

# notesNotes Section Enhancement

#46579 #48540 #42878

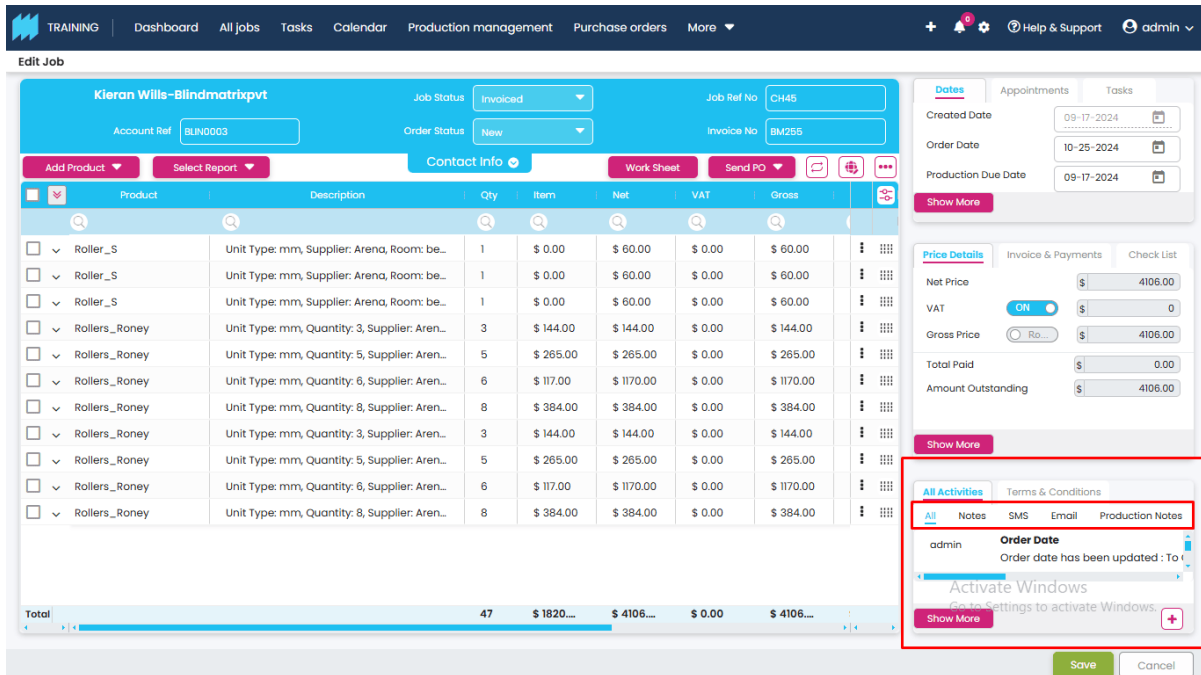
## Prototype:

<https://www.figma.com/design/ISfw7IMf0ko5kjd1qTQDNi/BlindMatrix-CRM-Job-Module-SMS?node-id=4792-2785&t=ob1d9bagp02ttwYY-1>

## Stake Holders:

Shade well Awnings and Blinds, Zicth Gordijnen and Blinds, Signature Blinds, Australian Window Fashions

## Current Notes screen in Live:



## Updated Functionality:

We have included a **"History"** section that displays the date, time, user name, and a description of any changes or updates made. **You can view the full details of the notes by hovering the mouse over the description.**

We have also added an **"Attachment"** section to display notes specifically related to attachments sent or generated from the job.

Lovely Blinds Dashboard All Jobs Tasks Calendar Communication Purchase Orders More --

All jobs > Edit job

**Joe Smith - Joe's Company** Job Status:  Job Ref No:

Account Ref:  Order Status:  Invoice No:

[Add product](#) [Contact info](#) [Work sheet](#) [Send P/O](#)

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status
<input type="checkbox"/>	Roller blinds	1100, 1500, White Plastic Chain,	2	121.45	324.43	3245	2343.56
<input type="checkbox"/>	Shutter	1100, 1500, Black Plastic Chain, Face	3	123.48	543.21	543.21	655.67
<input type="checkbox"/>	Roller Blinds	1100, 1500, Black Plastic Chain, Face	4	143.65	123.54	123.54	5674.732
<input type="checkbox"/>	Roller Blinds	1100, 1500, Black Plastic Chain, Face	6	231.34	435.23	435.23	3423.43
<input type="checkbox"/>	Roller Blinds	1100, 1500, Black Plastic Chain, Face	4	543.34	124.54	124.54	1234.99
<input type="checkbox"/>	-	1100, 1500, Black Plastic Chain, Face	7	123.545	243.76	243.76	1112.54
<input type="checkbox"/>	AAA Blinds	1100, 1500, Black Plastic Chain, Face	3	423.54	325.65	325.65	7332.43

