

Notes in Engage

Using notes in Engage, you can leave reminders for yourself and your teammates on how to best handle your incoming customer inquiries. They have a multitude of uses, from assignments and handovers, to draft messages, personal reminders, and many more workflows where internal coordination is key.

This article will help you to uncover the many flexible purposes of notes by walking you through the steps of creating, viewing, editing, and deleting them.

Creating Notes in Engage

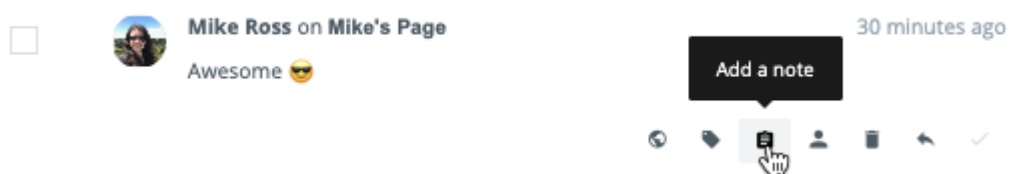
Leaving a note on a conversation item

All users with access to Engage can create notes for the content they handle. Notes can be added to the following items:

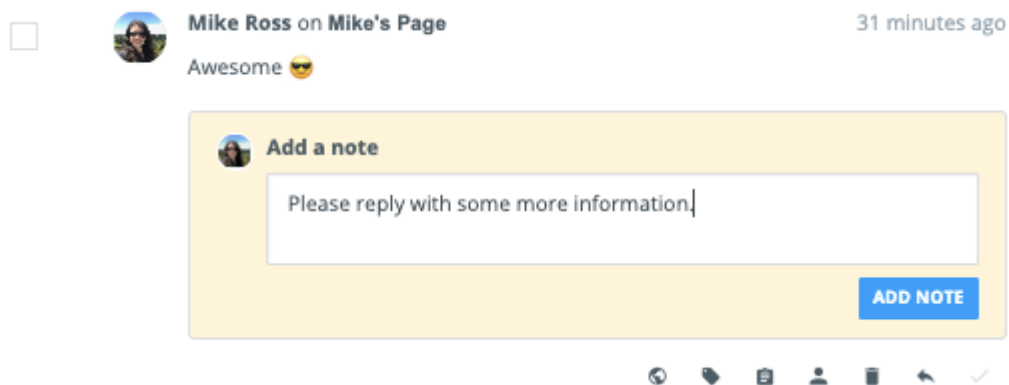
- Posts
- Comments under posts
- Nested comments (a comment under a comment, also called threaded conversations)
- Direct Messages

To create a note for any of these items, you can follow the steps below:

1. Navigate to the item in your Engage feed that you would like to leave a note for and click to open it in detail view.
2. Hover over the bottom right area under the conversation item. A context menu will appear.
3. Click the **'Add a note'** icon in the context menu.



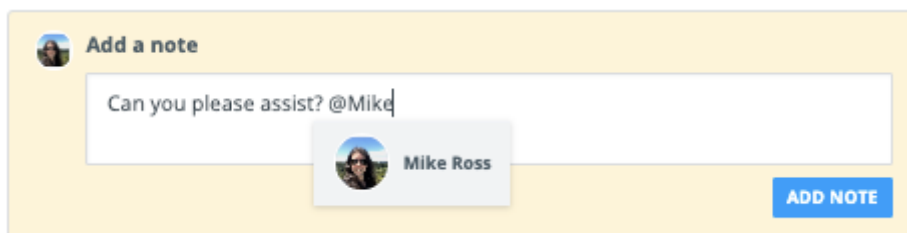
4. Write your note and click **'Add note'** once you're done.



Mentioning users in notes

When adding a note to any item in Engage, you can choose to mention any Social Media Management Admin or individual team member. By typing '@', you can search for the Social Media Management user and click to select their name. When a user is mentioned, they will receive an email containing a link to the conversation as well as a preview of both the comment and the note.

Currently, it's not yet possible to mention entire teams.



Follow the steps [below](#) to view only the items where you've been mentioned.

Assignment with notes

A note is automatically created when a conversation item is assigned to a Social Media Management user or a team. When assigning the item, you can customize the note with additional details. You can find a full guide on assignment workflows [here](#).

