

simplifi<sup>®</sup>

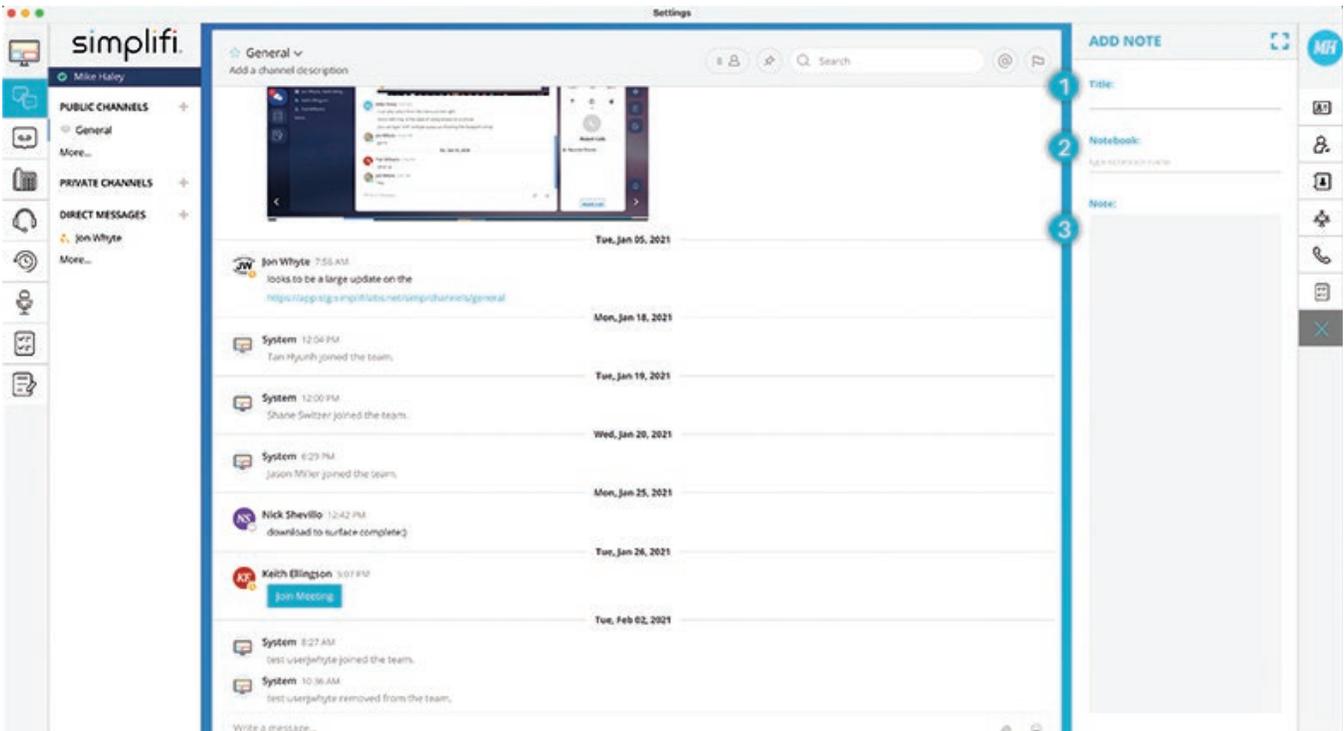
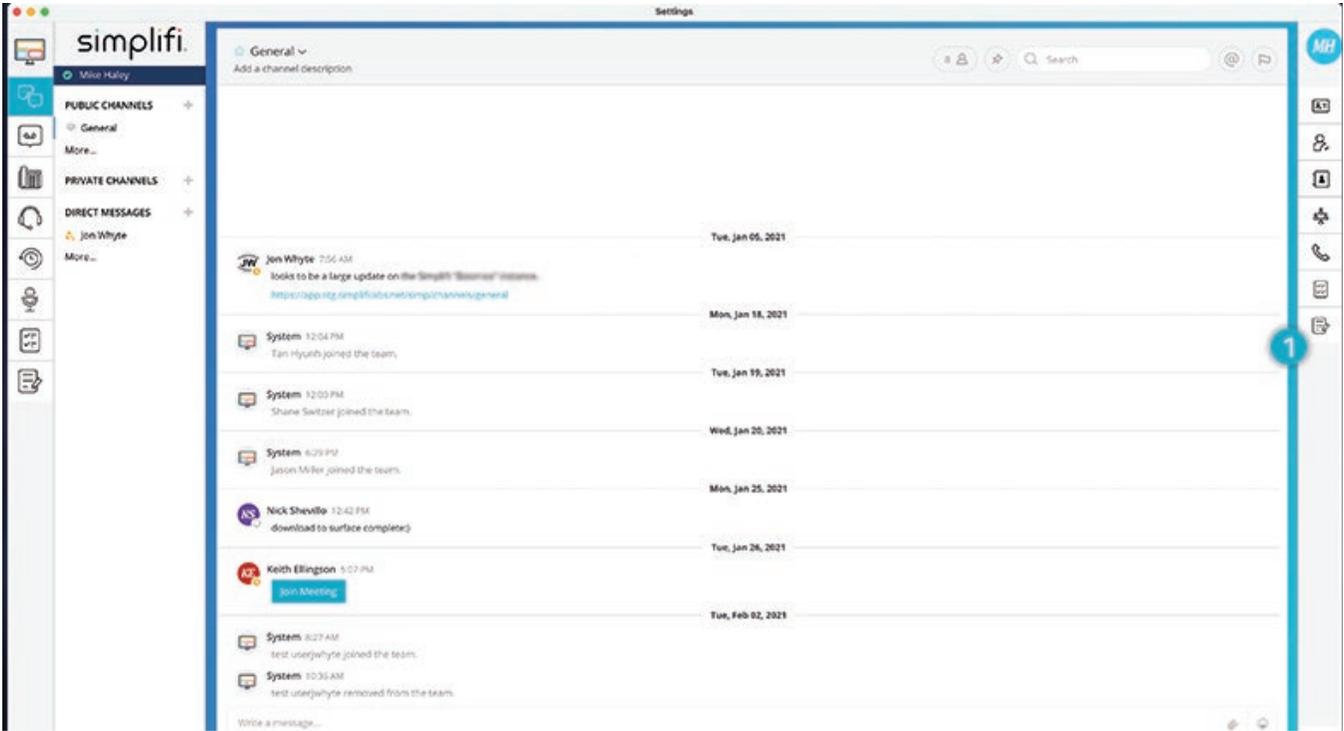


