

How do I create a new Note (*report, contact, interview*)?

The HELP demo uses the FI (Field Interview) template that comes with NoteM8. Your template might look different but will operate the same as the FI template.

Select **New Report** on the Home screen.



Select **Report Type** template

(FI, Contact, Interview, etc.)

You can have more than one template depending on your configuration (Individual or Agency).

To upgrade to Agency configuration, contact sales@presynct.com or call 866-773-7962.

