Service Location** section of a **Booking** you will find **Special Instructions**, these notes are coming from the **Customer** Profile (see above) but can also be edited on a **Booking**.

- **Customer Special Instructions -** notes in this section are intended for, and visible within **Bookings**, by **Customers** using the **Customer Portal**. They are also visible by **Internal** users.
- **Interpreter Special Instructions -** notes in this section are intended for, and visible within **Bookings**, by **Interpreters** using the **Interpreter Portal**. They are also visible by **Internal** users.
- **Internal Special Instructions -** notes in this section are intended for and visible by **Internal** users who can also view **Customer** & **Interpreter Special Instructions** as per above.

Also Visible: as above, the source of these notes are the **Customer** Profile.
Audience Visibility/Edits: as above, **Special Instructions** are visible to the respective audience within any **Bookings** that they have access to, however, only **Internal** users can edit these at the **Customer** Profile level or within **Bookings**. Any edits made on the **Booking** level will persist only at the **Booking** level (i.e. all **Jobs** that share the same **Booking** #), these will not update the **Special Instructions** at the **Customer** Profile level.
Level: **Customer** Profile & **Booking** level, i.e. any edits at the **Booking** level will persist for all **Jobs** under this **Booking** such as Recurring, Follow-up and Team **Jobs**.
Grids/Reset Columns: **Special Instructions** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Sp. I - Admin**/**Sp. I - Cust**/**Sp. I - Interp** under the **Reset Columns** menu.
Exports: These fields are available under **Manage Jobs Bookings Export** by selecting the attributes **customer special instructions**, **interpreter special instructions**, and/or **internal special instructions.**

Consumer Notes & Comments
In the **Appointment Details** section of a **Booking**, when a **Consumer** has been selected, you will see **Notes** & **Comments**, these notes are coming from the **Consumer** Profile (see above).
Also Visible: as above, the source of these notes are the **Consumer** Profile and also visible under the **Manage Consumers** grid.
Audience Visibility/Edits: These are visible and editable by **Internal** users only and can only be edited on the **Consumer** Profile by **Internal** users or they can also be edited via the **Manage Consumers** grid by simply clicking on the relevant note cell and then clicking/editing the appropriate field on the pop-up box.
Level: **Consumer** Profile.

Appointment Details

In the **Appointment Details** section of a **Booking** you will see **Appointment Details**, these notes are available to edit on the **Booking**, i.e. all Jobs that share the same **Booking #**. These notes are typically used to provide any additional details relative to the appointment for the benefit of **Internal** users and **Interpreters**.
Also Visible: These notes are not visible elsewhere.
Audience Visibility/Edits: These details are visible to everyone who has access to the **Booking** , i.e. **Internal**, **Customer** and **Interpreter**. These are editable by **Internal** users and **Customers** when creating and/or editing a **Booking**.
Level: **Booking**.
Grids/Reset Columns: **Appointment Details** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Appointment Details** under the **Reset Columns** menu.
Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **appointment details**. This field is also available under **Accounts** -> **Receivables** -> **Refresh** button -> **Export Invoices Expanded - Full details**, labelled **notes**. Similarly it is also available under **Accounts** -> **Payables** -> **Refresh** button -> **Export Payments Expanded - Full details**, labelled **notes**. It is also available on the **Export Margins Report - Full Details** under both **Receivables** and **Payables** labelled **notes**.

Notes
In the **Notes** section of a **Job** you will find 3 individual notes boxes that can be used for a variety of purposes and audience as outlined below. Note that each of these boxes are available at the **Job** level, i.e. you can add different notes to different **Jobs** under the same **Booking**. If you are updating one of these boxes on a **Job** that is part of a recurring set, you will receive the **Update Recurring Job** box which will allow you to choose how to apply the edits, i.e. to a single **Job** or multiple **Jobs** under the same **Booking**. These notes are **not** however at the **Interpreter Job** level, i.e. **Team Jobs**, therefore where **Team Jobs** are concerned these notes will apply to all of the **Jobs**. See below for more information on notes at the **Visit** level.

Job Details
These are similar to **Appointment Details** in that they are visible to all parties who have access to the **Job** and can be used to share additional details regarding the appointment, the difference being that these notes reside at the **Job** level rather than the **Booking** level.
Also Visible: These notes are also visible/editable on the **Notes** tab within **Financial Review** by **Internal** users only, however, any edits made here will be visible to all who have access to the **Job**. All parties who have access to the **Job** can also view/edit these notes in any **Job** grids, for example **Dashboard**, **Manage Jobs** etc., by clicking on the Job **ID** (or selecting **View More** from the **Job** action menu) and navigating to the **Reference/Notes** tab and clicking on the **Job Details** field to edit.
Audience Visibility/Edits: These details are visible/editable to everyone who has access to the **Job** i.e. **Internal**, **Customer** and **Interpreter** as per above. These are visible/editable by **Internal** users only within **Financial Review** but all updates will be available to all who have access to the **Job**.

