

Adding Notes

Last Modified on 05/10/2024 2:35 pm MDT

Keeping detailed logs is critical, and the Farmbrite notes feature provides an easy way to record all sorts of information. Notes are a common features of Farmbrite and can be used to keep track of all types of things.

You'll find notes available for these key resources:

- Livestock
- Livestock Groups
- Livestock Yields
- Grow Locations
- Plantings
- Crop Harvests
- Equipment
- Contacts

Adding Notes

The following example shows adding notes to a contact. The flow and features are generally the same regardless of where you're adding notes.

You'll want to keep detailed notes about your interactions with customers, suppliers, vendors, and other additional contacts. Sometimes taking a quick note can be the difference between dropping the ball on a customer order, or wowing them with your superior customer service.

To jot down a memo about one of your Contacts, navigate to Contacts, then choose your Contact record, and select Notes.



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- Crops
- Resources
- Accounting
- Market
- Contacts**
- Farm Map
- Reports

Contacts

New Contact



NAME	TYPE
Worthington, Carie	Buyer
Wiggum, Clancy	Contractor
White, Walter	Wholesale Customer
Wallace, Greg	Customer
Roberts, Anna	Employee
Nunez, Maria <small>Western Stock Show</small>	Consultant
Marcus, Regina	Veterinarian
Mann, Otto	Certifier
Krustofsky, Herschel	Consultant
Jordan, Linda	Supplier
Jones, Austin <small>Seed and Breedi...</small>	Consultant
Gordon, Trev	Buyer

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Greg Wallace

First Name: Greg
Last Name: Wallace
Email: greg@mailinator.cor
Contact Type: Customer
Keywords: example: Vet, mecha
Primary Phone: (303) 555-1030
Mobile Phone: (123) 867-5309
Fax: (123) 867-5309
Company:
Address:
City: Lafayette
Country: United States
State/Province: Colorado

Click the New Note button to start writing a note for this Contact.

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Greg Wallace

New Note

Today
Spoke with Greg at Farmers Market on 6/15 - Interested in wholesale purchase of Raspberry Hot Sauce for his bistro on Pearl st.
Meeting hot sauce

Displaying 1 note

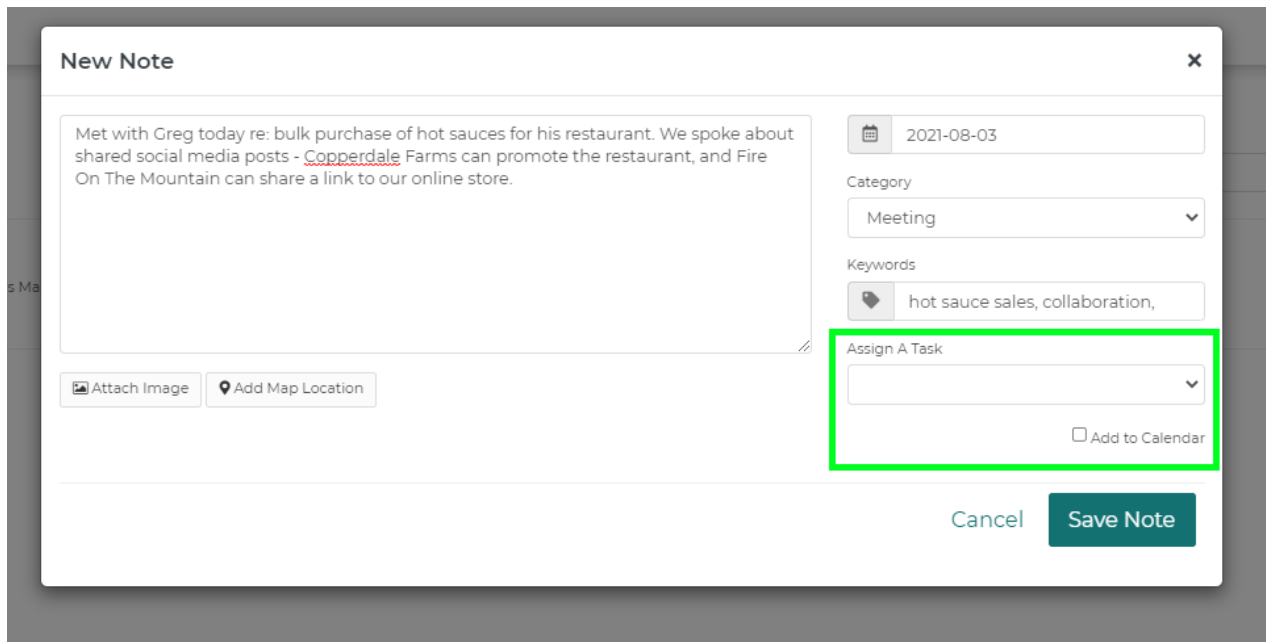
You can write the body of your note in the main Notes field on the left.

