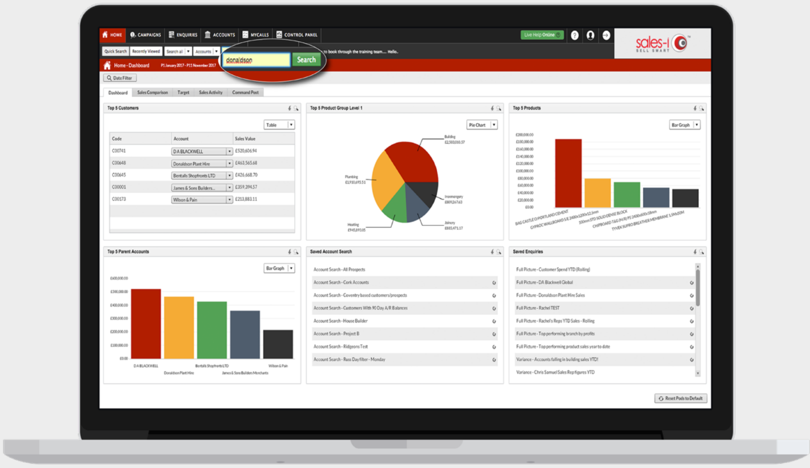
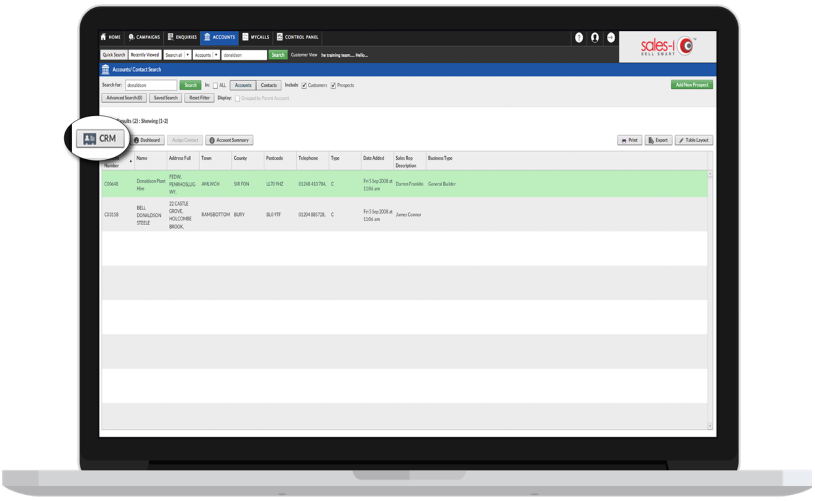
HOW TO ADD A NOTE

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.

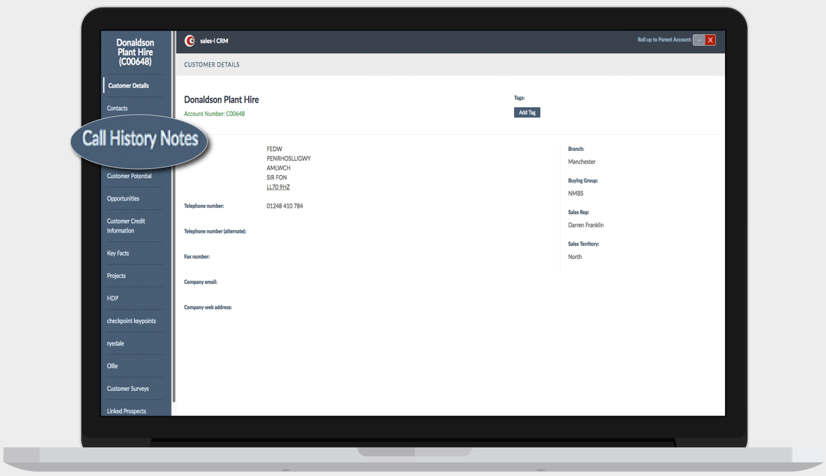
01 Search for the account you want to add a note to by using the **Quick Search** bar.