**Total** 20.00 1234.65 456.00 412.43 3428.00

Dates **Appointments** Task

Fitter	David	22 / 03 / 2021
Measurer	Mike	22 / 03 / 2021
Surveyor	Paul	22 / 03 / 2021

Price Details Invoice & Payments Checklist

Net Price £130.00

VAT £26.00

Gross Price £156.00

Total Paid £00.00

Outstanding Amount £352.00

[Show more](#) [Order confirmation](#) [Quotation](#)

**All activities** Terms & Conditions

History Notes SMS Email Production not

May 15, 3:25 PM Note by kane L. There are many variations of passages of Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

May 15, 3:25 PM Note by henry There are many variations of passages of Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

May 15, 3:25 PM Note by Joans There are many variations of passages of Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

[Show more](#) [Settings to activate Windows](#)

[Save](#) [Cancel](#)

Lovely Blinds Dashboard All Jobs Tasks Calendar Communication Purchase Orders More --

All jobs > Edit job

**Joe Smith - Joe's Company** Job Status:  Job Ref No:

Account Ref:  Order Status:  Invoice No:

[Add product](#) [Contact info](#) [Work sheet](#) [Send P/O](#)

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Net Price £130.00

VAT £26.00

Gross Price £156.00

Total Paid £00.00

Outstanding Amount £352.00

[Show more](#) [Order confirmation](#) [Quotation](#)

**All activities** Terms & Conditions

History Notes SMS Email Production not

MOUSE HOVER I would like to inform your fitter appointment has schedules on 12th May, at 6am.

ote by kane L. There are many variations of passages of Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

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[Show more](#) [Settings to activate Windows](#)

[Save](#) [Cancel](#)

## Attachment view:

In the attachment view of the notes section, details such as the user who generated or sent the report, the type of report, along with the date and time, will be displayed. Attachments can be viewed by clicking on them. If multiple attachments are present, a "+1" will appear next to the attachment, indicating additional files, as shown in the screenshots below.

This screenshot shows the 'Attachment view' in the software. The main content area displays a table of products for 'Joe Smith - Joe's Company'. The table has columns for Product, Description, Qty, Item price, Net price, VAT, Gross price, and Status. The total amount is 3428.00. On the right side, there is a sidebar with sections for 'Dates', 'Appointments', 'Task', 'Price Details', and 'All activities'. The 'Attachments' section is highlighted with a red box, showing a list of activities with columns for type (SMS, Email, Production notes, Attachments), user, and date. The 'Attachments' column shows a red box around the word 'Attachments'.

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status
Roller blinds	1100, 1500, White Plastic Chain,	2	121.45	324.43	3245	2343.56	On
Shutter	1100, 1500, Black Plastic Chain, Face	3	123.48	543.21	543.21	655.67	On
Roller Blinds	1100, 1500, Black Plastic Chain, Face	4	143.65	123.54	123.54	5674.732	Ready
Roller Blinds	1100, 1500, Black Plastic Chain, Face	6	231.34	435.23	435.23	3423.43	Ready
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AAA Blinds	1100, 1500, Black Plastic Chain, Face	3	423.54	325.65	325.65	7332.43	Ready

Activity	User	Date
SMS	kane L...	22 / 03 / 2021
Email	henry	22 / 03 / 2021
Production notes	Joan	22 / 03 / 2021
Attachments		

This screenshot shows the 'Attachment view' in the software, similar to the first one. The main content area displays a table of products for 'Joe Smith - Joe's Company'. The table has columns for Product, Description, Qty, Item price, Net price, VAT, Gross price, and Status. The total amount is 3428.00. On the right side, there is a sidebar with sections for 'Dates', 'Appointments', 'Task', 'Price Details', and 'All activities'. The 'Attachments' section is highlighted with a red box, showing a list of activities with columns for type (SMS, Email, Production notes, Attachments), user, and date. The 'Attachments' column shows a red box around the word 'Attachments'.

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Activity	User	Date
SMS		
Email		
Production notes		
Attachments		
Attachments	User 1	22 / 03 / 2021
Attachments	User 1	22 / 03 / 2021
Attachments	User 1	22 / 03 / 2021

Lovely Blinds Dashboard All Jobs Tasks Calendar Communication Purchase Orders More ...

