

Notes: write, pin and find

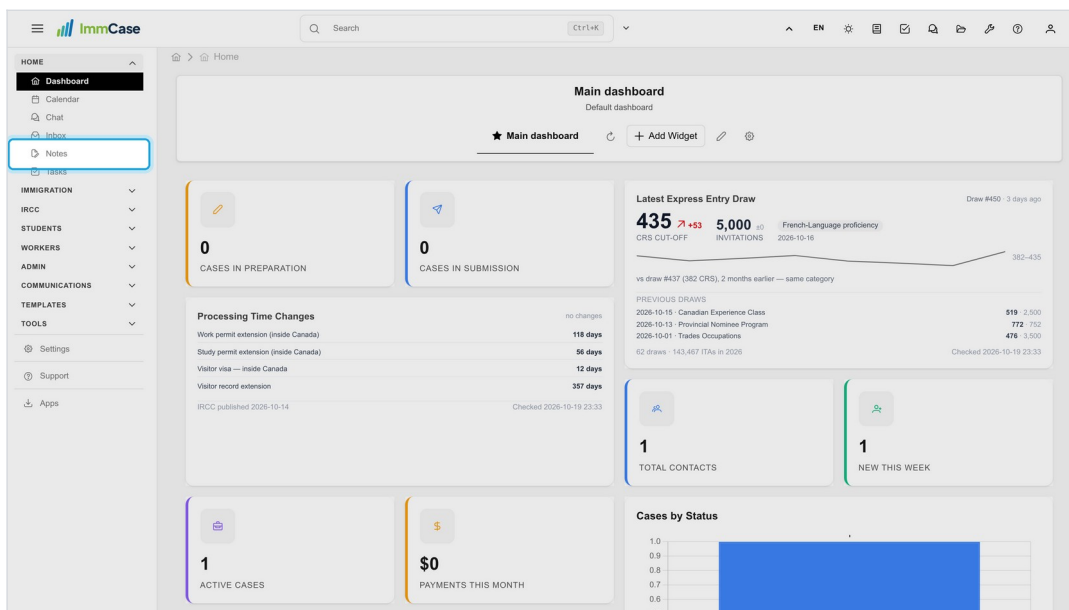
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Notes is your own notebook inside ImmCase: procedures you repeat, what a client told you on the phone, ideas for later. Each note has a title and formatted text, saves itself while you type, and can be **pinned** so it stays at the top.

The firm and the notes in this guide are **fictional**.

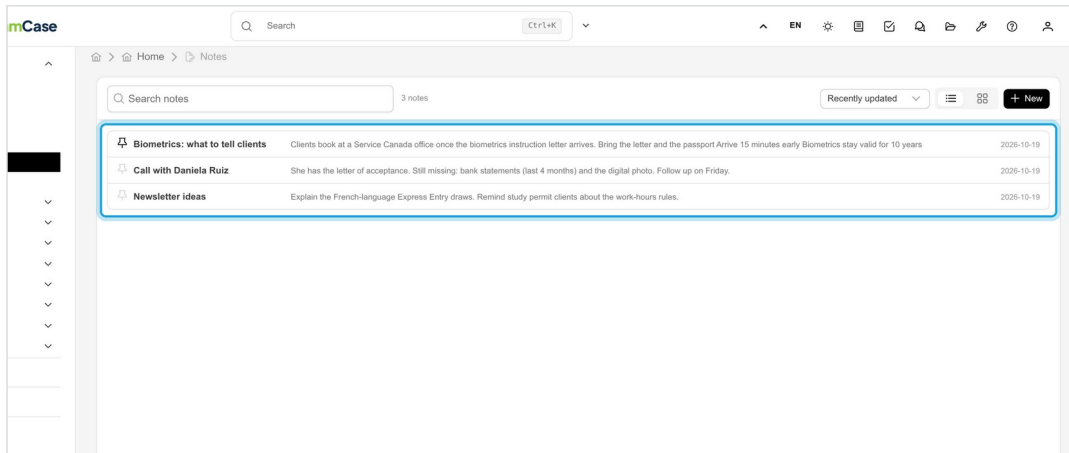
1. Open Notes

In the left menu, open **Home** and click **Notes**.