The screenshot shows a 'New Note' form. On the left is a large text area containing the text: 'Met with Greg today re: bulk purchase of hot sauces for his restaurant. We spoke about shared social media posts - Copperdale Farms can promote the restaurant, and Fire On The Mountain can share a link to our online store.' This text area is highlighted with a green border. Below it are two buttons: 'Attach Image' and 'Add Map Location'. On the right side of the form, there are several fields: a date field with '2021-08-03', a 'Category' dropdown menu set to 'Meeting', a 'Keywords' field with 'hot sauce sales, collaboration,', and an 'Assign A Task' dropdown menu. At the bottom right, there is an 'Add to Calendar' checkbox and two buttons: 'Cancel' and 'Save Note'.

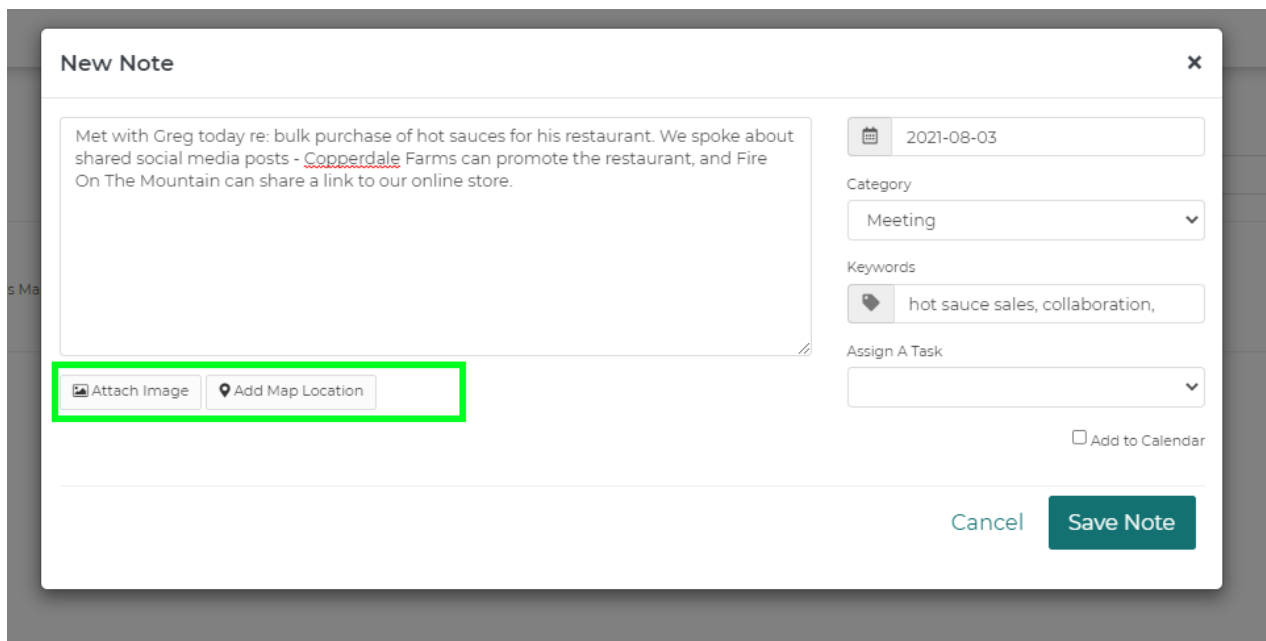
To the right, you'll see today's date preloaded, and the opportunity to categorize this note. Since this note details a Meeting with our customer Greg, we've marked it as such. Keywords can also be added, to easily search through your notes later to find ones tagged with this keyword - even if the keyword does not appear in the text of the note.

This screenshot is identical to the one above, but with a green box highlighting the date field ('2021-08-03'), the 'Category' dropdown ('Meeting'), and the 'Keywords' field ('hot sauce sales, collaboration,').

