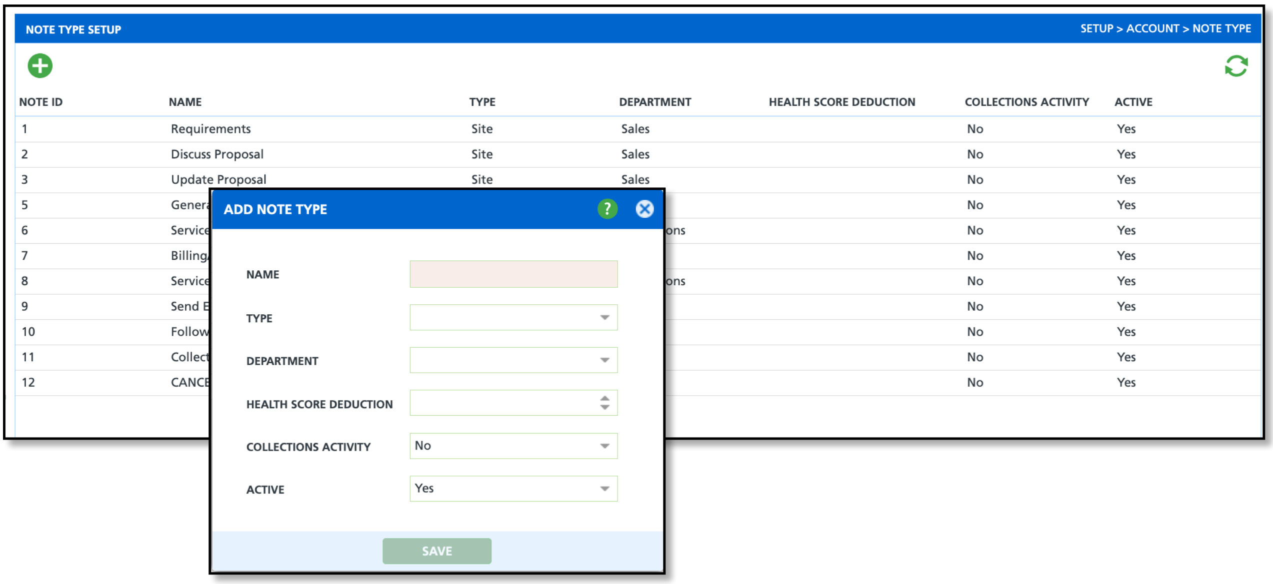
Note Type (Setup)

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.



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 added at the account level will display for all sites linked to the account.* • Site: *Notes 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 options.
Department	References 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. 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