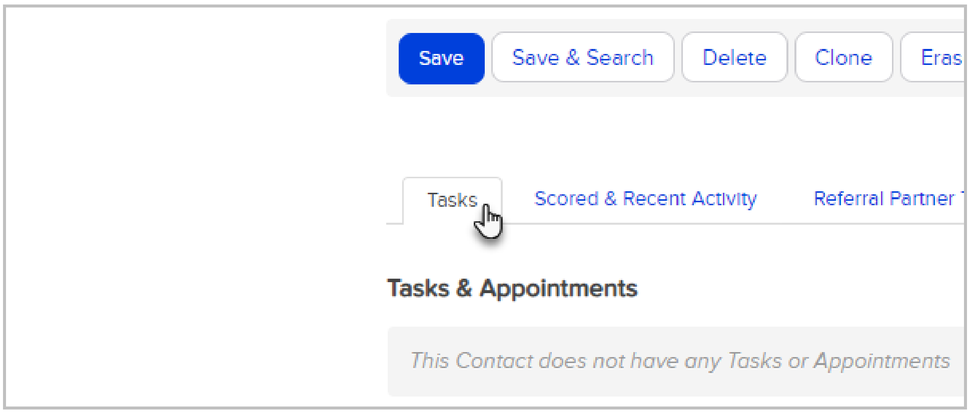
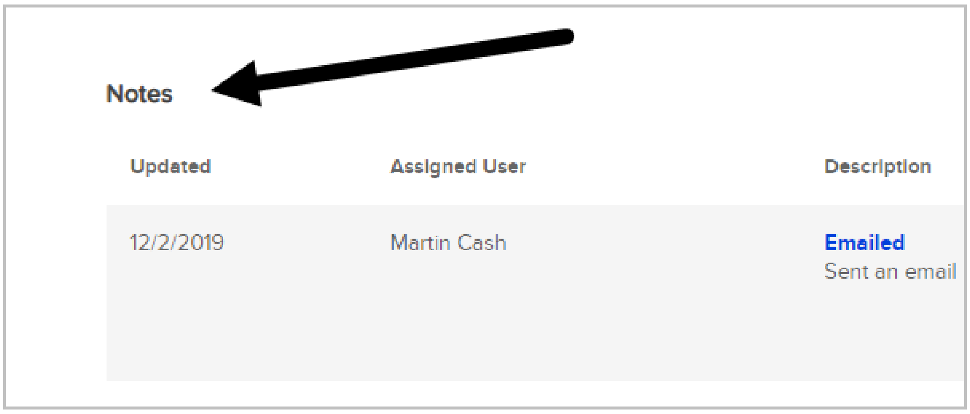
Add a note to a contact

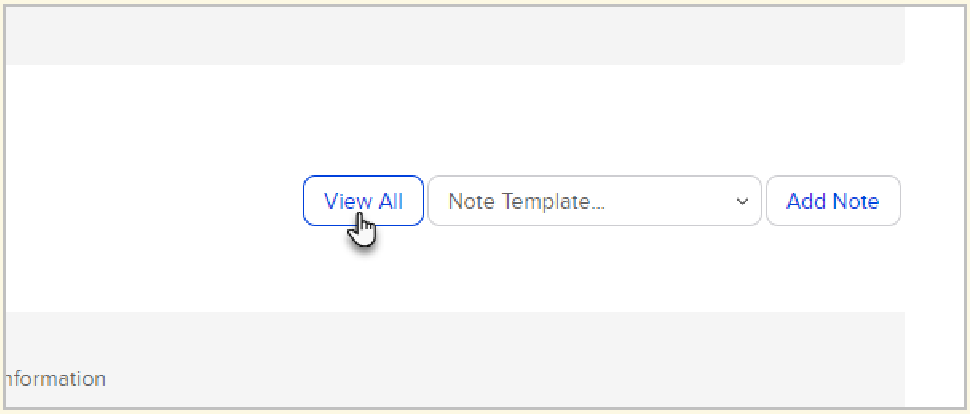
1. Navigate to the **Contact Record** and click the **Tasks** tab.



