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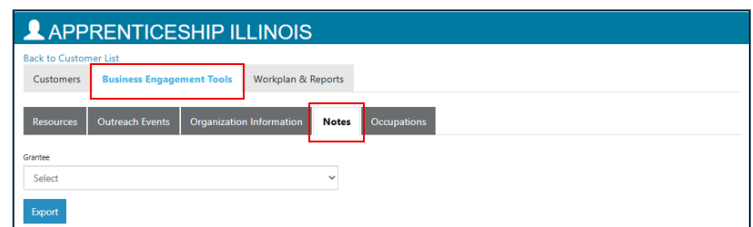
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Purpose

The **Notes** tab in the Business Engagement Tools displays all the notes that have been added to **Outreach Events** and **Organization Information**. There are several places in the system to add notes on Outreach Events and Organization Information.

Accessing Business Engagement Tools Notes

1. Select **Business Engagement Tools**
2. Select **Notes**

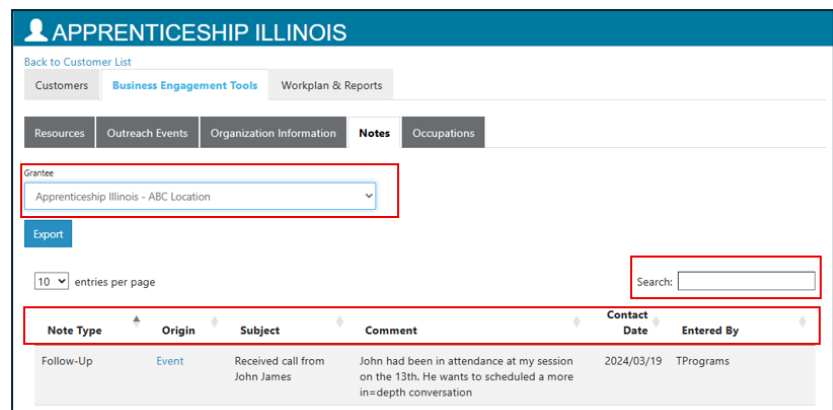


Notes

The Notes tab in the Business Engagement Tools displays all the notes that have been added to **Outreach Events** and **Organization Information**.

The Notes can be **filtered** by:

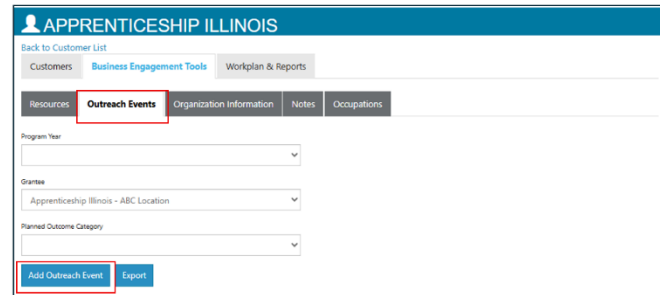
- Grantee
- Note Type
- Origin
- Subject
- Comment
- Content Date
- Entered By
- Arrows next to each column header
- A case note can be found by using the **Search** box.



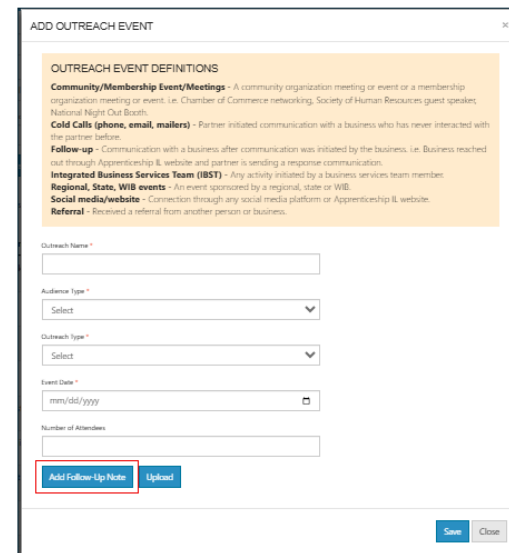


Outreach Event Notes

1. Outreach events are added by clicking **Add Outreach Event** on the Outreach Events tab.



2. When an Outreach Event is added, a case note can be created by clicking **Add Follow-Up Note**. After the follow-up note is saved, it is displayed on the Notes tab in the Business Engagement Tools Notes.



