**Managing Notes & Note Types in moonstride**

*Never lose track of vital details. In moonstride, you can easily create and manage note types to record extra information on enquiries, bookings, or quotations—and decide exactly where these notes appear for your team, customers, or suppliers.*

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**1. Introduction**

Notes allow CRM users to add any additional key information related to an enquiry, booking, or quotation. Each note is assigned a **note type**, which helps your team organise, search, and control the visibility of internal or external information.

**2. Accessing Note Types**

**Navigation:** Go to **Widgets → Widget → Note Type** in the main menu to manage all note types configured on your platform.

*Insert screenshot here of the Note Type listing screen.*

**3. Adding a New Note Type**

To create a new note type:

1. Click the **Add** button in the Note Type listing screen.
2. Fill out the following fields:
   * **Name:** The name for this note type (e.g., “Special Requests”, “Internal Memo”)
   * **Description:** The purpose or typical use of this note type.
   * **Status:** Set as active if you want the note type to be selectable, or inactive if not needed right now.
   * **Internal:** Tick this box if the note type is for internal staff only. Internal notes will **not** appear on any supplier or customer documents.
   * **Show On:** Tick which documents you want these notes to appear on (e.g., Invoice, Booking Voucher, Supplier Notification).
3. Click **Save** to add your new note type.

*Insert screenshot here of the Add Note Type form.*

**4. Editing Note Types**

To update the details of an existing note type:

* From the Note Type listing screen, click the **Actions** gear icon next to the relevant note type.
* Select **Edit** from the menu.
* Update any fields as needed, then click **Save**.

**5. Deleting Note Types**

To remove a note type:

* In the listing, click the **Actions** gear icon next to the note type you wish to delete.
* Choose **Delete**, and confirm your choice in the alert dialog (OK/Cancel).

**6. Searching & Sorting Note Types**

* Use the **Filter** button to find note types by name, description or status.
* Use the **Reset** button to clear any filters and display all note types.
* To view only active or inactive note types, use the **Status** dropdown filter.
* To customise the order in which note types are shown to users, enter the preferred number in the **Sort Order** column and click **Save Sequence** at the top right.

*Insert screenshot here of filtering and sorting options in the Note Type screen.*

**7. See Also**

* [Adding Notes to Bookings & Enquiries](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customising Document Templates](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Understanding User Access & Visibility](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

Custom note types in moonstride help keep your team organised and ensure that important information appears exactly where it’s needed—be it for internal use or for sharing with your customers and suppliers. For further help on structuring notes or configuring visibility, contact our support team.