

LEADERS link

Adding a Note to a Client Account

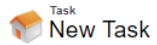
Adding notes to your client accounts allows you to keep track of all your client information in one place. You can add notes from meetings, phone calls or emails that you can quickly reference all in one spot.

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

The screenshot displays the 'Person Account' for 'John T Client'. At the top, there is a 'Show Feed' button. Below it, a navigation bar shows various tabs: 'Open Activities (0)', 'Activity History (8)', 'Compliance Approvals (Client) (7)', 'Financial Accounts (Client) (3)', 'Holdings (Client) (4)', 'Books & Records Docs (9)', and 'Notes & Attac'. The 'Activity History' tab is active, and a dropdown menu is open over it, showing options: 'Log a Call', 'View All', and 'Add a Note'. The 'Add a Note' option is highlighted in yellow. Below the dropdown is a table with the following columns: Action, Subject, Name, Related To, Task, Due Date, and Assigned To. The table contains seven rows of activity history.

Action	Subject	Name	Related To	Task	Due Date	Assigned To
Edit Del	Create Financial Plan	John T Client	John T Client	✓	3/10/2017	Bill Advisor
Edit Del	Call Client	John T Client	John T Client	✓	3/8/2017	Bill Advisor
Edit Del	Call	John T Client	John T Client	✓	3/7/2017	Bill Advisor
Edit Del	Quarterly Meeting		John T Client	<input type="checkbox"/>	3/1/2017 1:00 PM	Bill Advisor
Edit Del	Email Client	John T Client	John T Client	✓	3/1/2017	Bill Advisor
Edit Del	Other	John T Client	CM-0088	✓		Bill Advisor

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



Task Edit Save Save & New Task Save & New Event Cancel

Task Information I = Required

Assigned To	<input type="text" value="Bill Advisor"/>	Task Record Type	Notes
Subject	<input type="text" value="Notes"/>	Category	--None--
Due Date	<input type="text" value="5/11/2018"/> [5/11/2018]	Related To	<input type="text" value="Fee"/> <input type="text" value="John T Client"/>
Comments	<input type="text"/>		

Additional Information

Status	<input type="text" value="Completed"/>	Phone	
Priority	<input type="text" value="Normal"/>	Email	

Other Information

Repeat This Task	<input type="text" value="--None--"/>
Recurrence Interval	<input type="text"/>

Recurrence

Create Recurring Series of Tasks

Reminder

Reminder	<input type="checkbox"/>	<input type="text" value="5/11/2018"/>	<input type="text" value="8:00 AM"/>
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Save Save & New Task Save & New Event Cancel

Attachments Attach File

No records to display

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.

The image shows a Salesforce task record interface with an 'Attach File' pop-up window. The task record includes fields for Status (Completed), Priority (Normal), Repeat This Task (--None--), and Reminder (5/11/2018 at 8:00 AM). There are 'Save' and 'Save &' buttons at the bottom of the record, and an 'Attach File' button below. The pop-up window, titled 'Attach File - Google Chrome', provides instructions for attaching a file:

- 1. Select the File**
Type the path of the file or click the Browse button to find the file.
 No file chosen
- 2. Click the "Attach File" button.**
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
- 3. Click the Done button to return to the previous page.**
(This will cancel an in-progress upload.)

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