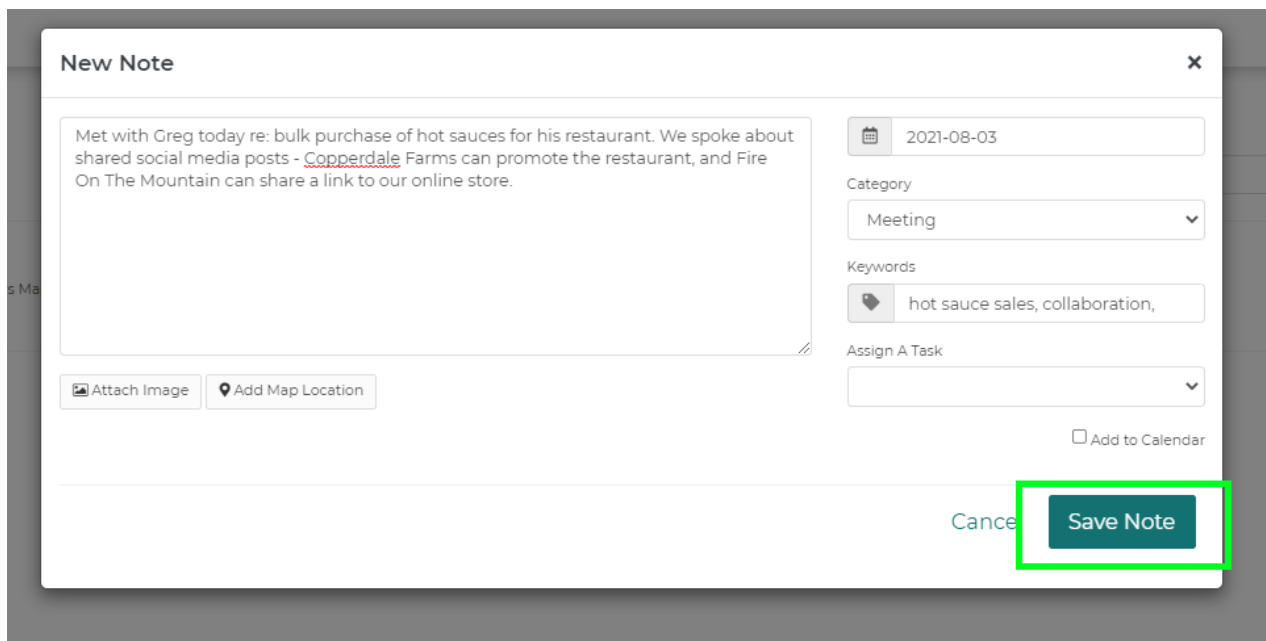
You can optionally assign this note as a task to one of your existing Farmbrite users, or add it to your Farmbrite calendar.



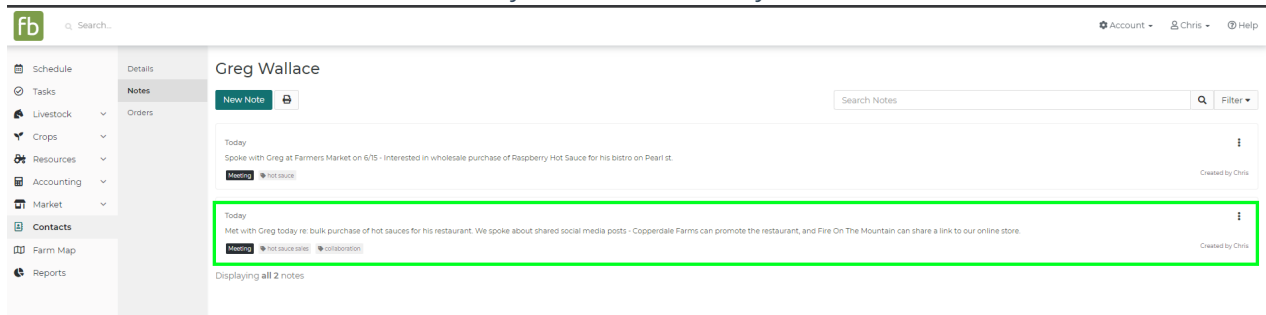
You also have the opportunity to associate an image with this note, or tag it with a geographic location - use these to add additional context to this note to help you remember more details when referencing it later.



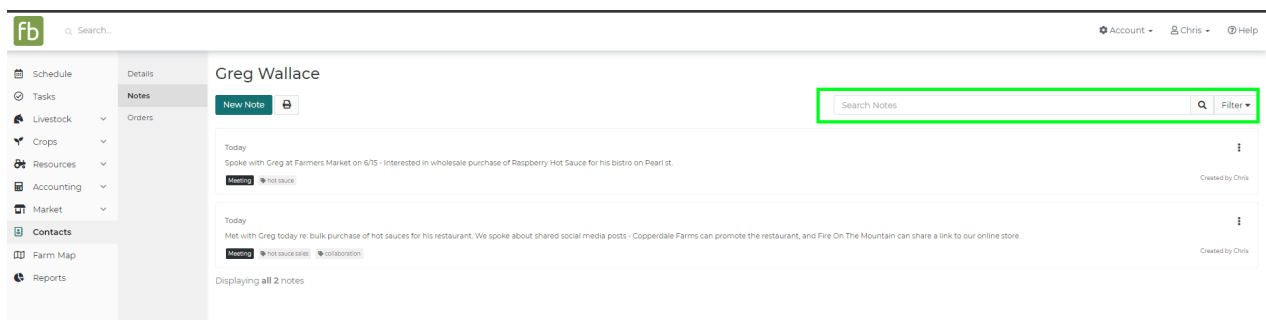
When you're done adding information to the note, click Save Note in the bottom right.



