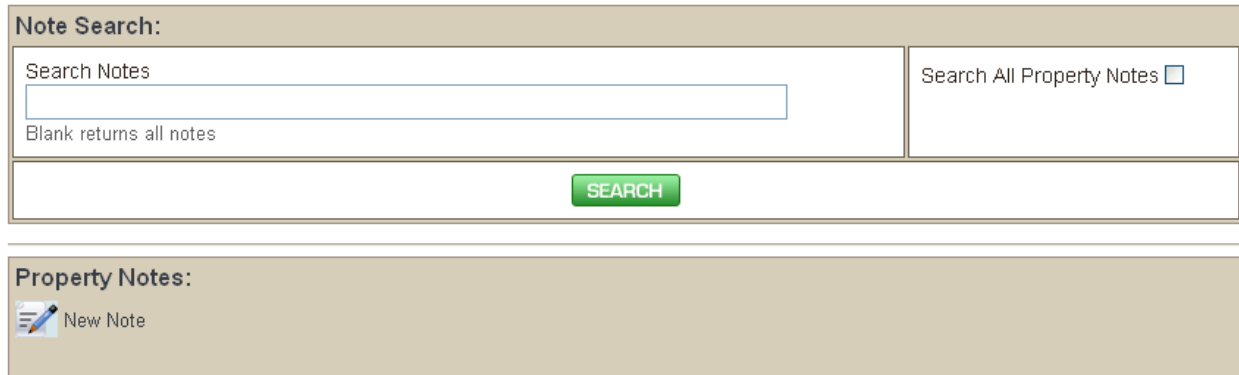


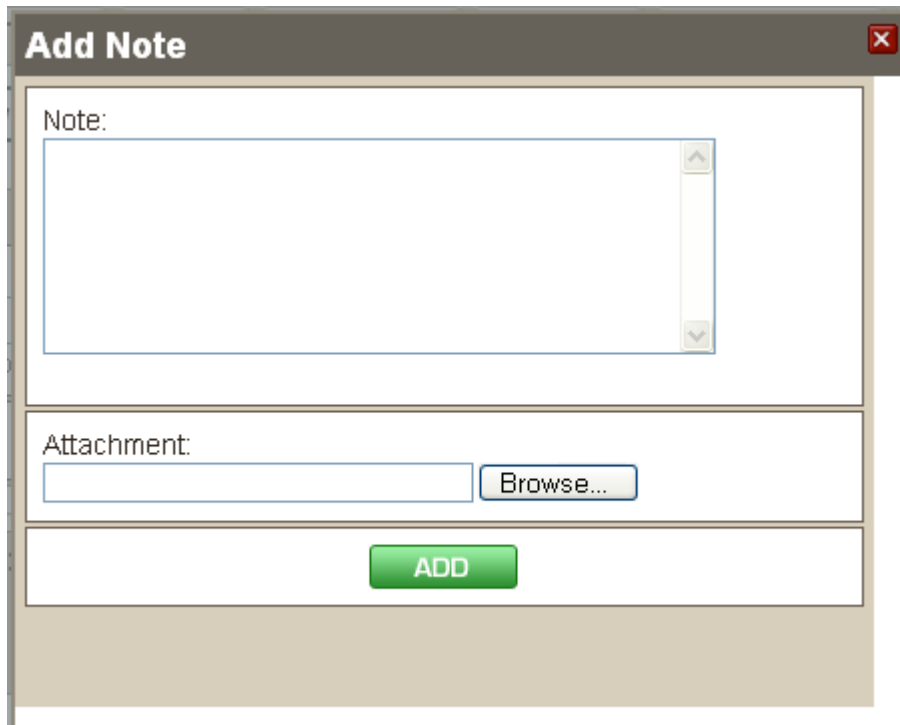
Adding Notes to a Property

When working with a property in the Broker Brain system, you can add notes regarding that property from a number of different locations on its main page. Generic property notes should be added from the Notes section. Click on Notes on the left hand side of the screen and the following screen will appear:



The screenshot shows a web interface with two main sections. The top section is titled "Note Search:" and contains a search box labeled "Search Notes" with the text "Blank returns all notes" below it. To the right of the search box is a checkbox labeled "Search All Property Notes". Below the search box is a green "SEARCH" button. The bottom section is titled "Property Notes:" and contains a "New Note" link with a pencil icon.

Click on New Note, and the following screen will appear:



The screenshot shows a dialog box titled "Add Note" with a close button (X) in the top right corner. The dialog box contains a text area labeled "Note:" for entering the note content. Below the text area is an "Attachment:" section with a text input field and a "Browse..." button. At the bottom of the dialog box is a green "ADD" button.

To add your note, simply type it in the box provided. If you have a document or a saved email that is related to the note that you are adding, click Browse to search for the file that you want. Once you have done that and typed your note, click Add and the note and attachment will be added to the property.

Notes are the containers for documents that you wish to store related to properties.



Adding Notes to a Property

Other Property Notes

Notes related to specific actions involving your property can also be added in the following locations on the property's main page:

Forms
Offers
BPO

HOA
Preservation
Eviction Info

Utilities
MMR

For instance, when an offer has been made on the property and you need to add that offer to your system, you can also add a note related to that offer. If there is specific documentation that you would like to attach, that is related to the offer, you may do that as well. This can be done for each of the above sections as you need. The process is the same as the above process for a generic note.

Searching Notes

Notes can be searched in the Properties > Notes tab. You can either search for Property only notes, or you can search for any note made in any section for this property by checking the Search All Property Notes checkbox.

Important:

- The icon to add a New Note does not appear in these sections unless they have been updated. For instance, in the Preservation tab, when you add a new repair bid, you will be able to add a note to that repair.
- You may have as many notes to each item as you like