# Image result for liverpool john moores university logoProcess Document

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**CRM Activities: Adding Notes**

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**Adding Notes to a case in CRM**

Notes are held securely against a case.

1. In order to record a **Note** you must first ensure you are in a **Case** and not a Contact record. Check you are in a case by looking for the ‘chevrons’ which will appear along the top of the screen, as shown below.

If notes are left against a Contact they may not be held securely.



1. Click on **Notes** in the centre of the screen
2. Type the note in the space provided and click on the ‘**Done’** button
3. Your note will then be saved.

