# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)Process Document

**CRM – Careers**

Liverpool John Moores University

**CRM Activities: Adding Notes to a Case**

Version 0.1, November 2020

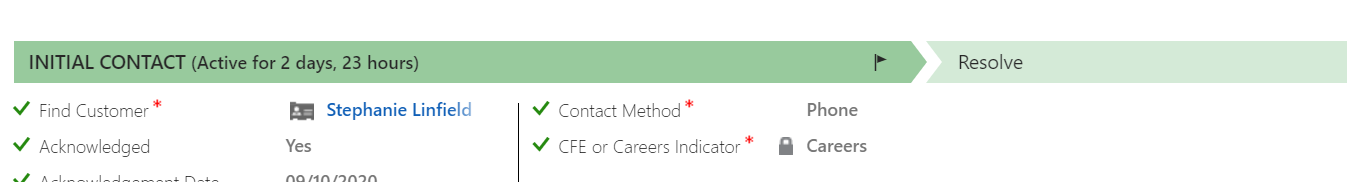
Author: SL Business Support Team

**Adding Notes to a case in CRM**

Notes are held securely against a case.

1. In order to record a **Note** you must first ensure you are in a **Case** and not a Contact record. Check you are in a case by looking for the ‘chevrons’ which will appear along the top of the screen, as shown below.

If notes are left against a Contact they may not be held securely.



1. Click on **Notes** in the centre of the screen
2. Type the note in the space provided and click on the ‘**Done’** button
3. Please be mindful that notes are provided under Student Access Requests (FOI) so please keep notes professional.
4. Your note will then be saved.

