Add a note to a contact
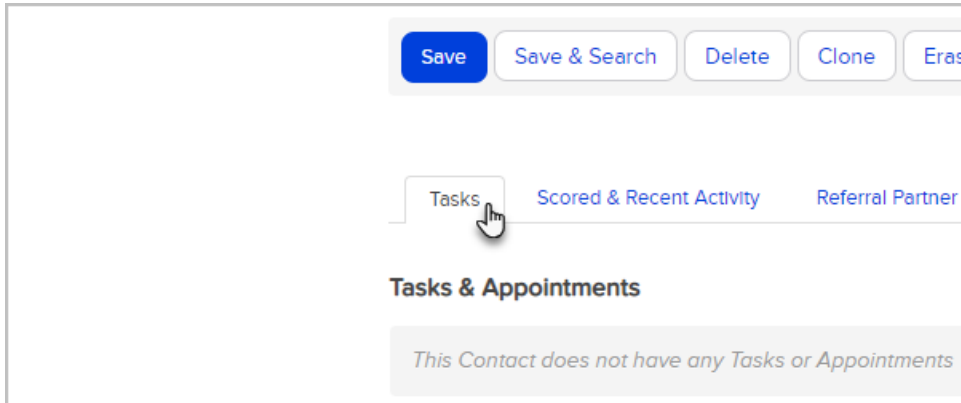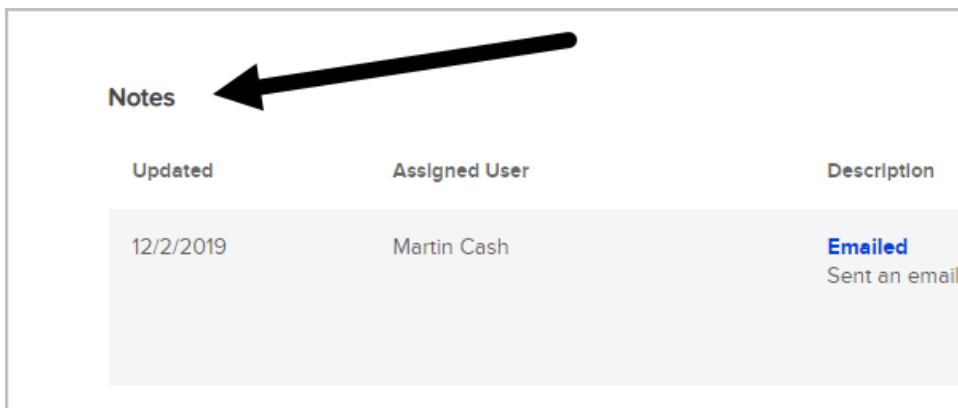
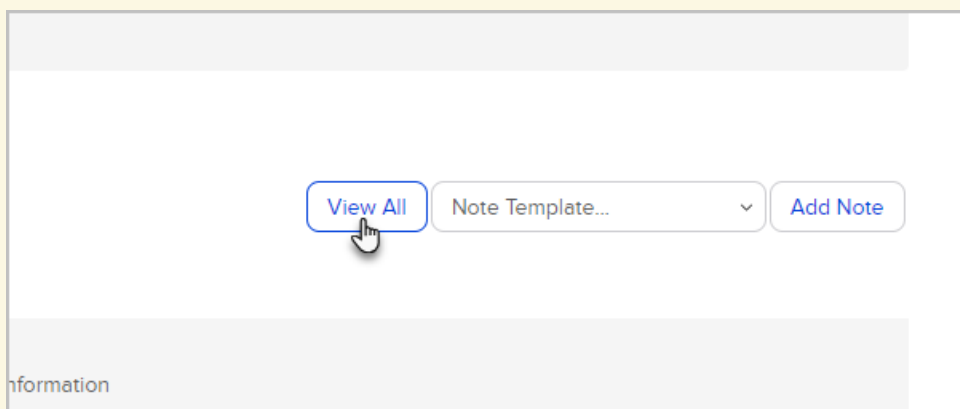This article applies to:

