

Add Notes - Web Portal

Description: In this topic, the user will learn how to add notes to an object (per user access). Entry types include, but are not limited to:

- Punch/Attendance Entries
- Accounts
- Profiles
- Payroll/Billing Entries
- Authorizations

*Please note: Notes have no character limit except for notes added directly to a punch entry which have a 2500-character limit. For more info on entering a note on a punch entry, see the Enter a Punch article in the help center.

Role Required: Client, Guardian, Supervisor, Employer, Super User, Caseworker, Employee (base user)

Permission Required: N/A

1. Log in with personal profile
2. Navigate to the details page of the object requiring the note
 - a. Example: To add a note to a punch, navigate to the punch entry details page.
3. Click **Actions**
4. Select **New Note** from the drop-down menu
5. Complete the New Note form
 - a. Note Type (**required**) - Select note type from the drop-down menu
 - i. Options include Note, Comment, Error, Authentication, and Custom.
 - ii. Selecting Custom opens the Note Sub Type field (**required**)
 1. The Note Sub Type selected may prepopulate a template for the Subject and Body. This template text is editable.
 - b. Subject (**required**) - Summary of the note or prepopulated if included in note sub type template
 - c. Body (**required**) - Add note content. The note body may include a template if included in the note sub type. Must contain at least five characters.
 - d. Attachment (optional) - Click the **Choose File** button to select and upload an attachment
6. Click **Save** and **Yes** to confirm
7. The note has been added and will appear in the table on the **Notes** tab of the details page. Notes added by other users will also appear in the table.

Related articles

- [September 2023 Release Notes](#)
- [Messaging Module - Navigation - Mobile App](#)
- [Mobile App - Employee - Manage Unverified Entries](#)
- [Add Notes - Web Portal](#)
- [February 2021 Release Notes](#)