# simplifi

# Simplifi Contact Station: Notes

SIMPLIFI CONTACT USER GUIDE

#### QUICK ADD NOTE

		Settings		
<b>B</b>	simplifi.	General → Add a channel Gescription	(*8) (\$) (Q. Seeth (@) (\$)	
8	PUBLIC CHANNELS +			Ø
•	© General			8
Opp	More_			8
u	PRIVATE CHANNELS +			
0	tine in Whyte	Tue, Jan 05, 2021		\$
0	More_	Jon Whyte 200 AM		S
Ş		https://lipp.itg.smplifiaburet/simple/savetsgeneral		
27		System 12047M		Ð
		Tan Hyunh joined the team. Tue, jan 19, 2021		Y.
-9		System 12/03 PM Shune Switzer joined the team.		
		Wood, jan 20, 2021		
		Jason Wiler joined the team.		
		Nick Sheville 1242194		
		download to surface completer) Twe, Jan 28, 2021		
		Reich Ellingson 5 02 PM		
		Join Meeting Tue, Feb 92, 2021		
		System 827 AM		
		System 1036 AM		
		ters usegonge removed from the team.		
				-
•••	1.0	Settings		
	simpiiti.	General →     Is B	Q search @ P	
95	<ul> <li>Mike Haley</li> </ul>		1 rate:	
9	General	Andreine     Andreine     andreine		<u>w</u>
0	More_	er katalan ekontor Virez	April 1000 and 1000	<i>8</i> .
	PRIVATE CHANNELS +	C	Note:	
Q	DIRECT MESSAGES +	Tue. Lan 05, 2021	3	\$
0	More_	Ion Whyte 755AM	T	6
8		tooks to be a targe update on the https://upp.stg.s.mp/thubu-net/ump/duaryschupmerail		
2		Mon, Jan 18, 2021		$\times$
2		Tan Hyunh joined the team. Tan Lan 19, 2021		
3		System 1200764		
		Shane Switzer joined the team. Wed, Jan 20, 2021		
		System (2) INA Jason Miller joined the team		
		More, June 25, 2021		
		download to surface completer;		
		Tur, Jan 24, 2021		
		Join Meeting		
		Tue, Feb 02, 2021		
		pers userpletyte joined the team.		
		test userputyte removed from the team.		
		Write a message	A Q	

#### SIMPLIFI CONTACT USER GUIDE

- 1. Click on the Notes icon.
- 2. Give your note a title.
- 3. Assign your note to a designated Notebook.
- 4. Use this space to compose the body of your note.

Clicking SAVE creates the note. If a new Notebook name is specified, the note created can be found in the newly created notebook.

#### EDITOR

Real-Time Collaboration

NOTE				<b>2 &lt; 6</b> mm ×	ADD NOTE [	: 😡
Search horse .	a v tele	Teat Note:			Tex	8
21400ET 1204 MW TEST NOTE This is my seat note.	Tags	elem sanayaan kase Me	Notebook Microsoft	54 P.0	Notabook Technologi	8
¢.	Cert	nang antar 1 Normal 1 Nov 1 10 .		<b>N B</b>	here	4
8		er in hy hod hills				8
						×
	Ę.ma	66 TE	Anadymere	ACO AT ACAMERET		

Other users can edit your notes at the same time as you and their work is displayed in real-time. Fonts/Styles/Images/etc

	NOTE			<b>⊘</b> <⊜ sw ×	ADD NOTE	MH
9	Search Note	Title Test Note			Totle:	
	2 Notes Options-	Tags: Add tone Tag	Notebook:		Notebook:	8
Ûm	TEST NOTE This is my test note.	Created: 02/10/2021 12:04 PM	Updated: 02/10/2021 12:04 PM		Test Notebook	
0	· · · · · · · · · · · · · · · · · · ·	Content			Note:	4
0		Calori I Normal I 13px I B I U A K G	<b>₽ E C E E % % G</b>			0
8		This is my test note.				
T C						×
		Linked To:	Attachments:	ADD ATTACHMENT		
	<b>O</b>				30/4	4

Simplifi Contact Notes can be edited via the Notes widget on the bottom of the left column.

simplifi.

