Managing Your Notes

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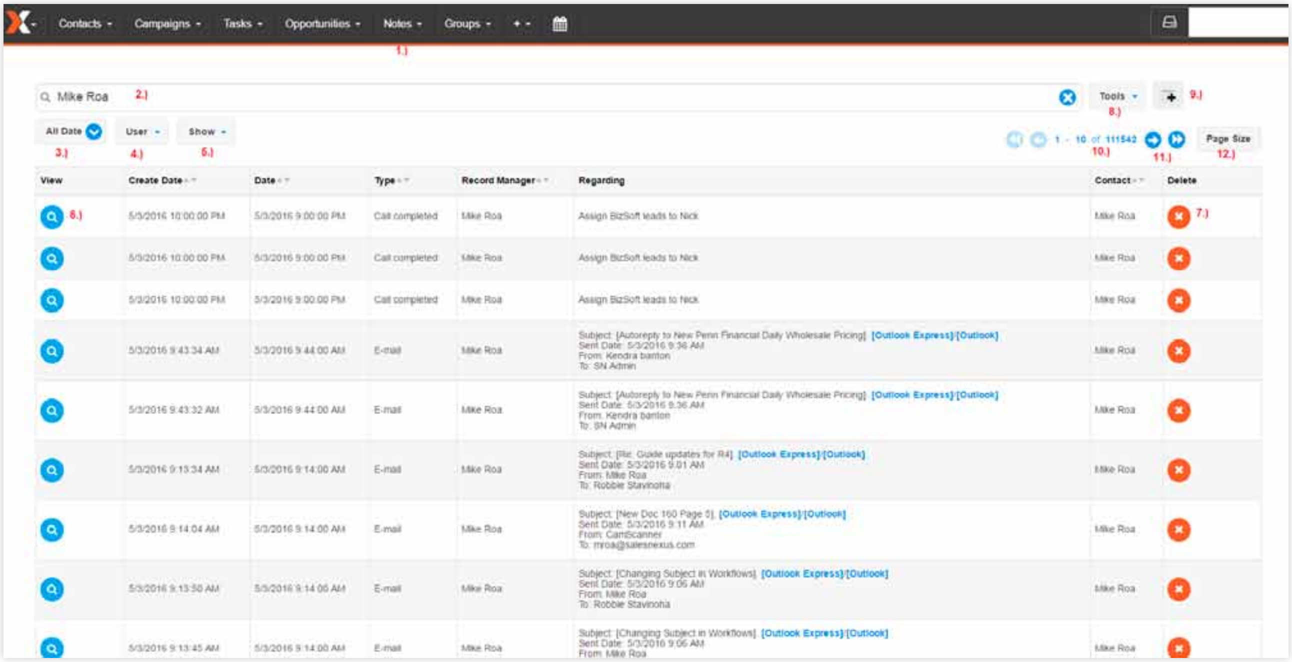

Description

1) To access the Notes area, click on the Notes tab on top, in the grey menu bar.

2) To view notes of a specific record type in the record's name in the blank provided and the matching record's notes should then be displayed on screen.

3) Option to choose the date range of when the notes were created, for the ones to be displayed on screen, under this drop down, there are several options such as Today, Today and Future, Past Dates and Tomorrow.

4) In the User drop down, choose the User's name that entered the notes to filter the note's author for display.

5) Under the "Show" drop down, filter here the type of notes that you want to be displayed, such as Notes, History, Attachments, E-mails and Note-Activity.

6) To view more details of the notes, click on the blue magnifying glass icon.

7) To delete a note click on the red X icon to the far right.

8) Create additional notes by clicking on the Tools drop down and choosing "+ Create".

9) To add more Note columns in view, click on the + sign in the far upper right portion of the screen.

10) Displays the number of notes in total, and the ones currently in view in the current page.

11) To go to the next page of notes click on the blue arrow symbols.

12) To display how many items to be placed in view per page, click on the Page Size drop down and you should see options to increase the number of items in view, or to decrease it according to your preference.