

# Job Diary Notes

The *Job Diary Notes* section allows you to create a quick note that you can view at any time afterwards. The *Notes* grid can be sorted by selecting one of the column headings such as Note (alphabetical order), Diary Entry Date, Status (public or private), and Created By.

To create a note, simply click on the *New Diary Note* button at the top right of the page:

A rectangular button with a light green background and a white border. It contains a small white plus sign icon followed by the text "New Diary Note" in a white sans-serif font.

This will prompt a pop-up to appear for you to write your note, set the Diary Date, and select whether your note is private or not:

## Create Diary Note ✕

Note

Diary Date

Is Private?

Create a quick note that you can view anytime later.

To view them later look under **My Account (top right corner) -> My Notes**, or from **Jobs -> Diary Notes**. You can also see them on the diary calendar and move them around.

Even better, you can later **promote them to jobs**.

Also your colleagues can view your diary notes if you choose to not tick the note as private.

You can also create new jobs from diary notes. Click on *Promote* for the *Diary Note* you would like to create a job from, and you will be taken to the *Create a New Job* page. The note entry will appear in the Job Details section:

**New Job - Required Job Information:**

▶ Save

**Job Details**

Meeting Room

Request For Quote

Contract. (please select) ▼

Site Name (please select) ▼

Location. (please select) ▼

SubLocation (please select) ▼

Reported By

Expected Start By 30/08/2021 14:06

Job Type (please select) ▼

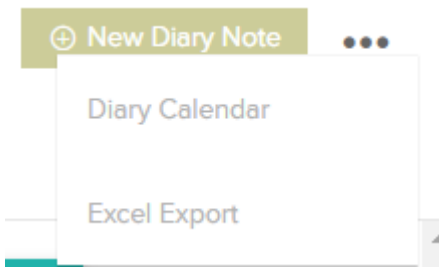
Sub Type (please select) ▼

Resource (please select) ▼

Instruct Resource

Assign to User - Facilities Manager ▼

Clicking on the three dots next to the *New Diary Notes* button will display additional options:



- **Diary Calendar** – this will bring you to the *Calendar* view with the *Diary Entries* filter option already selected. Here you will be able to view all notes that have been created and when.
- **Excel Export** – this option allows you to export the *Diary Notes* list to an Excel sheet.