How Do I ...

Create Notes and Attachments

Introduction

Create Notes and Attachments enables you to add comments and attach files to a record such as an opportunity or account. You can add notes and attachments to a record from the History sub-panel in the record detail view or the Activities module.

Objectives

This guide will enable you to:

- Create Notes
- Add Attachments
- Manage Notes

Create Notes

Notes can be created from either the Activities Module or the History sub-panel of most records.

To create notes, follow the steps below.

Step	Action
1	In the **Action** section of the Activities Module, click **Create Note or Add Attachment**, OR in the History sub-panel or the desired record, click **Create Note or Attachment**. ***Result****:* The **Notes** page appears.
2	Enter information on the **Notes** page for the following fields: • **Contact**: Click **Select** to choose a contact from the Contacts list or to search for a contact in the list, if the note is associated with a contact. • **Related To:** Select the type of record you wish to link the note to, then click **Select** to the right of the drop-down to include the name of the related record. If the note was created from the History subpanel, the **Related to** field defaults to the associated record. It can be changed, if needed. • **Teams**: Click **Select** to select the team that is allowed to view the note or attachment. Teams are available on Sugar Professional and Sugar Enterprise editions. • **Subject**: Enter the subject of the note. • **Note**: Enter the text of the note in this box.
3	Click **Save** to create the note; click **Cancel** to return to the Notes home page without saving your changes.

Add Attachments

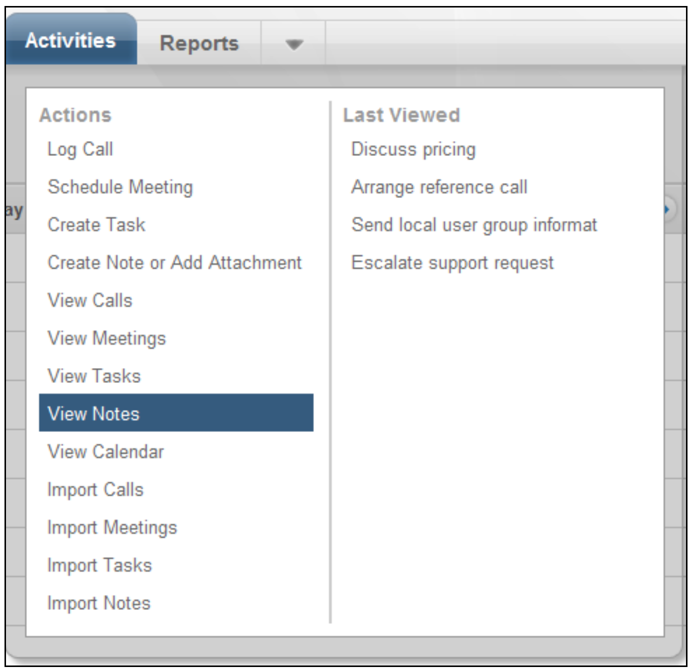
To attach a document, click **Browse**, navigate to the location of the file, and select the file. The file is then uploaded to the Sugar server when you click **Save**.

Attachments display in the Notes home page under the column heading **Attachments** and as a **paperclip icon**  on the record's History sub-panel.

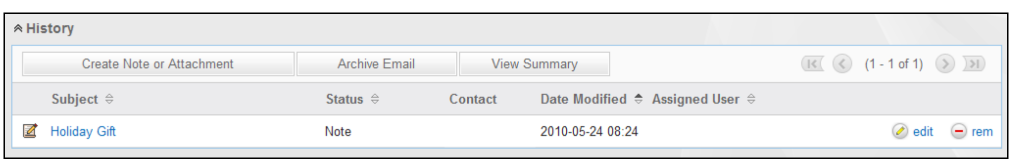
Managing Notes

You can access your existing notes by navigating to either:

- The **Activities** module tab hover menu. Click **View Note** action and selecting the notes record you want to modify from the **Notes** home page.



- The **History** sub-panel of most records. Click the note record you want to modify.



Edit Multiple Records: To edit multiple notes, use the **Mass Update** action on the Notes home page. For further details see [How Do I … Edit Multiple Records].

View Details: To view the details of a note, click the subject hyperlink. The Notes detail page displays information, such as the subject and date.

Edit a single record: To edit the information, click **Edit**, revise the information, and click **Save**; click **Cancel** to return to the Notes detail page without saving your changes.

Duplicate Records: To duplicate the information, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to return to the Notes detail view.

Delete Record: To delete the note, click **Delete** and click **OK** to confirm the deletion. The system deletes the note and returns to the Notes list.

See Also

For further information on notes and attachments, please see the ***Sugar User and Administrator Guide***, which is available from the Help link in Sugar.