# Note Type (Setup)

Last Modified on 02/04/2025 2:11 pm PST

#### **Pathway:** Setup > Account > Note Type

Note Type Setup is used to create various note types available for selection when adding a note via the 'Add Note' option on the customer service screen calendar.

NOTE TYPE SETUP								SET	JP > ACCOUNT > I	NOTE TYPE
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NOTE ID	NAME		TYPE		DEPARTME	п	HEALTH SCORE DEDUCTION	COLLECTIONS ACTIVITY	ACTIVE	
1	Requirements		Site		Sales			No	Yes	
2	Discuss Proposal		Site		Sales			No	Yes	
3	Update Proposal		Site		Sales			No	Yes	
5	Genera	ADD NOTE TYPE		?	$\otimes$			No	Yes	
6	Service				on	5		No	Yes	
7	Billing.							No	Yes	
8	Service	NAME			on	5		No	Yes	
9	Send E	ТҮРЕ		~				No	Yes	
10	Follow							No	Yes	
11	Collect	DEPARTMENT		~				No	Yes	
12	CANCE							No	Yes	
		HEALTH SCORE DEDUCTION		Ŧ						
		COLLECTIONS ACTIVITY	No	Ψ.	1					_
		ACTIVE	Yes	Ψ						
			SAVE							

#### Permissions

The following permissions are required to view, add and edit the Note Type Setup screen:

Permission ID	Permission Name
23	Setup \ Account

#### **Field Descriptions**

Field	Description
Name	The name of the note that will display for selection.
Туре	<ul> <li>Determines which level the note type is available to: Site or Account.</li> <li>Account: Notes added at the account level will display for all sites linked to the account.</li> <li>Site: Notes added at the site level will only display for the site the note was added.</li> <li>Recommend: Review the articles linked at the bottom of this page to learn more about the various account level and site level note options.</li> </ul>
Department	References the department the note type applies to.
Health Score Deduction	
<b>Collections Activity</b>	
Active	Controls the availability of the note type for selection and use.

## Note Type Setup Steps

- 1. Click the green + to open the Add Note Type editor.
- 2. Complete the following required fields:
  - Enter a **Name** for the Note Type.
- 3. Select 'Yes' from the Active drop down to make the note type available for use.
- 4. Complete additional fields based on your company's established procedures.
- 5. Click **Save** when finished.

### **Related Article:**

Add Note Overview of Note Types Account Level Notes Site Level Notes