# Simplifi Contact

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Station: Notes

QUICK ADD NOTE

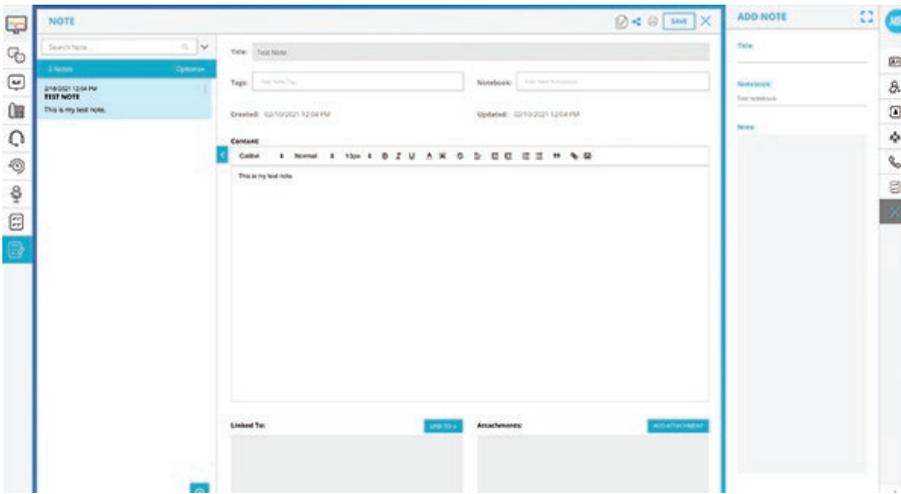


1. Click on the Notes icon.
2. Give your note a title.
3. Assign your note to a designated Notebook.
4. Use this space to compose the body of your note.