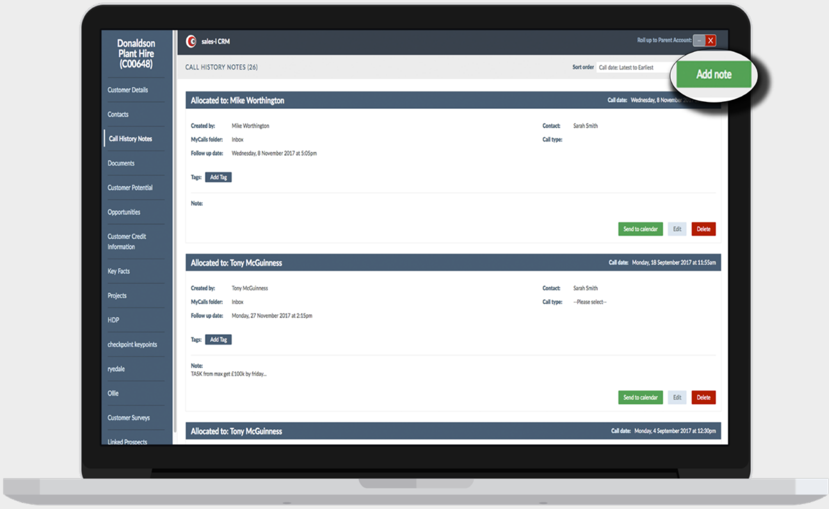


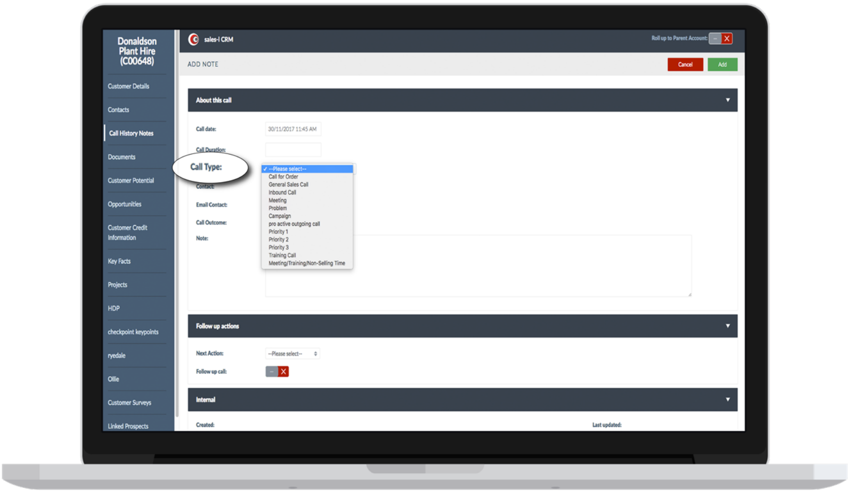
02 Select the account so that it highlights green and then click **CRM.**

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



04 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 right-hand corner of the screen.

