

Creating Notes

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What are Notes?




Notes are pretty simple, and they are client specific. They are used to store information about a client that other staff members can see. They are useful for keeping a history of interactions with the client, special instructions, and more. Notes can be sticky notes, which causes them to appear at the top of the client profile page. If a note is not a sticky note, it can be accessed under the "Notes" link, within the client profile box as highlighted below:

Client #1600


Active (Click to change)

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phillipsdata@gmail.com
7143988132 (Work Phone)
7143988158 (Work Fax)

 [vCard](#)
 [Notes \(0\)](#)  [Edit](#)

Member of **General**

Invoice Method	Auto Debit
EMAIL	ENABLED ?
Auto Suspension	Payment Notices
ENABLED 	ENABLED

Creating a Note

A note can be created by selecting "Add Note" under the Actions box on a client profile page. The following form will be shown:

Create Note

Summary

☐ Sticky this Note ?

[^ Details](#)

Create Note

A note only needs a Summary to be created, but additional details may be stored as well. Checking the "Sticky this Note" box, will make this note a sticky where it will appear in yellow at the top of the clients profile page.

May 13, 2021: Sticky notes are pretty great!