

Getting Started

1. Download our mobile app Tak It C App Store GET IT ON **Google Play**

(or call our dictation hotline 608-831-3015)



2. Press record to begin your dictation. Speak & spell the contact name, then speak your notes.

OR

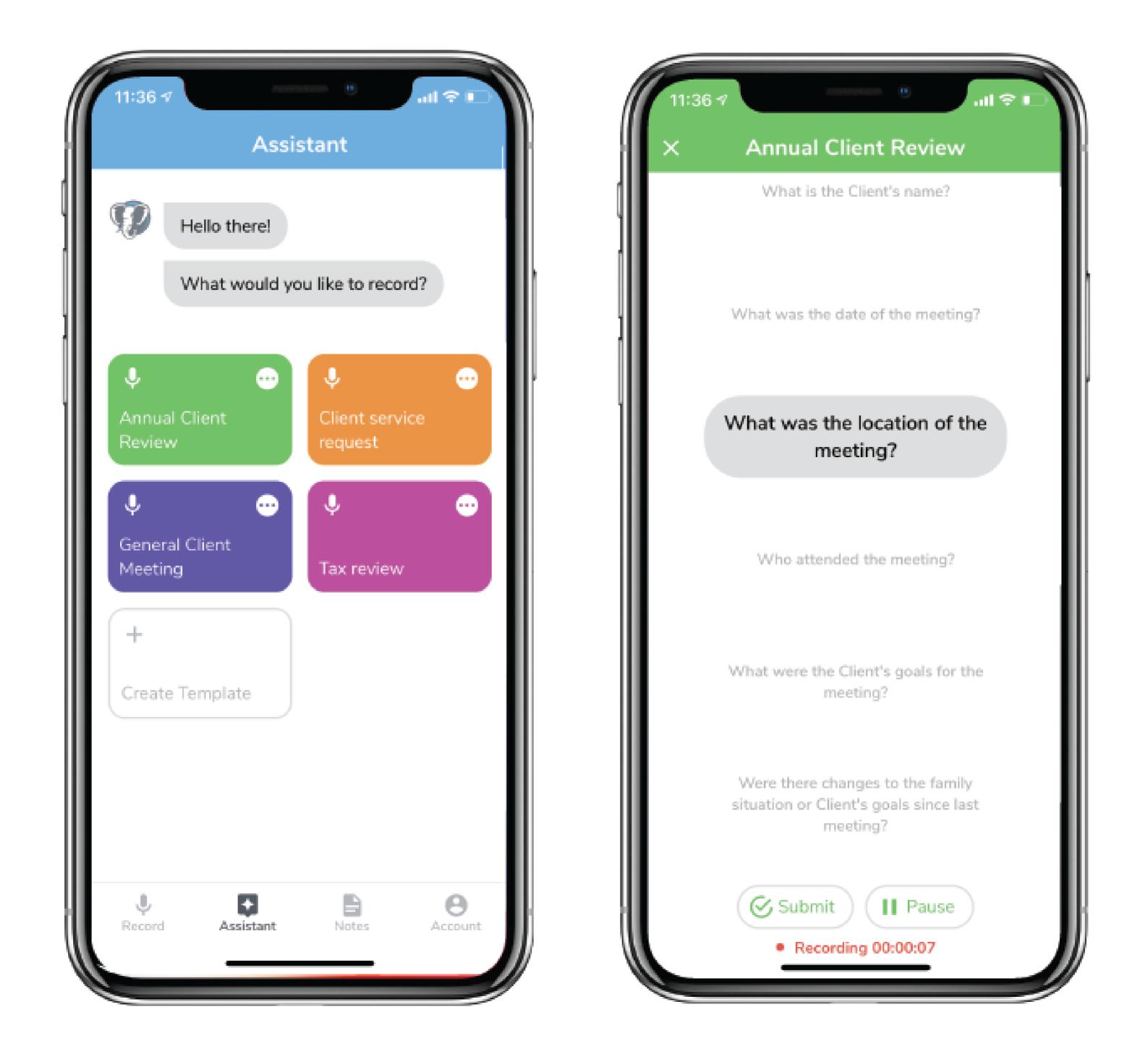
Click the Assistant at the bottom of the screen, then choose or create a template to guide you through the dictation process.

3. Within 8 business hours, your notes will be professionally typed & delivered by email and to the Notes section for the contact in the Wealthbox CRM.

Pro Tip: If you would like your dictation delivered as a Task in Wealthbox, you MUST say "make this a Task" at the beginning of your dictation.

Meet your new Assistant

Designed to help guide you to record what matters most



To access your account online visit www.mobileassistant.us

Contact us | support@mobileassistant.us | 888-373-1916