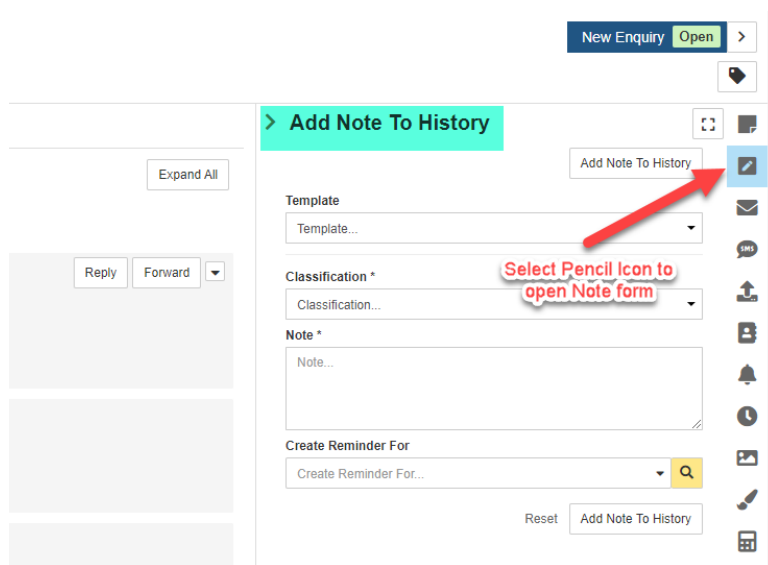


Updated 27.10.22

**Prime Support Centre - Jobs**

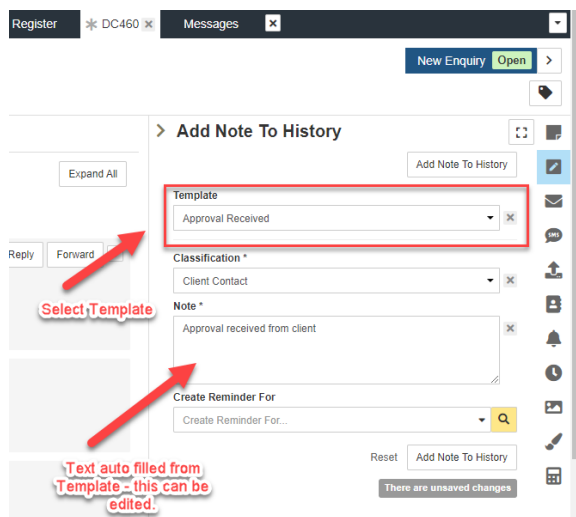
## Prime Instructions | Jobs – How to Add Note to History

1. From any screen in the job select Pencil icon (Add Note To History) on the right hand side of the screen.



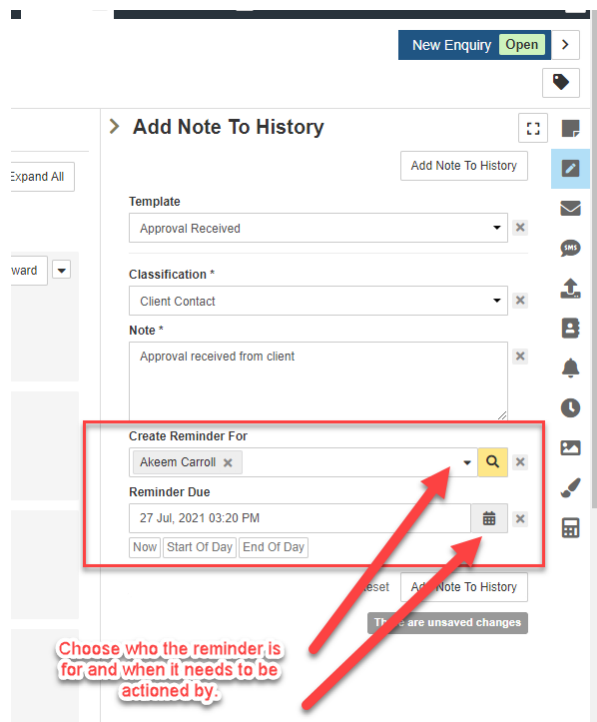
The screenshot shows the 'Add Note To History' form. At the top right, there is a 'New Enquiry Open' button and a pencil icon. Below this is the form title '> Add Note To History'. The form contains several fields: 'Template' (a dropdown menu), 'Classification \*' (a dropdown menu), 'Note \*' (a text area), and 'Create Reminder For' (a dropdown menu with a search icon). At the bottom of the form are 'Reset' and 'Add Note To History' buttons. A red arrow points to the pencil icon, and a red callout box says 'Select Pencil Icon to open Note form'.

2. Use the Template drop down to select the template you wish to use. Templates can be set up through Administration.  
\*If you do not want to use a Template you can simply write in the Note box.  
The Classification and Note Fields will auto fill as per the template you have selected, you can edit/add to these as required.



The screenshot shows the 'Add Note To History' form with a template selected. The 'Template' dropdown menu is highlighted with a red box and contains the text 'Approval Received'. A red arrow points to the dropdown with the text 'Select Template'. The 'Note' field contains the text 'Approval received from client', and a red callout box says 'Text auto filled from Template - this can be edited'. The 'Classification \*' dropdown is also filled with 'Client Contact'. At the bottom, there is a 'There are unsaved changes' message.

- You can create a reminder for an internal staff member so they can see the Note you are adding, or if they need to action the Note further etc.  
Select the user from the drop down list, then select a date and time for when the Reminder is due by.



- Once you are happy with the Note select the Add Note To History button. You will see the green success message when the Note has been added to the history and the form will reset itself. You will be able to see the Note in the history and the details of the Reminder you created.

