**Initial Contact Form**

The initial contact form gathers the following information:

* First Name
* Last Name
* Date of Initial Contact
* How they heard about us
* Customer Deadline (Date they have to have auction items out or move done by)
* Home Phone
* Mobile Phone
* Email
* Check box ? asking what type of contact they prefer (text, call on mobile, call on house phone, email)
* Current Address
* Check box section asking what service(s) initially requested (Move, Auction, Appraisal, Consignment Shop)
* **VERY IMPORTANT!** Notes Section
  + Is there a way to link to this notes section from anywhere in that client’s forms – for example, I’m on the Auction Look At form for that customer and there will be a button there that I can click that makes that notes window pop up as an overlay, not as a separate page.
  + AND just to make me happier still – could I add to that notes section from anywhere?
  + And can this notes section appear and stay beside the form I’m using at the top so that I don’t have to scroll back up to it each time I want to add a note? For example, on the Initial Contact Form – the form itself would be on one side of the page and next to it would be a notes section.
* Other? That we are not thinking of?