

HOW TO ADD A NOTE

This guide will show you how to record notes to a customer record after a call/visit, and e-mail these through to a customer or colleague, letting you share important messages instantly.

01 Search for the account you want to add a note to by using the **Quick Search** bar.





02 Select the account so that it highlights green and then click **CRM**.

03 From the menu on the left-hand side of the screen, select Call History Notes.

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This area of sales-i displays all of the notes already made for this account. To add a new note, click Add Note in the top righthand corner of the screen.

ldson	sales-I CRM		Roll up to Parent Account
	LL HISTORY N	NOTES (26)	Sort order Call date: Latest to Earliest Add note
als I	Viocated to:	Mike Worthington	Call date: Wednesday, 8 November 20
	Preated by: AyCalls folder:	Mike Worthington Inbox	Contact: Sanah Smith Cail type:
	'ollow up date:	Wednesday, 8 November 2017 at 5:05pm	
	Add Tag		
tal ,	icte:		
			Send to calendar Edit Online
	Viocated to:	Tony McGuinness	Call date: Monday, 18 September 2017 at 11:55en
		Tony McGuloness	Contact: Sanh Smith
	Preated by: AyCalls folder:		Contact: sama smot
	ollow up date:	Monday, 27 November 2017 at 2:15pm	
soints	lages Add Tag	I Contraction of the second	
	kote: XSX from max get	e £100k by friday	
			Send to calendar Edit Delete
95			
1	Viocated to:	Tony McGuinness	Call date: Monday, 4 September 2017 at 12:30pm



05 Use the **Call Type** drop down list to select the overview of the meeting you are going to have with this account, i.e. Account Visit, Sales Call, Meeting.

*Please note these can be customised to suit your needs by the Power User of your system.

06 Add a note into the mandatory Note field to outline the objectives and discussion points of this interaction.



Donaldson Plant Hire	About the call r					
(C00648)	Call date:	30/11/2017 11:45 AM				
Customer Details	Call Duration:					
Contacts	Call Type:	Pirase select- 0				
Call History Notes	Contact Email Contact	Sanh Smith (Default) =				
Documents	Call Outcome:	-Pirase Select- 0				
Customer Potential	Note:					
Opportunities						
Customer Credit Information						
Key Facts	Follow up actions			•		
Projects	Next Action:	Please select \$				
HDP	Follow up call:					
checkpoint keypoints						
ryedale	Follow up date:	14/12/2017 11:45 AM		•		
Olie	Created:		Last updated:			
Customer Surveys	Allocate note to:	Offe Copland 0				
Linked Prospects	Email allocated user:					



07 Use the Follow-up call time & date selector* to drive your diary and schedule future interactions with the account.

> *You may need to tick the box next to Follow-up call to enable this selector.

OPTIONAL STEPS

You may need to email the contents of this note to your customer contact, or internally to a colleague.

The following optional steps will show you how.

If you don't need to do this, skip to Step 10.

08 If you want to share the note with the contact you just met with (for example, as a reminder of your agreed points of action) toggle the Email Contact switch to green.

> You can cc additional contacts by selecting multiple emails from the list on the right.

> PLEASE NOTE: By opting to email the contact, they will receive the contents of this Call Note as an email.





09 You may need to share the contents of this Call Note with a colleague internally. To do this, toggle the Email allocated user switch to green and select the desired email addresses from the list on the right.

> The selected email addresses will receive the contents of this Call Note as an email.

10 When you're done, just click **Add** in the bottom left.

You can view this note at any time in the Call History Notes section.