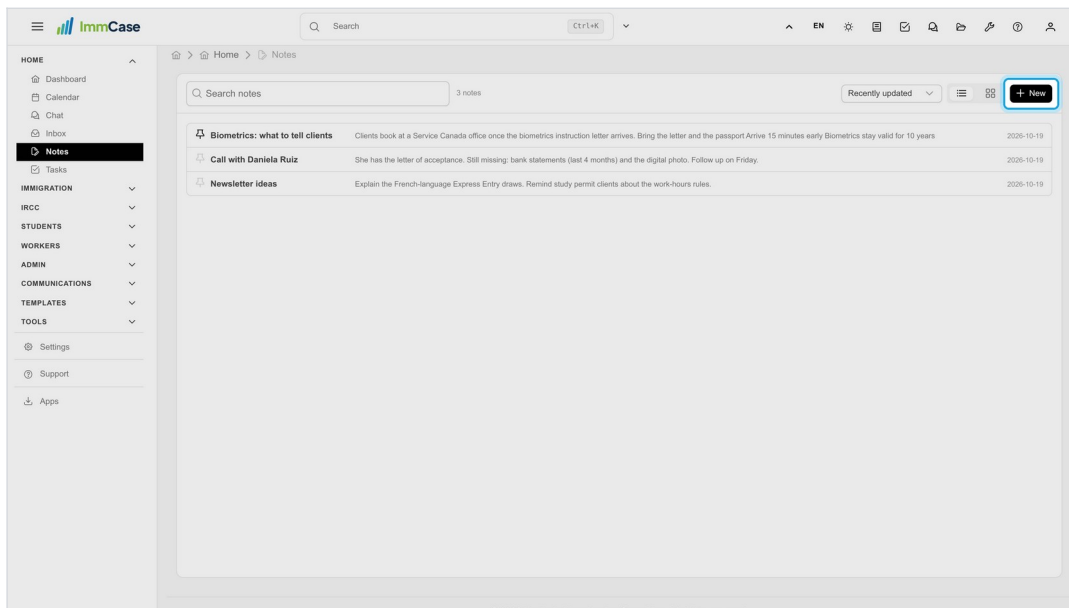
2. Your notes

Every note you wrote, newest first. **Pinned** notes always come first. Search and sort from the bar above the list.



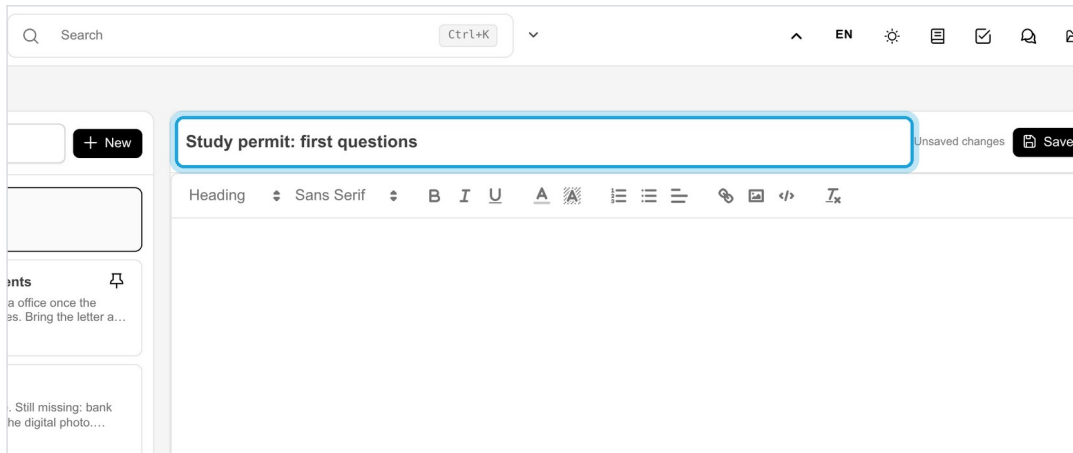
3. Start a note

Click **New**. An empty note opens beside the list.



