



Manually Add a Note

Only follow these steps when a user's email domain doesn't match the email domain for the company:

1. From a Conversation, click the **Notes** tab.
2. Click the **Add Note** button.
3. Click the **Category** drop-down.
4. Choose an applicable option from the list. The default category is **General**.
5. Click in the red-bordered field and enter your note.
6. Choose whether to keep the option **Public** or click **Private** and enter and select the user(s) and/or company(ies) who will have visibility to the note.
7. Click **Save**.