

Note Sub Types

Description: In this topic you will learn how to add a new Note Sub Type, search, export, view, and edit a Note Sub Type Code.

*Please note: Note Sub Types are used when a Custom Note Type is used when adding a note to an item, such as a client profile. The Note Sub Types appear in the New Note wizard on an item's details page when a Custom Note Type is selected.

Role Required: Super User

Permission Required: Notes Sub Type Admin

Add a new Note Sub Type

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Custom Drop Down** from the sub menu
4. Select **Add New Custom Drop Down Item**
5. Select **Note Sub Type** from the Item Type dropdown menu in the Add New Custom Drop Down Item wizard
6. Complete the wizard with the Item's name and status
7. Click **Save**
8. Click **Yes** in the confirmation alert window

Search and View for a Note Sub Type

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select Custom Drop Down from the sub menu
4. Select **Note Sub Type** from the search criteria, then click the blue **Search** button
5. Click anywhere in the row to select a particular Note Sub Type
6. This will open the Custom Drop Down Details page where the Note Sub Type's events can be viewed and filtered, and edit the Note Sub Type information
 - a. All notes that have been added in the system with this sub type will appear in the Notes table. Use the filters to find desired notes.

Export Note Sub Types

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select Custom Drop Down from the sub menu
4. Select **Note Sub Type** from the search criteria, then click the blue **Search** button
5. There are two options to export:
 - a. Export all Note Sub Types by clicking the **Export** button located beneath the search filters
 - b. Use the search criteria referenced in the instructions above to show a group of filtered Note Sub Types, then click the **Export** button located beneath the search filters
6. The file will automatically download and save to the Download folder on the user's computer. It will be saved as a CSV file. The file is compatible with Microsoft Excel.

Edit a Note Sub Type Code

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select Custom Drop Down from the sub menu
4. Select **Note Sub Type** from the search criteria, then click the blue **Search** button
5. Click anywhere in the row to select a particular Note Sub Type
6. Select **Actions** then **Edit Custom Drop Down Item** from the dropdown menu
7. Complete desired edits
8. Click **Save**
9. Select **Yes** in the confirmation alert window

Related articles

- [Note Sub Types](#)
- [How to decode notes report?](#)
- [Add Notes](#)