

The Appending SmartPad[™] Notes feature makes it possible to add content to existing SmartPad[™] notes without modifying the content or date of the original note.

Appending a Note to SmartPad[™] Records

- Open a contact record.
- Open the contact SmartPad.
- Select a record in the SmartPad.
- Click the Append to Current Note button.



Figure 1: The Append to Current Note button.

• Enter the note to be appended.

🕘 SmartOffice Web Page Dialog 🛛 🛛 🔀												
New SmartPad Entry - Joseph M. Ackerman												
Арр	Appended SmartPad Entries Spreadsheet											
	Merno Date	Note Type	Keywords	Notes								
	07/17/2006	Activity		Appointment was scheduled for 07/21/2006 at 03:00PM (Active) - Talked to Joe - he's very interested in discussing Long Term Care options. Scheduled an appointment for Friday, July 21.								
Not	es	📕 🕹 🖻 🛍 🗐	H>A A \$ B I	u T. 4a 트 콜 콜 듣 듣 倖 倖 @ — 🆄 💖								
	Memo Date/Tim	e 07/21/2006	07:06AM	By Daniel Odell								
	Keyword	ls										
	Linked With Contact											
	Private- Select multiple users for limited access Send this note as an Alert to other User(s)											
			OK Link	Cancel								
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Figure 2: The New SmartPad Entry screen with Appended SmartPad Entries section.



• Click OK.

Appended notes can be viewed or hidden using tree control in the SmartPad.

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SmartPad - Joseph M. Ackerman												
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	Merno Date&	Туре	Open Link	Notes	Keywords	Created By						
	07/17/2006	Activity	<u>.</u>	Appointment was scheduled for 07/21/2006 at 03:00PM (Active) - Taiked to Joe - he's very interested in discussing Long Term Care options. Scheduled an appointment for Friday, July 21.		Daniel Odell	< III					
	07/17/2006	Activity	a	Call was scheduled for 07/17/2006 (Done) - Follow-up on LTC Prospecting Letter - set up an appointment		Daniel Odell						
	07/17/2006	Notes		Talked to Joe - he's very interested in discussing Long Term Care options. Scheduled an appointment for Friday, July 21.		Daniel Odell						
	07/11/2006	Letter	1	Title: LTC Approach (with Life Benefit)		Daniel Odell						
	03/28/2006	Change		Previous Business Fax : 001 213 577-0337	Phone Change	Daniel Odell						
	01/11/2006	Inv. Trans	₿X	Type : Buy Share: 600.000000 Name: BioTech Manufacturing Price: 25.000000 Value: 15000.00	Investment - Transaction	Daniel Odell						
	01/11/2006	Investment	άĝ	Type: Stocks Name: BioTech Manufacturing	American Funds Account	Daniel Odell						
Ţ	01/11/2006	Inv. Trans	BĽ	Type : Buy	Investment -	Daniel Odell	~					
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re	vious Page 🛛 🔽	Next Page	Total Records: 51+ (Click	here to list all)								
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Figure 3: SmartPad Entry with appended note.