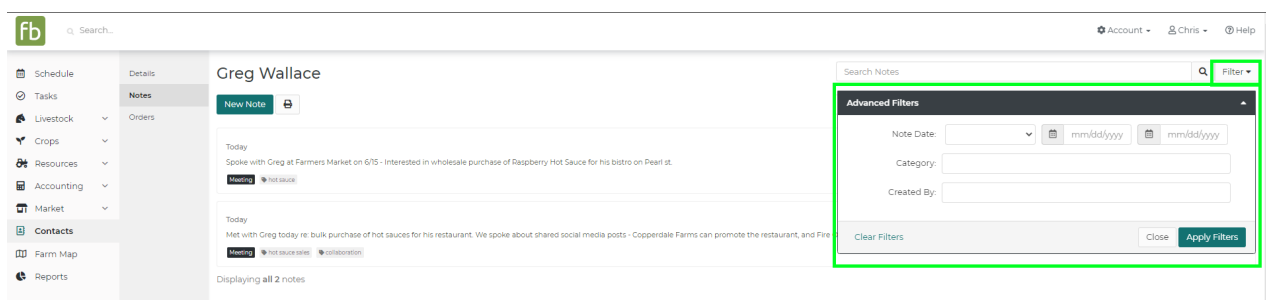
The note will be added to this Contact, and you'll be able to easily reference it in the future.



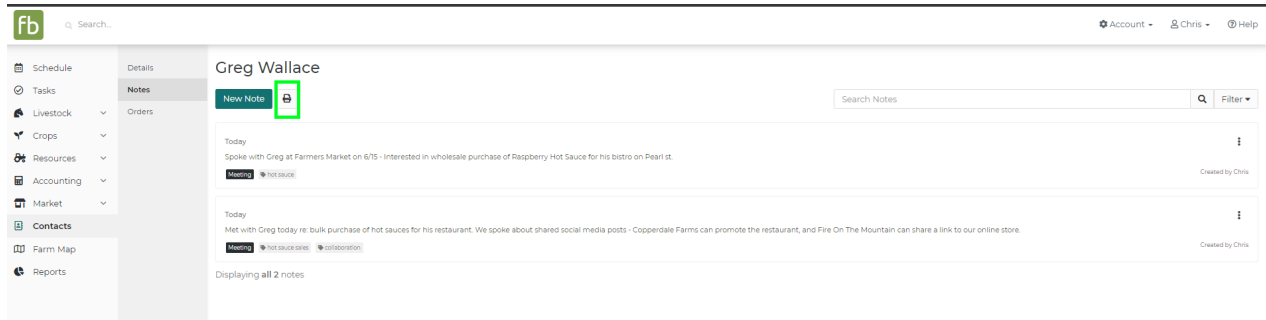
if you have a lot of notes for this contact, you may find it useful to use the Search field to look for certain keywords.



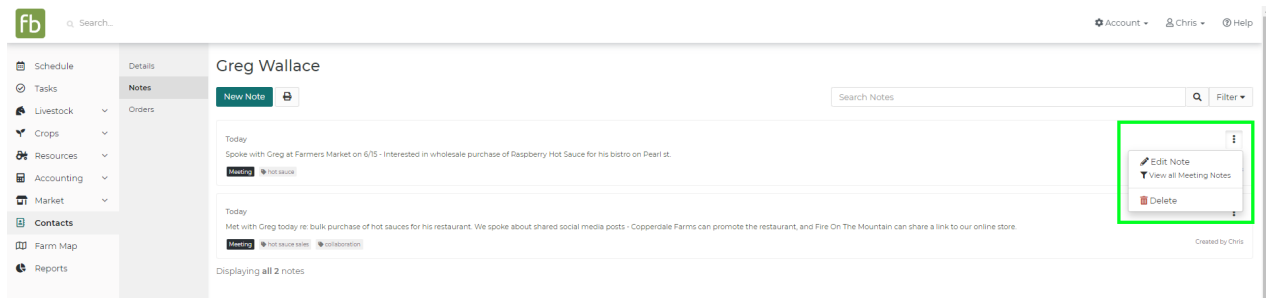
You might also find it helpful to apply filters to the contact note to find only those written within a given date range, assigned to a specific category, or written by a particular Farmbrite user.



Print a copy of all your notes - perhaps filtering them first to not waste paper - by using the Print button.



Finally, you can edit or delete your notes by clicking the More Options (3 dots) icon to the right of your note. Be careful - if you delete a note, the action is permanent, and it cannot be recovered.



Still have questions about your contacts? Be sure to check out the other articles in this Knowledge Base category, and feel free to [reach out to us](#) if you didn't find your answer.