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Person Contact Notes

Summary

This block is intended for use within the Rock internal pages to focus on contacting users with a specific note type. By default it loads a Person picker and can run with default settings as seen below. If you wish to use it with groups for specific group member notes you may pass a GroupId=### parameter in the URL.

You have to option of displaying the previously entered notes for that person. You also have the ability to create a custom lava template for displaying information about the person for whom you are creating the note. You can create default note text which is helpful if in situations where you might have a standard set of questions you are going to ask the person. You can also choose to launch a workflow after note entry.

Quick Links:

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- Using the Block
- Block Settings

What's New

The following new goodness will be added to your Rock install with this plugin:

• New Block: Person Contact Notes

Using the Block

This block can be used 2 ways, as a person note entry block or as a group member entry block. In order to use it as a group member entry block, you will need to pass a GroupId=## parameter n the URL. If no GroupId is passed, the block will default to person note entry mode. You can choose which note types are available for each mode.

After installing the plugin, you will need to add the block to a page. The block will be found in the KFS > CRM category.

Person Note Mode

In person note mode, the standard Rock person picker is used.

Person Contact Notes

•	•		
Search			Q
Name	marb		
🔿 Alisha I	Marble Age: 52 yrs; S	pouse: Bill	•
	Adult (52 yrs ol	d) Membe	r
12	Spouse: Bill Ma	arble	
	Address		
	3002 W Lupine	Ave	
	Phoenix, AZ 85	029	
	alisha.marble@	rocksolidchurchden	nc
	(623) 555-2444	Work	
	View Profile		
🔘 Bill Ma	r ble Age: 56 yrs; Spou	se: Alisha	
	Adult (56 yrs ol	d) Membe	r
	Spouse: Alisha	Marble	
Select Can			

Group Member Mode

In group member note mode, you will get a drop down of all of the members of the group.

G	localhost:55845/page/12964?GroupId=105
	Person Contact Notes Home > Person Contact Notes
	La Select a Group Member
	Admin Admin
	Alisha Marble Jenny Michaels

Workflows

You can choose a workflow type to be launched after the note is entered. There is a block setting that allows you to choose which entity you would like to pass to the workflow.

Lava Templates

Person Contact Notes

There are 2 lava templates used by the block. By default, the standard Rock NoteViewList.lava will be used for displaying notes. A new lava template is installed in the plugins folder to controlling the person or group member information.

Select a Person	📕 Add a Note	
Alicha Marble Adult (S2 yrs old) Spouse: Bill Marble Adults Souse: Bill Marble Address 3002 WL Lupine Ave Phenix, A2 8029 alisha.marble@rocksolidchurchdemo.com (623) 555-2444 Work Verw Refile Last Contact Date: 6/9/2020 223354 PM Last Contact Person: Admin Admin Last Volunter Date: 6/7/2020	How are they doing? What is new in their life? What do they need prayer for? Aret Private Minin Admin Transitions gan Contact Note How are they doing? Alisha Marble is doing great! What is new in their life? She is getting back to church and wanting to find where to serve. What do they need prayer for? Prayer for wisdom in where to serve in the church.	Cancel Save Not
	Admin Admin an hour ago Contact Note How are they doing?	

Block Settings

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1 **Note Term** The term you want to use for the note (i.e. Note, Comment, etc.).

2 Person Note Types An optional list of person note types that you want to allow to be entered with this block.

