

How Do I Keep Detailed Contact Notes?

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Writing Notes On Your Contact Records

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You'll want to keep detailed notes about your interactions with customers, suppliers, vendors, and other additional contacts. Sometimes taking a quick note can be the difference between dropping the ball on a customer order, or wowing them with your superior customer service. To jot down a memo about one of your Contacts, navigate to Contacts, then choose your Contact record, and select Notes. Click the New Note button to start writing a note for this Contact.

The screenshot displays the Farmbrite web application interface. At the top, there is a search bar and user account information. The left sidebar contains a navigation menu with 'Contacts' selected. The main content area is titled 'Greg Wallace' and features a 'New Note' button, a search field for notes, and a list of two notes. Each note includes a date, a brief description of the interaction, and tags for categorization. The first note is dated 'Aug. 03, 2021 (8 months ago)' and describes a meeting with Greg at Farmers Market on 6/15, discussing a wholesale purchase of Raspberry Hot Sauce. The second note is also dated 'Aug. 03, 2021 (8 months ago)' and describes a meeting with Greg today regarding a bulk purchase of hot sauces and shared social media posts. Both notes are categorized as 'Meeting' and 'hot sauce'.

You can write the body of your note in the main Notes field on the left. To the right, you'll see today's date preloaded, and the opportunity to categorize this note. Keywords can also be added, to easily search through your notes later to find ones tagged with this keyword - even if the keyword does not appear in the text of the note. You can then optionally assign this note as a task to one of your existing Farmbrite users, and add it to your Farmbrite calendar. You also have the opportunity to associate an image with this note, or tag it with a geographic location - use these to add additional context to this note to help you remember more details when referencing it later. When you're done adding information to the note, click Save Note in the bottom right.

There are other options you'll have when viewing already written contact notes as well.

- If you have a lot of notes for this contact, you may find it useful to use the Search field to look for certain keywords.
- You might also find it helpful to apply filters to the contact note to find only those written within a given date range, assigned to a specific category, or written by a particular Farmbrite user.
- You can print a copy of all your notes - perhaps filtering them first to not waste paper - by using the Print button.
- You might edit or delete your notes by clicking the More Options (3 dots) icon to the right of your

note. Be careful - if you delete a note, the action is permanent, and it cannot be recovered.

Still have questions about your contacts? Be sure to check out the other articles in this Knowledge Base category, and feel free to [reach out to us](#) if you didn't find your answer.
