

Custom Note Sub Types

Description: In this topic, the user will learn about custom note sub types. Notes in DCI require a Type to be selected at creation. If the note being created is not associated with the current item types available in the drop-down, create a custom note sub type (e.g., employee complaint or kudos log). Additionally, custom note sub type templates can be created for the subject and body of the custom note. Use the note template to prompt users to input specific details and/or answer specific questions when adding a note.

Role Required: Super User

Permission Required: Notes Sub Type Admin

Create Note Sub Type

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Custom Drop Down** on the submenu
4. Click **Actions**
5. Select **Add New Custom Drop Down Item** from the drop-down menu
6. Complete the form wizard
 - a. Item Type: Select **Note Sub Type**
 - b. Item Name: Enter a name for the new custom note sub type
 - c. Set Template: Select Yes or No. Defaults to No. Select Yes to expand the form to include Subject and Body fields to create note templates.
 - i. Subject: Add the template subject (e.g., Monthly Summary)
 - ii. Body: Add the template body (e.g., key questions that must be answered in the note or prompts)
 - iii. Please note: If the Set Template field is set to Yes, the user must complete either the Subject field or the Body field or both fields to save the form.
 - d. Item Status: Select **Active**
7. Click **Save** and **Yes** to confirm

This custom note sub type can be added to any note in the system. If the Set Template field is set to Yes, the note will pre-populate with the template text as indicated in the Subject and/or Body fields.

Edit Note Sub Type

1. Login to DCI
2. Click **Settings** on the main menu
3. Click **Custom Drop Down** on the submenu
4. Select **Note Sub Type** from the Select Item Type filter and click **Search**
5. **Click anywhere on the note sub type row** to open the details page
6. Click **Actions**
7. Select **Edit Custom Drop Down Item** from the drop-down menu
8. Update the **Item Name** or **Item Status** fields as needed
9. Click **Save** and **Yes** to confirm

Search for and View a Note Sub Type

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Custom Drop Down** on the submenu
4. In the Select Item Type filter, select **Note Sub Type**.
5. Click **Search**
6. Click anywhere in the row to select a particular Note Sub Type and open the custom drop down details page
7. Click on the tabs to view additional information
 - a. All notes that have been added to the system with this sub type will appear in the Notes tab. Use the filters to find desired notes.

Export Note Sub Types

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Custom Drop Down** on the submenu
4. In the Select Item Type filter, select **Note Sub Type**.
5. Click **Search**
6. There are two options to export:
 - a. Export all Note Sub Types by clicking the **Export** button located beneath the search filters OR
 - b. Use the filters to search for specific Note Sub Types, then click **Export**.
7. The file will automatically download and save as a .CSV file to the Download folder on the user's computer. The file is compatible with Microsoft Excel.

Related articles

- [September 2023 Release Notes](#)
- [Custom Note Sub Types](#)
- [General Activity - Custom Drop Down](#)
- [Client Fees](#)