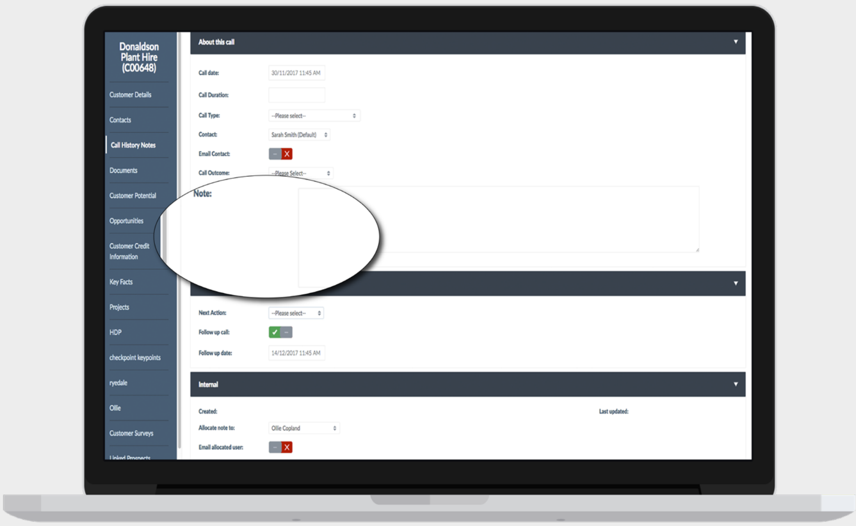


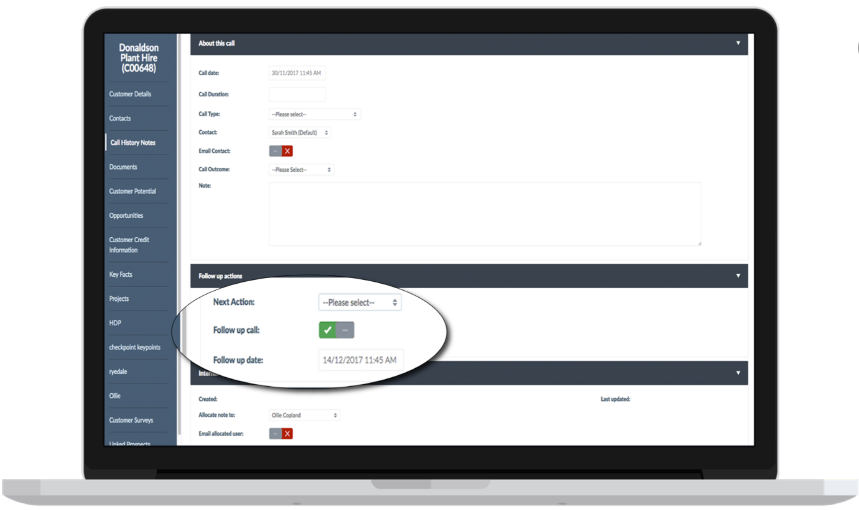


05 Use the **Call Type** drop down list to select the overview of the meeting you are going to have with this account, i.e. Account Visit, Sales Call, Meeting.

*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.





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**.

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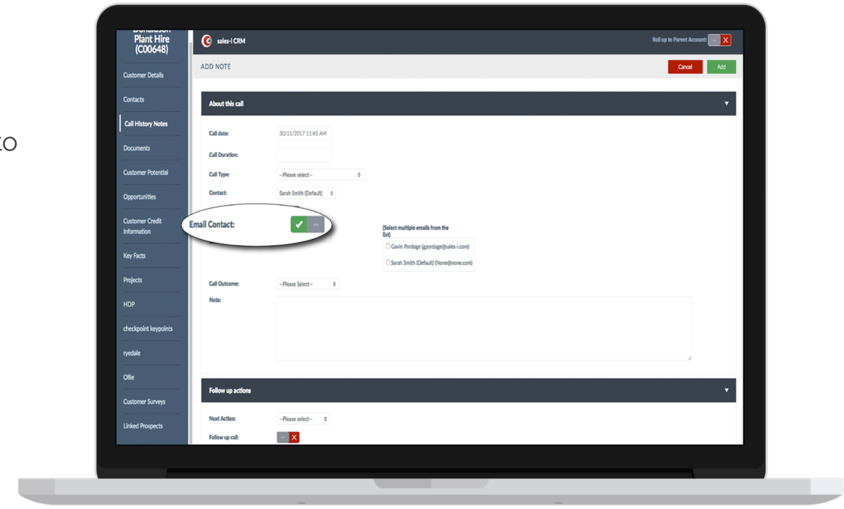
If you want to share the note with the contact you just met with (for example, as a reminder of your agreed points of action) toggle the **Email Contact** switch to green.

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.



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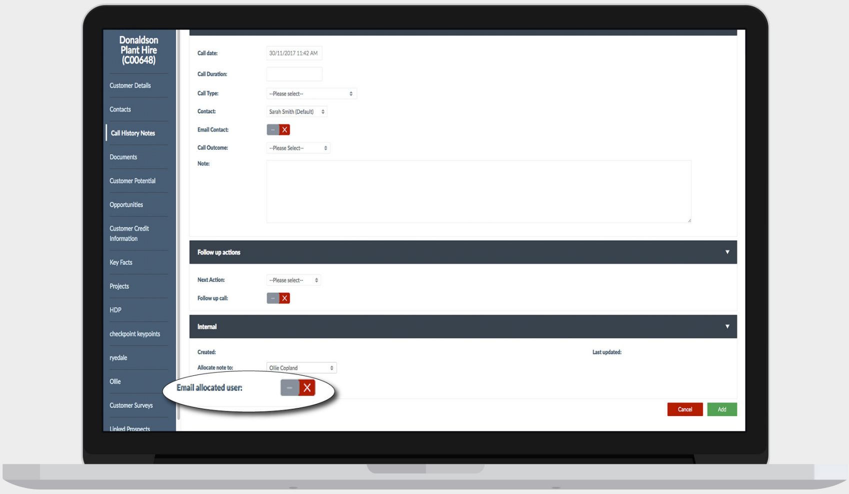
You may need to share the contents of this Call Note with a colleague internally. To do this, toggle the **Email allocated user** switch to green and select the desired email addresses from the list on the right.

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



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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.