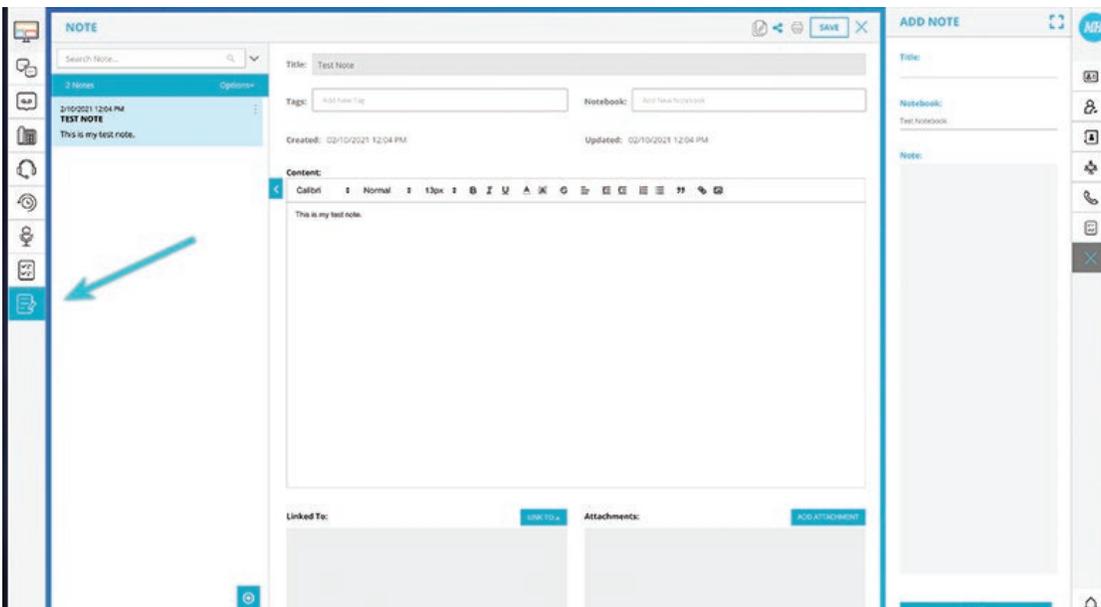
Clicking SAVE creates the note. If a new Notebook name is specified, the note created can be found in the newly created notebook.

## EDITOR

Real-Time Collaboration



Other users can edit your notes at the same time as you and their work is displayed in real-time. Fonts/Styles/Images/etc



Simplifi Contact Notes can be edited via the Notes widget on the bottom of the left column.

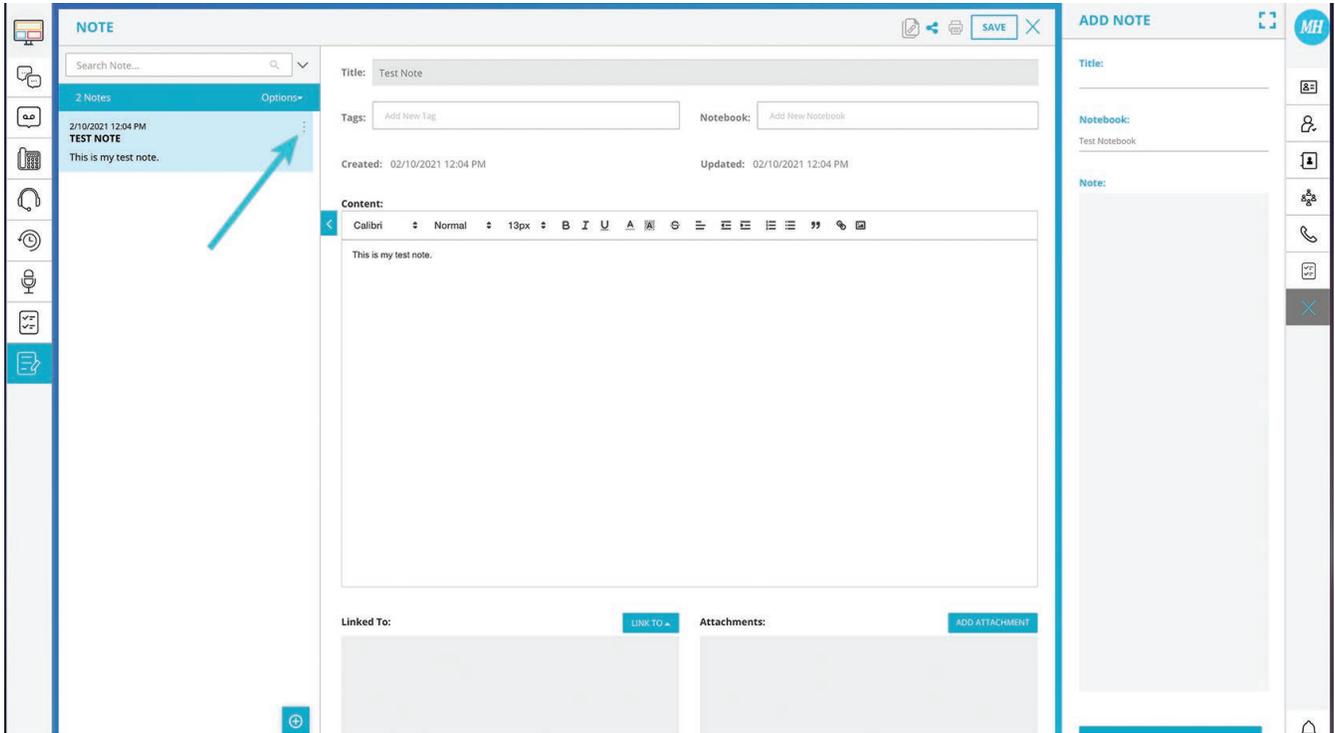
The screenshot displays a note editing interface. On the left, there is a sidebar with a 'Notes' menu. The main area contains the following fields:

