

# Customer Concierge Training

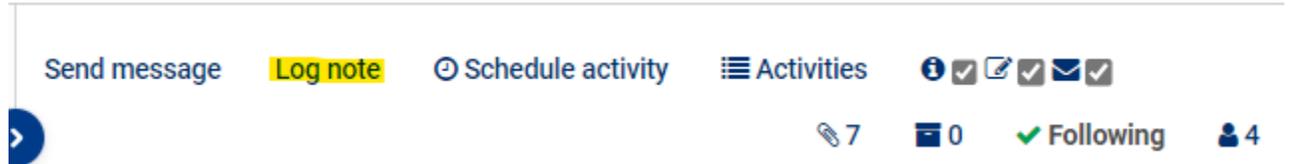
**Module:** Odoo Basic Overview

**Subject:** Log a note

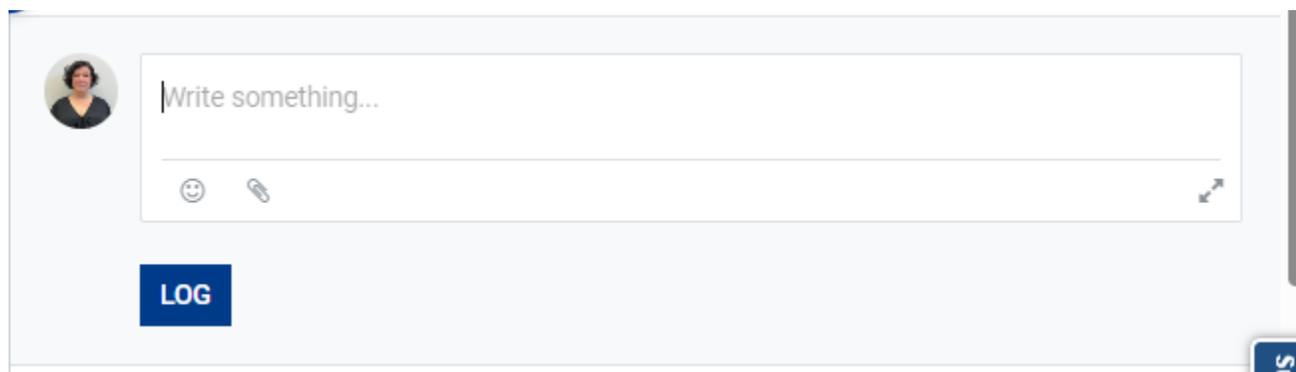
**Trainer:** Cheryl Day

**Date of Training:** 4/17/2025

**How To:** To log a note go to the chatter in either the Opportunity or Quotation World and click **Log note**.



The text box will appear for your note.



If you are directing it to a person or to a department, begin with the @ symbol. For example, @Dan Thau or @Shipping. This will direct your note to the correct recipient. Then follow by typing your note.

You can use the paperclip or drag and drop anything you need to attach, such as an email to further explain your note. Be concise and to the point but also be specific.

When complete click the LOG button at the bottom of the text box.



Your note has been sent. The recipient or group will receive an email notifying them.

Double check after clicking LOG that the @ address is blue to indicate it is going to the correct recipient.

You will notice that it also adds a **To:**