

# Adding a New Journal Entry in CRM and Linking to Another Record



This guide provides a straightforward process for adding a new journal entry in a CRM system and linking it to another record, making it essential for users who want to efficiently document interactions and maintain organised records.

By following the steps outlined, users can enhance their workflow and ensure that important information is easily accessible and connected to relevant properties.

- 1
- Navigate to any record on CRM, here we use a Sales Applicant record. However, the process is the same for all Journals in CRM.

- 2
- Scroll down the left menu and Click "Journal"

Viewings

Offers

Linked Applicants

Contacts

Documents

Journal

E-Sign

Audit

Title

Forename  
sales

Website

Phone Number

Email Address  
zagg.dave@gmail.com

Salutation  
Applicant26

Applicant Address

Postcode  
Enter postcode

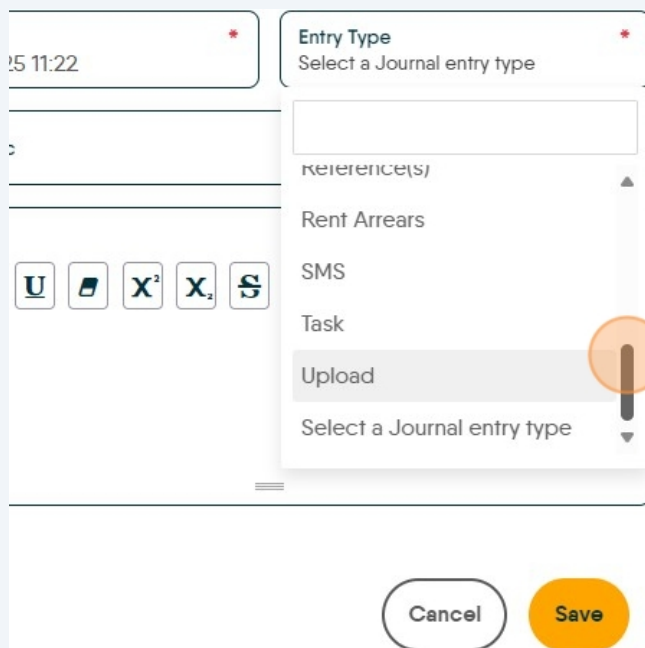
3 Click "New Journal"

The screenshot shows a software interface with a sidebar on the left containing menu items: 'icant Temp.', 'Contacted', 'Details', 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', and 'Contacts'. The main area has a header with 'Reference:' and 'Negotiator: Training Dave'. Below this, a button labeled '+ New Journal' is highlighted with an orange circle. To the right of the button are two icons: a dark square with a white equals sign and a white square with a dark equals sign. Below the button is a 'Sort Journal' dropdown menu. Further down are 'Start' and 'End' date fields with values '13/10/2024' and '13/01/2025' respectively, and a 'Search' input field. On the right side, there is a profile card for 'TD Training Dave' with a timestamp '13/01/2025 10:35:00' and a note 'Called to chase purchaser re prop'.