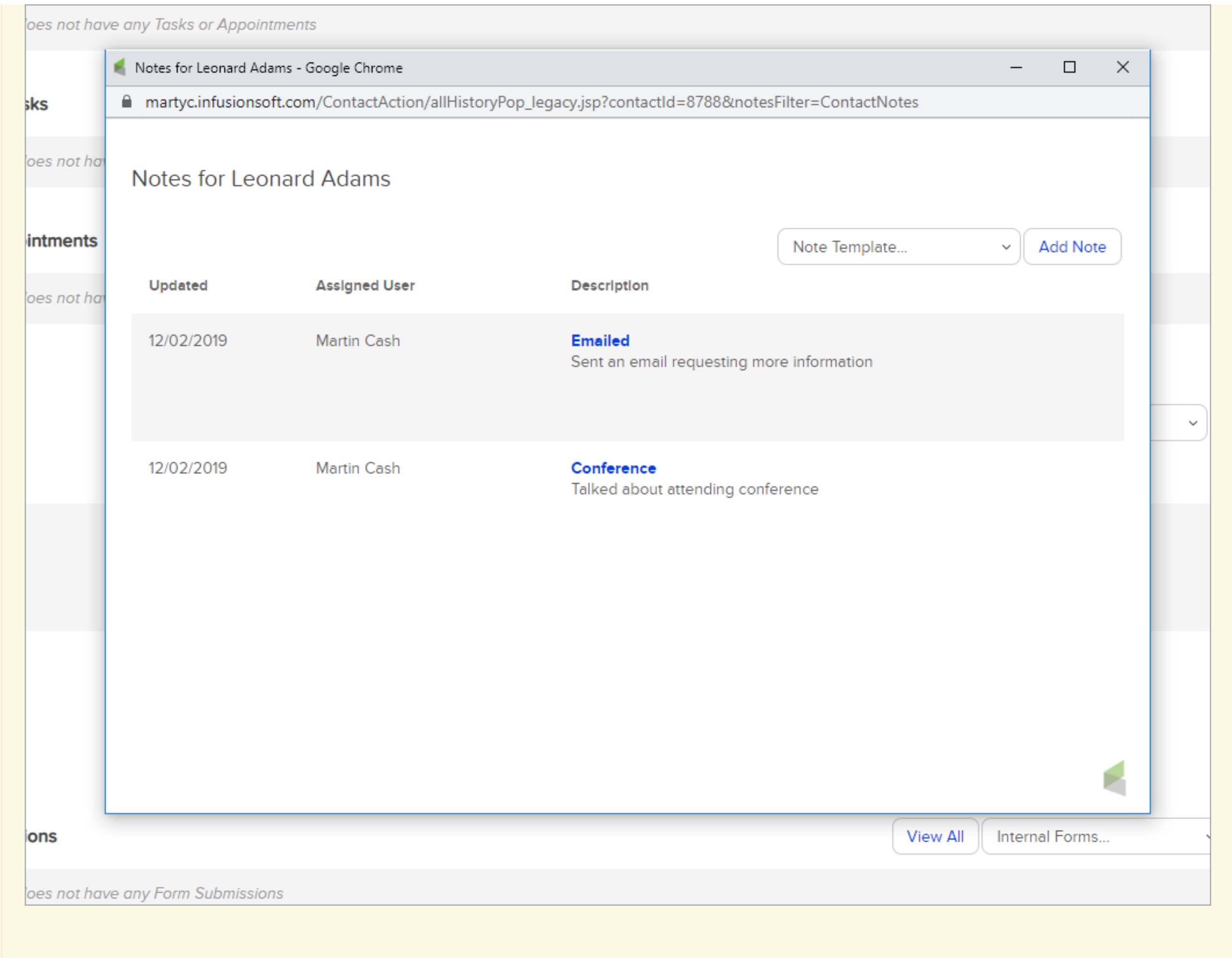
2. Locate the **Notes** section.



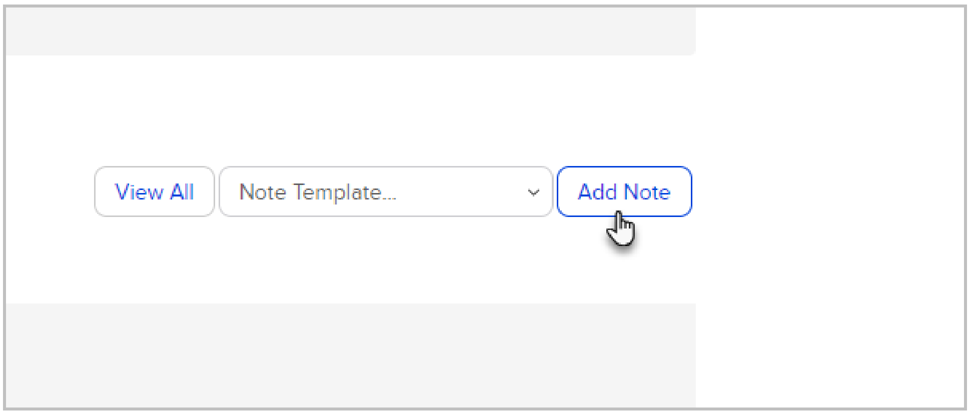
Note: The number of **Notes** displayed is limited to 10. You can click **View All** to view all notes for the contact,

