

SUPERVISORY NOTES

Due to new state regulations and the need to communicate specific information to on-site technicians, we have added a new **Supervisory Note** section to the Bell Sensing portal and app. This section allows supervisors to share instructions and notes with technicians servicing the account. They are visible in the app under the **Account Notes** section.

You can edit the **Supervisory Note** on the **Bell Sensing web portal** in two places:

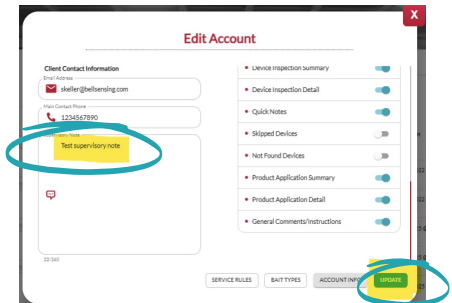
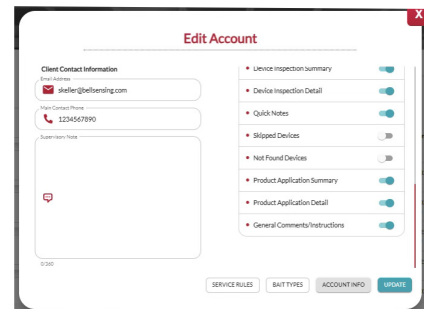
- The **Create New Account widget** (for new accounts)
- The **Edit Details widget** (for existing accounts)

IMPORTANT: Supervisory Notes cannot be added or edited in the **Bell Sensing app**.

ADDING OR EDITING THE SUPERVISORY NOTE

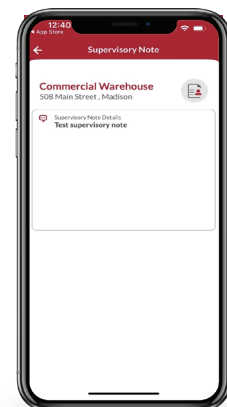
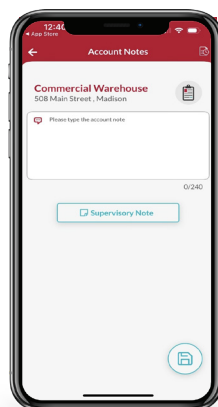
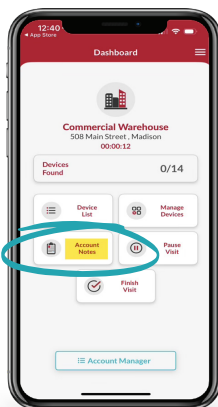
To create or edit the Supervisory Note:

- 1 Login to the Bell Sensing portal, navigate to the account's home page, and select **Edit Details** at the top of the page. This will open the **Edit Details** widget.
- 2 Scroll down to find the **Supervisory Note** window on the left, beneath Client Contact Information. Add the **Supervisory Note** (360 character max) and click **UPDATE** to save it.



ACCESSING SUPERVISORY NOTES IN THE APP

To access the Supervisory Note in the app:



- 1 Start a service on the account, then select **Account Notes** on the dashboard.
- 2 On the next screen, select the blue **Supervisory Note** button below the note field.
- 3 The **Supervisory Note Details** are visible on this screen. **Remember**, this note cannot be edited from the app and must be done on the web portal.