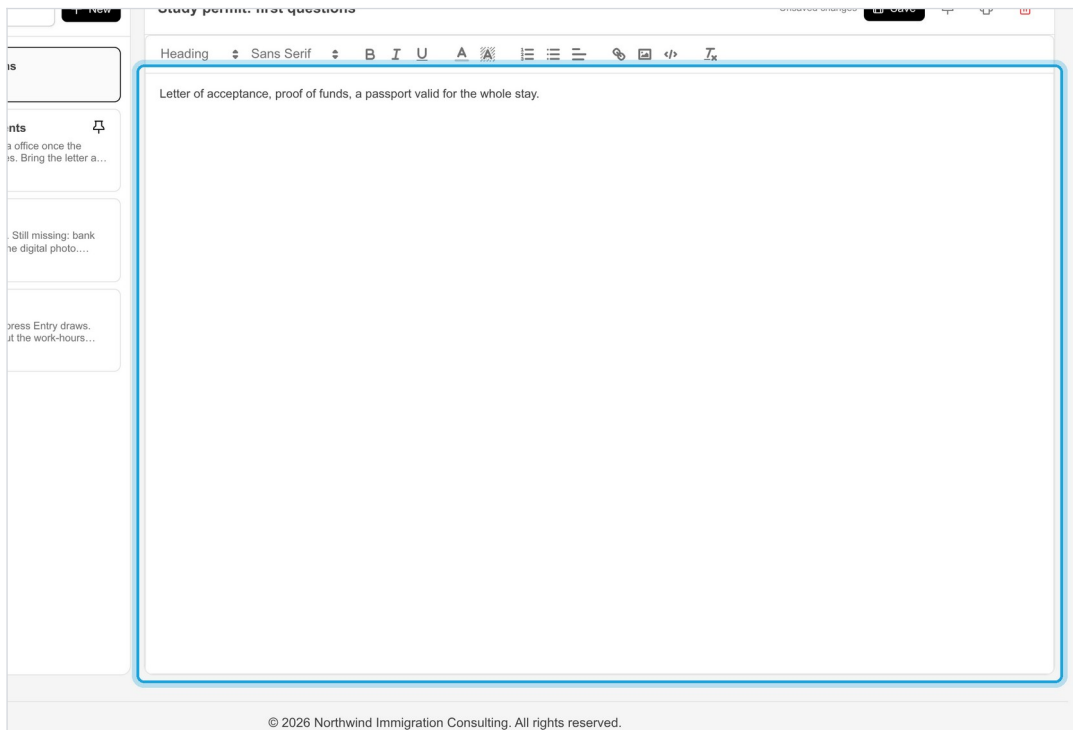
4. Give it a title

Type a title that you will recognise in the list later.