Level: Job.
Grids/Reset Columns: Job Details are available for selection anywhere there is a table/grid that includes the Reset Columns button by selecting Job Details under the Reset Columns menu.
Exports: This field is available under Manage Jobs Bookings Export by selecting the attribute **job details**.

Billing Notes
These are for Internal users use only and are used during the Job Workflow (Assignment, Cancellation etc.) to capture any important instructions for billing purposes, as well as within Financial Review to record any actions taken during the billing process.
Also Visible: These notes are also visible/editable on the Notes tab within Financial Review by Internal users only. Internal users can also view/edit these notes in any Job grids, for example Dashboard, Manage Jobs etc., by clicking on the Job ID (or selecting View More from the Job action menu) and navigating to the Billing Notes tab and clicking on the Billing Notes field to edit.
Audience Visibility/Edits: These details are visible/editable to Internal users only.
Level: Job.
Grids/Reset Columns: Billing Notes are available for selection anywhere there is a table/grid that includes the Reset Columns button by selecting Billing Notes under the Reset Columns menu.
Exports: This field is available under Manage Jobs Bookings Export by selecting the attribute **billing notes**. This field is also available under Accounts -> Receivables -> Refresh button -> Export Invoices Expanded - Full details, labelled **billing info**. Similarly it is also available under Accounts -> Payables -> Refresh button -> Export Payments Expanded - Full details, labelled **billing info**. It is also available on the Export Margins Report - Full Details under both Receivables and Payables labelled **billing info**.

Notes about Interpreter(s)
These are for Internal users only and are used during the Job Workflow (Assignment, Cancellation etc.) to capture any important instructions relative to the Interpreter(s) to be assigned/assigned.
Also Visible: These notes are also visible/editable on the Notes tab within Financial Review by Internal users only. They are also visible/editable on the Assignments tab of the Job.
Audience Visibility/Edits: These details are visible/editable to Internal users only.
Level: Job.
Grids/Reset Columns: Notes about Interpreters are available for selection anywhere there is a table/grid that includes the Reset Columns button by selecting Interpreter Notes under the Reset Columns menu.
Exports: This field is available under Manage Jobs Bookings Export by selecting the attribute **interpreter notes**, the resulting column in the export will also be labelled **interpreter notes.** This field is also available under Accounts -> Receivables ->

Refresh button -> **Export Invoices Expanded - Full details**, labelled **interpreter notes**. Similarly it is also available under **Accounts** -> **Payables** -> **Refresh** button -> **Export Payments Expanded - Full details**, labelled **interpreter notes**. It is also available on the **Export Margins Report - Full Details** under both **Receivables** and **Payables** labelled **interpreter notes**.

Assignments tab

Notes about Interpreter(s)

These are for **Internal** users only and are used during the **Job** Workflow (Assignment, Cancellation etc.) to capture any important instructions relative to the **Interpreter(s)** to be assigned/assigned. These are the same **Notes about Interpreter(s)** as available on the **Job Details** tab as outlined above.
Also Visible: These notes are also visible/editable on the **Notes** tab within **Financial Review** by **Internal** users only. They are also visible/editable on the **Job Details** tab.
Audience Visibility/Edits: These details are visible/editable to **Internal** users only.
Level: **Job**.
Grids/Reset Columns: **Notes about Interpreters** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Interpreter Notes** under the **Reset Columns** menu.
Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **interpreter notes**, the resulting column in the export will also be labelled **interpreter notes.** This field is also available under **Accounts** -> **Receivables** -> **Refresh** button -> **Export Invoices Expanded - Full details**, labelled **interpreter notes**. Similarly it is also available under **Accounts** -> **Payables** -> **Refresh** button -> **Export Payments Expanded - Full details**, labelled **interpreter notes**. It is also available on the **Export Margins Report - Full Details** under both **Receivables** and **Payables** labelled **interpreter notes**.

