

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

TitleForename sales

WebsitePhone Number

Email Addresszagg.dave@gmail.comSalutation Applicant26

Applicant Address

PostcodeEnter postcode

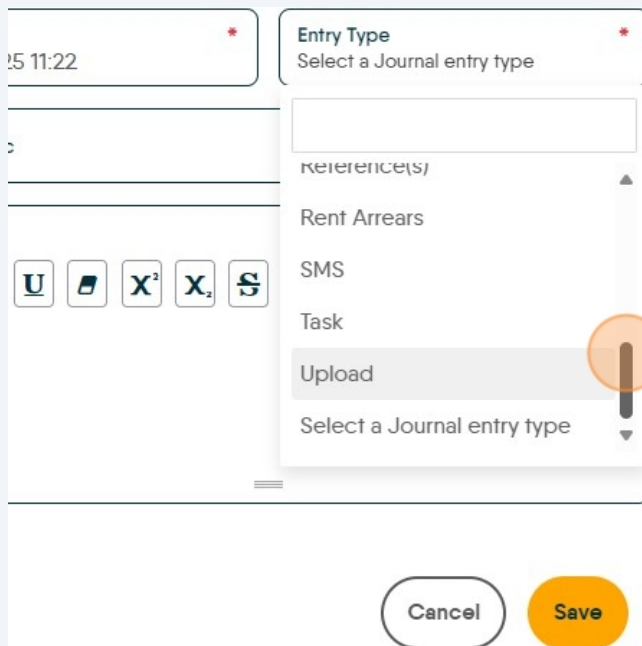
3 Click "New Journal"

The screenshot shows a CRM interface. On the left is a sidebar with menu items: 'Significant Temp.', 'Contacted', 'Details', 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', and 'Contacts'. The main area has a header with 'Reference:' and 'Negotiator: Training Dave'. Below this is a 'New Journal' button with a plus icon, which 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. To the right of the dropdown are 'Start' and 'End' date pickers, both showing '13/10/2024' and '13/01/2025' respectively. Below these is a 'Search' input field. On the far right, 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"

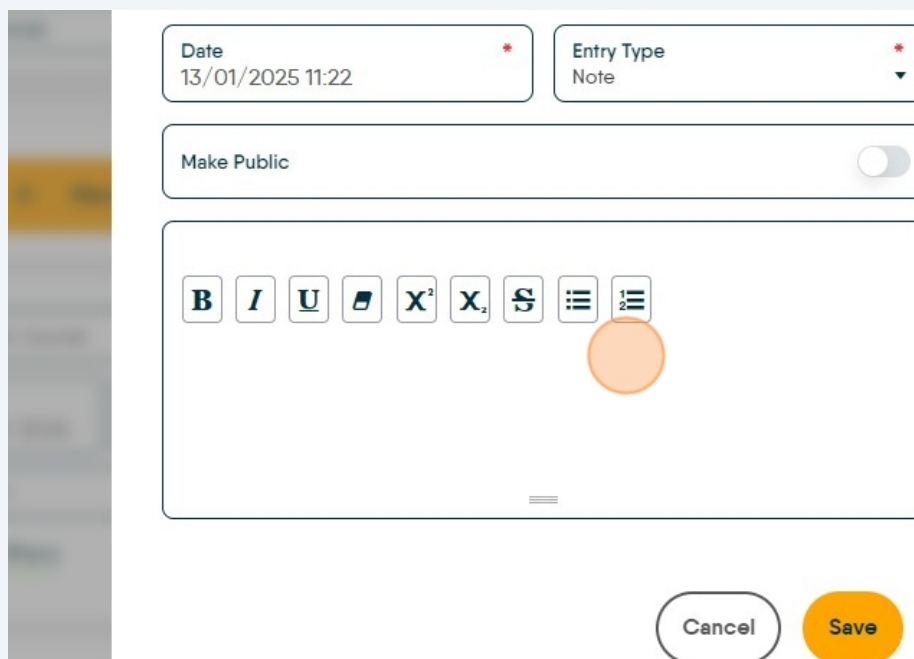
The screenshot shows a modal titled 'Add New Journal Entry' with a close button (X) in the top right. The modal has three tabs: 'DETAILS', 'ATTACHMENTS', and 'RECORDS'. The 'DETAILS' tab is active. It contains a 'Date' field with the value '13/01/2025 11:22' and a red asterisk. Below it is a 'Make Public' checkbox. To the right of the date field is an 'Entry Type' dropdown menu, also with a red asterisk, showing the text 'Select a Journal entry type'. This dropdown is highlighted with an orange circle. Below the dropdown is a list of options: 'reference(s)', 'Rent Arrears', 'SMS', 'Task', and 'Upload'. At the bottom of the modal is a rich text editor with formatting icons: Bold (B), Italic (I), Underline (U), Link, X², X₂, and Strikethrough (ABC).