4 Click "Select a Journal entry type"

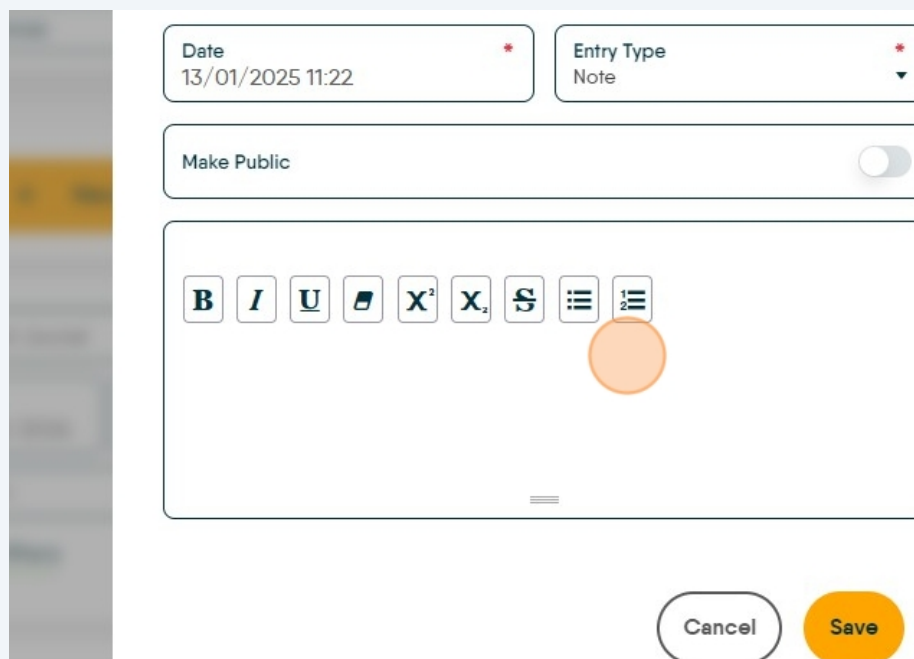
The screenshot shows a modal window titled 'Add New Journal Entry' with a close button (X) in the top right corner. The modal has three tabs: 'DETAILS', 'ATTACHMENTS', and 'RECORDS'. The 'DETAILS' tab is active. It contains a 'Date' field with the value '13/01/2025 11:22' and a red asterisk. Below it is a 'Make Public' checkbox. To the right of the date field is an 'Entry Type' dropdown menu with a red asterisk. The dropdown is open, showing a search bar and a list of options: 'reference(s)', 'Rent Arrears', 'SMS', 'Task', and 'Upload'. The option 'Select a Journal entry type' is highlighted with an orange circle. At the bottom of the modal, there is a rich text editor with formatting icons: Bold (B), Italic (I), Underline (U), Text Color (A), Strikethrough (ABC), Subscript (x<sub>2</sub>), and Superscript (x<sup>2</sup>).

5 Find the journal type you are adding and click.



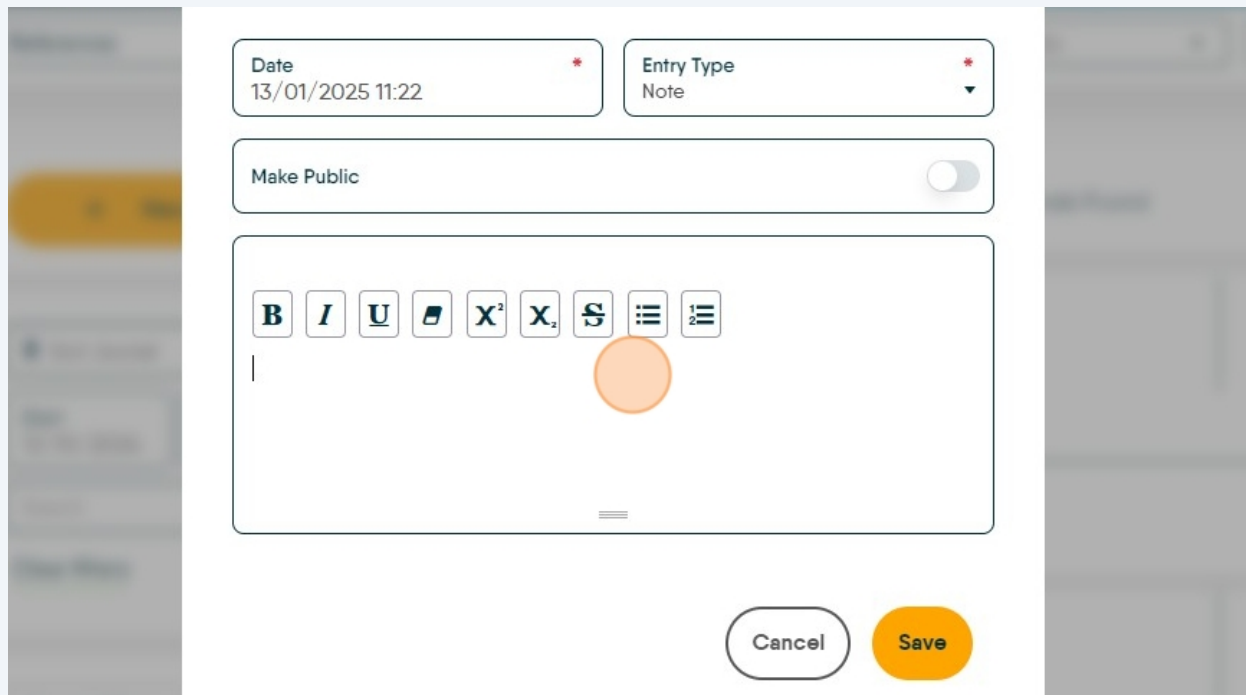
The screenshot shows a form with a date field containing '13/01/2025 11:22' and an 'Entry Type' dropdown menu. The dropdown is open, showing a list of options: 'reference(s)', 'Rent Arrears', 'SMS', 'Task', 'Upload', and 'Select a Journal entry type'. The 'Upload' option is highlighted with an orange circle. Below the form are 'Cancel' and 'Save' buttons.

