

Miscellaneous Notes

Under the Agency Fee & Services Tab, just above where service items are entered is a Misc Notes section. This section can be used to communicate information about individual files between Principal Accounting and port. You can also upload documents here that DO NOT need to go into the DA, but are informational (any documents that need to be pulled in FDA should be uploaded to the line item, agency line, or as Courier Support under documents tab)

Service Items: SAVE, DELETE SELECTED, COPY ITEM, VIEW SERVICES

Templates: RETRIEVE TEMPLATE, SAVE AS TEMPLATE

Workflow: RESEND EMAIL, CANCEL SERVICE, GENERATE PO, CANCEL PO

Payments: GENERATE CHECK(S), PAID WITH CREDIT CARD/CASH, VIEW PAYMENTS, POST/VOID BLANK CHECKS, REPRINT/VOID CHECKS

DBA Invoice: APPROVE, REVOKE, PREVIEW

In lieu Invoice: APPROVE, REVOKE

MISC NOTES: MISCNOTES /ADD/ EDIT

To enter a note, click on the MISCNOTES/ADD/EDIT. Enter note, upload documents if needed, and then Save.

Add Miscellaneous Notes

Comment

Attachment

Select files...

Max size 25mb

SAVE CLOSE

If a note has been entered, the button turns green.

Service Items: SAVE, DELETE SELECTED, COPY ITEM, VIEW SERVICES

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MISC NOTES: MISCNOTES /ADD/ EDIT

To view the note, click and the box pops up with the note. A new note can be added if needed by clicking the

button ADD MISC NOTES.

Miscellaneous Notes

ADD MISC NOTES

Comments	Created By	Created On	Updated By	Updated On	Document Link	Acti...
test	mgeorge	06/04/2024				

1

100

Items per page

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