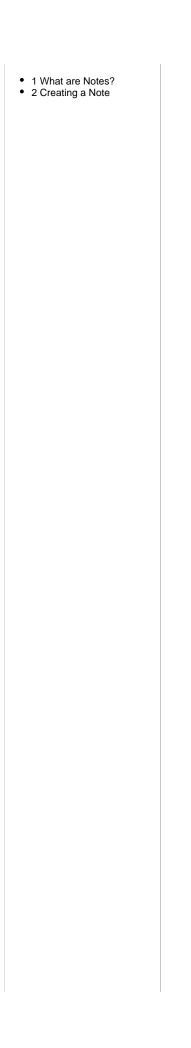
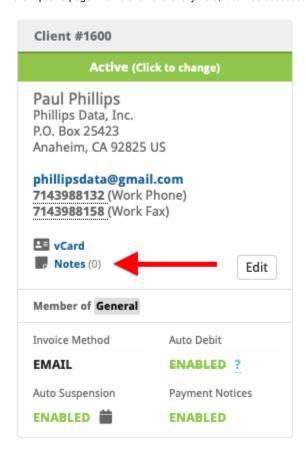
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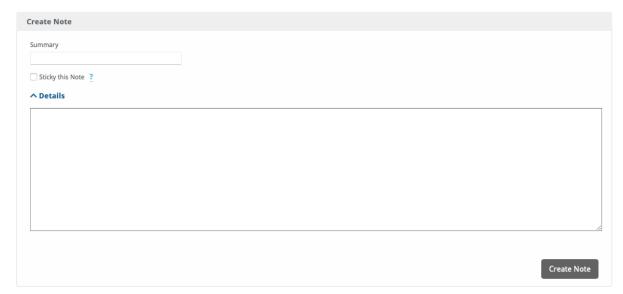
What are Notes?

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:



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:



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!