Add a Note to a Contact Records

1. Navigate to the Contact Record



2. Go to the "Notes" section

Previous Appointr	nents	
This Contact does	not have any Tasks or Appointments	
Notes 2		
Updated	Assigned User	Descript

Note: The number of "**Notes**" displayed is limited to 10. You can click the "**View All**" to view all notes for the contact.



Which opens as a pop-up window.

	This Contact	does not have any Tasks or Appointments	
Notes for Rose Thorn -	Google Chrome		×
https://yq263.infu	sionsoft.com/ContactAction/allH	istoryPop.jsp?contactId=82353¬esFilter=ContactNotes	Q
Notes for Ro	se Thorn		
		Note Template Add Note	
Updated	Assigned User	Description	
01/08/2019	Amanda Madsen	Letter purchase maintenance On August 23, 2001, you authorized me to purchase maintenance supplies for the Springfield Condominiums. I will do my best to keep written records justifying all expenditures, save all receipts,	
		d11	you authorized n
01/08/2019	Amanda Madsen	Letter Received Our company will be moving from Springfield on July 1, and it is therefore necessary for me to cancel my membership in the Springfield Chamber of Commerce. I have enclosed my receipt for	Justifying all exp
		membership	moving from Spr
01/08/2019	Amanda Madsen	Letter Received Please cancel my membership immediately. My account is 1234. According to the terms of the contract, my written notice is sufficient to cancel my subscription.	of Commerce. I h
			mbership immed
01/08/2019	Amanda Madsen	Letter Received Please cancel my membership. I am returning my membership pin and card. Poor health has made it difficult for me to maintain the	ly subscription.
		Society's schedule for continued certification. Please confirm my	-
		Please cancel m	y membership. I am re

3. Click on the "Add Note", which will open as a pop up window.

View All Note Template	۲ Add Note

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	https://yq26.infusionsoft.com/ContactAction/manageContactAction.jsp?isPop=true&view=add&cont	Q
y	Note Summary	
	Details	
	2+2 Assign to different user	Vie
SI	D Template Please select one	
na	C Type Please select one	e supplies f
	Title -	
na	Description	herefore ne or members
na	Notifications	
	Notify Please select	According to
	Send as a blind carbon copy	
	Cancel Save g	in and card. my ch

- a. (Optional) **Assign to different user**: Select a user from the drop-down to associate someone else with the note (if your user permissions allow).
- b. (Optional) **Template**: This drop-down list includes pre-populated note templates.
- c. (Optional) Type: Select a type that describes the interaction you're recording (i.e. Call, Email, etc.). Note: You can modify this list through CRM > Settings > Task/Appt/Note Settings (if your user permissions allow.)
- d. **Title**: Enter a subject line for the note. The subject is visible in the contact history; it should be a short description of the interaction.
- e. **Description**: Enter or customize the notes. This is a more detailed description of the interaction.
- f. (Optional) **Notify**: Select one or more users to send them a copy of the note by email.
- g. Click on the Save button to record the note in the contact record.

Pro-Tip: You can also use note templates to record repetitive interactions. Note templates can also trigger automation in Infusionsoft. They can help you work more efficiently and reduce the possibility of errors.

Important Note: Your user permissions may not allow you to delete a note from a contact history. The **Can edit all records** permission needs to be set correctly.