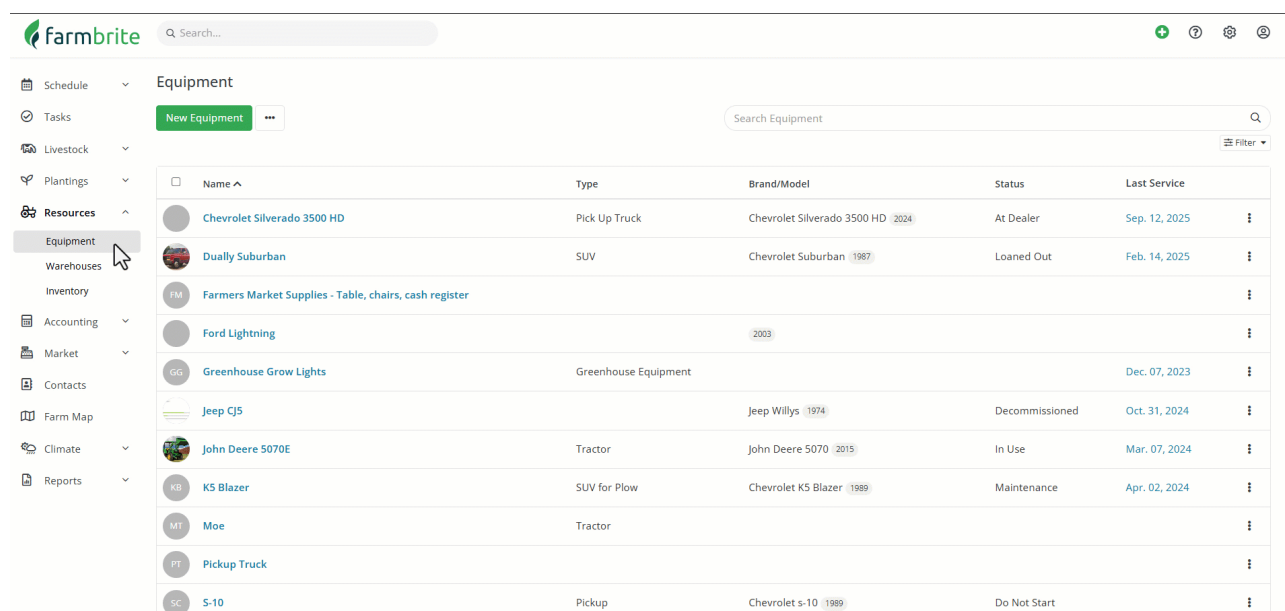# Adding Notes

Farmbrite comes preloaded with many different types of records you can create for your animals, equipment, crops, and more. These might be things like treatment records for livestock and crops, feeding and measurement records for your animals, or service and usage records for your equipment. You can even create custom fields to store data that you need as well. We're referencing these things because we want you to know that Farmbrite has many pre-built areas for you to store data, but **what happens when what you need to store doesn't fit into any of those record types**? The answer to that might be Notes, which are available all around the software for you jot down data that you need to be aware of that does not fit into any other area.

You can write notes on any of the following record types:

- Livestock
- Livestock Groups
- Crop Types
- Individual Plantings
- Grow Locations
- Equipment Records
- Contacts

You'll see a Notes tab on any of those record types, and we'll use Equipment in our example below as that is likely applicable to any agricultural operation. The steps and features shown below are the same for any of the record types.

In this example, we navigate to the equipment record for our pick up truck. We recently noticed rust developing on the fender, and wanted to make a note about it so our Farmhand Willy can take a look at it. We choose Notes from the menu and then create a new note.


When you write a note, you can complete these fields to jot down important information.

- <u>Note Text</u> - the main window in the note, where you'll write whatever you need to jot down. You can use unique text formatting and font sizes, or even create a hyperlink if you need.