6 E.G. Click "Note"



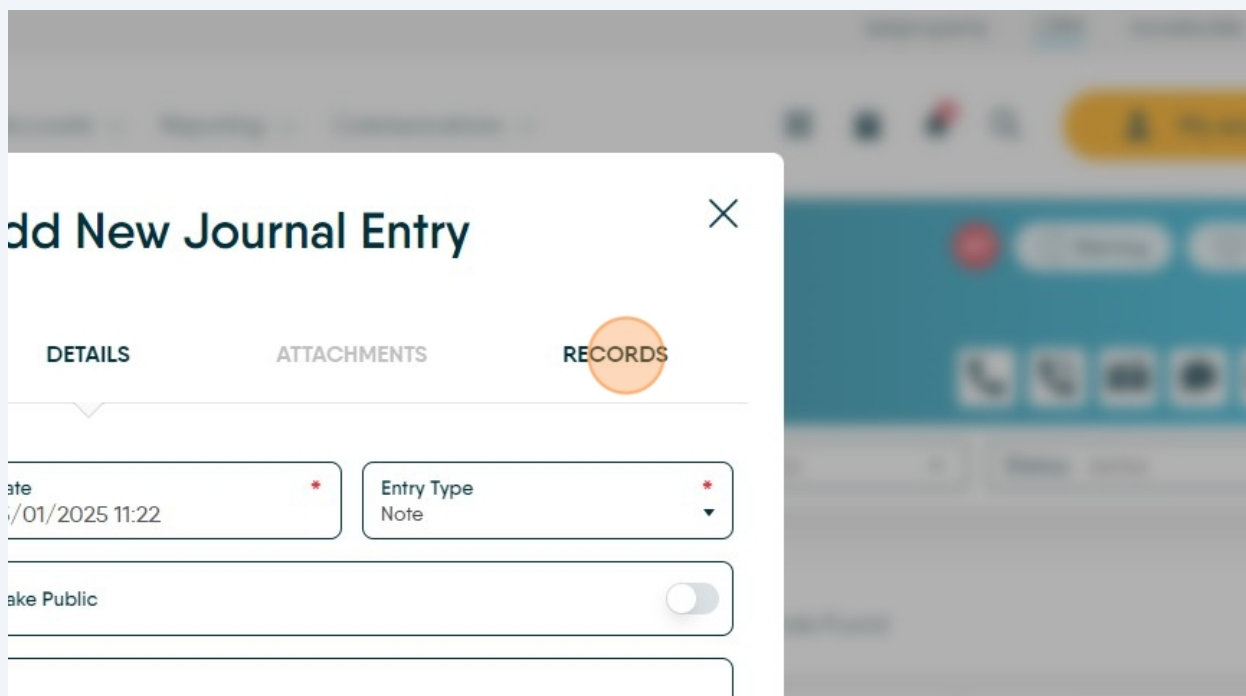
The screenshot shows the journal entry form with the 'Entry Type' dropdown set to 'Note'. The 'Make Public' toggle is turned off. The text editor toolbar includes buttons for Bold (B), Italic (I), Underline (U), Text Color (A), Subscript (X<sub>2</sub>), Superscript (X<sup>2</sup>), Strikethrough (ABC), Bulleted List (≡), and Numbered List (1≡). The Numbered List button is highlighted with an orange circle. Below the form are 'Cancel' and 'Save' buttons.

- 7 Click here. Type your journal note text, or paste the email text.



