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| TULCO OILS | # CRM – Contact Notes<br>SOP 147<br>Revision E, 4/26/22<br>Approved by: Venezia Peña |

**PURPOSE:**

CRM (Customer Relationship Management) can capture a variety of notes when contacting customers (i.e. Sales, Accounts Payables, etc.).

Prior to entering contact notes, the contact company must be set up (see SOP *146_Contact Entry and Credit Approval*).

**PROCESS:**

**Create Note for existing Bill-To Customer:**

1. Navigate to CRM > CRM Reporting
2. Enter appropriate information in the pre-filter (e.g., Bill-To Company, etc.).
3. Click View. The "View Contacts" window will pop-up.
4. Highlight the company and click Modify. The "Edit Contact" window will pop-up.

   **Note:** To Add a new Contact, click the Add [+ plus sign] button. The "Edit Contact People" window will pop-up. Only a Last Name is required to save the record; this allows users to create Contacts with little known information then continue to add/update information as more details become available (see SOP *146_Contact Entry and Credit Approval*).

5. In the Contact Notes box at the bottom of the page, click the Add [+ plus sign] button. The "Edit Contact Note" window will pop-up. The Date, Time, and User will be pre-populated.
   a. In the Contact Person field, select the appropriate contact by clicking on the magnifying glass to see options.
   b. In the CRM Note Type field, select the appropriate note type by clicking on the magnifying glass to see options.
   c. In the Note field, begin typing the note for this contact. The "Note" box will pop-up. Continue typing in the full note and click Save and close window.

      **Note:** Some "Predefined Notes"[templates] will be provided as they become developed and added.

6. Click Save on the "Edit Contact Note" box and close window.
7. The note now shows as a Record in the "Contact Notes" box.
8. Click Save in the header to save information entry.

REVISIONS

| Rev | Date | Change |
|---|---|---|
| I/R | 01/23/18 | New |
| A | 3/21/18 | Formatting |
| B | 10/30/18 | Divide steps into different processes |
| C | 10/31/18 | Reference CRM Contact Entry |
| D | 10/30/20 | Change to v16 Menu names |
| E | 4/26/22 | Updated reference to SOP 146 (name change) and updated step 2. |