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". Below it is a text input field. To the right, the "Entry Type" dropdown menu is open, displaying 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. At the bottom of the form are "Cancel" and "Save" buttons.

6 E.G. Click "Note"



The screenshot shows the same form as in step 5, but now the "Entry Type" dropdown is closed and "Note" is selected. Below the date and entry type fields is a "Make Public" toggle switch, which is currently turned off. Below that is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Text Color (A), Background Color (B), Subscript (X₂), Superscript (X²), Strikethrough (ABC), Bulleted List (≡), and Numbered List (1≡). An orange circle highlights the Numbered List icon. At the bottom are "Cancel" and "Save" buttons.

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

Date 13/01/2025 11:22

Entry Type Note

Make Public

B *I* U A ~~ABC~~ X^2 X_2 S

- ≡
- ≡

|

Cancel Save

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

Add New Journal Entry

DETAILS ATTACHMENTS RECORDS

Date 13/01/2025 11:22

Entry Type Note

Make Public

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

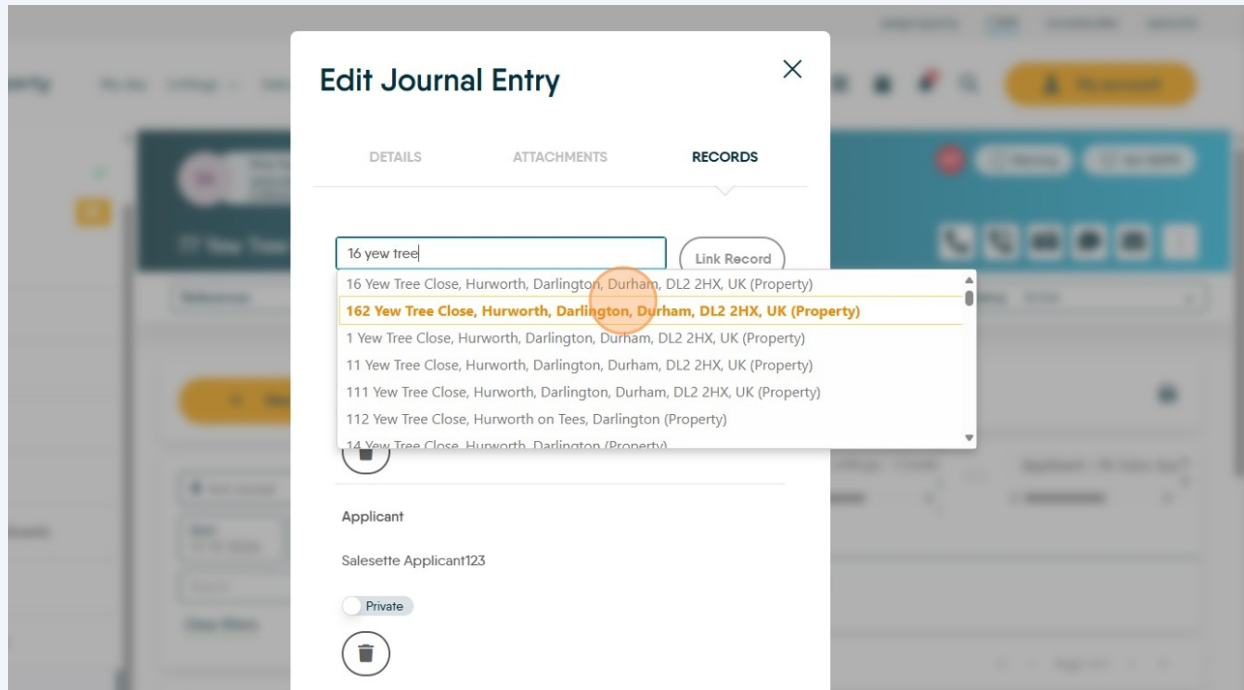
Applicant

Salesette Applicant123

☐ Private

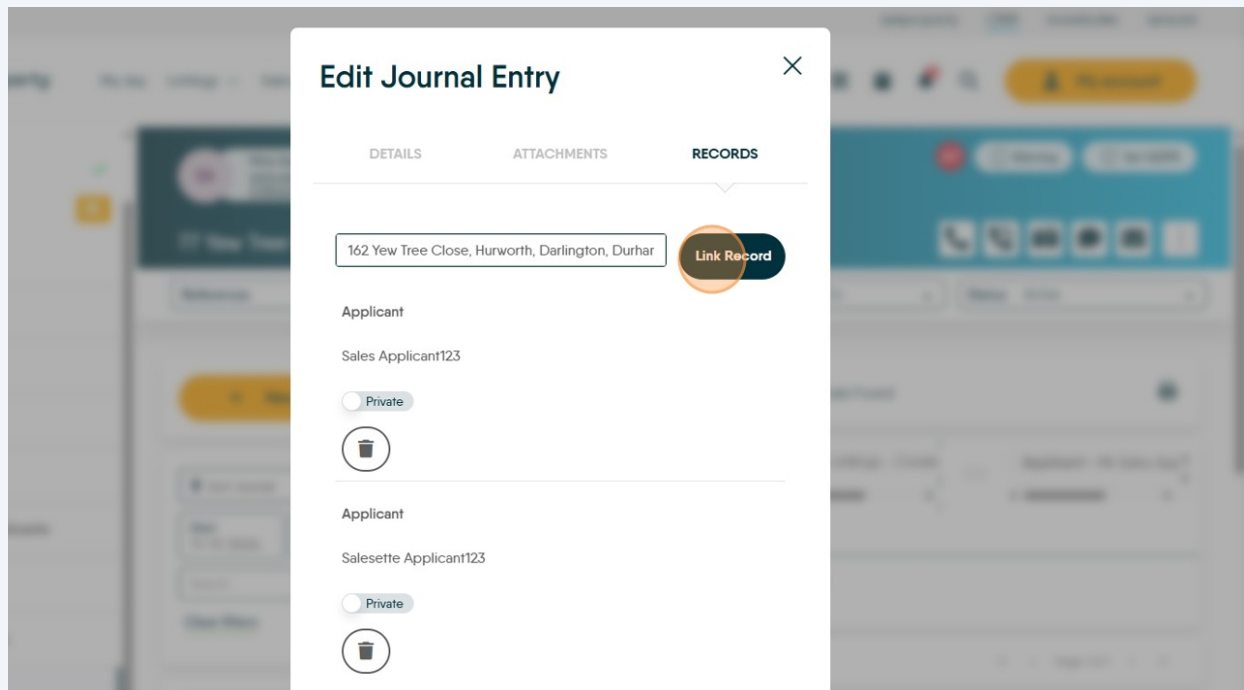
11

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 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", 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 arrow points from a label "Private/Shared toggle" to this second toggle switch. At the bottom right of the modal are "Cancel" and "Save" buttons. The background shows a blurred view of a software interface with various icons and buttons.

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