

CCH iFirm Learning Portal

Add a Note or Reminder to Contact Record

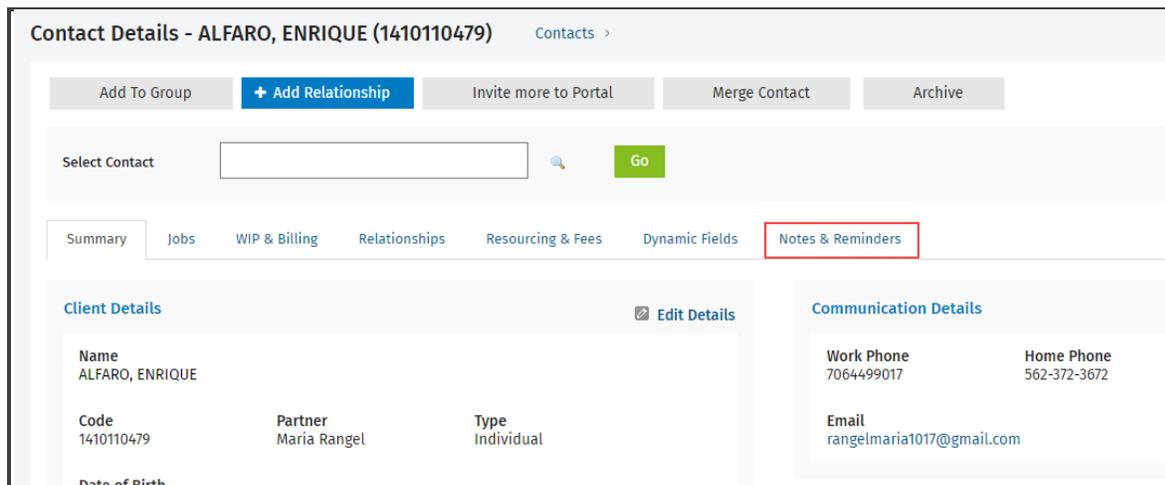
Notes and reminders relating to a client can be created in Contacts or from the Client Notes panel of the Job Details screen if you are using Practice Manager. Regardless of how where the note is added, it is always accessible for the Notes & Reminders tab of the Contact Details page.

In order for a user to be able to Client Notes, they must have the security roles: *Contacts – View, Add and Edit Contacts*.

Add notes and reminders

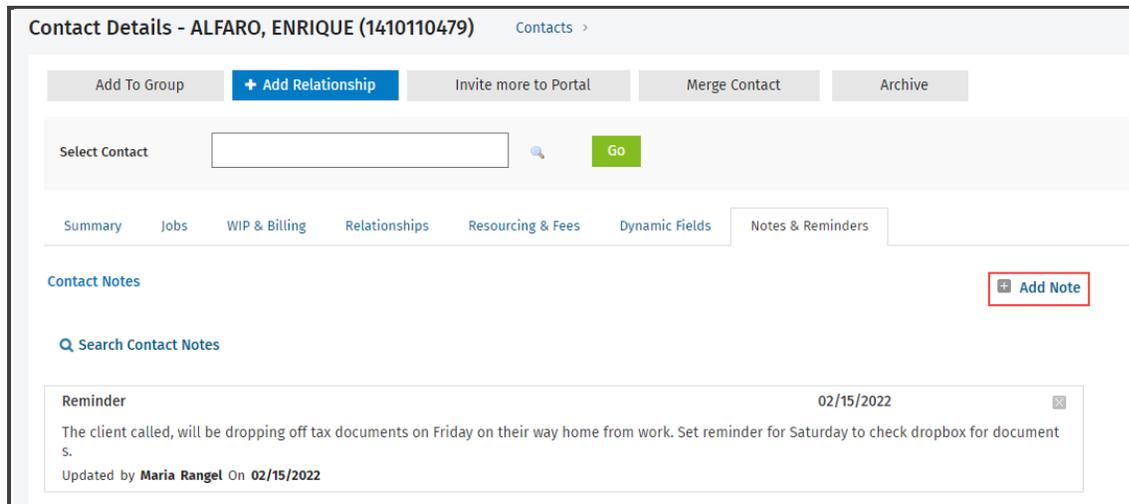
To add a client, note:

1. From the Contacts navigation icon, select **All Contacts**. From the Contacts page, select the contact you want to add a note to.
2. From the Client Details page, click the **Notes & Reminders** tab.

