Notes

Each contact and account in Forté CRM has an Activity tab. Clicking on this tab displays the activity list for the contact or account containing a record of all interactions between parties. Activity items include notes, documents, emails, appointments, tasks and phone calls. A search facility is available in Forté CRM to easily access activity item information.

A Note is an activity item which allows you to record:

- Documents received
- Telephone calls received (calls in)
- Telephone calls made (calls out)
- Meetings and other interactions

Note activity items have a note icon beside them in the activity list. You can record an unlimited number of notes for a contact or account. Each note must be linked to at least one contact or account, and can be linked to as many contacts or accounts as required.

The Notes feature in Forté CRM is considerably powerful. Consider a meeting that occurs involving Gina Gogetter from Meganational Corporation, Robb Carrs from a local car lease company and Lance Lawless, from Lawless and Wilde, lawyers for Meganational Corporation. Many systems would require you to enter details of this meeting three (or more) times. In Forte CRM, this event is entered once and each account and contact involved is attached to the note. This reduces recording errors and disk space. It also means that, by viewing the activity history of any of the meeting attendees, you can see consistent details and who else was involved in the meeting.

Add n a Not

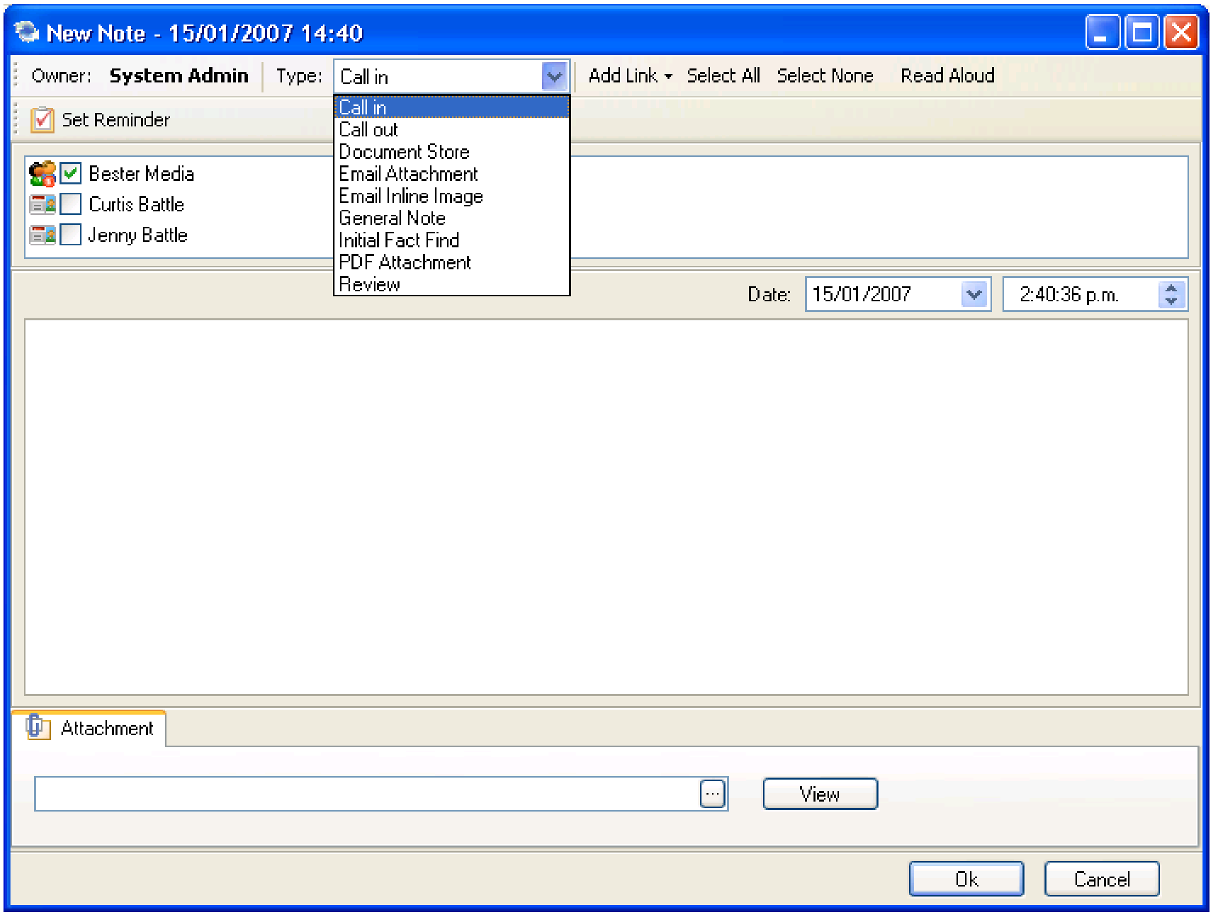
A new note can be created in one of the following ways:

- Right click on a contact or account, either in the treeview on the left or in the grid on the right, and select 'Note' from the pop up menu.

- If contact or account details are displayed, click on the 'Note' button at the top right of the screen.

- Select multiple contacts or accounts by checking the box beside their names in the grid. Then either right click on one of the selected contacts or accounts and select 'Note' from the pop up menu, or click the 'Action' button at the top of the grid and choose 'Note'.

The 'New Note' screen is displayed.



O n r The account manager who created this note.

Ty The type of note to be created is selected from the drop down box. Note types can be customised using the System Administration function.

Add L nk A list of all related accounts and contacts are displayed. Select the accounts and/or contacts that you want to create the note against by checking the appropriate boxes.
Use the 'Add Link' button to add any other accounts or contacts that you wish to file this note against.

S l ct All The note will be filed against all displayed accounts and contacts.

S l ct Non Uncheck all selected accounts and contacts. Each required account or contact can then be individually selected as required.

R ad Alo d Selecting this option causes the note to be read aloud.

S t R m nd r Click this button to create a reminder regarding this note. Enter the reminder subject and description, and select a date for the reminder to be issued. A reminder containing these details will pop up on the screen on the selected date.

Acco nts/ Contacts If a contact was selected, the contact and all linked accounts will be displayed.
If an account was selected, the account and all linked contacts will be displayed.
Accounts and contacts marked with a green tick will have the note added to their activity list. These can be selected or unselected as required. Other accounts or contacts can be added using the 'Add Link' button.

Dat The date and time that the note was created. This defaults to actual date and time but can be changed as required to create past or future notes.

Note Text

Type or paste the text of the note in the description box. The text of the note can be any required length. A scroll bar will be added if the text exceeds the si e of the description box.

Adding an attachment

An attachment, such as a Word or Open Office document, image or PDF file, can be added to a new or existing note. Click the browse button (...) in the Attachment tab, navigate to the required file, select the file to highlight it and click 'Open'. The attachment will be stored in the database when the note is created.

- Click 'View' to see the contents of the selected attachment.

- Click 'Ok' when finished.

A note attachment can be used to store scanned versions of documents received or digital recordings of phone calls. It is important, however, to consider the si e of the file being stored, as larger files will slow down the syncing of information. For scanned documents, PDF or RTF may be suitable formats, while recordings of phone calls or meetings may be best stored as a mono MP3 file with a low bit rate and sample rate.

In multi-user versions of Forté (Enterprise and Hosted), when operating in 'sync mode', the notes created against accounts and/or contacts will only be available for other users to view after the syncing process has completed.

Ed t n a Not

Once a note has been created, its details can be changed at any time.

To d t a not :

- Double click on the selected note on the activity list for the contact or account.
- Note details are shown and can be changed as required.
- Click 'Ok' to effect the change.

D l t n a Not

Notes are usually left in the activity list of contacts or accounts to provide a history of interaction with the client.
Deleting a note will remove the note from the activity list of any contacts and accounts the note was filed against when it was created.

To d l t a not :

- Double click on the selected note on the activity list for the contact or account.
- Click the 'Delete' button at the bottom of the 'Edit Note' screen.
- Click 'Yes' to confirm the deletion.

G n ral Not s

The 'General Notes' tab for a contact or account is a text area used for recording static information about the contact or account. This may be a comment about the parking arrangements at their office, or something else that doesn't categori e easily.

To d t G n ral Not s:

- Click on the 'Edit General Notes' button on the General Notes tab.
- Alter the notes text on the 'Edit General Notes' screen.
- Click 'Ok' to update the notes.