

Guidance for Writing Effective Case Notes

1. **Be concise and specific:** Keep your case notes clear and to the point. Avoid using excessive jargon or technical terms that might confuse other users who read the notes later. Clearly state the relevant information without unnecessary details.
2. **Use bullet points or numbered lists:** Organize your case notes using bullet points or numbered lists. This helps break down complex information into easily digestible chunks, making it easier for others to follow and understand.
3. **Include relevant timestamps:** If you're providing updates or documenting conversations, include timestamps to indicate when the events occurred. This helps create a timeline of the case history and provides context for future reference.
4. **Document actions taken and results:** When documenting your interactions or troubleshooting steps, clearly state the actions you took and the results obtained. This helps others understand the progress made on the case and avoids duplication of effort.
5. **Maintain a professional tone:** Case notes should be written in a professional and objective manner. Avoid personal opinions or emotional language. Stick to the facts and focus on providing information that is relevant to the case.
6. **Proofread and edit:** Before saving your case notes, take a moment to proofread and edit them for clarity and accuracy. Check for any spelling or grammatical errors, and make sure the information is complete and coherent.
7. **Use formatting options:** Salesforce provides formatting options such as bold, italics, and underline. Utilize these options sparingly to highlight important points or headings within your case notes. However, avoid overusing formatting, as it can make the notes cluttered and harder to read.
8. **Update regularly:** As the case progresses or new information becomes available, make sure to update the case notes accordingly. Regularly reviewing and updating the notes ensures that they remain accurate and reflect the current status of the case.

Remember, effective case notes are crucial for effective communication and collaboration within the Salesforce platform.

Case Note Examples

Services & Notes Example 1 - Financial Analysis & Loan/Grant Prep Assistance

BSC loan consultant met with client via google meet to go over financials. She is interested in a working capital loan. Client is looking to get a loan to pay off a LADBS permit for a spray booth \$xk, \$xk for architect/engineers, \$xk for equipment and parts. Aside from that client is also looking to increase her line of credit with her current bank or other bank that would give her up to a \$x to \$xk limit.

Documents collected were 2019, 2020 & 2021 taxes, credit report and bank statements for the last 3 months. Upon review of financial and credit it was determined that she had enough cash flow to cover a loan of up to \$x-\$xk loan. Business Loan consultant requested a profit loss statement to evaluate whether financials supported move forward to connection of lender and loan packaging.

BSC loan consultant and business consultant met with client to collect all required documents to apply for working capital loan and line of credit (credit score, 2019, 2020 & 2021 taxes were collected along with profit loss). Loan packet is being completed with TMC for working capital loan and Bank of the West for the line of credit. Total amount requesting \$x,000.

UPDATE 8/28/22- BSC consultant was informed by loan counselor that client had been approved for the \$xK with TMC and also was approved for a line of credit in the amount of \$xk and business credit card for \$xk with Bank of the West. Loan consultant will follow up with business consultant once LOI and approval letters are provided.

While this note is detailed, it is dense and requires time to distill the critical information contained in it.

Services & Notes Example 2 - Financial Analysis & Loan/Grant Prep Assistance

TITLE: Financial Analysis & Loan/Grant Prep Assistance

08/28/22 - UPDATE

1. BSC consultant informed by loan counselor that client had been approved for \$xK with TMC
2. Approved for a line of credit in the amount of \$xk and business credit card for \$xk with Bank of the West.

ACTION ITEMS (will added as TASKS in Salesforce on this Account)

1. COMPLETE - Loan consultant will follow up with business consultant once LOI and approval letters are provided. (task logged)
2. COMPLETE - Calendar 90 day check-in phone call (task logged)

04/02/22 - CLIENT MEETING SUMMARY

- Client seeking loan to pay off LADBS permit (spray booth) + line of credit.
- Upon document and financial review, loan packet prepared with TMC for working capital loan and Bank of the West for line of credit.
- Total amount requested: \$XXXX

DOCUMENTS REVIEWED:

1. Tax Filings 2019, 2020 & 2021
2. Credit report
3. Bank statements for the last 3 months
4. Profit & Loss Statement

OUTCOME:

- Approved - \$XXXX Working Capital Loan approved
- Approved - \$XXXX Line of credit through Bank of the West

This note has a title that clearly indicates the subject of the narrative. It also utilizes the NOTE functions in Salesforce that allow for the use of bullets, boldface type, and other features to create a more concise, bulleted case note. This type of concise, bulleted note will allow for a viewer to quickly gather information about this client. Additionally, action items should always be added as “tasks” inside Salesforce on the client’s account to help track the support that needs to be provided to the client.