Adding Notes and Touches to a Contact Record in Radius

1) Find the correct contact. I like searching by email in the Global Search Field whenever possible to make sure I'm getting the correct person.

Contacts	¥	slatkabundeva@gmail.com	9	Support 🔻	I	Setup	

Select the correct student from the list of results:

#	My intended start te	My intended start ye	I am inquiring as a	First Name	Preferred First Name	Last Name	Date of Birth
1	Fall	2018	Graduate	Jackey	Anderson		

- 2) Add the Notes and Touches Tab to your view of contact records. This take a few steps:
 - a. Click on the Related Button button

Contacts	*	Search	Q	Support 👻
			~	-
		(Rel	lated Information
tachments x	E	Payment Gateway Transaction Log 🗙	E Tool	Score Values X
ntact Owner: A	ndre	a Martin		

b. Select Notes and Touches from the list to add that tab



3) Click on the Notes and Touches tab, and then click the "New Notes/Touches" button

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Edit Clone	Find & Merge Duplicates	
Contact	oplication 🗙 🧾 Notes/Touches 🗙 🔒 Conta	ct I
	S 🛞 New Notes/Touches	
View As: List	▼	
Add/Remove Colum	ns Sorting order Drag your columns here	to s
# 🔲 Title	,	lot

This view has been loaded and contains no data.

- 4) Once you're in the form to create a new Note or Touch, please follow these instructions.
 - a. Funnel Status: Use EITHER **Inquiry** or **Application Incomplete**. If you haven't been told explicitly that you're contacting prospective students with incomplete applications, please use Inquiry
 - b. Note/Type Method: leave blank
 - c. Note Venue: Choose what's accurate: Email, Mail, In Person
 - d. Notes/Touch Content: Keep it brief but informative, and "sign" your initials and date
 - e. Title: use the same title each time from this list:
 - i. MES Ambassador Email
 - ii. MES Ambassador Phone Call
 - iii. MES Ambassador Student Meeting
 - f. Notes/Touches Owner: This should default to you
 - g. Related to: This should default to the Contact you selected

NOTES/TOUCHES							
🝙 Save 📄 😭 Save & New 🕒 Ca	ancel						* Required Field
Note Information							
* Funnel Status: Inquiry		~	* Title:	MES Ambassado	or Email		
Note Type/Method:		~	* Notes/Touches Owner:	Andrea Martin			9
Note - Venue: Email		~	* Related To:	Contact	~	jackey Anderson	P 🔾
Notes/Touches Content: Ambassar applicatio	ador emailed to offer assistance in answering questions about program and on process <u>ASM</u> 10/27/17						

5) Make sure to save when you're done. Congratulations! You know how to add Notes/Touches to a contact record!