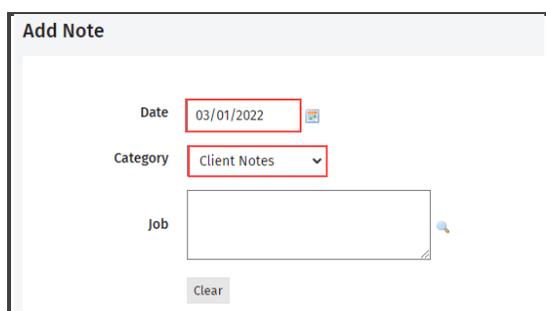


The screenshot displays the 'Contact Details' page for 'ALFARO, ENRIQUE (1410110479)'. The page features a navigation bar with tabs: Summary, Jobs, WIP & Billing, Relationships, Resourcing & Fees, Dynamic Fields, and Notes & Reminders. The 'Notes & Reminders' tab is highlighted with a red box. Below the navigation bar, there are sections for 'Client Details' and 'Communication Details'. The 'Client Details' section includes fields for Name (ALFARO, ENRIQUE), Code (1410110479), Partner (Maria Rangel), and Type (Individual). The 'Communication Details' section includes Work Phone (7064499017), Home Phone (562-372-3672), and Email (rangemaria1017@gmail.com).

3. If there are existing client notes, you will see them listed here. To add a new note, click **Add Note**.



4. CCH iFirm displays the Add Note dialog box. Select the date and note category. The date will normally default to your computer date.



- i** Note that you can customize the list of note categories. For additional information, review the corresponding help file on [Edit the Note Categories](#).
5. If this note is specific to a job, use the search icon to locate the job. Type your note in the provided Note section. If you do not need to add a reminder, click **Save**. For this lesson, click **Set Reminder**.

Add Note

Job

Clear

Note

The customer dropped off paperwork. We have all the information we need to complete the job.

Email Reminder:

6. Click the calendar icon for to select the reminder date and then select who needs to receive the email reminder.

Set Email Reminder

Remind me on:

Send an email reminder to:

General User
 Georgia Smith
 Maria Rangel
 Maria Rangel
 Megan Caldwell

Mail to other (CC):

7. The following items are optional:

- Use the CC and BCC to add any additional email addresses of individuals that also need to receive the reminder that may not be users in CCH iFirm.
- If this is a recurring reminder, use the Repeat Reminder options to setup the frequency.

8. Once your preferences have been set, click **OK**.

Set Email Reminder

Mail to other (CC):

Mail to other (BCC):

Repeat Reminder:

+year(s)

+month(s) or specific month only

+days(s) or specific month only

End By:  

Ok Cancel

9. CCH iFirm returns to the Edit Note page. At the bottom of the screen, you see the dates for which your reminder is set. From here, you have the option to Edit or Delete the reminder. To save the note and the reminder, click **Save**.

Add Note

Job

Clear

Note

The customer dropped off paperwork. We have all the information we need to complete the job.

Email Reminder:
Reminder to be sent on 03/04/2022

Edit Reminder Delete Reminder

Save Cancel

10. CCH iFirm returns to the Notes & Reminders tab, where we see the note, along with when and who last updated that note.

Summary Jobs WIP & Billing Relationships Resourcing & Fees Dynamic Fields **Notes & Reminders**

Contact Notes + Add Note

Search Contact Notes

Reminder	02/15/2022	✕
The client called, will be dropping off tax documents on Friday on their way home from work. Set reminder for Saturday to check dropbox for documents.		
Updated by Maria Rangel On 02/15/2022		
Client Notes	03/01/2022	✕
The customer dropped off paperwork. We have all the information we need to complete the job.		
Updated by Maria Rangel On 03/01/2022		