

## Tech Tip Tuesday—April 15, 2014

by David Hirsch

### Office Notes

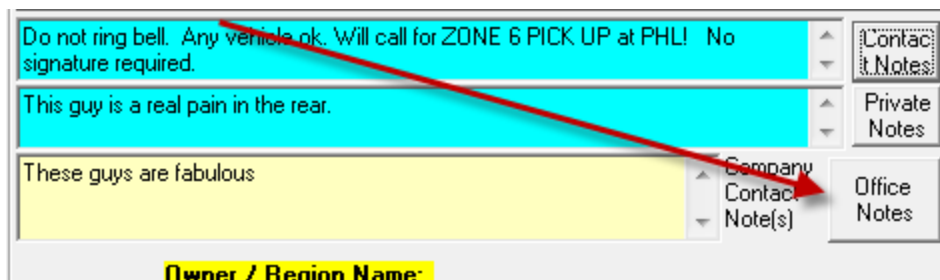
We've talked about Contact Notes, Private Notes, and Company Contact notes in previous Tech Tips. But what about Office notes?

As we know, Contact Notes are automatically inserted into every trip. They can be edited, of course, but if you have a lot of different notes for a particular booker, and on any particular trip, most of the notes do not apply, then it can be tedious to delete most of the notes every time.

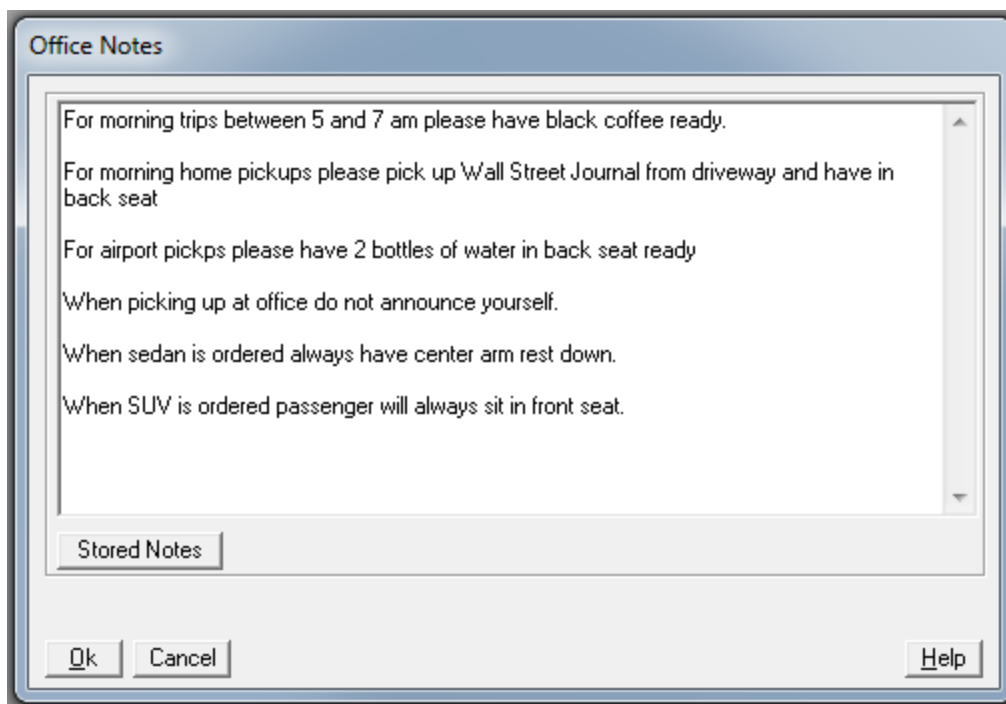
Office Notes is the answer. Office Notes is a place where you can build an entire note library for that particular booker. Then, on a trip by trip basis, you can copy the relevant Office Note to the Trip Note (or elsewhere) on an as-needed basis.

These notes could be used for a very picky client, or one that you use affiliates for all around the world (and need to note which affiliates you need to use in each city for this picky client). I'm sure you can think of lots of other examples.

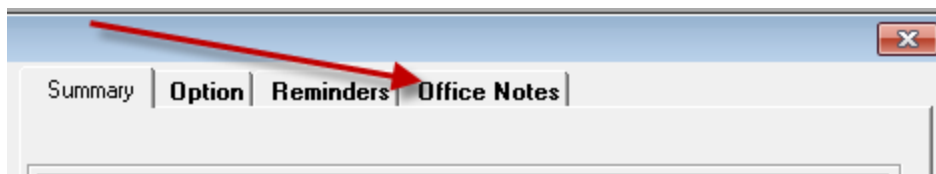
Office notes are accessed by clicking on the Office Notes button from within a contact.



Then, you can type in as many notes as you might need (maximum 2000 characters).



If there are Office Notes for a contact, then a trip booked by that contact will have the Office Notes tab visible when opening a trip.



You can then highlight the note you need, copy it, and paste it to the Trip Notes field in a trip.

