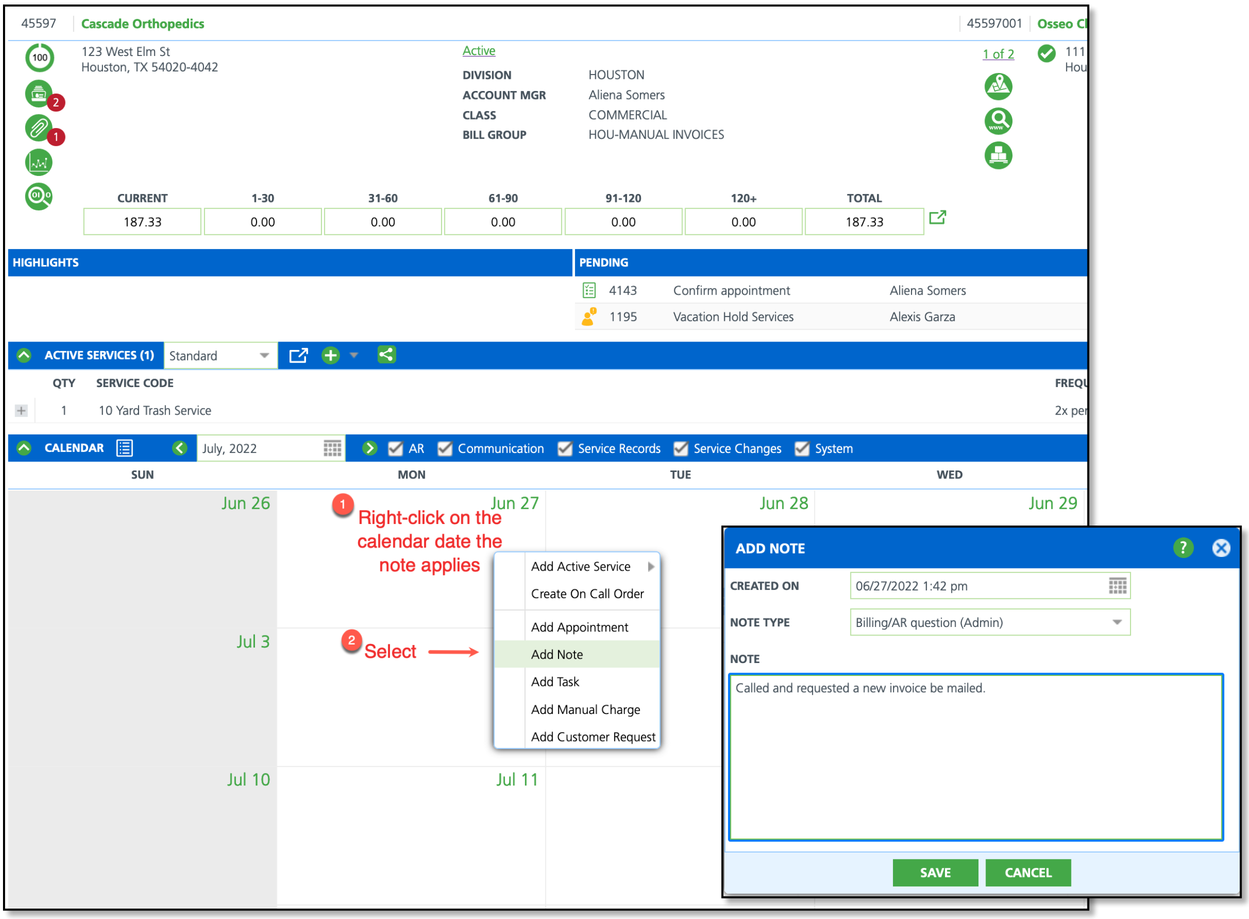
Add Note

Last Modified on 11/21/2024 12:00 pm PST

Pathway: *Accounts > Search > Accounts*

Notes provide an option to record information or interactions with a customer that can be referred back to. Notes only display on the account calendar for the day it was added and do not generate followup notifications.



Permissions

The following permissions determine what a user can do with the Add Note feature:

Permission ID	Permission Name
5	View Account
6	View Site
14	Add Note
15	Edit Note For Self
16	Delete Note For Self
17	Edit Note For Others
18	Delete Note For Others
19	Set Note Date And Time When Adding Note
20	Edit Note Date and Time For Self
21	Edit Note Date and Time For Others

Field Descriptions

Field	Description
Created On	The date the note was created/applies. Select the calendar icon to change the date of the note.
Note Type	Indicates what the note is about.
Note	Text field to record a note.

Add A Note

1. Right-click on the **calendar date** the note applies.
2. Select **Add Note** from the popup that displays.
3. From the Add Note popup editor, complete all necessary fields.
4. Select **Save** when finished.

Locations Where Notes Display

Notes are displayed on the calendar of the customer's account on the date they were created or assigned. The title of the note reflects the selected 'Note Type'.