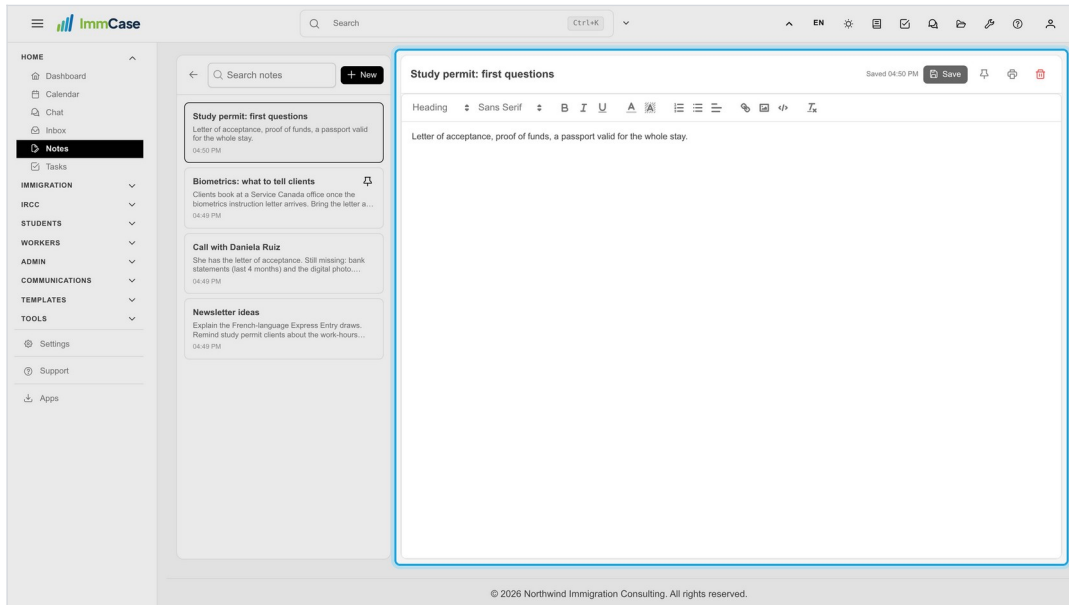
5. Write

Write the note. The toolbar adds **headings, bold, lists and links**.



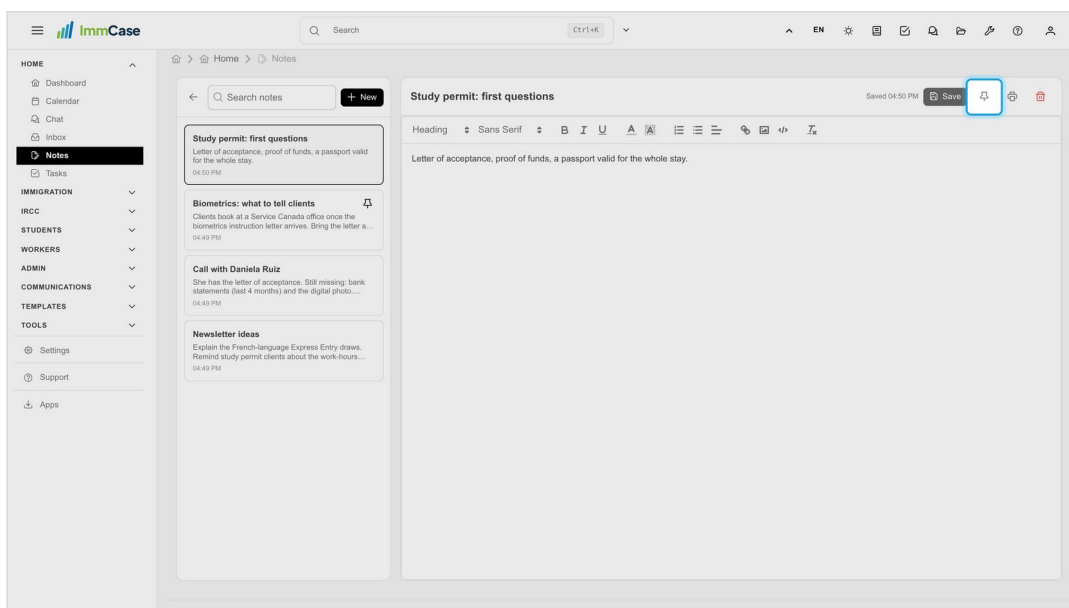
6. It saves itself

A moment after you stop typing, the note is saved; the time appears next to **Save**. You can also click **Save** yourself.