Job Notes

These are for **Internal** & **Interpreter** users only and are used during the **Job** Workflow (Assignment, Cancellation etc.) to capture/communicate any important notes between **Internal** users and **Interpreters** relative to the appointment before or afterwards. These are not accessible by **Customers**.
Also Visible: These notes are also visible/editable on the **Notes** tab within **Financial Review** by **Internal** users only. **Internal** users & **Interpreters** can also view/edit these notes in any **Job** grids, for example **Dashboard** etc., by clicking on the **Job ID** (or selecting **View More** from the **Job** action menu) and navigating to the **Reference/Notes** tab and clicking on the **Job Notes** field to edit.
Audience Visibility/Edits: These details are visible/editable to **Internal** & **Interpreter** users only.
Level: **Job**.
Grids/Reset Columns: **Job Notes** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Job Notes** under the **Reset Columns** menu.

Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **interpreter job notes**, the resulting column in the export will also be labelled **interpreter job notes.**

Internal Job Notes

These are located at the **Interpreter Job** level (Individual **Interpreter Job** where there are multiple such as **Team Jobs**), under the **Interpreters** section. These are for **Internal** users only and are used during the **Job** Workflow (Assignment etc.) to capture/communicate any important notes between **Internal** users relative to the individual **Interpreter Job**, i.e. each individual **Interpreter Job** can have a different note. These are not accessible by **Customers** or **Interpreters**.
Also Visible: These notes are also visible/editable at the bottom of the **Time Record** tab within **Financial Review** (labelled **Notes**) by **Internal** users only.
Audience Visibility/Edits: These details are visible/editable to **Internal** users only.
Level: **Interpreter Job**.

Final Job Notes

These are located at the **Interpreter Job** level (Individual **Interpreter Job** where there are multiple such as **Team Jobs**), under the **Interpreters** section. These are for **Internal** and **Interpreter** users only and are used during the **Job** Workflow (Assignment etc.) to capture/communicate any important notes between **Internal** and **Interpreter** users relative to the individual **Interpreter Job**, i.e. each individual **Interpreter Job** can have a different note. These are not accessible by **Customers**.
Also Visible: These notes are not visible/accessible elsewhere, however, they can be added to via **Job Close Notes** and **Cancellation Notes** when **Closing/Cancelling** a **Job** either as an **Internal**, **Customer** or **Interpreter** user.
Audience Visibility/Edits: These details are visible to **Internal** and **Interpreter** users only but can be added to via **Job Close Notes** and **Cancellation Notes** when **Closing/Cancelling** a **Job** either as an **Internal**, **Customer** or **Interpreter** user.
Level: **Interpreter Job**.
Grids/Reset Columns: **Final Job Notes** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Final Notes** under the **Reset Columns** menu.

Job Close

Job Close Notes

These are located on the **Close Job** screen and can be added by **Internal**, **Customer** or **Interpreter** users when closing **Jobs.** These notes are added to/accessible under **Final Job Notes** on the Assignments tab (see section above) by **Internal** and **Interpreter** users only. Once added, these are not accessible by **Customers**.
Also Visible: These are also visible on the **Assignments** tab at the Individual **Interpreter Job** (where there are multiple such as **Team Jobs**), under the **Interpreters** section.
Audience Visibility/Edits: These details are visible to **Internal** and **Interpreter** users only but can be added to via **Job Close Notes** when **Closing** a **Job** either as an **Internal**, **Customer** or **Interpreter** user.

Level: **Interpreter Job**.

Job Cancellation

Notes at Cancellation

When a **Job** is cancelled by either an **Internal** user or a **Customer**, these notes will be available on the **Job Cancel** screen. These notes will be added to **Billing Notes** on the **Job Details** page (see above) and also **Notes at Cancellation** visible within **Financial Review** and **Final Job Notes** on the **Assignment** **page.**

Also Visible: These are also visible within **Billing Notes** in several locations (see **Billing Notes** above) and on the **Time Record** tab within **Financial Review**.

Audience Visibility/Edits: Once entered, these notes are visible to **Internal** users only but can be entered by **Internal** and **Customer** users via the **Job Cancel** screen.

Level: **Interpreter Job**.

Grids/Reset Columns: **Billing Notes** are available for selection anywhere there is a table/grid that includes the **Reset Columns** button by selecting **Billing Notes** under the **Reset Columns** menu.

Exports: This field is available under **Manage Jobs Bookings Export** by selecting the attribute **billing notes**. This field is also available under **Accounts** -> **Receivables** -> **Refresh** button -> **Export Invoices Expanded - Full details**, labelled **billing info**. Similarly it is also available under **Accounts** -> **Payables** -> **Refresh** button -> **Export Payments Expanded - Full details**, labelled **billing info**. It is also available on the **Export Margins Report - Full Details** under both **Receivables** and **Payables** labelled **billing info**.

