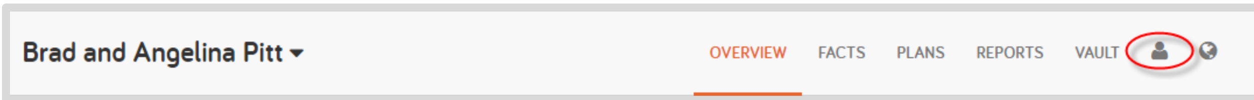
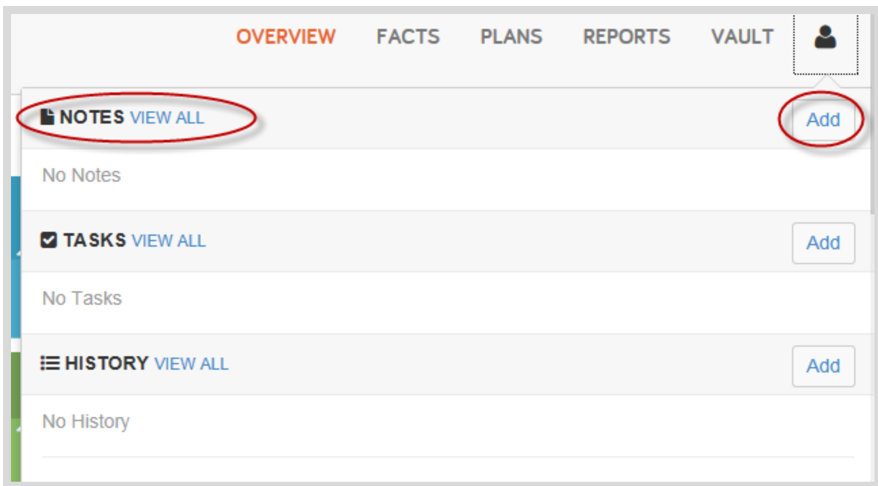
Adding Client Notes

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.

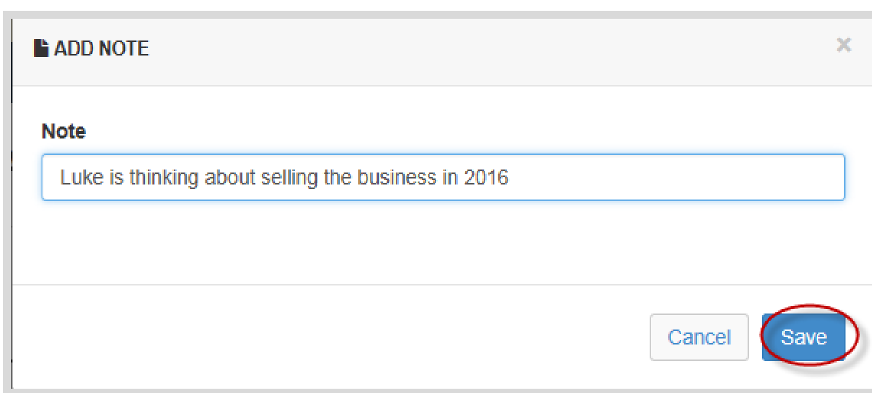
1. To add notes to a client's profile from their **Overview** page select the **Client History Icon.**



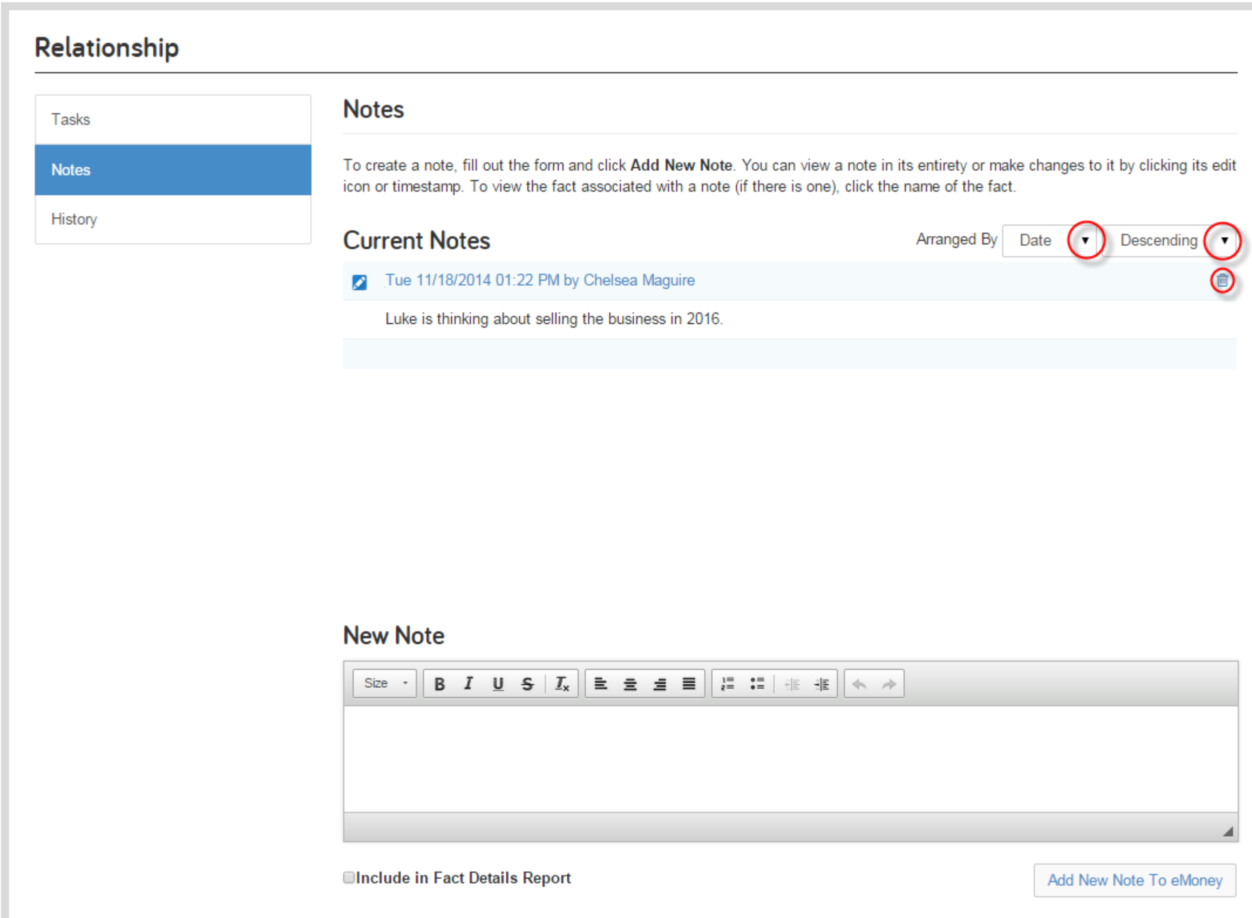
2. Select **View All**.



