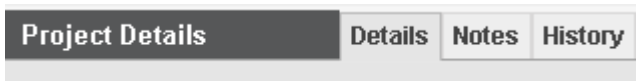


Evolution Notes Functionality

- Notes can be added by any user on your system and you also have the option to share notes between your users. If you wish to turn on note sharing please contact your Barbour ABI account manager.
- Notes can be added to projects and also to companies within the Evolution system.

Please use the following steps to add a note to a project within your system:

Open the project you wish to add a note to by clicking the project name from your list of searched projects. At the top of the project details screen you will see the following tabs :



Click on the notes tab.

You will then be taken to your notes screen with the project details showing at the top of the page and the following notes field shown at the bottom of the page :



To enter your note simply type in the notes field. Once you are finished, click

You will then notice at the top of your screen and also on the previous projects list screen that the notes icon is showing in yellow :



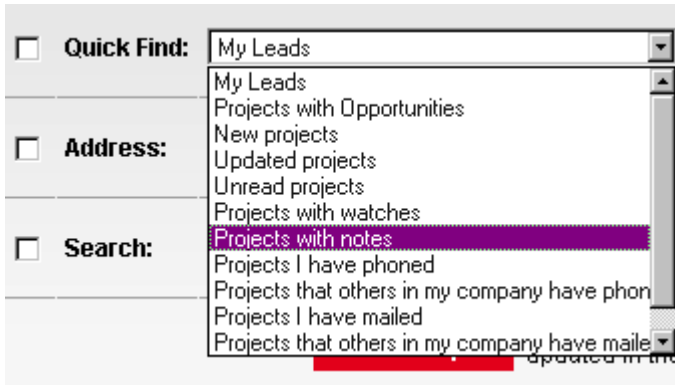
If you return to your notes screen you are then able to see when you last updated / added your notes by looking at the last saved date at the top right of your notes field :



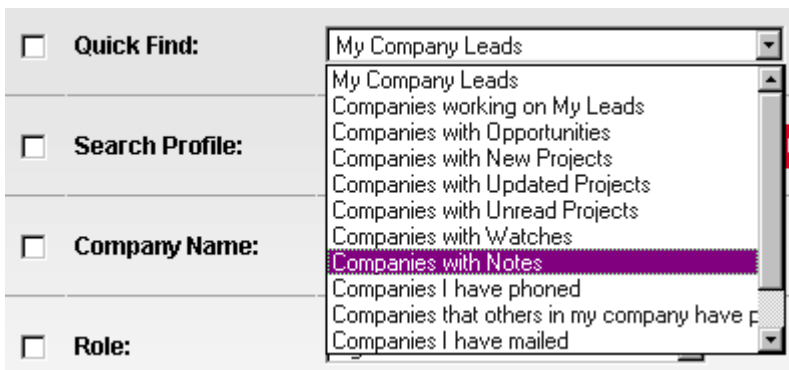
Please follow the same steps to add notes within companies and people. Your notes tab will appear as shown below :



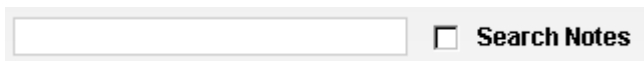
You are now able to search for projects with notes through your quick find option within Projects.



And also through your quick find option within Companies and People.



You are now able to search ANY of the text within your notes by using the Search Notes option within Projects.

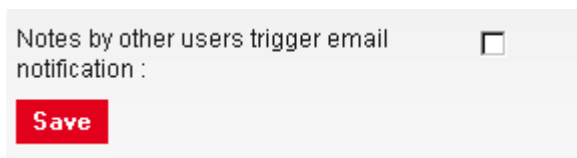


If you have enabled Shared Notes through your Barbour ABI account manager you are also able to receive an email to your registered email address when another user within your system adds a note.

- Please note in order to activate this function you must have Administrator rights.

Access the **Configuration** menu from your menu option on the left hand side of your Evolution front page.

On the next page, select the **Custom Settings** tab.



At the bottom of the following page you will see the following option :

Tick the tick box and click **Save**. In order for this to take effect, all currently logged on users will need to logout and back in again. Notes by other users will now trigger an email notification.