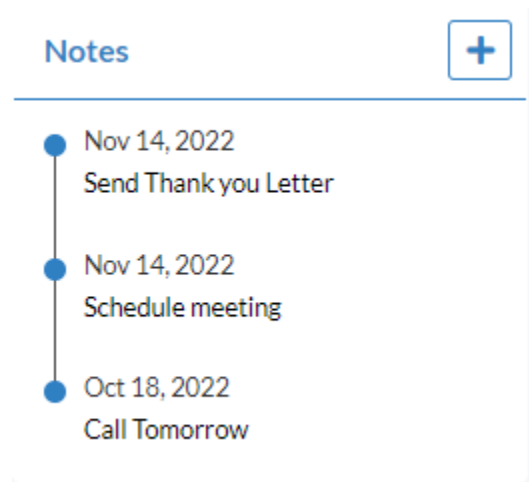








The **Notes** function in Crimson allows users to keep track of notes within a People record. When adding a note, the user can include a subject, date, note, and attachment.



\*\*Notes cannot be searched for using **People** search. To view a note, open the note within the **People** record or generate the **Full Profile** call sheet. There are also **Data Maintenance Reports** that allow you to pull notes in mass by subject, state, date, etc. (#1002, #1003, and #1005).


### Creating and Editing Notes within People Records

1. To create or edit a note, first open the **People** record the note is to be assigned to. For information on how to find and open a **People** record, please see the [Crimson: People Search](#) solution on the HelpDesk.
2. Once within a **People** record, you will see several panels. Click on the **Notes** panel to pull up a list of notes associated with this record and options to create or edit notes.



Notes			
<a href="#">Add Note</a>			
	Date	Subject	Note
 	11/14/22	Send Thank you Letter	
 	11/14/22	Schedule meeting	
 	10/18/22	Call Tomorrow	


3. To edit a note in the list, click the  button. The **Note** window containing that note's information (subject, date, note, and attachment) will appear. After you have finished editing, click **Save** or **Cancel**.
4. To delete a note in the list, click the  button.

5. To create a new note, click the  button. In the new window, you can enter the subject, date, note, and attachment. Then click **Save**.

**Add Note** - Mr. Joseph M. Banks, Sr. (PID: 74178535)

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Subject

Date  

Ask Memo

Note

Move

Move Life Cycle Stage