

Notes – New Notify Option

Often the need to place a note on an Open Item or RFQ has also needed the ability to notify users of the note that has been placed within the CRM.

Add Note to Activity

☐ Yes, Send email details to users regarding this note

ADD

Add Note

Customer Is Still Deciding. (HHG)
2022-04-07 07:55:07
Sent A Follow Up To The Customer O
Check On The Suggestion Made For T
(HHG)
2022-04-01 08:03:24
Customer Wanted To Know The Stack
Measurements Before We Proceed. Si
Customer. (HHG)
Assigned To HHG (03/3
Crane Estimate Submitted3t Adjustal
Include 3t Harrington Ry, 15ft Drop 4
Bridge, 460v 3ph Plug For Direct Plug
Supersack Lifting Device Include Insp
Test Only. Install By Others.
2022-05-02 18:27:22
Followed Up Again With Customer To
A Phone Call Was Unsuccessful. This
Communicated To Brendan After The
Reaching Out To The Customer Today
2022-04-27 14:12:32
THE QUOTE HAS BEEN WORKED UP I
PROCESSED IN ACS UNTIL A CUSTOI
HAS BEEN CREATED. JOHN CURA IS
THE CUSTOMER CONTACT TO GET TH
INFO TO MAKE THEIR ACS ACCOUNT
RECENT UPDATE HAS BEEN COMMUN
SALES AND OPERATIONS TEAMS(IDJ
2022-04-26 16:12:52
WORKING ON QUOTE(IDJ)
2022-03-31 11:13:06
We Will Not Be Quoting This Until Bre
Look At This Which He Is Working To
Week Of April 4th. (CBP)
Assigned To CBP (03/3
Tyler Needs A Quote To Install A Tota
Accelerometers On His (3) Fans And
Systems On Lines 8-10. Units Are Ou
Level. He Wants To Feed Them To His
Vibration Alarms.
2022-04-22 09:05:33
Met With Ryan. Said Tyler Would Still
This But He's Only Here On Tuesdays

By checking the new “Yes, Send email details to users regarding this note” option all the users associated with this activity will be notified of the latest note added to the activity.

If the activity is an RFQ, the email message will contain a link back to that RFQ detail screen where the activity can be viewed with the new note.

If the activity is on an Open Item (Job, Quote, Order, Estimate) the email message will contain a link back to the Open Item Detail page.

The email will also contain the note, the customer name in the subject line and the distribution list of emails notified.