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.

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
30/08/2021 14:03

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.

Cancel   Save

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.