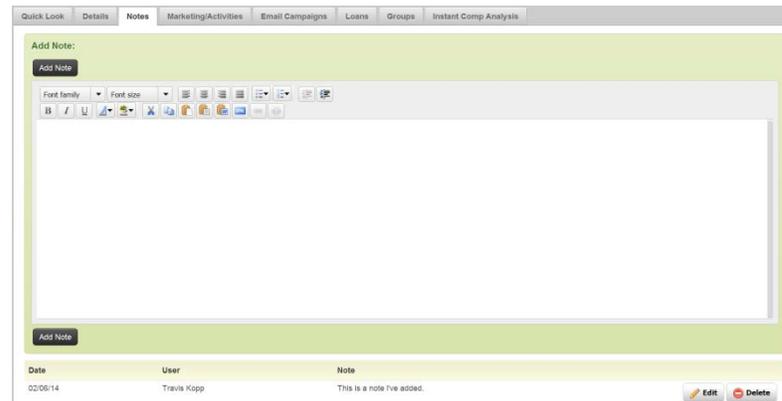


Notes

Whenever you make contact with a client or real estate agent, and want to be able to keep in mind what was said, you can use the **Notes** section of the person's profile to do so. To add a note, just type in the white box and click "Add Note". The notes will appear below the box and stack up over time, and the recent ones will appear in the "Quick Look"



section. There's even a button on the navbar that allows you to view **Recent Contact Notes**. This may serve as a reminder of profiles you've recently viewed if you're taking good notes.

Making the Best Use of Notes

Taking notes frequently will keep your information up to date and make sure you remember any important details. However, you do not *need* to take notes after all of your calls, only those where information was exchanged that you might want to remember.

For example, if you make a birthday call where the borrower thanks you and tells you she still loves her home, you could make a note, but you certainly don't have to. The fact that she loves her home is wonderful, but probably won't change your strategy with her in the future or affect your business today. However, if on that same phone call the borrower mentioned a detail you wanted to remember next time (new job, baby was just born, football fan, etc.) you would want to write that in a note. That way the next time you call on the borrower's birthday you can ask questions that show you know who you're talking to.

The other thing to keep in mind about notes is that they're not best for all kinds of reminders. Let's take our previous example and say that the homeowner mentioned that her brother was looking for a home but didn't have a lender. If you get the brother's information, a note would be the wrong step because this is information you want to act on now, not the next time you call. In this case you would want to create an **activity** to call or email the brother.