

# How to add and archive notes added to an opportunity

Chase allows users to archive notes added to an opportunity. Archiving notes makes it easy for users to track progress on the opportunity. Before notes can be archived you need to add notes to the opportunity.

Below are steps to show you how to archive notes added to an opportunity.

## Step-by-step guide

1. To add a note to an opportunity, click the "+" button on the opportunity you want to add notes to

Company	Descriptio	Contact	Contact P	Date Added	Target Date	Opp Statu	Probabilit	Sale Valu	Assigned	Client Par	FY Est Re	FY Annua	Industry	Last Actio	Last Action Date	Due Date
Media ..	Print Pr...	J Mark...	082556..	04 Apr 2017	12 Apr 2017	Prospe...	55%	25000	Adam							30 May 2017
TCC	TV and...	Mpho S...	012522..	19 Apr 2017	20 Apr 2017	Prospe...	60%	850	Adam	TCC Ho...	25000	560	Pharma..	Sec...	19 Apr 2017	26 Apr 2017
Telekom..	Billboar...	M Simp...	083 75..	29 May 2017	23 Jun 2017	Propos...	1%	45000	Adam	Telekom..	540000	540000	Teleco...	Cle...	25 May 2017	14 Jun 2017

2. The notes section under the opportunity appears. Click the notes section to add notes

OPPORTUNITIES

Status Filter: Show All Open

Company	Description	Contact	Contact P	Date Added	Target Date	Opp Status	Probabilit	Sale Valu	Assigned	Client Par	FY Est Re	FY Annual	Industry	Last Actio	Last Action Date	Due Date
Media ...	Print Pr...	J Mark...	082556...	04 Apr 2017	12 Apr 2017	Prospe...	55%	25000	Adam							30 May 2017
TCC	TV and...	Mpho S...	012522...	19 Apr 2017	20 Apr 2017	Prospe...	60%	850	Adam	TCC Ho...	25000	560	Pharma... Sec...		19 Apr 2017	26 Apr 2017
Telkom...	Bilboar...	M Simp...	083 75...	29 May 2017	23 Jun 2017	Propos...	1%	45000	Adam	Telkom...	540000	540000	Teleco... Clie...		25 May 2017	14 Jun 2017

Notes:

- The notes field appears. Enter "Waiting for feedback from client regarding the proposal" as notes for this opportunity

OPPORTUNITIES

Status Filter: Show All Open

Company	Description	Contact	Contact P	Date Added	Target Date	Opp Status	Probabilit	Sale Valu	Assigned	Client Par	FY Est Re	FY Annual	Industry	Last Actio	Last Action Date	Due Date
Media ...	Print Pr...	J Mark...	082556...	04 Apr 2017	12 Apr 2017	Prospe...	55%	25000	Adam							30 May 2017
TCC	TV and...	Mpho S...	012522...	19 Apr 2017	20 Apr 2017	Prospe...	60%	850	Adam	TCC Ho...	25000	560	Pharma... Sec...		19 Apr 2017	26 Apr 2017
Telkom...	Bilboar...	M Simp...	083 75...	29 May 2017	23 Jun 2017	Propos...	1%	45000	Adam	Telkom...	540000	540000	Teleco... Clie...		25 May 2017	14 Jun 2017

Notes:

- Once notes have been added click the "Archive" button

OPPORTUNITIES

Status Filter: Show All Open

Company	Descriptio	Contact	Contact P	Date Added	Target Date	Opp Statu	Probabilit	Sale Valu	Assigned	Client Par	FY Est Re	FY Annuu	Industry	Last Actio	Last Action Date	Due Date
Media ...	Print Pr...	J Mark...	082556...	04 Apr 2017	12 Apr 2017	Prospe...	55%	25000	Adam							30 May 2017
TCC	TV and...	Mpho S...	012522...	19 Apr 2017	20 Apr 2017	Prospe...	60%	850	Adam	TCC Ho...	25000	560	Pharma... Sec...		19 Apr 2017	26 Apr 2017
Telkom...	Billboar...	M Simp...	083 75...	29 May 2017	23 Jun 2017	Propos...	1%	45000	Adam	Telkom...	540000	540000	Teleco... Cle...		25 May 2017	14 Jun 2017

Waiting for feedback from client regarding the proposal

5. Notes will be added to archives. To view archived notes, click the "Search" button

OPPORTUNITIES

Status Filter: Show All Open

Company	Descriptio	Contact	Contact P	Date Added	Target Date	Opp Statu	Probabilit	Sale Valu	Assigned	Client Par	FY Est Re	FY Annuu	Industry	Last Actio	Last Action Date	Due Date
Media ...	Print Pr...	J Mark...	082556...	04 Apr 2017	12 Apr 2017	Prospe...	55%	25000	Adam							30 May 2017
TCC	TV and...	Mpho S...	012522...	19 Apr 2017	20 Apr 2017	Prospe...	60%	850	Adam	TCC Ho...	25000	560	Pharma... Sec...		19 Apr 2017	26 Apr 2017
Telkom...	Billboar...	M Simp...	083 75...	29 May 2017	23 Jun 2017	Propos...	1%	45000	Adam	Telkom...	540000	540000	Teleco... Cle...		25 May 2017	14 Jun 2017

Search

6. The **Notes History** pop-up window appears with all notes archived for this opportunity and the user who updated these notes.



## Related articles

---

### Content by label

There is no content with the specified labels

### Chase Version:

6.308.6311.18341