Max Classic

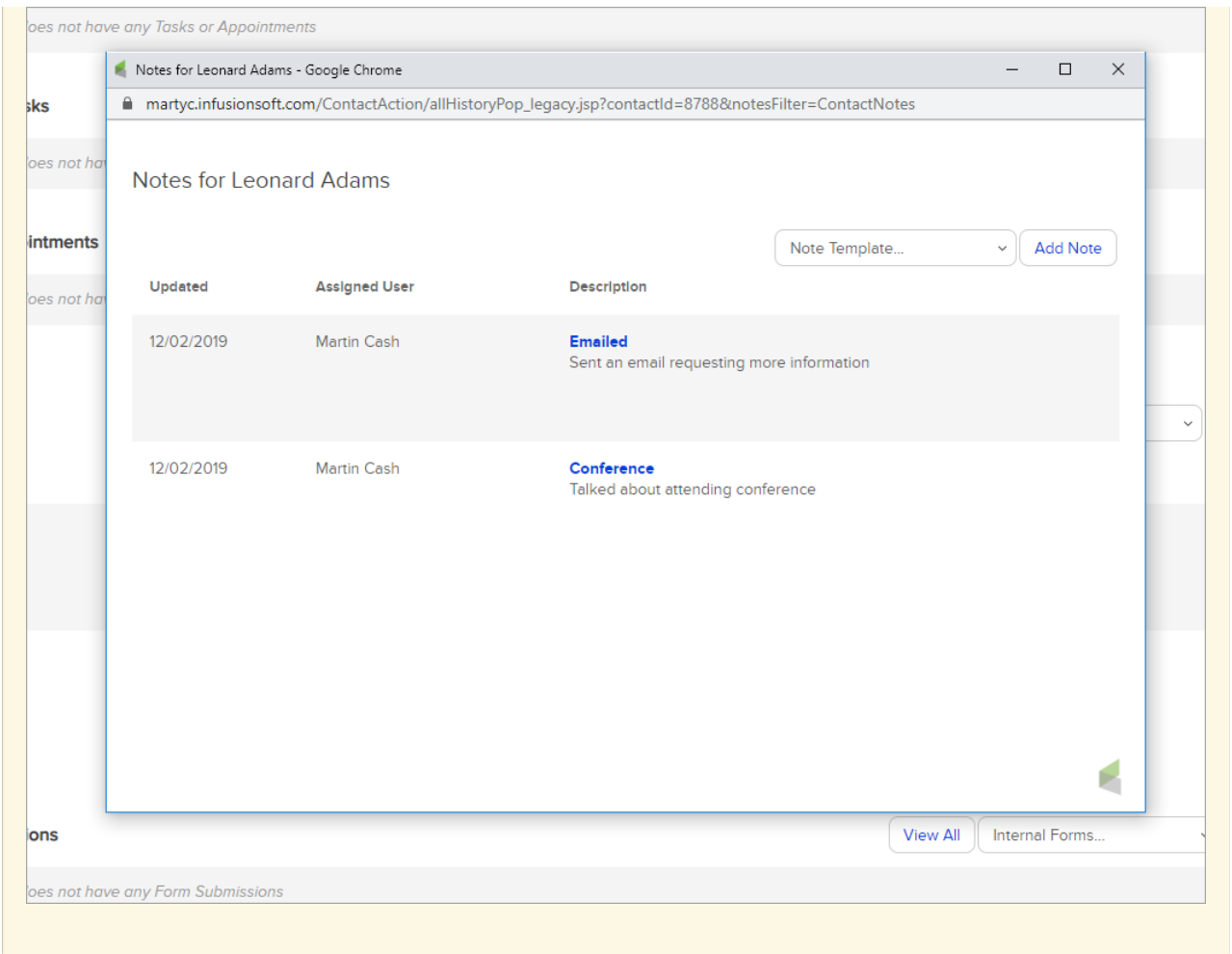1. Navigate to the **Contact Record** and click the **Tasks** tab.
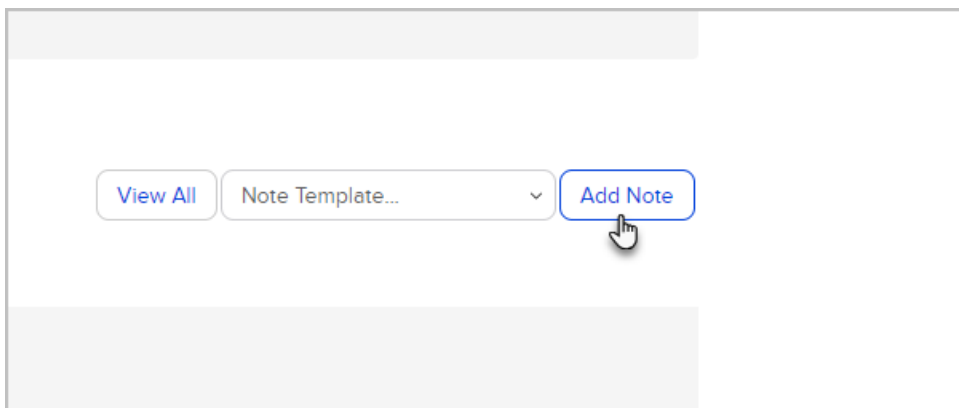

2. Locate the **Notes** section.

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

Which opens as a pop-up window. View all is limited to 200 notes. If you want to see more than 200, use the tasks note report.

Notes for Leonard Adams - Google Chrome

🔒 martyc.infusionsoft.com/ContactAction/allHistoryPop_legacy.jsp?contactId=8788&notesFilter=ContactNotes

Notes for Leonard Adams

Note Template... ⌄   Add Note

Updated	Assigned User	Description
12/02/2019	Martin Cash	**Emailed** Sent an email requesting more information
12/02/2019	Martin Cash	**Conference** Talked about attending conference

View All   Internal Forms...

oes not have any Form Submissions

3. Click **Add Note**, which opens a pop up window.

Note Summary

Contact Name   Leonard Adams (Select a different contact...)

Details

Assign to different user

Template   [Please select one ▾]

Type   [Please select one ▾]

Title*   [ ]

Description   [ ]

Notifications

Notify   [Please select...]

☐ Send as a blind carbon copy

[Cancel] [Save]

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; e.g., call, email. **Note**: You can modify this list, if your user permissions allow, by navigating to **CRM > Settings > Task/Appt/Note Settings**.

d. **Title**: Enter a subject line for the note. The subject is visible in the contact history, so it should be a short description of the interaction.

e. **Description**: This is a more detailed description of the interaction.

f. (Optional) **Notify**: Select one or more users to receive a copy of the note by email.

g. Click **Save** to record the note in the contact record.

Pro-Tip: You can use note templates to record repetitive interactions. Note templates can also trigger automation in Max Classic. They can help your efficiency and reduce the possibility of errors.

Important Note: Your user profile permissions determine if you are able to delete a note from a contact history.