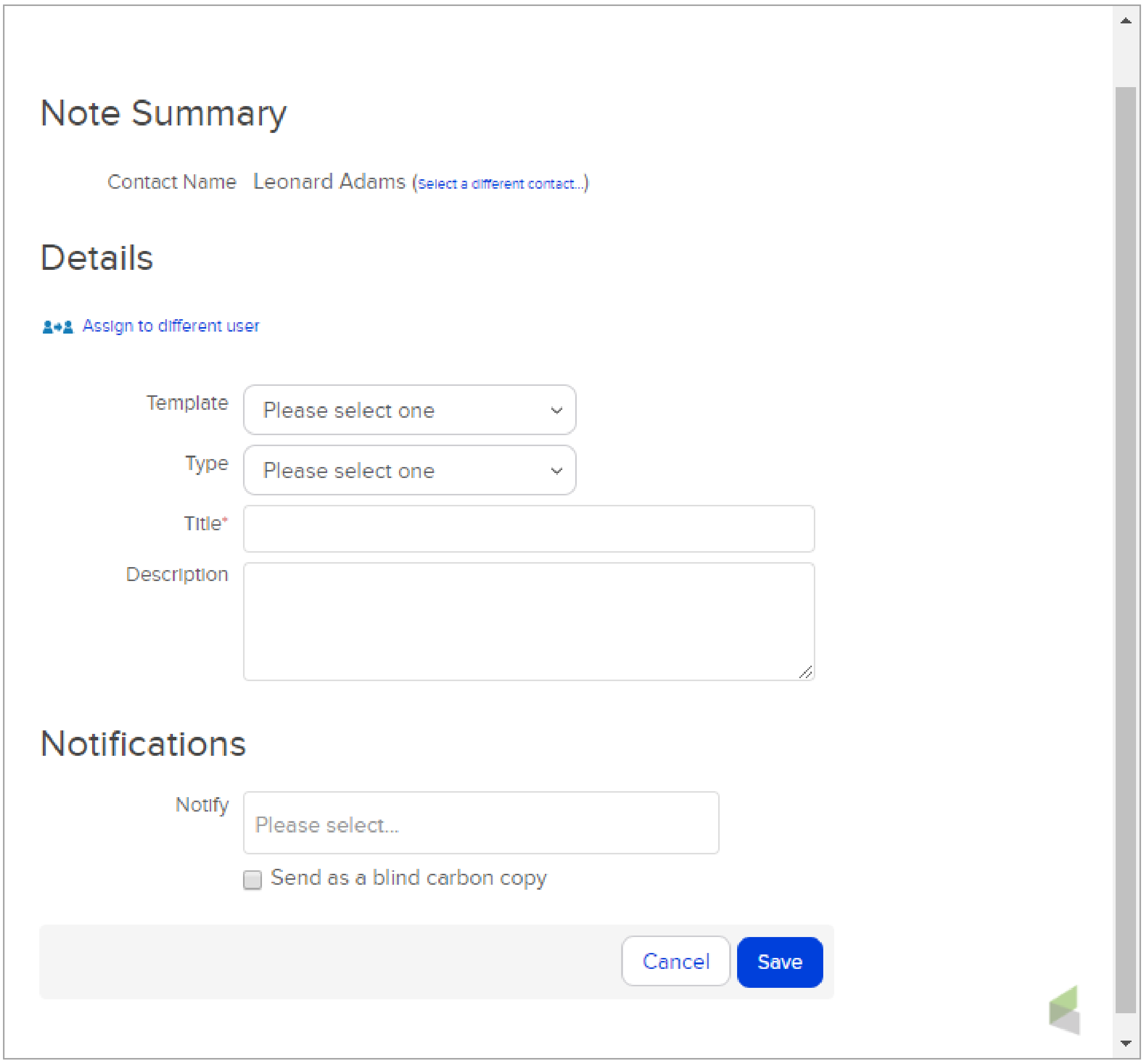


Which opens as a pop-up window. View all is limited to 200 notes. If you want to see more than 200, use the tasks note report.



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





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 Infusionsoft. 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.