- Title:** Test Note
- Tags:** Add New Tag
- Notebook:** Add New Notebook
- Created:** 02/10/2021 12:04 PM
- Updated:** 02/10/2021 12:04 PM
- Content:** (Empty text area)

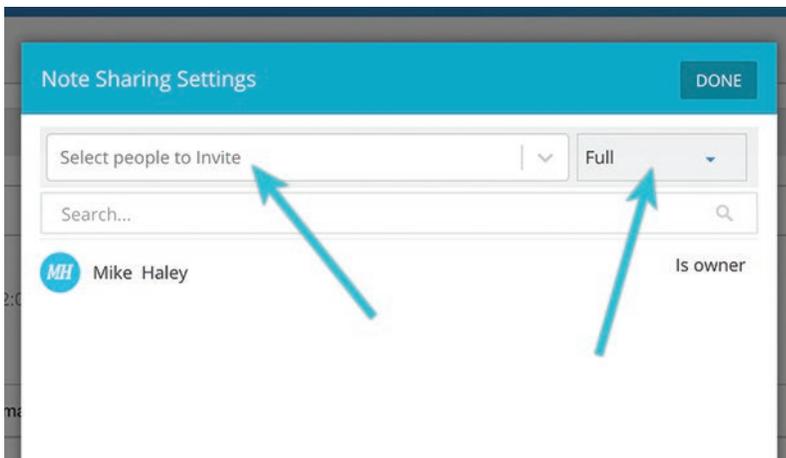
Editing features include (Left to Right):

- Font
- Paragraph Format
- Font size
- Bold
- Italic
- Underline
- Text Color
- Background Color
- Strike-through
- Text Align
- Increase/Decrease Indent
- Insert/Remove Numbered List
- Insert/Remove Bulleted List
- Block Quotation
- Code Block
- Add Link
- Add image