Accounts - Financial Review

Time Record tab

Notes at Cancellation - see above on **Job Cancellation**, **Notes at Cancellation**
Job Notes - see above on **Assignments** tab, **Job Notes**
Notes - see above on **Assignments** tab, **Internal Job Notes**

Notes tab

Job Details - see above on **Job Details** tab, **Job Details**
Job Notes - see above on **Assignments** tab, **Job Notes**
Billing Notes - see above on **Job Details** tab, **Billing Notes** (these will also include any notes added at cancellation, see above **Notes at Cancellation**)
Notes about Interpreters - see above on **Job Details** and **Assignments** tab, **Notes about Interpreters**

Accounts - Receivables

Invoice Notes

When a **Job** has been Invoiced by an **Internal** user you can add notes to the **Invoice** itself (by selecting the **Invoice** on the **Invoices** tab on the right hand side and accessing **Invoice Notes** on the **Invoice** on the left hand side) for **Internal** purposes only. These notes will also be

automatically stamped by the system indicating the user and date & time that the **Invoice** was created, or, in the case where an **Invoice** was bulk-created a system generated note will be added to indicate this.
Also Visible: These notes are not visible elsewhere.
Audience Visibility/Edits: These notes are visible to **Internal** users only.
Level: **Invoice**.
Grids/Reset Columns: **Invoice Notes** are available for selection under **Accounts** -> **Receivables** -> **Invoices** tab (you may need to use the **Reset Columns** button and select **Notes**).
Exports: This field is available under **Accounts** -> **Receivables** -> **Invoices tab** -> **Refresh** button -> **Export Invoices.**

Accounts - Payables

Payment Notes

When a Payment has been generated for a **Job**(s) by an **Internal** user you can add notes to the **Payment** itself (by selecting the **Payment** on the **Payments** tab on the right hand side and accessing **Payment Notes** on the **Payment** on the left hand side) for **Internal** purposes only. These notes will also be automatically stamped by the system indicating the user and date & time that the **Payment** was created, or, in the case where a **Payment** was bulk-created a system generated note will be added to indicate this.
Also Visible: These notes are not visible elsewhere.
Audience Visibility/Edits: These notes are visible to **Internal** users only.
Level: **Payment**.
Grids/Reset Columns: **Payment Notes** are available for selection under **Accounts** -> **Payables** -> **Payments** tab (you may need to use the **Reset Columns** button and select **Notes**).
Exports: This field is available under **Accounts** -> **Payables** -> **Payments tab** -> **Refresh** button -> **Export Payments.**

Tasks

Task Notes

When a **Task** is being created or edited for a **Job** by an **Internal** user you can add notes to the **Task**. These notes will be visible anytime that the **Task** is edited or within **Task** grids on the **Tasks** tab of the Dashboard or within the **Job** itself.
Also Visible: These notes are not visible elsewhere.
Audience Visibility/Edits: These notes are visible to **Internal** users only.
Level: **Task**.

Comments

Comments are another quick and useful way to add notes to a **Booking**, they are especially useful for brief notes, questions or reminders. You can add **Comments** either in **View** mode or

in **Edit** mode on a **Booking**. Any Comments added to a **Job** will be visible under all related **Jobs** under that **Booking** #.
You can access and add **Comments** within a **Job** itself on the top right hand side, on the 2nd tab next to the **Documents** tab. Simply click on **Add Comment,** enter the comment, click on the **Save** link.
You can also access and add **Comments** from the **Manage Jobs** page and within **Financial Review.** Use the **Reset Columns** button to firstly add **Comments** to the grid and then simply click on the counter icon to view and/or add **Comments**. The counter will indicate the number of **Comments,** if any, that have been added.
You can also access and add **Comments** on the **Assign Interpreter** page **Comments** tab.
Both **Customers** and **Interpreters** can access the **Comments** feature and add and view **Comments**, however, they will only be able to view **Comments** that they have added respectively while **Internal** users can view all **Comments**.
Also Visible: **Comments** are visible from within a **Job** or **Booking**, the **Manage Jobs** page and **Financial Review**.
Audience Visibility/Edits: These are visible to respective users only; both **Customers** and **Interpreters** can add and view **Comments**, however, they will only be able to view **Comments** that they have added respectively while **Internal** users can view all **Comments**.
Level: **Booking.**
Grids/Reset Columns: Use the **Reset Columns** button and select **Comments**.
Exports: This field is not available for export.