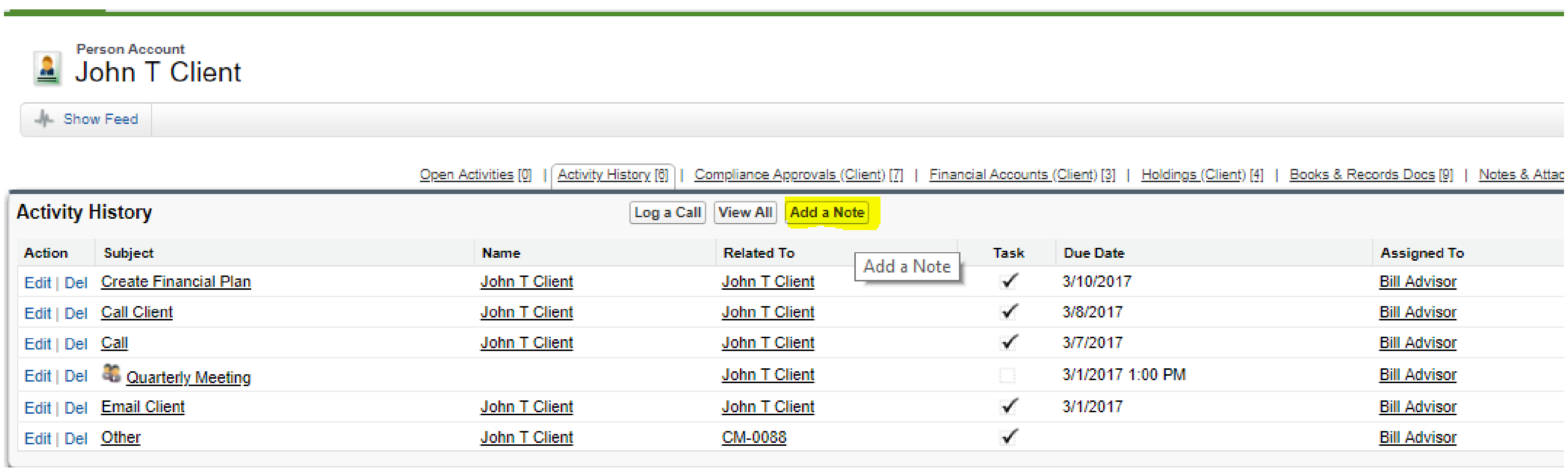
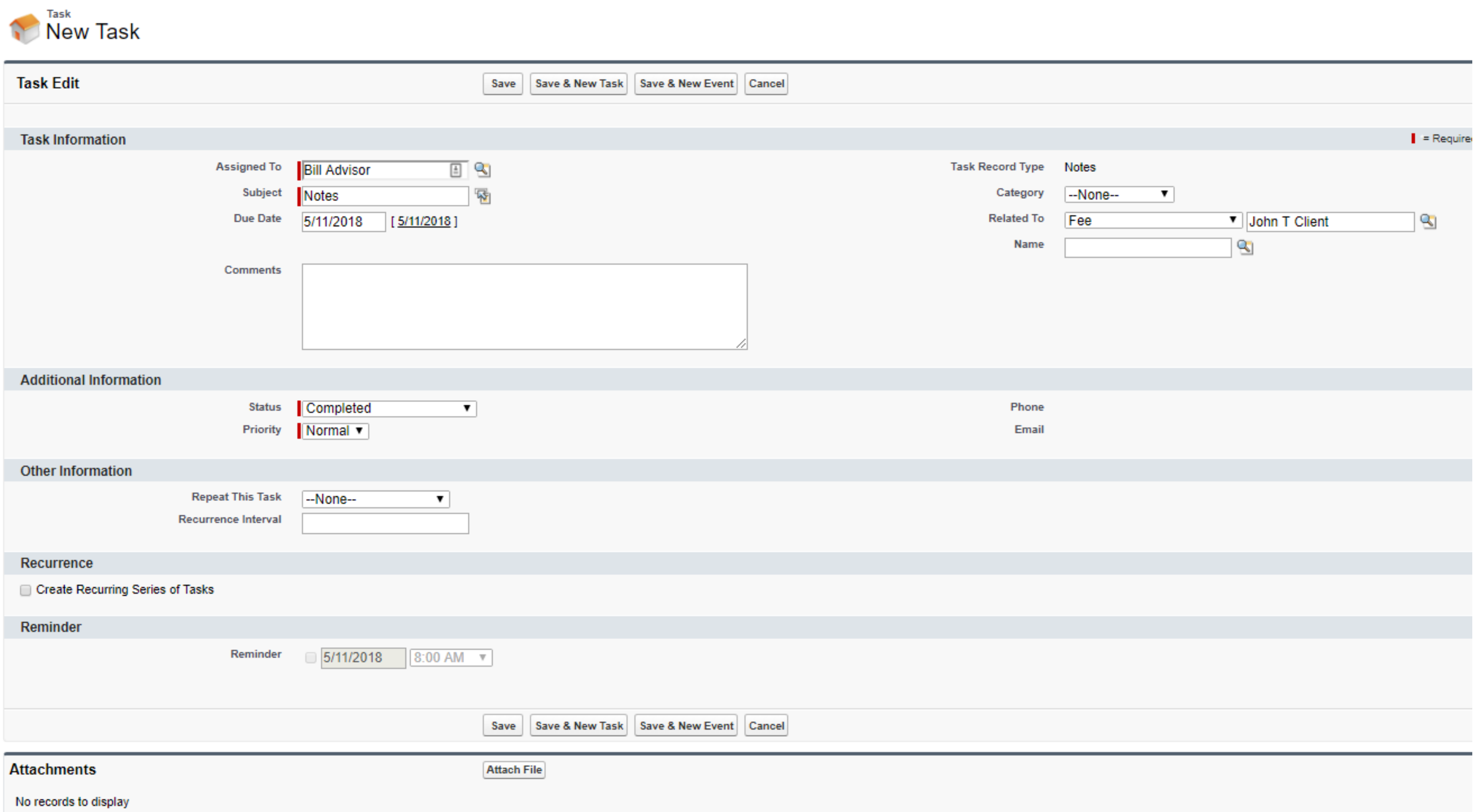
Adding a Note to a Client Account

