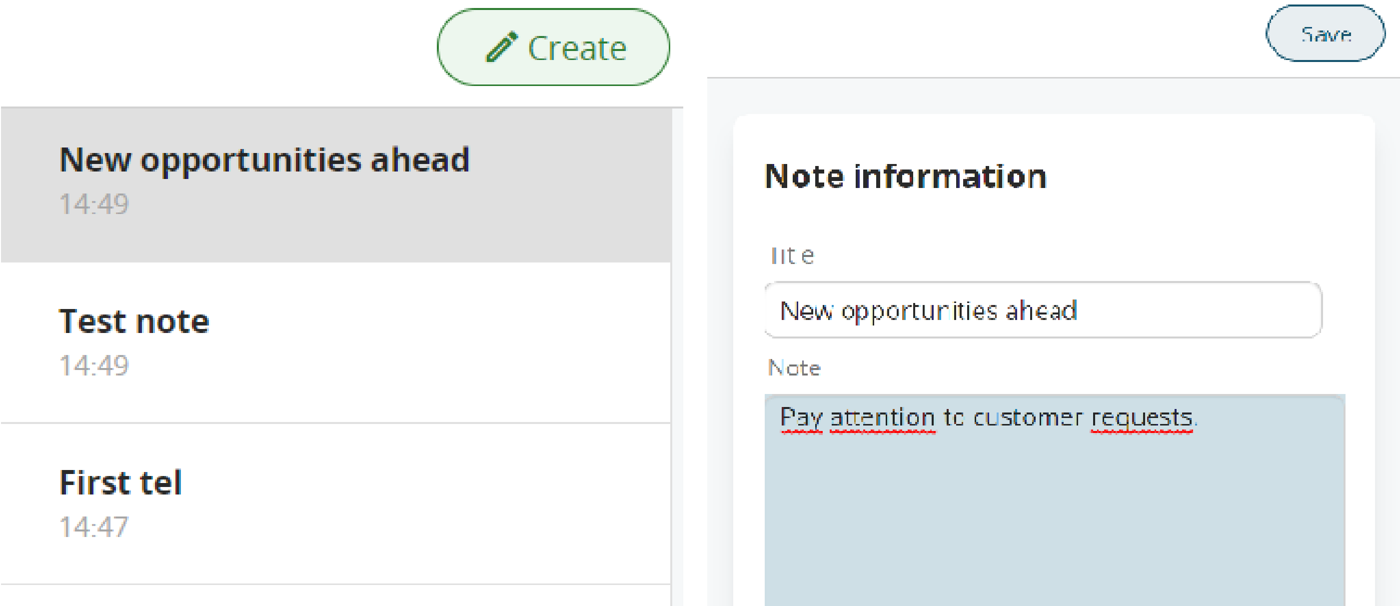
5.7 Notes

Notes can be found in the vtenext records, located at the bottom left (available in most modules), and on the main management panel, which is accessible from the icon on the light blue toolbar.

The following options are available from the record:

- Make a temporary note, which will be already linked to the record;
- Browse previous/subsequent notes (always related to the record in question);
- Convert the note into an evolved CRM object (e.g. if a customer note gives rise to a potential, it can be converted without having to re-input the same information).

These notes can be viewed with two modes: List or Slider.



Visibility of Notes in the record is regulated by Sharing Access:

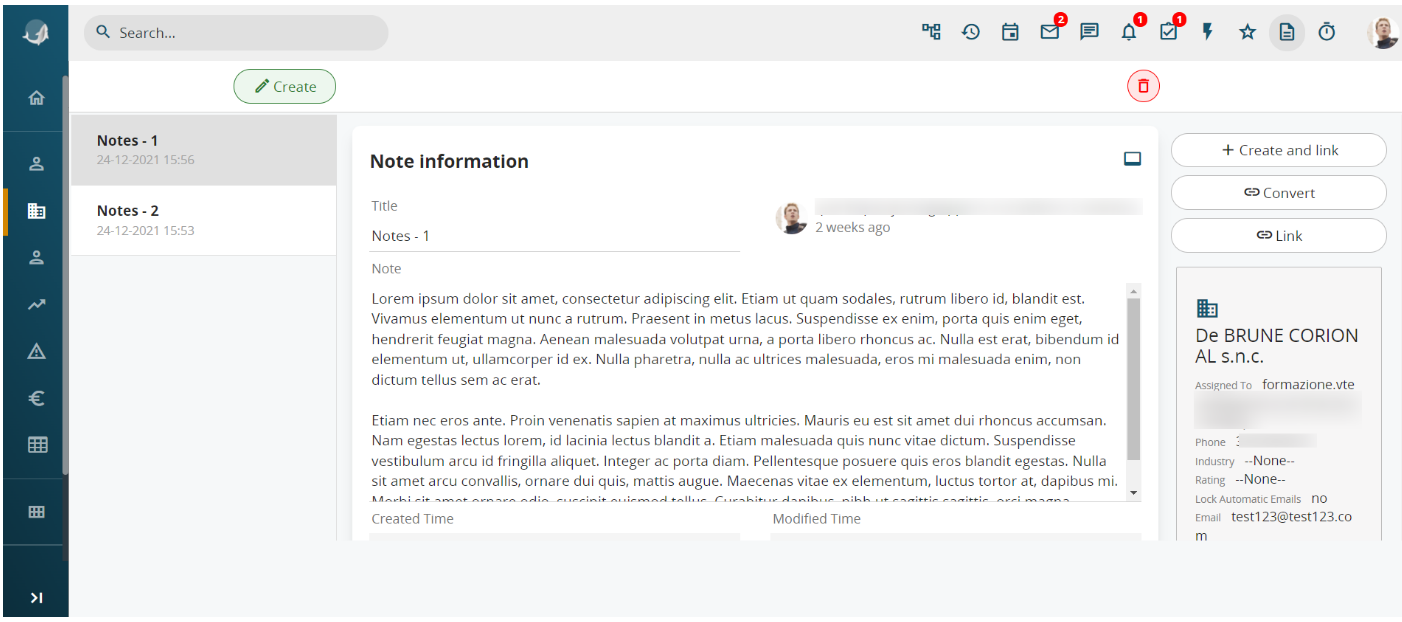
- Personal: notes can be accessed only by the author;
- Public: notes can be in read-only mode by whoever has access to the record.

Warning! The note contents cannot be filtered using the module’s Filter function, nor can they be displayed as a column in the list view or tracked by means of the global search function. This is a personal tool that is independent with respect to the data entered in the record.

The main Notes page also allows the following actions:

- Browse through all the notes generated by the user in the CRM;
- Perform searches;

- Write notes that are not related to any particular object. The notes will remain private, meaning they cannot be viewed by other users.



Revision #1
Created 2026-07-06 15:07:42 UTC by Admin
Updated 2026-07-06 15:07:42 UTC by Admin