The screenshot shows a form titled 'Add New Journal Entry'. At the top, there are two input fields: 'Date' with the value '13/01/2025 11:22' and 'Entry Type' with a dropdown menu showing 'Note'. Below these is a 'Make Public' toggle switch. The main part of the form is a large text input area with a rich text editor toolbar above it. The toolbar includes buttons for Bold (B), Italic (I), Underline (U), Text Color (A), Background Color (X<sup>2</sup>), Strikethrough (X<sub>2</sub>), Bulleted List (S), Numbered List (≡), and Indent (≡). An orange circle highlights the text input area. At the bottom right of the form are 'Cancel' and 'Save' buttons.

- 8 To link the journal to another record, in the top menu Click "RECORDS"



The screenshot shows the same 'Add New Journal Entry' form, but with the 'RECORDS' tab selected in the top menu. The 'RECORDS' tab is highlighted with an orange circle. The form fields are the same as in the previous screenshot, but the text input area is empty. The background shows a blurred view of the application interface.

9

Click this text field and enter the details for the record you are searching for, then from the drop down menu select the record you are linking to.

**Add New Journal Entry** ✕

DETAILS ATTACHMENTS RECORDS

Link Record

Applicant

sales Applicant26

☐ Private

10

Click this text field.

**Edit Journal Entry** ✕

DETAILS ATTACHMENTS RECORDS

Link Record

Applicant

Sales Applicant123

☐ Private

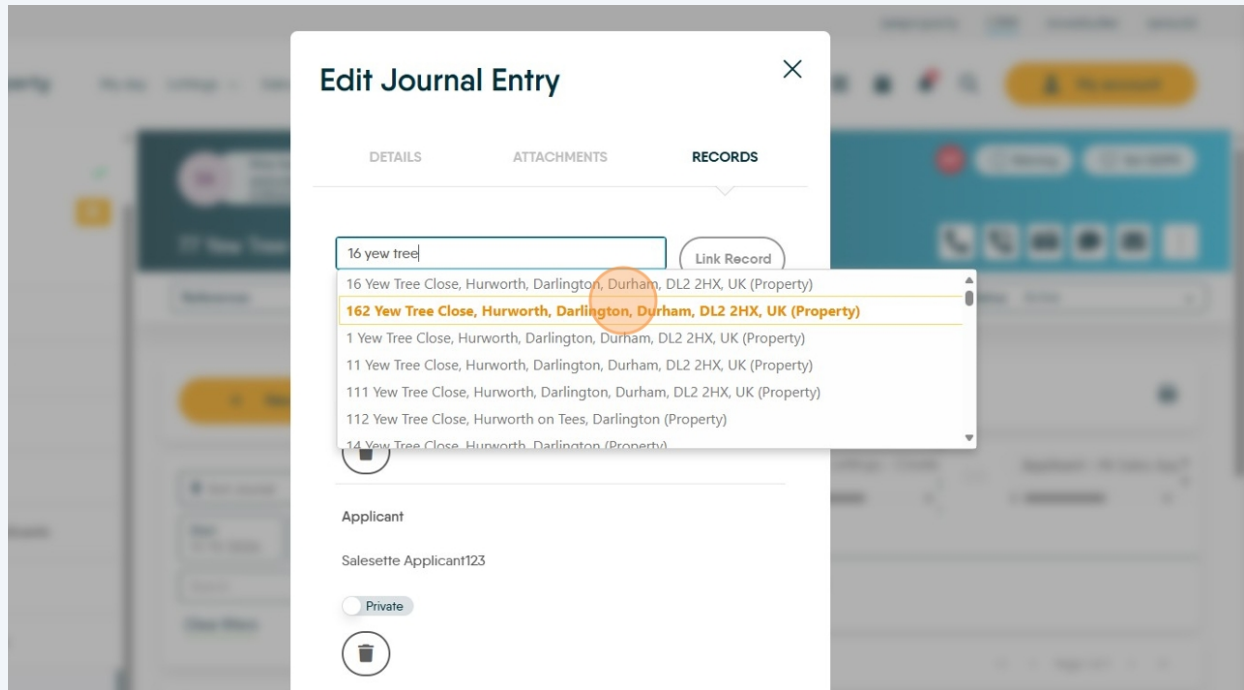
Applicant

Salesette Applicant123

☐ Private

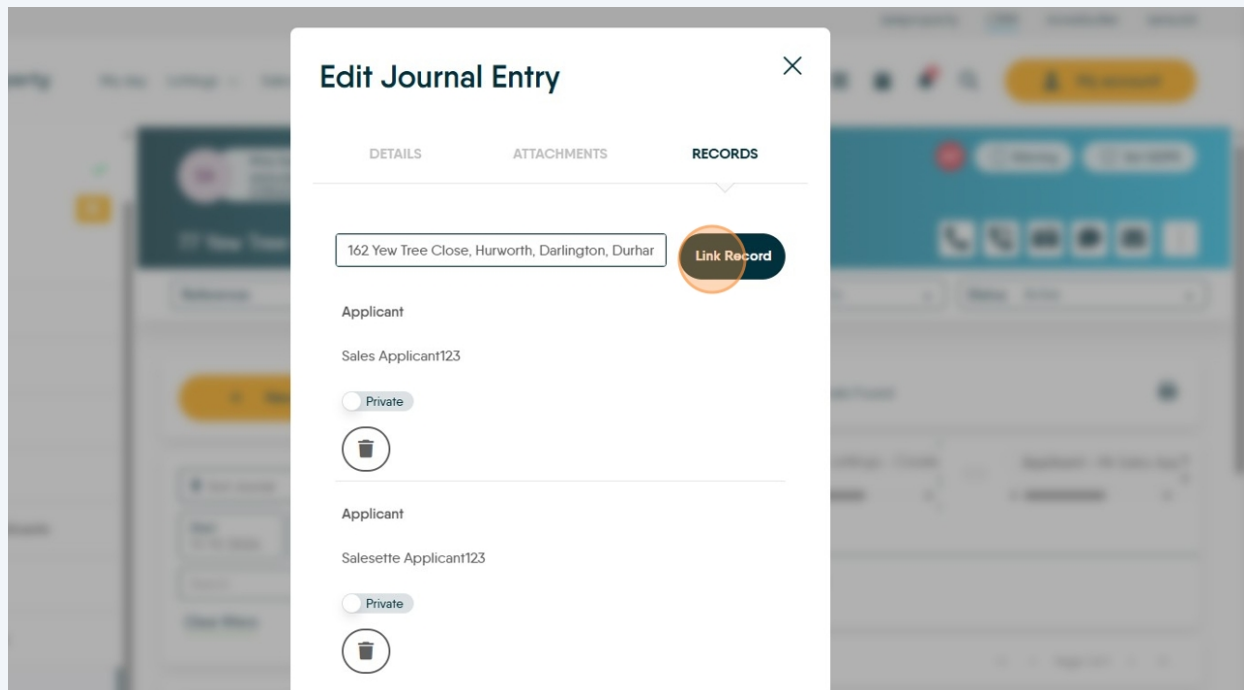
11

Type the name of the person or property you are linking to and select from the drop down list. You can link to any Vendor/Applicant/Tenant/Landlord/Property record.