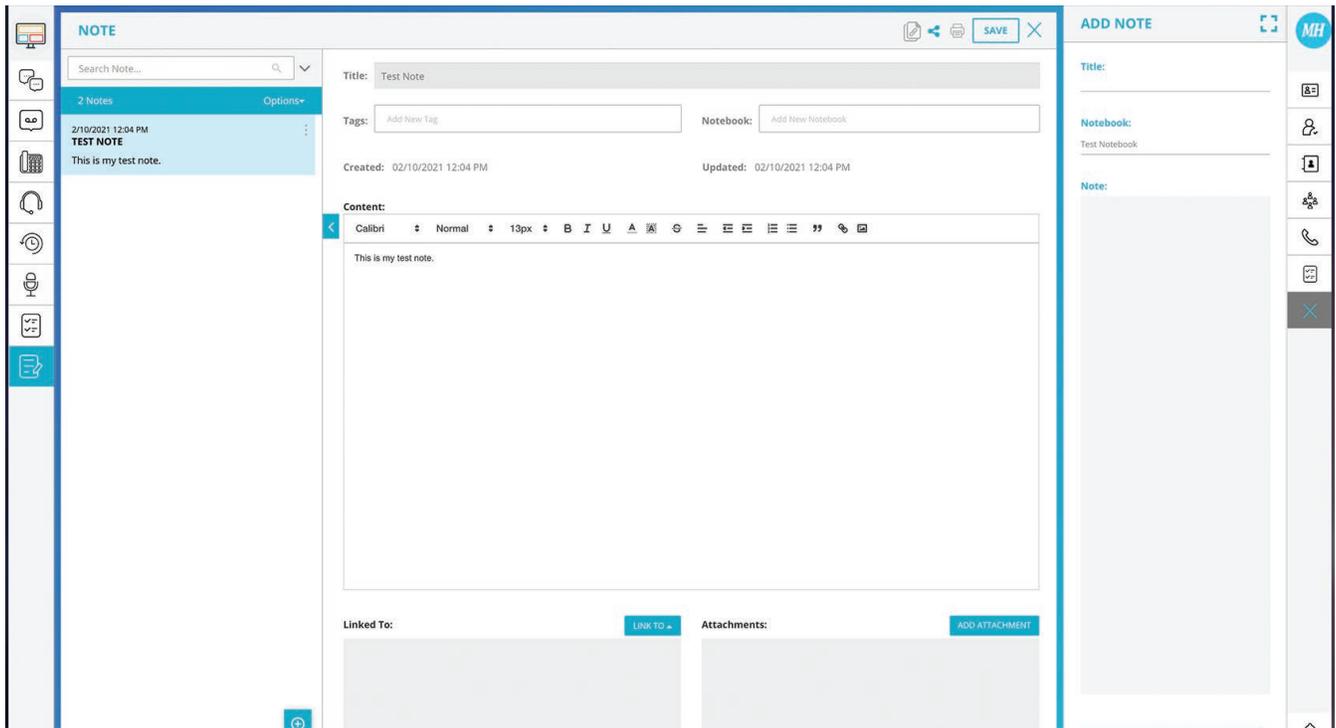
SHARING AND PERMISSIONS



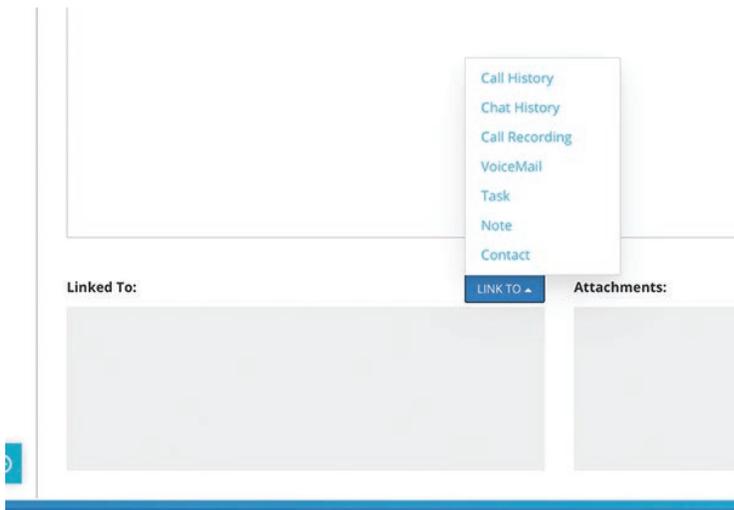
To share a note for real-time collaboration, locate the note on the left-hand side of the screen and click the 3 dots next to the entry, then select Share With.



1. Select the permission you would like to give to the user you will share the note with.
2. Select the user to grant access to. When selected, the add button will display so you can add the user. You can set their level of access here as well.