#### SIMPLIFI CONTACT USER GUIDE

Title:	Test Note	
Tags:	Add New Tag	Notebook: Add New Notebook
Creat	ed: 02/10/2021 12:04 PM	Updated: 02/10/2021 12:04 PM
Conte	ent:	

Editing features include (Left to Right):

- Font
- Paragraph Format
- Font size
- Bold
- Italic
- Underline
- Text Color
- Background Color
- Strike-through
- Text Align
- Increase/Decrease Indent
- Insert/Remove Numbered List
- Insert/Remove Bulleted List
- Block Quotation
- Code Block
- Add Link
- Add image

SIMPLIFI CONTACT USER GUIDE

#### SHARING AND PERMISSIONS

	NOTE		🖉 < 🖶 🗙	ADD NOTE	MH
	Search Note Q	Title: Test Note		Title:	
9	2 Notes Options+	Tags: Add New Tag	Notebook: Add New Notebook	Notebook:	Q
	TEST NOTE This is my test note.			Test Notebook	<u>د</u> ر. ا
		Created: 02/10/2021 12:04 PM	updated: 02/10/2021 12:04 PM	Note:	2 8 <sup>8</sup> 8
6		Content: Calibri + Normal + 13px + B I U A A S			e.
•©)		This is my test note.			5
Ŷ					×
VF VF					
Ð					
		Linked To:	Attachments: ADD ATTACHMENT		
	$\oplus$				$\triangle$

To share a note for real-time collaboration, locate the note on the left-hand side of the screen and click the 3 dots next to the entry, then select Share With.

Select people to Invite	Full -
Search	1 a
MH Mike Haley	Is owne

- 1. Select the permission you would like to give to the user you will share the note with.
- 2. Select the user to grant access to. When selected, the add button will display so you can add the user. You can set their level of access here as well.

#### SIMPLIFI CONTACT USER GUIDE

## NOTES

<b>—</b>	NOTE			🖉 < 🖨 SAVE 🗙	ADD NOTE	MH
	Search Note Q. V	Title: Test Note			Title:	
	2 Notes Options+	Add New Yor	Ard New Matcheok		2.01.12	8=
	2/10/2021 12:04 PM TEST NOTE	Tags.	Notebook.		Test Notebook	8.
	This is my test note.	Created: 02/10/2021 12:04 PM	Updated: 02/10/2021 12:04 PM			1
Q		Content:			Note:	888
Ð		Calibri * Normal * 13px * B I U A A S				C
Ð		This is my test note.				1 T
- VIII						$\times$
		Linked To:	Attachments:	ADD ATTACHMENT		
	$\odot$					~

Now that the user has been selected, they will have access to the note via their own Simplifi Contact Notes widget.

	Chat History
	Call Recording
	Task
	Note
	Contact
Linked To:	LINK TO A Attachments:

Various Items within Simplifi Contact can also be linked to individual Notes.:

- Calls within your personal Call History
- Chat Conversations
- Individual Call Recordings
- Individual Voicemails
- Individual Tasks

# simplifi,

#### SIMPLIFI CONTACT USER GUIDE

# NOTES

<b>—</b>	VOICEMAIL			« 3 1 5 » <b>T</b> Filter
G <sup>eo</sup>	Time	Caller ID Name	Message	Action
	February 10, 2021 12:13 PM	HALEY MICHAEL (+) (269) 352 - 2549	0.00/0.08	Link to Task
	Hi, Mike. This is a test. No need to call me back.			Link to Note Delete
Q	February 10, 2021		> <u>-</u>	Archive 888
•	12:13 PM	(269) 352 - 2549	0:00/0:08	6
Ð				T
\r \r \r				Ð
				/

Choose the object you would like to link to the Note and select "Add To Note" (top-right of the page).

#### NAVIGATION AND VIEWS

æ	NOTE		🖉 < 🖶 SAVE 🗙	MH
G.	Search Notebook Q	Title: Test Note		6-1
	0 Notebooks Options+	Tany Add New Tan		6-1
9	No Notebook found			8.
		Chated: 02/10/2021 12:04 PM Updated: 02/10/2021 12:04 PM		1
Q		Content:		888
9		く Calibri キ Normal キ 13px キ B I U A 画 G 王 正 臣 臣 臣 第 % 回		S
9		This is my test note.		Y:
Ŷ				B
\ ↓ ↓				لات
₽				
		Linked To: Attachments:	ADD ATTACHMENT	
				~

simplifi.

The Options section allows you to customize what note you see.

	Order By		Date Created	
nd	Show	•	Last Updated	
	Layout	•	Alphabetical	2.0

#### Order By

- Date Created (Newest first)
- Last Updated (Newest first)
- Alphabetical (A to Z)

	Order By	•	
ł	Show		<ul> <li>Notes Shared With Me</li> </ul>
	Layout	•	Include Archived Notes

Show

- Notes Shared With (displays any notes shared with you)
- Include Archived Notes (displays any notes that have been archived along with unarchived notes)

Г	Order By	•	ſ		
nd	Show	•	Tags:	Add New Tag	
	Layout		Note View		2:0
			Notebook View		
	_		Content:		

#### Layout

- Note View (displays all notes regardless of Notebooks associated)
- Notebook View (displays all of the notes within a selected Notebook)

# simplifi,