- <u>Date</u> - When did you write the note? It defaults to today but can be changed.
- <u>Category</u> - Choose what category the note should be classified in. These categories differ based on the type of record you are writing the note for.
- <u>Keywords</u> - Add any keywords you need to further classify this note. You can filter your reports and note lists later based on these keywords. They are entirely customizable; use whatever works for you.
- <u>Assign Task</u> - If a follow up task is needed, you can create and assign it directly from the note. The note text will be used in the Task, and you can always add more steps or details to the task later.
- <u>Add to Calendar</u> - Do you need to see this note on your Farmbrite schedule?
- <u>Add Map Location</u> - This can geolocate the note on your farm map. This might be helpful if the note is for a grow location, perhaps for locating pests, hazards, and more.
- <u>Add Attachment</u> - If you need to attach an image or PDF file, you can do so here.

Quick Add Notes

You can also add notes via the Quick Add menu. Instead of navigating to the record you want to write the note on, you can select Quick Add from the upper right and then associate the note with a record right there. This could be particularly helpful in the mobile app as you can accomplish it from your homepage.
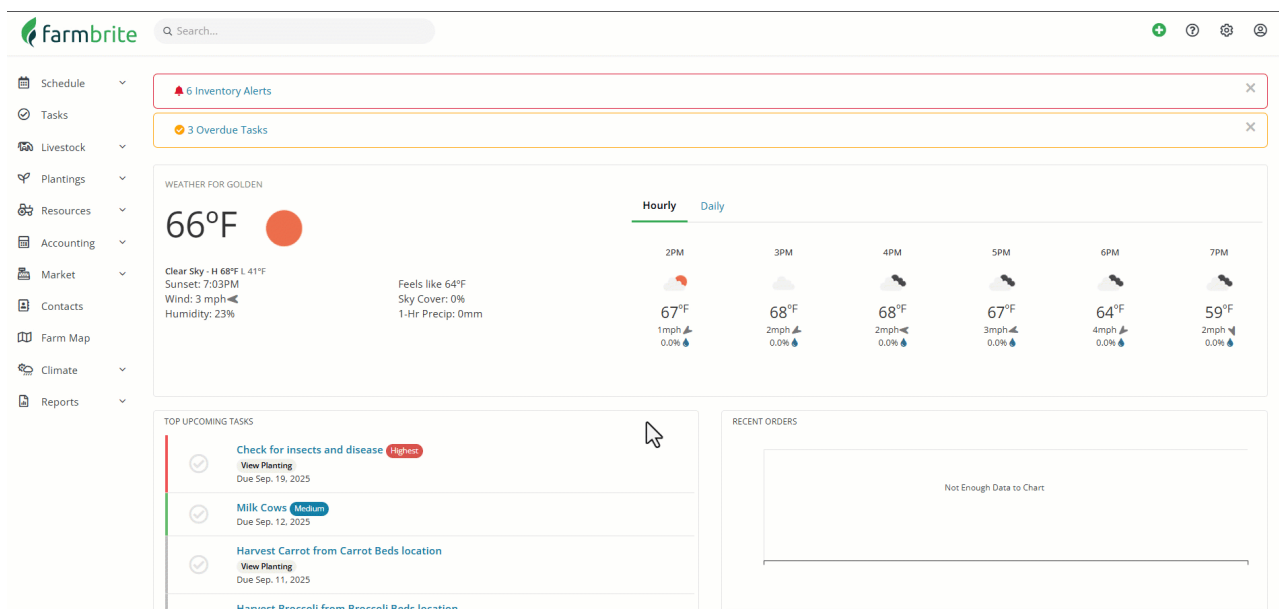
Bulk Add Notes

You can also add the same note to multiple records at the same time using Bulk Actions. In our example below we write the same note for Bertha and Scarlet, tow cows who might not get along well.

Notes Reporting

Of course you can see the notes when you access records, but if you'd like to see all of them, you can run reports in the Reporting tab. There are notes reports for Livestock and Crops, and you can also build custom reports from them as well.