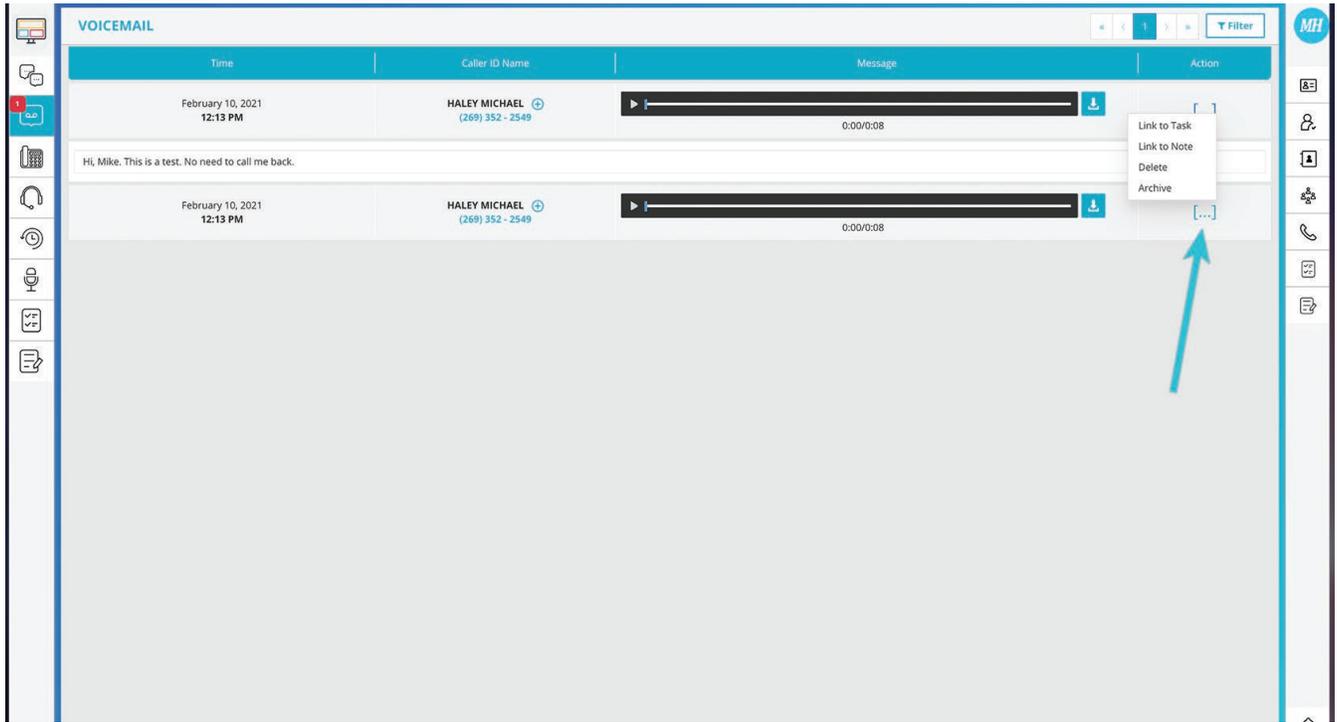


Now that the user has been selected, they will have access to the note via their own Simplifi Contact Notes widget.