12

Click "Link Record"



13 Click "Save"

The screenshot shows a web application interface with a modal window titled "Add New Journal Entry". The modal has three tabs: "DETAILS", "ATTACHMENTS", and "RECORDS", with "DETAILS" being the active tab. Inside the "DETAILS" tab, there is a text input field at the top, followed by a "Link Record" button. Below this is the "Applicant" section, which displays "sales Applicant26" and a "Private" toggle switch. Underneath is a trash icon. The "Property" section displays "16 Yew Tree Close, Hurworth, Darli..." and another "Private" toggle switch. An orange box with an arrow points to this second toggle switch, with the text "Private/Shared toggle" next to it. At the bottom right of the modal are "Cancel" and "Save" buttons. The background shows a blurred view of the application's sidebar and main content area.

**i** Tip! The Journal will not be visible in a landlord or Vendor portal unless the 'Private' toggle is switched to 'Shared'.

**14** to view the linked records use the scroll arrows.

Initiator: Training Dave Branch: Morgan & Co Status: Active

3 Journals Found

Training Dave  
3/01/2025 11:22:00  
lote

Property - 16 Yew Tree C

Asked for feedback on property viewed

Property - 112 Yew Tree C

**15** To quickly link a record or view the linked records, click the link. You can link multiple records together through a Journal.

Initiator: Training Dave Branch: Morgan & Co Status: Active

3 Journals Found

Training Dave  
3/01/2025 11:22:00  
lote

Property - 16 Yew Tree C

Asked for feedback on property viewed

Property - 112 Yew Tree C