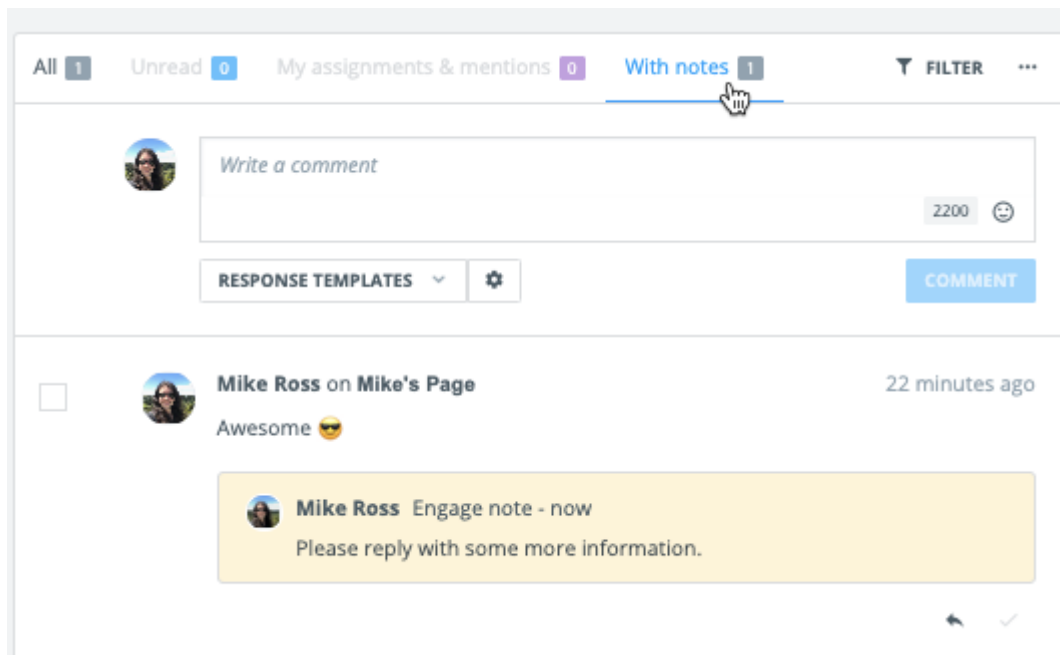
Viewing, Editing, and Deleting Notes

All notes will appear along with a timestamp directly below the item it was added to. They stand out from the other content by their yellow color.

Viewing only comments containing notes

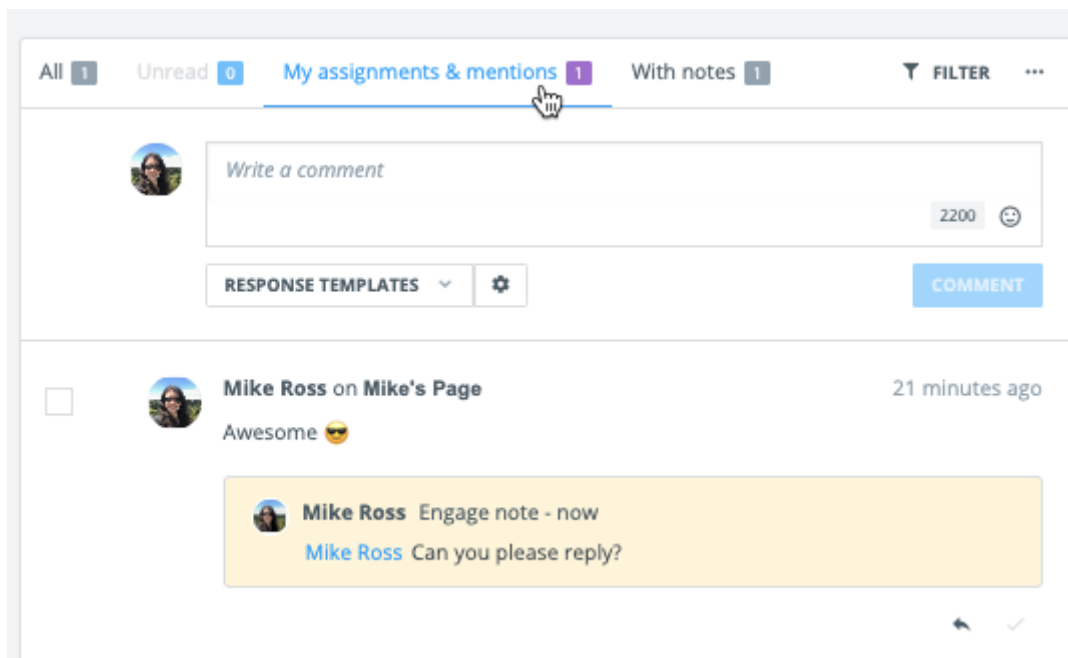
When you click to open a conversation in Engage (viewing it in detail view), you can choose to filter for items containing notes by clicking the preset filter, 'With notes'. By

choosing this option, you will only see comments containing any kind of note, including assignments and notes which have mentioned other Social Media Management users.



Viewing only comments containing my mentions and assignments

Similarly, when you click to open any item in Engage, you can view only the comments which have either been assigned to you, or which have mentioned your Social Media Management user. Click 'My assignments & mentions' to view the filtered list of comments along with the applicable notes.



Viewing only conversations which contain my mentions

When you are [creating a new feed in Engage](#), you can choose to filter the list to include only conversations in which you have been mentioned in notes. Check the box beside 'Mentions me in notes' to apply the filter.

The screenshot shows a filter configuration interface for creating a new feed. It includes several filter categories with their respective options:

- On network(s):** A row of social media icons: Facebook, Twitter, Instagram, WhatsApp, LinkedIn, and YouTube.
- On channel(s):** A dropdown menu labeled "SELECT CHANNELS".
- Of type(s):** A dropdown menu labeled "SELECT MESSAGE TYPE".
- Marked as read by:** A row of buttons: "ME", "ANYBODY", and "NOBODY".
- Assigned to:** A row of buttons: "ME", "MY TEAM", "OTHERS", and "NOBODY".
- Mentions me in notes:** A checkbox that is checked, with a mouse cursor hovering over it.
- ADVANCED FILTERS:** A section header with a dropdown arrow.

Below the filters is a "Title" field with the value "All". At the bottom, there are three buttons: "CLEAR SELECTION", "APPLY", and "SAVE FEED".

Editing and deleting notes

Any user can edit and delete their own Notes by hovering over the note in Publish or Engage. All Social Media Management Admin users can edit and delete all Notes created by all users.



Notes Across Publish and Engage

Any Note created on a post in the Publish section will automatically appear in Engage once your content is live. Similarly, any Notes left on a post in Engage will automatically appear in Publish.

Sharing a Note on a post in Publish will allow you, for example, to leave a comment for your colleagues on how to handle the future engagement you're anticipating for one of your posts.

Note:

Only Notes left on the post itself in Engage will carry over to Publish. Notes left on any of the comments or nested comments under the post will not be visible in Publish.