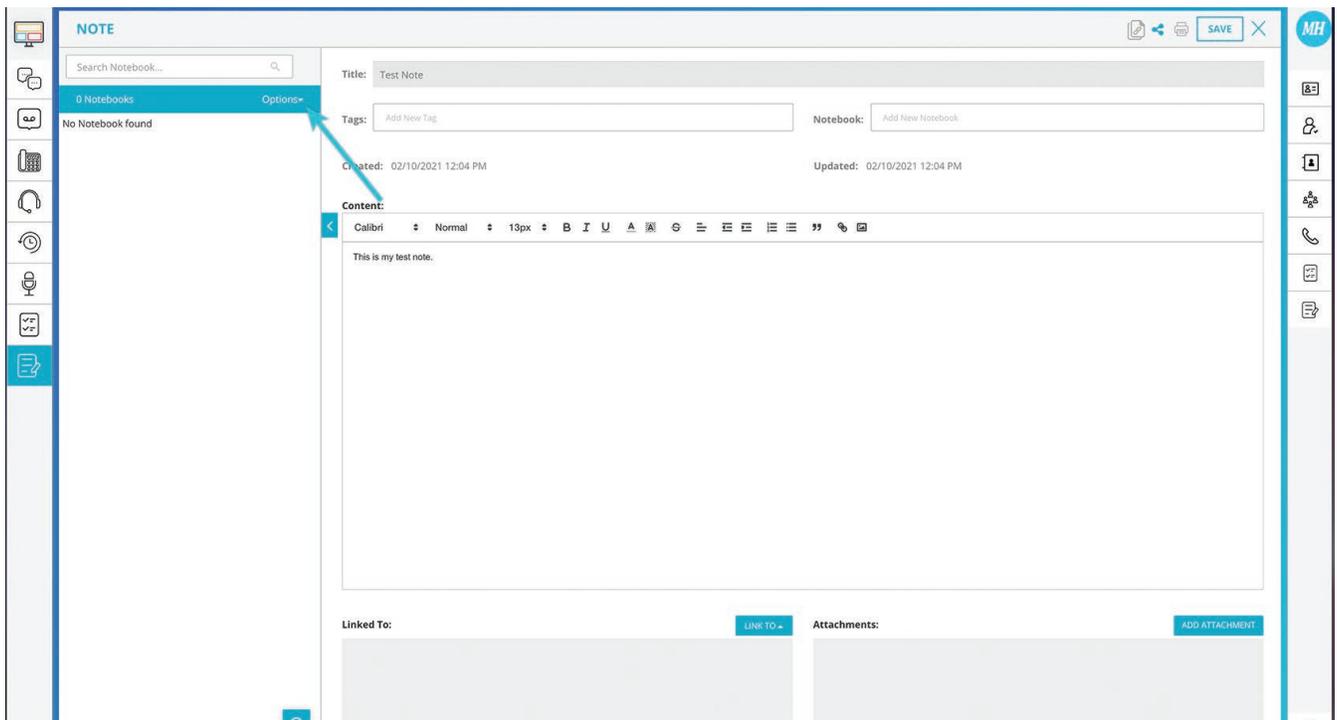
Various Items within Simplifi Contact can also be linked to individual Notes.:

- Calls within your personal Call History
- Chat Conversations
- Individual Call Recordings
- Individual Voicemails
- Individual Tasks

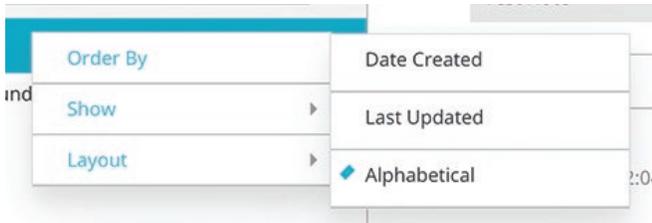


Choose the object you would like to link to the Note and select "Add To Note" (top-right of the page).

NAVIGATION AND VIEWS

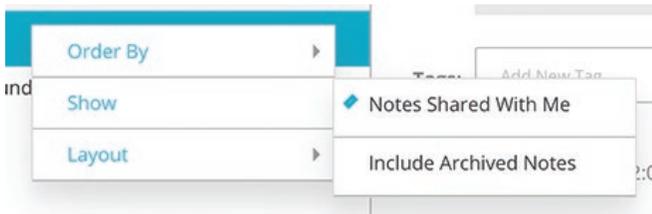


The Options section allows you to customize what note you see.



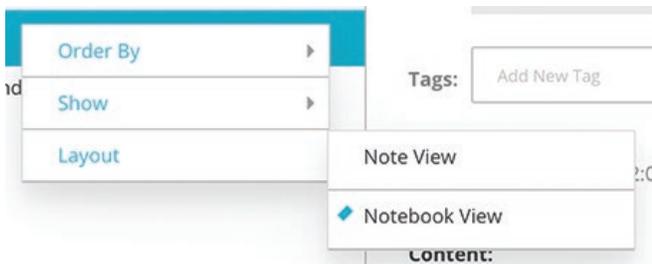
Order By

- Date Created (Newest first)
- Last Updated (Newest first)
- Alphabetical (A to Z)



Show

- Notes Shared With (displays any notes shared with you)
- Include Archived Notes (displays any notes that have been archived along with unarchived notes)



Layout

- Note View (displays all notes regardless of Notebooks associated)
- Notebook View (displays all of the notes within a selected Notebook)