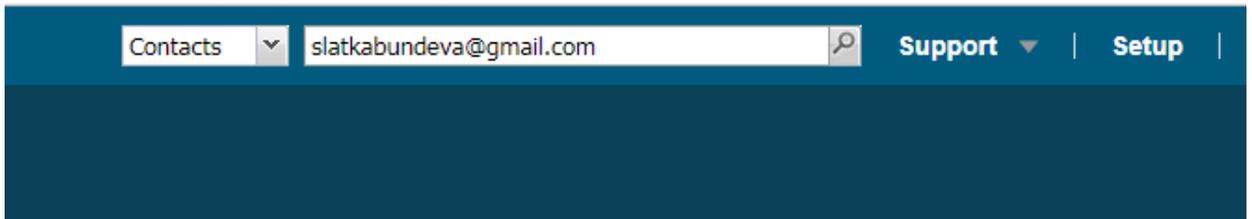


Adding Notes and Touches to a Contact Record in Radius

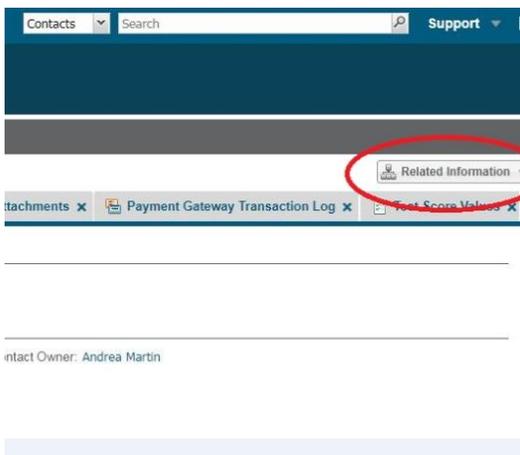
- 1) Find the correct contact. I like searching by email in the Global Search Field whenever possible to make sure I'm getting the correct person.



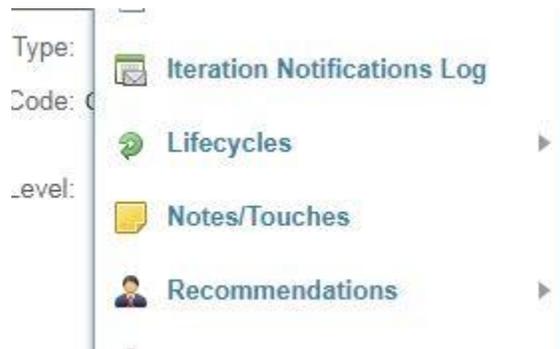
Select the correct student from the list of results:

#	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	

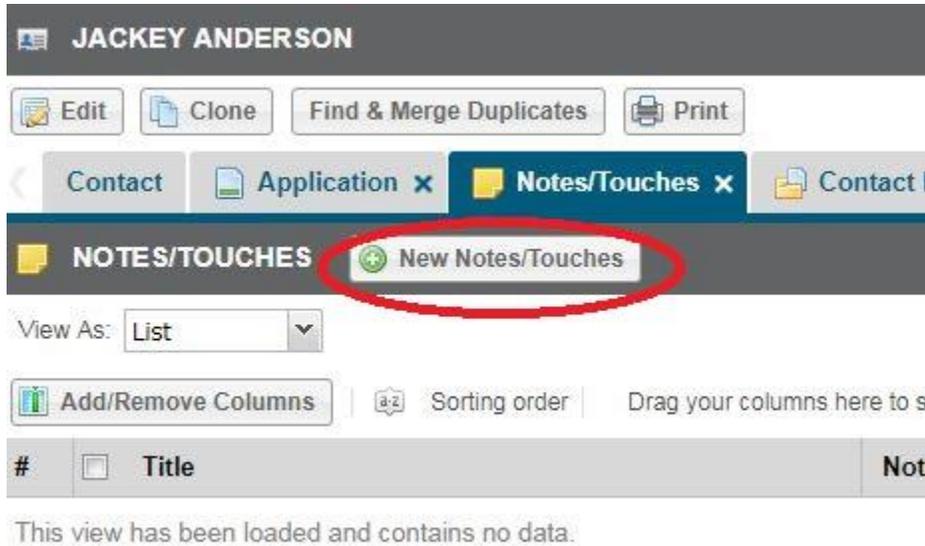
- 2) Add the Notes and Touches Tab to your view of contact records. This take a few steps:
 - a. Click on the Related Button button



- 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



- 4) Once you’re in the form to create a new Note or Touch, please follow these instructions.
- 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
 - Note/Type Method: leave blank
 - Note – Venue: Choose what’s accurate: Email, Mail, In Person
 - Notes/Touch Content: Keep it brief but informative, and “sign” your initials and date
 - Title: use the same title each time from this list:
 - MES Ambassador Email
 - MES Ambassador Phone Call
 - MES Ambassador Student Meeting
 - Notes/Touches Owner: This should default to you
 - Related to: This should default to the Contact you selected

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