

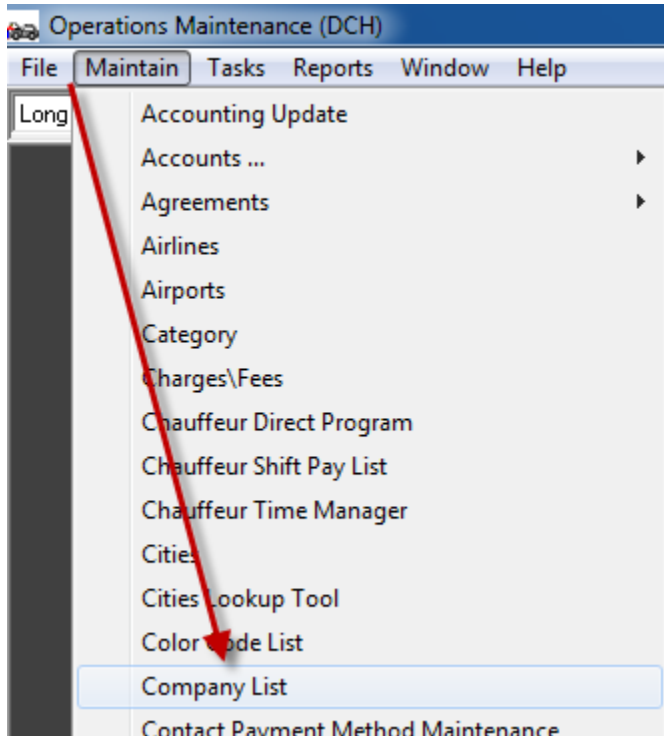
Tech Tip Tuesday—April 8, 2014

by David Hirsch

Company Notes

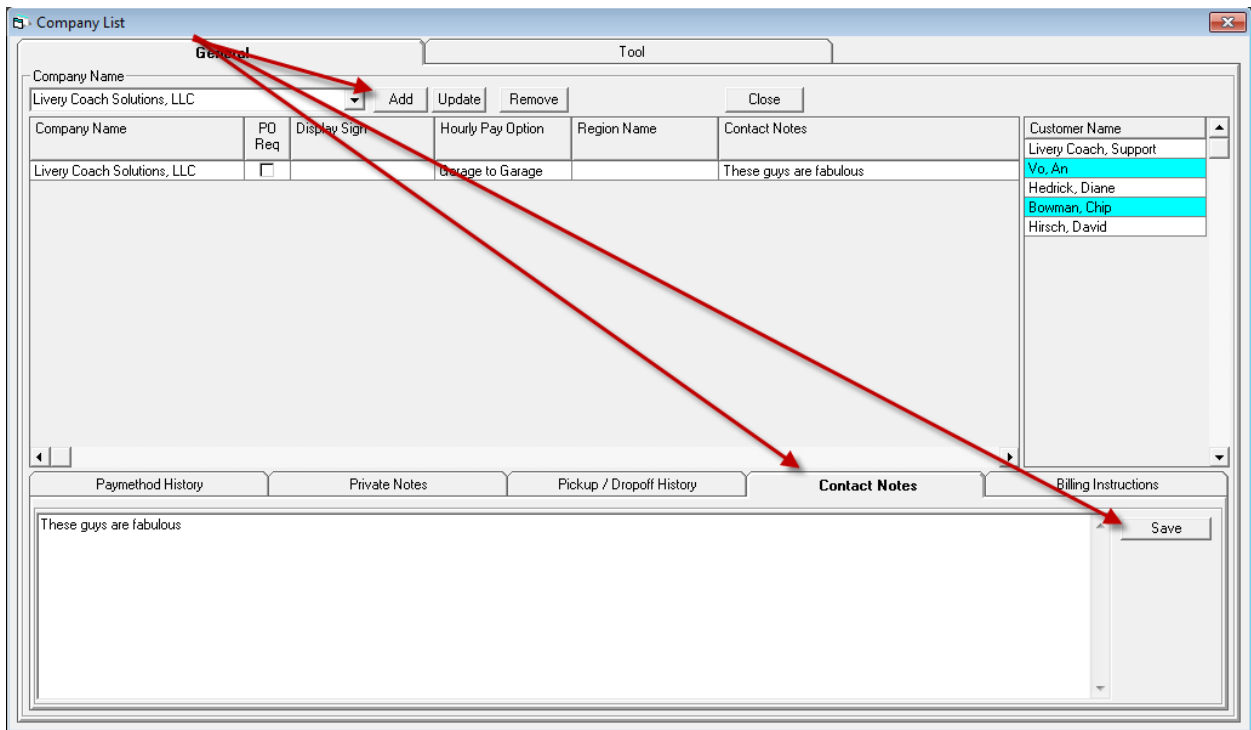
Company Notes are notes that will appear in EVERY trip booked by a contact associated with a particular company.

Since they are notes that aren't associated with a particular booker, but the company of that booker, they are not entered on the contact screen, but rather in Maintenance...Maintain Company List.

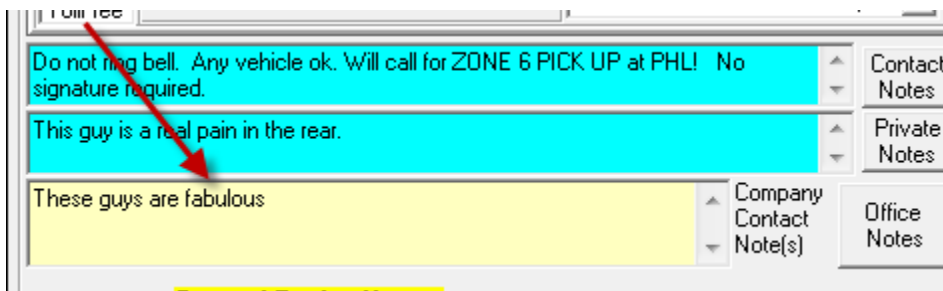


IMPORTANT NOTE: You must have already created at least one contact for that company in order to be able to enter a Company Note.

Select the company from the dropdown and click Add to add the company to the list. Once added, select the company, click on the Contact Notes tab, enter your note in the box, and click Save.



Once they are saved, you will see these notes in the contact record of any contact tied to that company.



Also, whenever you open a trip booked by someone at that company, you will see these notes (highlighted in yellow) on the Trip Summary.