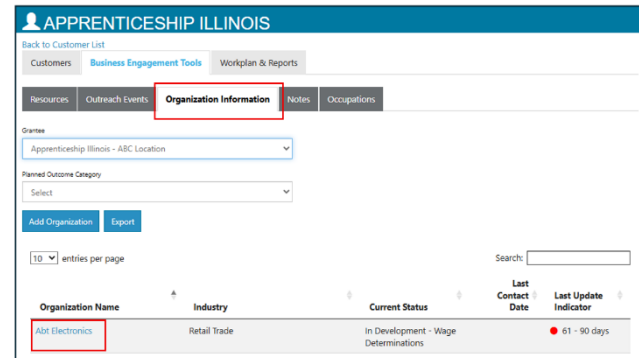


Organization Information Notes

1. To add notes to an Organization, click on an **Organization Name** on the Organization Information tab.

There are two sections on an Organization where notes can be entered:

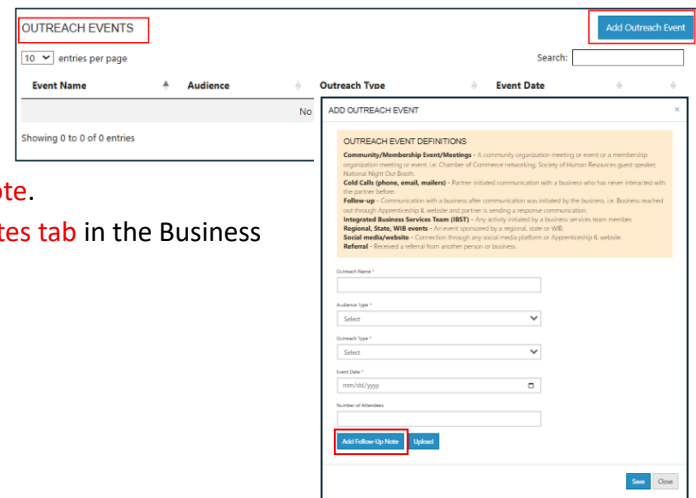
- Outreach Events
- Organization Notes



Outreach Events

At the bottom of an organization, there is an **Outreach Events** section.

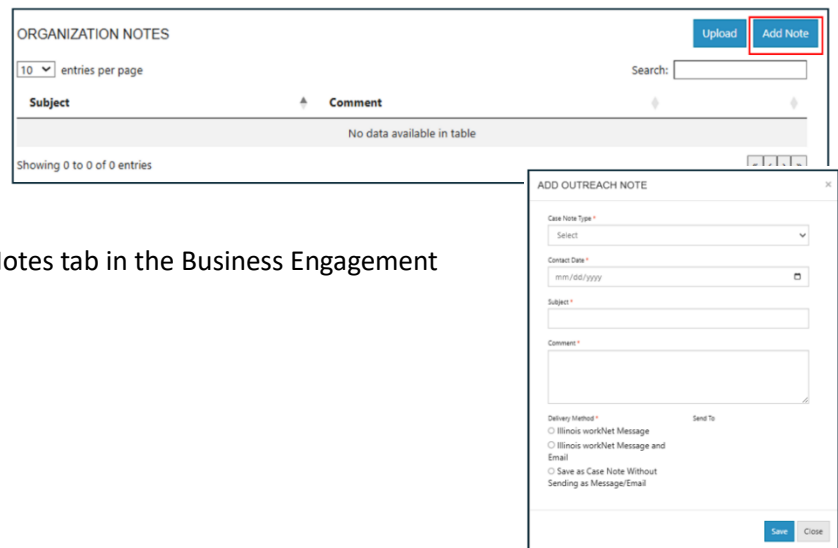
1. Click **Add Outreach Event**
2. When an Outreach Event is added, click **Add Follow-Up Note**.
3. After the follow-up note is saved, it is **displayed on the Notes tab** in the Business Engagement Tools.



Organization Notes

At the bottom of an organization, there is an **Organization Notes** section.

1. Click **Add Note**
2. When **Add Note** is selected, it opens an Add Outreach Event modal.
3. After the note is saved, it is displayed on the Notes tab in the Business Engagement Tools



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