

Adding Service Notes in Salesforce

The screenshot displays the Salesforce interface for a record page. At the top, there are navigation buttons: '+ Follow', 'Edit', 'Change Owner', and 'Delete'. Below these, the record details are shown: Type (Small Business), Industry (Hospitality), Email, and Phone. The Owner is also listed. On the right sidebar, there are 'Related List Quick Links' for Account NAICS Codes (0), Account Services (8), Event Attendee Enrollments (1), and Event Attendance Trackings (0). The main content area has tabs for 'Case Notes', 'New Task', 'Log a Call', and 'Email'. The 'Case Notes' tab is active, showing a 'Subject' field with 'Notes' and a 'Related To' field. Below this is a 'Comments' text area and a 'Save' button highlighted in a red box.

Click on the Case Notes tab



Select Notes under Subject



Enter service notes with next steps in chronological order with most recent interaction at the top.



Sample Service Notes in Salesforce

3/28/2024 Follow-up

Emailed and left a voicemail message for Michelle to inquire if she has gathered the business financial documents.

3/5/2024 Enrollment & Assessment/Consultation:

Michelle came into the office today to complete the IBSA and provide eligibility documentation. She established her business as a makeup artist in 2018. The majority of her work is derived from working with clients in the entertainment industry. Michelle pays rent of \$2000 per month and has one part-time assistant.

Her annual gross revenue was \$1M in 2022. Her business faced a serious setback as a result of the entertainment industry strike. The decrease in revenue led her to get a loan to cover overhead expenses and payroll. She has accumulated debt and is seeking options for debt refinancing that could reduce her payments.

Provided an explanation of criteria required for refinancing. Explained documents needed to assess loan eligibility and evaluate financial performance of the business.

Next Steps:

Meet once the client gathers the required financial documents:

- Business Debt Schedule
- Business Federal Tax Returns for the past two years
- Personal Federal Tax Returns for the past two years
- Year-to-Date Business Financial Statements
- 6-month bank statements for the business
- 6-month bank statements for the personal accounts
- Credit report
- P&L and Balance Sheet for 2024

3/1/2024 Introduction & Services Overview

Met Michelle at the Small Business Summit. Confirmed Michelle's business is registered in the City of LA. Scheduled a meeting for 3/5/2024 to provide additional information on services and enroll her as client.

Requested the following documents:

- BTRC
- CA ID