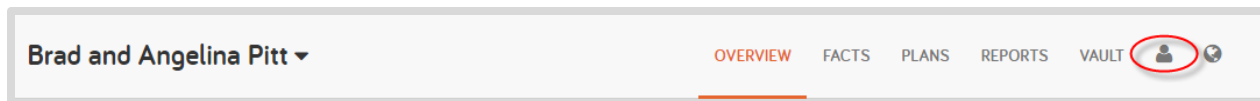
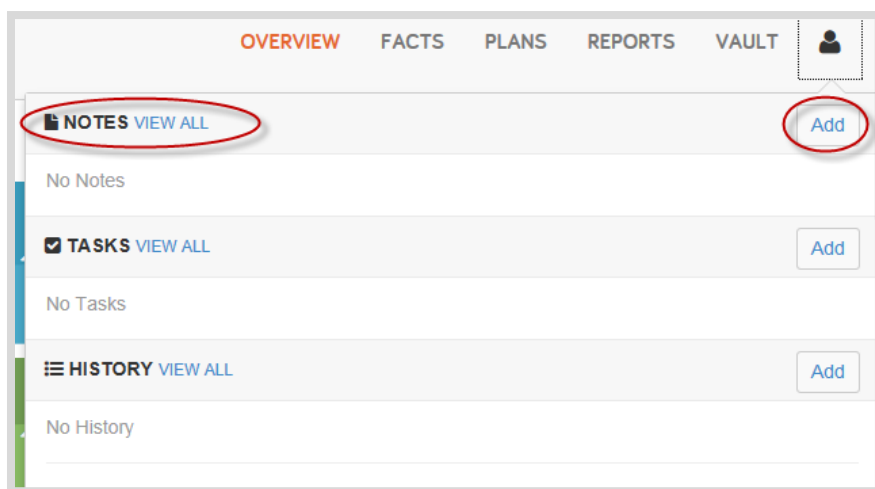


In this user guide, we will demonstrate how to add Client Notes. Notes allow the advisor to keep track of miscellaneous information regarding a client.

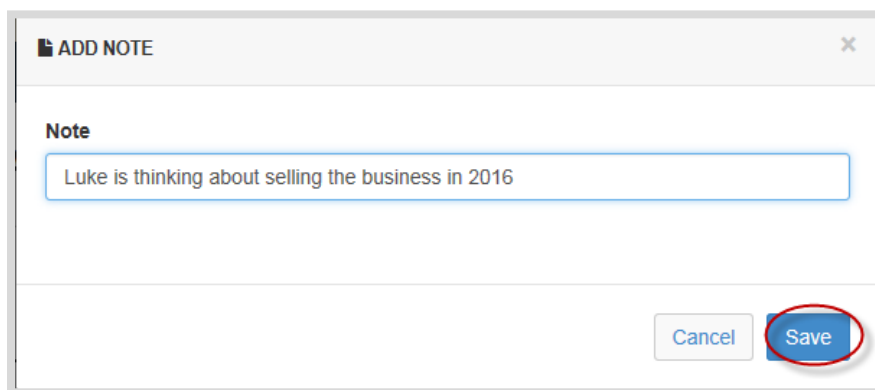
1. To add notes to a client's profile from their **Overview** page select the **Client History Icon**.



2. Select **View All**.



3. Complete the note and click **Save**.



4. To edit or remove notes, from the **View All** screen, sort notes by date, editor, or fact.

Relationship

Tasks
Notes
History

Notes

To create a note, fill out the form and click **Add New Note**. You can view a note in its entirety or make changes to it by clicking its edit icon or timestamp. To view the fact associated with a note (if there is one), click the name of the fact.

Current Notes Arranged By Date Descending

Tue 11/18/2014 01:22 PM by Chelsea Maguire

Luke is thinking about selling the business in 2016.

New Note

Size - **B I U S Ix** [List Icons] [List Icons] [List Icons] [List Icons]

Include in Fact Details Report [Add New Note To eMoney](#)

Advisors can also add a **Note** within a specific data entry while working in the clients **Facts**.

1. From the Basic Facts view, select the section to start the data entry or edit the fact by selecting the **Advanced** option.

| Assets | Owner | Value |
|-------------------|-----------|----------|
| Easy 123 Checking | Joint/ROS | \$4,568 |
| Easy 123 Checking | Joint/ROS | \$4,568 |
| | Joint/ROS | \$3,000 |
| | Joint/ROS | \$3,000 |
| | Joint/ROS | \$1,500 |
| | Joint/ROS | \$1,500 |
| | Joint/ROS | \$1,000 |
| | Joint/ROS | \$1,000 |
| | Joint/ROS | \$62,684 |
| | Joint/ROS | \$62,684 |

2. Navigate to the **Notes** tab and select **Add**.

Go back to Facts

Easy 123 Checking

Basic Ownership Fees Holdings Asset Mix Account History Sub-Accounts **Notes**

Current Notes [Add](#)

There are no notes for Easy 123 Checking.

