

# Person Contact Notes

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## Summary

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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.

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## What's New

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

- **New Block:** Person Contact Notes

## Using the Block

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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


Home > Person Contact Notes


 Select a Person

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Search 

Name

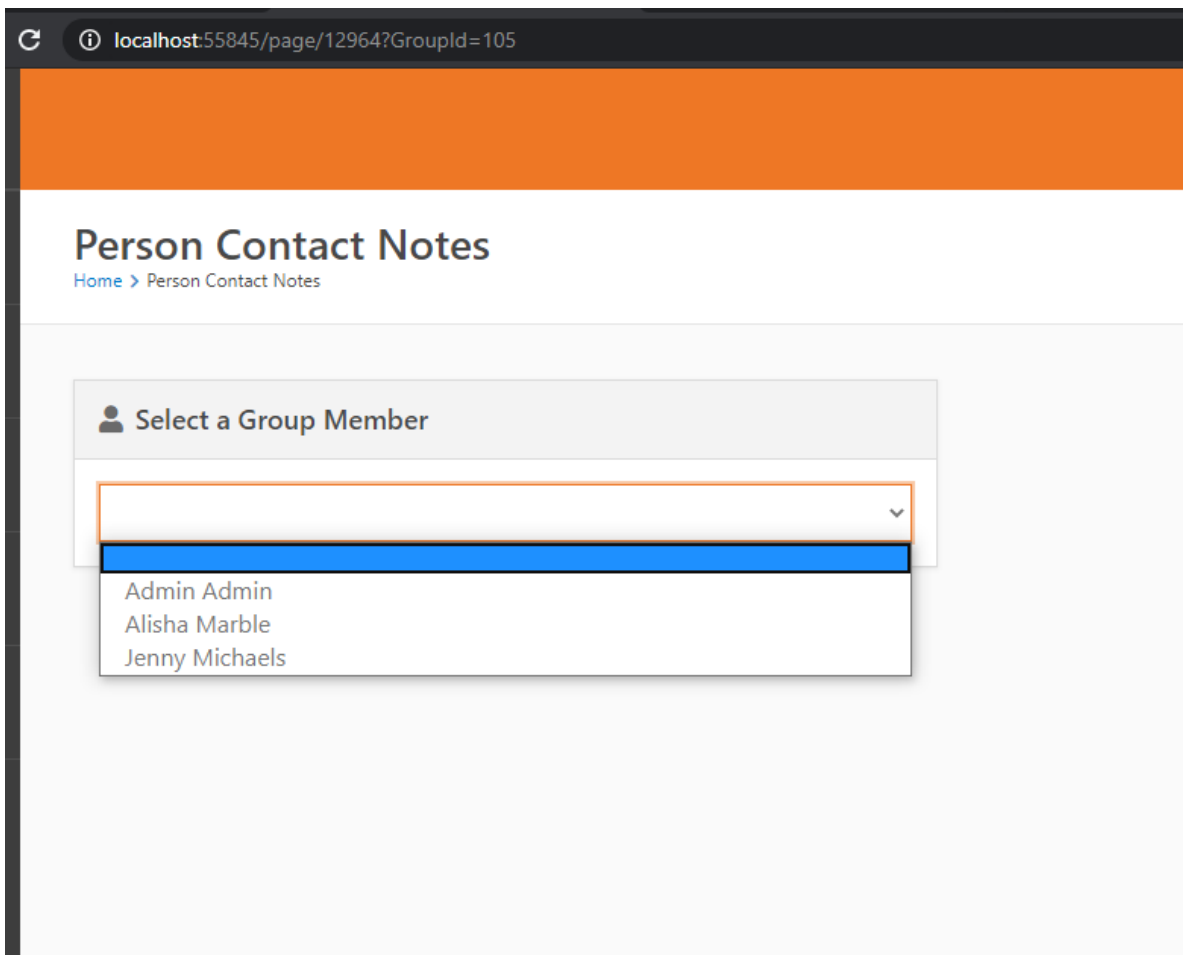
Alisha Marble Age: 52 yrs; Spouse: Bill  
 Adult (52 yrs old) **Member**  
Spouse: Bill Marble  
Address  
3002 W Lupine Ave  
Phoenix, AZ 85029  
alisha.marble@rocksolidchurchdenc  
(623) 555-2444 Work  
[View Profile](#)

Bill Marble Age: 56 yrs; Spouse: Alisha  
 Adult (56 yrs old) **Member**  
Spouse: Alisha Marble

