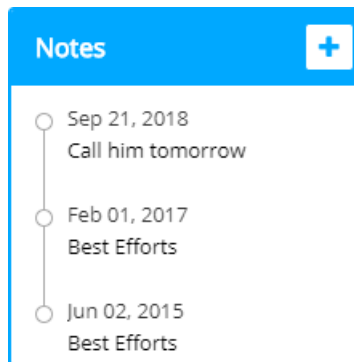


The **Notes** function in Crimson allows users to keep track of notes within a People record. When adding a note, the user can include a subject, date, note, and attachment.

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.



Add Note		Date	Subject	Note
		9/21/2018	Call him tomorrow	
		2/1/2017	Best Efforts	Best Effort sent.
		6/2/2015	Best Efforts	Best Effort sent.

Navigation: << < 1 > >> 10 items per page 1-3 of 3 items

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

Subject:

Date:

Ask Memo:

Note: