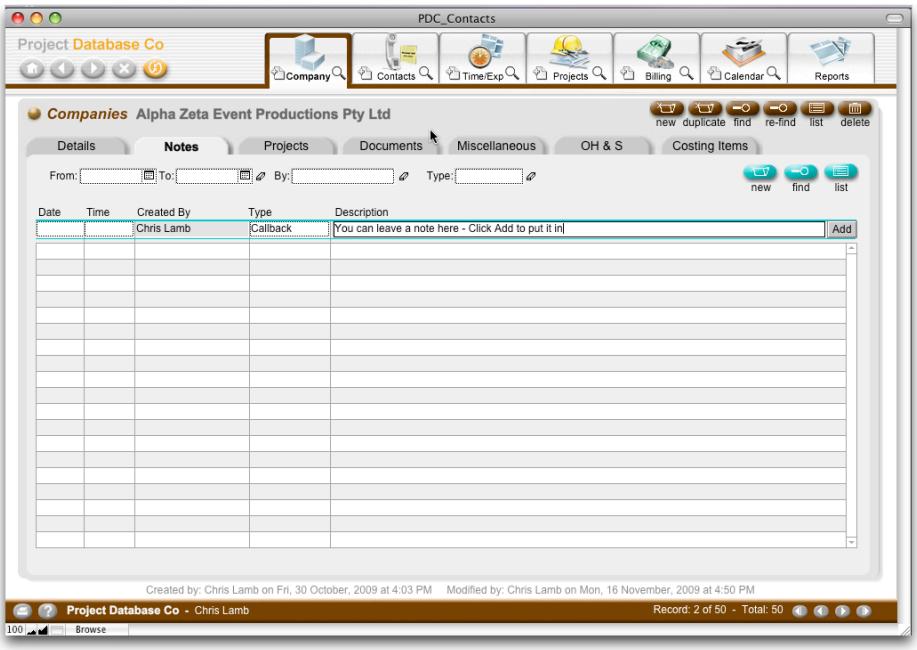
Company Note

The Company Notes Tab this is where notes can be entered that relate to the company rather than to an individual.



Although once created in this section a note can be added to a contact as well once the relevant person.

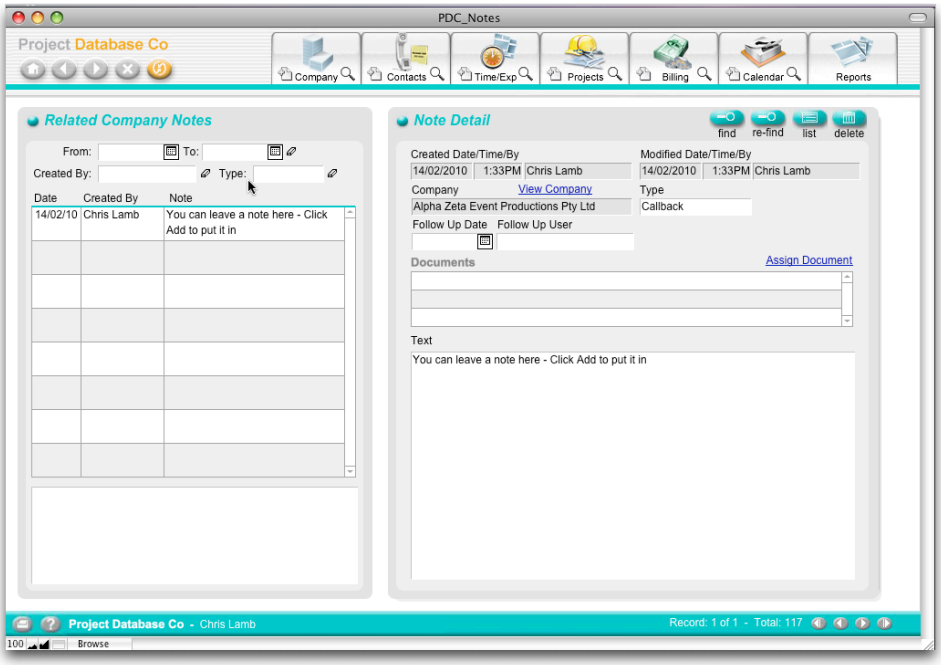
Choose the type of note to add put the comment in then Click on "Add" (on the right)

If you want or need to go into the note to add a contact or to put a follow up date on it click on the line and you will be taken to this screen where you can set a date and person to follow it up. It will then appear on the "Advanced Home Screen" of the person on the day they are to follow it up.

There is also the ability to filter these entries by a variety of criteria to enable a particular note to be found

Project Database Co

Developer of
ExhibitOffice + ManagEvent



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