Adding notes to your client accounts allows you to keep track of all your client information in one place. You can add notes from meetings, phone calls or emails that you can quickly reference all in one spot.

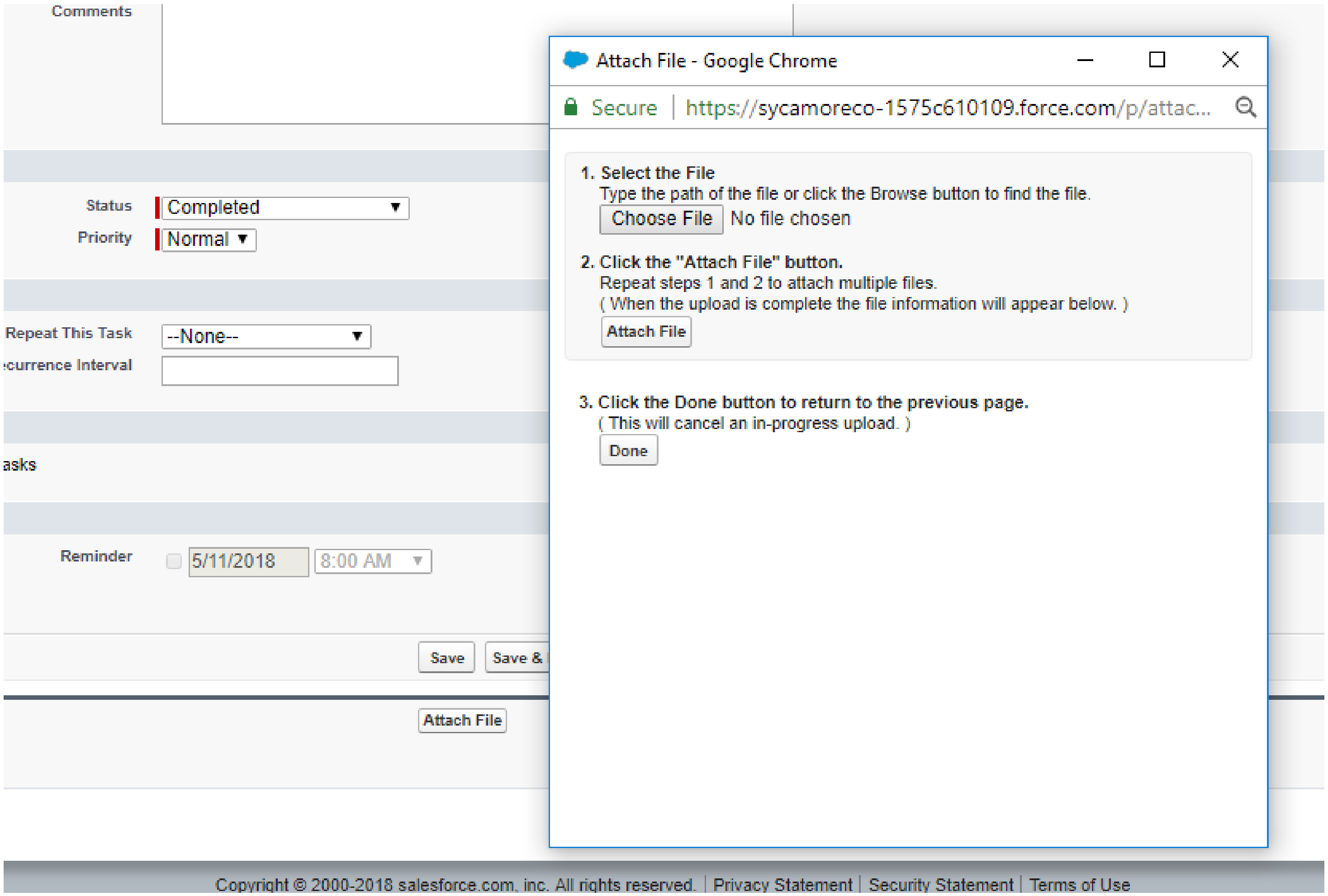
1. To start, from the “Person Account”, or other client record, hover over “Activity History” and select “Add a Note”



2. Fill out the required information. And add your notes into the “Comments” section.



3. You can also attach documents associated with this note using the Attachments section.
4. Click Attach File and follow the instructions in the pop-up.



5. Click the "Save" button at the top or the bottom when done.