

Case Notes

Case Notes / Case Note Entry

[View](#) [Add](#) [Add With Templates](#) [Edit](#) [Delete](#) [Manage Templates](#) [Print or Export](#)

Case Notes

Search:

Date	Domain	Author	Case Note
	<input type="checkbox"/> PK		
	<input checked="" type="checkbox"/> Date		
	<input type="checkbox"/> ClientPK		
	<input checked="" type="checkbox"/> Domain		
	<input checked="" type="checkbox"/> Author		
	<input checked="" type="checkbox"/> Case Note		

Click the drop down arrow for any column header to adjust which columns are available.

View – View a case note.

Add – Creates a case note record.

Add With Templates – Adds a new case note record using a template.

Edit – Changes a case note record.

Delete – Removes a case note from the client's record.


Manage Templates – Creates and edits case note templates.


[Print or Export](#) - Creates a printable report or exports services list as a CSV file.

1. Click *Add*.
2. Enter the *Date*.
3. Select an *Author*.
4. Enter the note in the *Case Note* field space.
5. Click *Save*.

Case Notes / Case Note Entry > Add

Save Back

Date: 

Author:  Click here to select from 1 choice.

Folsbogen, Gredlewist

Case Note:

Case Notes

View Add Add With Templates Edit Delete Manage Templates Print or Export

Case Notes

Search:

Date	Domain	Author	Case Note
4/6/2018	Tester	Folsbogen, Gredlew	Note one

Manage Templates

Case Notes

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Case Notes

Search:

Date	Domain	Author	Case Note
4/6/2018	Tester	Folsbogen, Gredlew	Note one

1. Click *Manage Templates*.
2. Click *Add*.

Case Notes / Case Note Entry > Case Note Template Manager

[View](#) [Add](#) [Delete](#) [Back](#) [Print or Export](#)

Case Note Template Manager

Search:

Name	Text
SSOAP	S- S- O- A- P-

3. Enter a name for the template.
4. Enter the *Text* for the template.

Case Notes > Manage Templates > Add

Save Back

Name:

Text:

5. Click Save.

Case Notes / Case Note Entry > Case Note Template Manager

View Add Delete Back Print or Export

Case Note Template Manager

Search:

Name	Text
SSOAP	S- S- O- A- P-

Once the case notes template is saved, that template can be used to create new case notes.

Add With Templates

To create a case note using the template:

1. Click *Add With Templates*.

Case Notes

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Case Notes

Search:

Date	Domain	Author	Case Note
4/6/2018	Tester	Folsbogen, Gredlew	Note one

2. Check Select.
3. Click Continue.

Case Notes / Case Note Entry > Add With Templates

[Continue](#) [Back](#) [Print or Export](#)


Case Note Template Manager


Search:

Name	Text	Select
SSOAP	S- S- O- A- P-	<input checked="" type="checkbox"/>

Case Notes / Case Note Entry > Add With Templates > Continue

Save SSOAP Back

Date: 4/6/2018 

Author: Folsbogen, Gredlewist 

Case Note:

4.


Enter the *Date*.


5. Select the *Author*.

6. Click the template name to populate the template text in the Case Note field.

Case Notes / Case Note Entry > Add With Templates > Continue

Save SSOAP Back

Date: 4/6/2018 

Author: Folsbogen, Gredlewist 

Case Note:

S-

S-

O-

A-

P-

To print values in a window click *Print or Export* to get to the *Report Setup*.

Client Search > Report Setup

[Back](#)

Print or Export

Print Current Page	Generate a report for the current page in a printable format
Print All Pages	Generate a report for the current list in a printable format
View Current Page as a PDF document	Generate a PDF document for the current page in a printable format
View All Pages as a PDF document	Generate a PDF document for the current list in a printable format
Printable List Format Options	Customize the report format
CSV Export (All Pages)	Download the list as a CSV File

Click *Printable List Format Options* to edit the format of printed pages.

Client Search > Report Setup > Report Format

[Edit](#) [Back](#)

Title Font:	<input type="text" value="Georgia"/>
Title Font Size:	<input type="text" value="12"/>
Bold Title:	<input checked="" type="checkbox"/>
Italicize Title:	<input type="checkbox"/>
Underline Title:	<input checked="" type="checkbox"/>
Report Header Font:	<input type="text" value="Times New Roman"/>
Report Header Font Size:	<input type="text" value="12"/>
Bold Report Header:	<input type="checkbox"/>
Italicize Report Header:	<input type="checkbox"/>
Column Header Font:	<input type="text" value="Times New Roman"/>
Column Header Font Size:	<input type="text" value="10"/>
Bold Column Headers:	<input checked="" type="checkbox"/>
Italicize Column Headers:	<input type="checkbox"/>
Underline Column Headers:	<input checked="" type="checkbox"/>
Data Row Font:	<input type="text" value="Times New Roman"/>
Data Row Font Size:	<input type="text" value="10"/>
Bold Data Rows:	<input type="checkbox"/>
Italicize Data Rows:	<input type="checkbox"/>