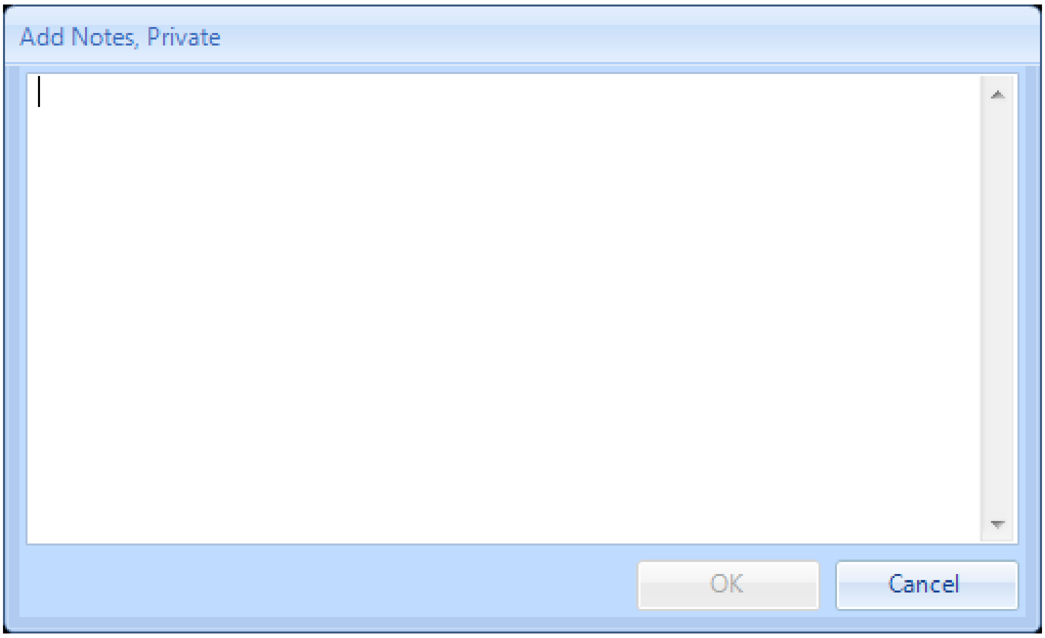
Add Notes - Private

Wed, Jan 17, 2024 Agent Actions - Reactive, Quote, PPM, Audit

This section of a Work Order is where the User can add any information that maybe considered private and confidential, relating to the requirements of the Work Order. This is done using the Add Notes > Private action. Private notes are notes that can only be seen by specific Users (whose Profiles allow it). This is a useful way to discuss information about a Work Order, such as financial information, with only informing specific Users such as informing the Client of details that Resource does not need to know.

1. From the Agent Actions menu, choose Add Notes and select Private.

2. Enter the required text in the text box and click OK.



3. Once created, the Private notes will be added to the Notes History (in the correct colour) along with a padlock symbol and to the Add Notes event.

Note: For a User to be able to view Private notes, they must have the relevant Permission against their Profile.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=277