**Select** [Cancel](#)

## Group Member Mode

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

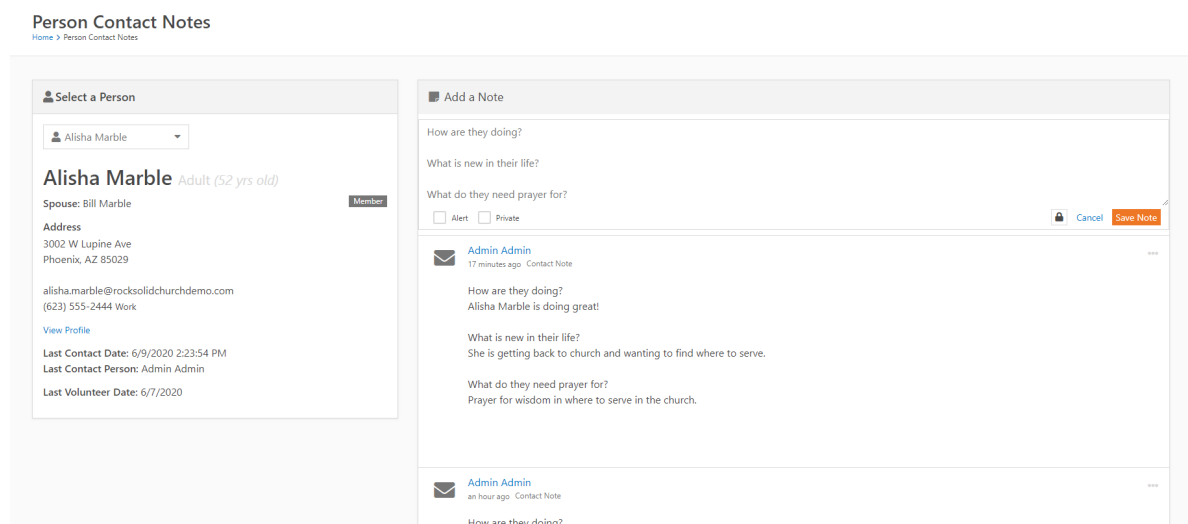


## Workflows

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

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.



# Block Settings

**Person Contact Note** KFS > CRM / Id: 8505

Basic Settings | Advanced Settings

Name •  
Person Contact Note

Note Term 1  
Note

Person Note Types 2  
 Communication Note  
 Contact Note  
 Event Registration  
 Personal Note  
 Phone Note  
 Secure Note

Group Member Note Types 3  
 Group Member Note

Workflow 4  
Test Person Request

Workflow Entity 5  
Note

Start new search after adding a note 6  
Yes

Notes Column

Display Type 7  
Full

Show Alert Checkbox 8  
Yes

Show Private Checkbox 9  
Yes

Show Security Button 10  
Yes

Allow Backdated Notes 11  
No

Display Note Type Heading 12  
No

Expand Replies 13  
No

Note View Lava Template 14  
1 {% include "~/Assets/Lava/NoteViewList.lava" %}

Default Note Text 15  
How are they doing?  
What is new in their life?

Person Info

Person Info Lava Template 16  
1 {% include "~/Plugins/rocks\_kfs/crm/Lava/PersonInfo.lava" %}

Enabled Lava Commands 17  
 All  
 Cache  
 Execute  
 RockEntity  
 Search  
 Sql  
 WebRequest  
 WorkflowActivate

Save Cancel

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.

- 3 **Group Member Note Types** An optional list of group member note types that you want to allow to be entered with this block.
- 4 **Workflow** Workflow that you want to initiate after the note is entered.
- 5 **Workflow Entity** The entity that should be used to initiate the workflow. Options are Person, Note or Group Member.
- 6 **Start new search after adding a note** If set to yes, after a note is entered, the person will be cleared from the page and the search will start fresh. If set to no, after the note is entered, the person's information will remain on the page and the entered note will be shown. **If you are using the block in Group Member mode, be sure to set this to No** or it will switch to person mode.
- 7 **Display Type** Controls the display for note entry. In Full mode, all the controls selected in the show alert, private and security settings will be displayed. In Light mode, none of the controls will be displayed regardless of the show alert, private and security settings.
- 8 **Show Alert Checkbox** Should the alert checkbox be displayed when the display type is set to full.
- 9 **Show Private Checkbox** Should the private checkbox be displayed when the display type is set to full?.
- 10 **Show Security Button** Should the security button be displayed when the display type is set to full?
- 11 **Allow Backdated Notes** If set to Yes, the note entry will allow the user to select the date and time for the note.
- 12 **Display Note Type Heading** Should the note type be displayed as a heading above each of the existing notes?
- 13 **Expand Replies** Should replies be automatically expanded for note types that allow replies?
- 14 **Note View Lava Template** The lava template to use when rendering the view of the notes. Default is `{% include '~/Assets/Lava/NoteViewList.lava' %}`
- 15 **Default Note Text** Enter default note text such as any questions you would like answered, etc.
- 16 **Person Infor Lava Template** The lava template used when rendering the person or group member selected. Default is `{% include '~/Plugins/rocks_kfs/crm/Lava/PersonInfo.lava' %}`
- 17 **Enabled Lava Commands** The lava commands that should be enabled for the block.