Internal note

Last Modified on 07/12/2023 3:42 pm EDT

Sometimes, you need a place to leave notes for other authors (or yourself) that isn't the **Version Notes** field. This might include notes on who the subject matter expert is, or that if you update this article, you should also update another article, or some type of quality control note (such as Article Confidence levels if you use KCS).

This type of note is exactly what we designed the **Internal Note** field for.

Internal notes:

- Are notes you want front-and-center when you or other content creators are editing a given article or category.
- Are displayed only in app.knowledgeowl.com, not to your readers.
- Accept very simple HTML markup, so you can include hyperlinks and lists.
- Will be displayed at the top of ALL versions of the article.
- Are available in the **Manage Articles CSV export**.
- If used in a template article, will be copied to new articles created from that template.
- If in an existing article, will be copied when a new article is created from that existing article.

Our default **Editor** and **Writer** roles can add, edit, and remove internal notes. If you're using **custom author roles**, you can add each of these permissions independently using the **Internal Note** **Permissions** options. Authors who do not have no permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do. Authors with only some permissions can only see the options they have permissions to use.
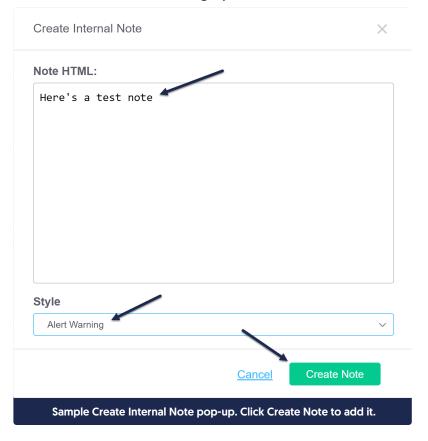
Add an internal note

To add an internal note:

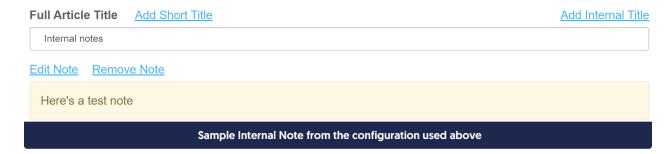1. Click the **Add Internal Note** link to the right of the title:

2. Add the HTML you want to use for your note. If you're just putting in regular sentences, you don't need to add HTML, but you can use it for formatting lists, hyperlinks, and so on.

3. Select the style you want to use for your note from the dropdown; we default to Alert Info. Here, we've

added a one-line note and selected the Alert Warning style.

Create Internal Note ✕

Note HTML:

Here's a test note

Style

Alert Warning ⌄

Cancel   Create Note

Sample Create Internal Note pop-up. Click Create Note to add it.

4. Select **Create Note**.

5. This creates the note and displays it using the style you selected between the title and the editor. You do not need to resave the article itself for the note to be saved.

Full Article Title   Add Short Title   Add Internal Title

Internal notes

Edit Note   Remove Note

Here's a test note

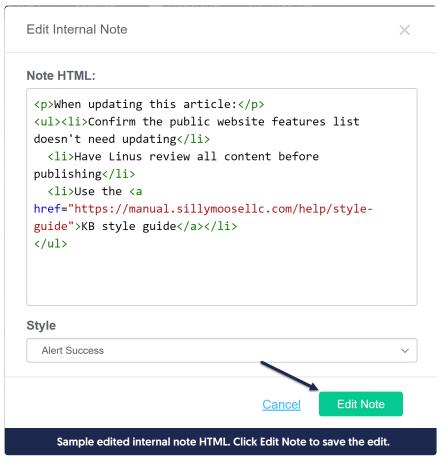**Sample Internal Note from the configuration used above**

Edit an internal note

Once an internal note exists, you can edit it to make updates. To do so:

1. Click the **Edit Note** link that appears just above the note:

Full Article Title   Add Short Title   Add Internal Title

> Internal notes

Edit Note   Remove Note

> Here's a test note

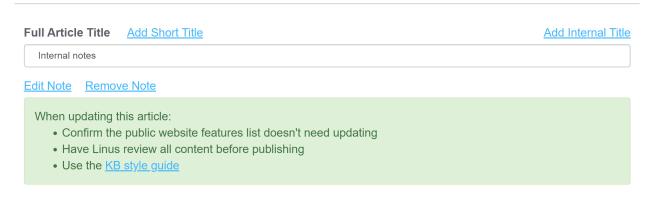**Click the Edit Note link**

2. Edit the HTML or change the style as you'd like. Once you're done making changes, select **Edit Note** to save your changes. Here, we've added a more complex note with a list:

Edit Internal Note   ✕

Note HTML:

```
<p>When updating this article:</p>
<ul><li>Confirm the public website features list
doesn't need updating</li>
   <li>Have Linus review all content before
publishing</li>
   <li>Use the <a
href="https://manual.sillymoosellc.com/help/style-
guide">KB style guide</a></li>
</ul>
```

Style

Alert Success   ⌄

Cancel   Edit Note

Sample edited internal note HTML. Click Edit Note to save the edit.

3. The note updates immediately based on the changes you made. You do not need to resave the article or category itself for the note to be saved.
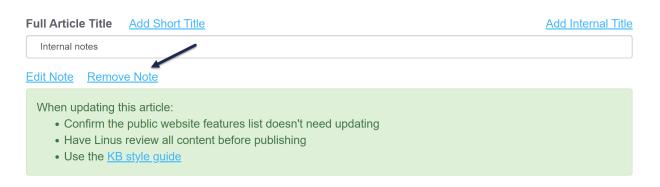
Full Article Title   Add Short Title   Add Internal Title

> Internal notes

Edit Note   Remove Note

> When updating this article:
> - Confirm the public website features list doesn't need updating
> - Have Linus review all content before publishing
> - Use the KB style guide

Switch Editor: Legacy

Sample Internal Note displayed based on the HTML in the previous step

Delete an internal note
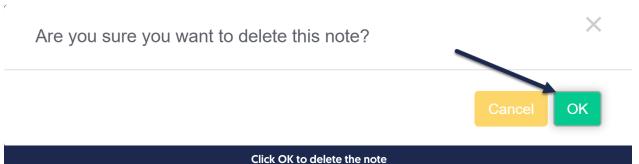
To delete an internal note completely:

1. **Click the Remove Note link that appears just above the note:**

   Full Article Title   Add Short Title   Add Internal Title

   > Internal notes

   Edit Note   Remove Note

   > When updating this article:
   > - Confirm the public website features list doesn't need updating
   > - Have Linus review all content before publishing
   > - Use the KB style guide

   Switch Editor: Legacy

   Click the Remove Note link

2. **A confirmation window will pop-up to be sure you want to delete the note. Select OK to delete the note.**

   Are you sure you want to delete this note?   ✕

   Cancel   OK

   Click OK to delete the note

3. **The note is deleted immediately; you do not need to resave the article or category for the deletion to complete.**

What HTML is supported in internal notes?

We've kept these notes pretty lean. They will support HTML:

- **Paragraph** `<p>`
- **Numbered list** `<ol>`
- **Bulleted list** `<ul>`
- **List items** `<li>`
- **Hyperlinks** `<a href="www.mylink.com">Link text</a>`
- **Bold text** `<b> or <strong>`
- **Italics** `<i>`
- **Paragraph breaks** `<br>`
- **Headers, e.g.** `<h1>`