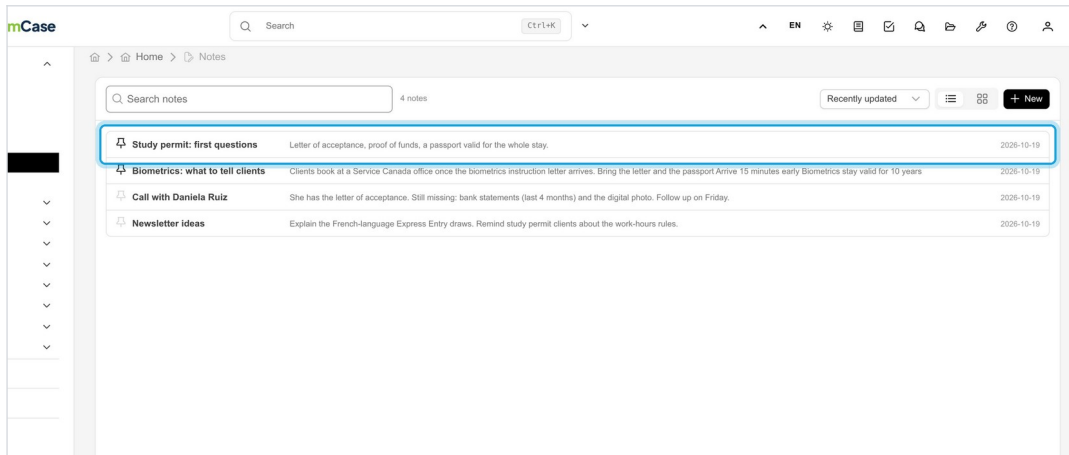
7. Pin it

Click the **pin** to keep this note at the top of the list. Beside it: **Print** and **Delete**.



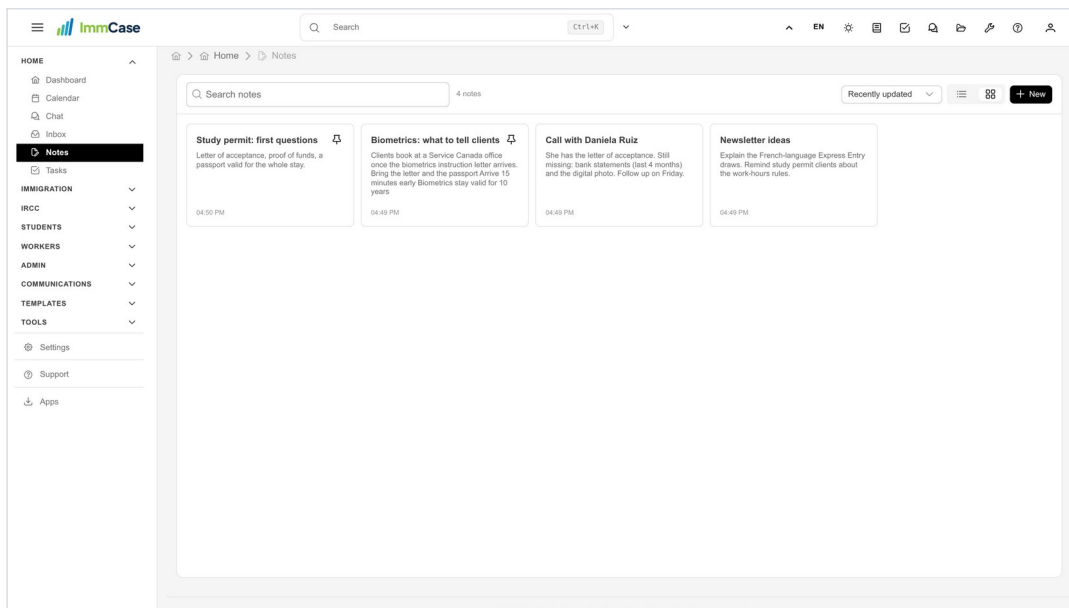
8. Back to the list

The arrow at the top of the list goes back to **All notes**. Your pinned note is now first.



9. List or cards

Switch between **List** and **Cards** with the buttons beside **New**. ImmCase remembers your choice.



Good to know

- **Notes are yours.** Other people in the firm don't see them. To share something about a client, use **Comments** on the client's or the case's record.

- **Quick note from anywhere:** the notebook icon at the top of every screen opens a small note window, so you don't have to leave what you are doing.
- **Find it later:** the search box looks in titles and text.

Questions: hello@immcase.com.