

Prospect Note Log

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The Note Log is used to track Events that have taken place with the Prospect throughout the sales cycle. SedonaOffice automatically tracks certain changes made to a Prospect or any Opportunities associated with the Prospect, and enters records into the Note Log.

You have the ability to manually enter Notes/Events that may have taken place or will take place with the Prospect.

Changes that are automatically written to the log are listed below.

- Any change made to the Status field on the Prospect or Opportunity
- A new Opportunity is created.
- The % to close field on the Opportunity is entered or changed.
- The Primary Salesperson is changed.
- A Secondary Salesperson is entered or changed.
- An email is sent using the Email function button on the Prospect or on a Contact record.
- An appointment is scheduled using the function button on the Prospect or on a Contact record.
- A VCard is created using the function button on the Prospect or on a Contact record.

The Note Log is divided into two sections; the Upper section is a listing of all Events automatically recorded by SedonaOffice and Manual Events entered by Users. The lower section is used to enter a Manual Event for the Prospect. The data entry fields for a Manual Event are described below.

Note: If your company is using the Opportunities feature within the Sales Management module and an Opportunity for a Prospect is converted into a Customer record, any manually entered notes (events) into the Prospect Note Log will be copied over to the Sales Notes folder on the new Customer record.

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Add a New Note

To add a new Note/Event, begin by clicking the New button located at the lower right of the Note Log form.

- View Time - At the upper left corner of the data entry form is a checkbox labeled View Time. If this option is checked, a new field will be displayed to the right of the Event [date] field. If the note being entered is time sensitive, you are able to use the up/down arrows to select the time related to your Note/Event.
- Event [date] - Enter or select a date from the calendar on which the event occurred or will occur.
- Event Type - Select the appropriate Event Type code from the drop-down list. Event Types are entered and maintained in SedonaSetup.
- Notes - You may enter up to 256 characters of text into the Notes field.

Once information has been entered, click the Save function button located at the lower right of the Note Log form. The Manual Event will be displayed in the Note Log in the upper tier of the form.