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

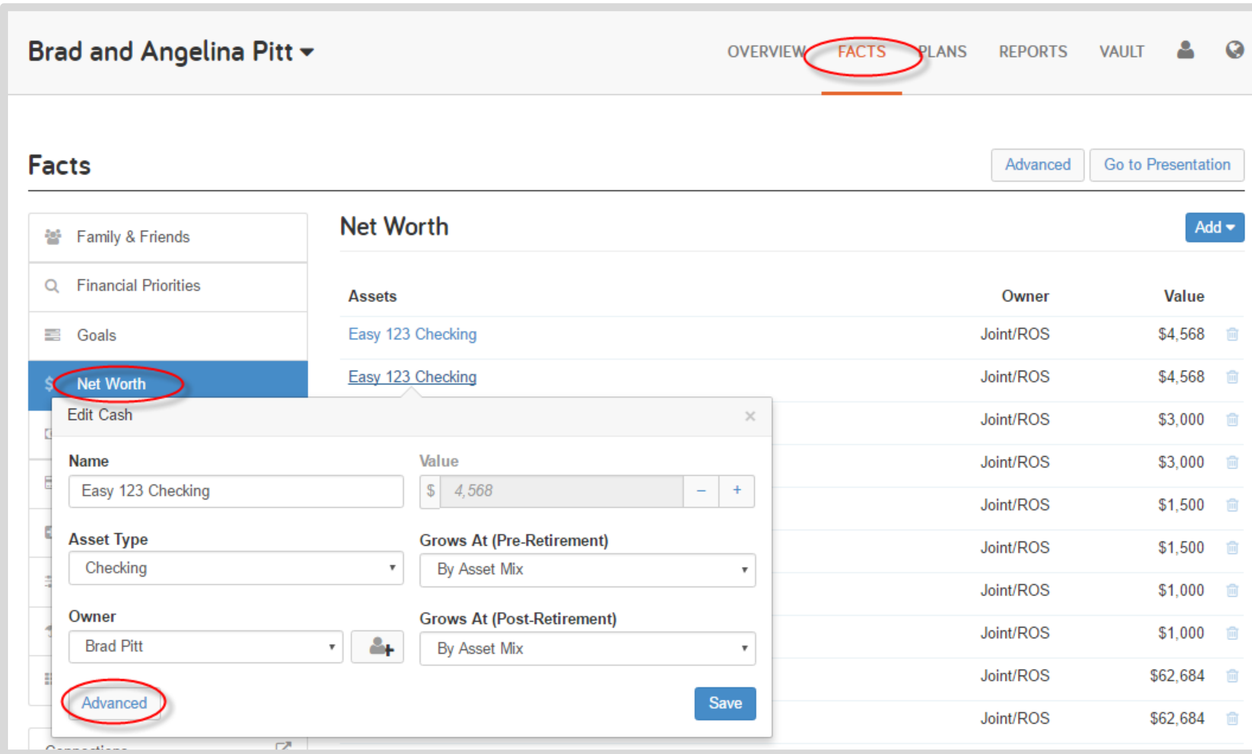


4. To edit or remove notes, from the **View All** screen, sort notes by date, editor, or fact.

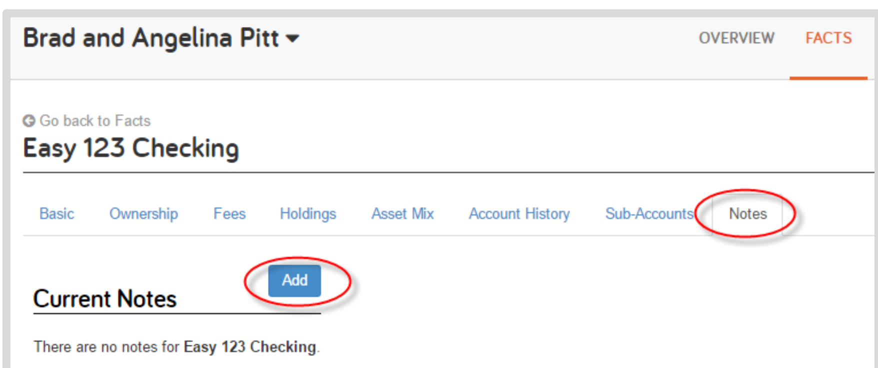


Advisors can also add a **Note** within a specific data entry while working in the clients **Facts.**

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



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



3. Enter the **Note** in the free form field and select **Save**.