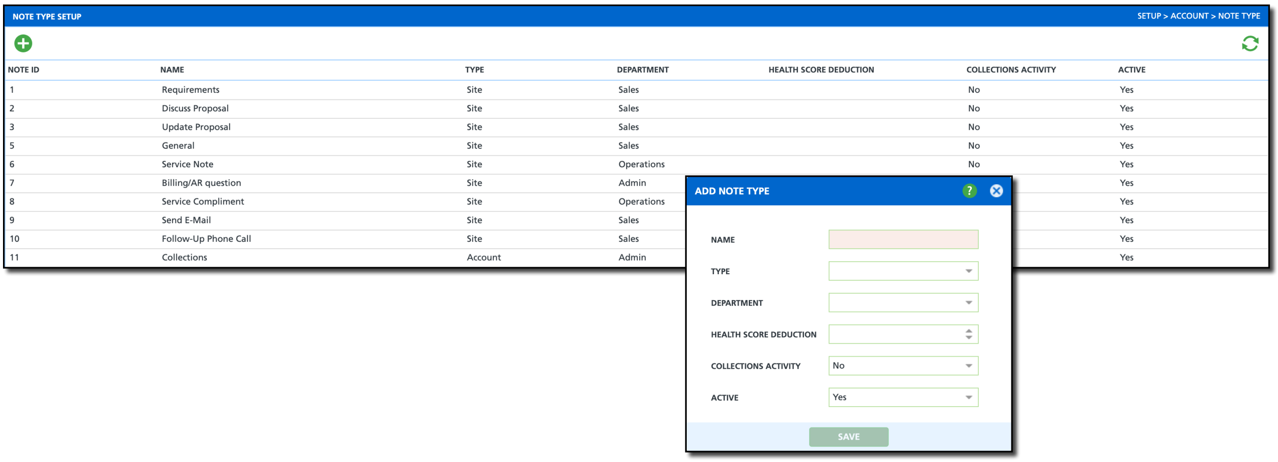
Note Type (Setup)

Last Modified on 04/26/2024 3:13 pm EDT

Pathway: *Setup > Account > Note Type*

Note Type Setup is used to create the different note types that are available for selection when servicing or communicating on an account or site.



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.
Type	Determines which level the note type is available to: Site or Account. • Account: *Notes and warnings added at the account level will display for all sites linked to the account.* • Site: *Notes and warnings added at the site level will only display for the site the note was added.* **Recommend:** Review the articles linked at the bottom of this page to learn more about the various account level and site level note types.
Department	The department the note type applies to.
Health Score Deduction	
Collections Activity	
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. Complete additional fields based on your company's established procedures.
4. Click **Save** when finished.

Related Article:

Overview of Note Types
Add Note