All jobs > Edit job

**Joe Smith - Joe's Company** Job Status: Text Value Job Ref No: Invoice No: Account Ref: Order Status: Office

Add product Contact info Work sheet Send P/O

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status	
<input type="checkbox"/>	Roller blinds	1100, 1500, White Plastic Chain,	2	121.45	324.43	3245	2343.56	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Shutter	1100, 1500, Black Plastic Chain, Face	3	123.48	543.21	543.21	655.67	<input checked="" type="checkbox"/>
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<input type="checkbox"/>	AAA Blinds	1100, 1500, Black Plastic Chain, Face	3	423.54	325.65	325.65	7332.43	<input type="checkbox"/> Ready

Dates Appointments Task

Filter David 22 / 03 / 2021  
 Measurer Mike 22 / 03 / 2021  
 Surveyor Paul 22 / 03 / 2021

Show more Check measure

Price Details Invoice & Payments Checklist

Net Price £130.00  
 VAT £26.00  
 Gross Price £156.00

Total Paid £00.00  
 Outstanding Amount £352.00

Show more Order confirmation Quotation

All activities Terms & Conditions

SMS Email Production notes Attachments

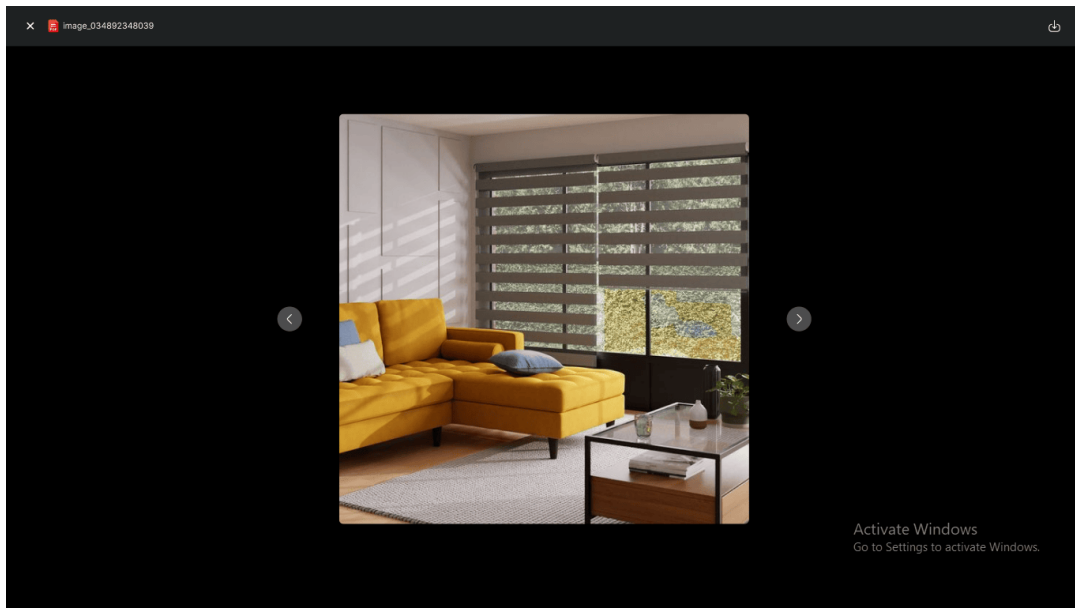
Attachment 04/11/24, 1:00PM  
 Attachment 04/11/24, 1:00PM  
 Attachment 04/11/24, 1:00PM

Activate Windows  
 Go to Settings to activate Windows.

Total 20.00 1234.65 456.00 412.43 3428.00

Save Cancel

Attachment Preview directly from notes section:



**Filter:** We have included a filter within the "All activity" section to choose the sections which need to be displayed in the notes for easy readability. Based on the selections, only those sections will be shown in the notes section.

Joe Smith - Joe's Company

Job Status: Text Value Job Ref No: Invoice No:

Account Ref: Order Status: Office

Add product Contact info Work sheet Send P/O

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status
Roller blinds	1100, 1500, White Plastic Chain,	2	121.45	324.43	3245	2343.56	On
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AAA Blinds	1100, 1500, Black Plastic Chain, Face	3	423.54	325.65	325.65	7332.43	Ready

Total: 20.00, 1234.65, 456.00, 412.43, 3428.00

Price Details: Net Price £130.00, VAT £26.00, Gross Price £156.00, Total Paid £00.00, Outstanding Amount £352.00

All activities: History, Notes, SMS, Email

After clicking the "Show more" option, all the notes will be listed within the "all" section, and here, too, we have given the ability to filter the sections which need to be displayed in the notes for easy readability.

Joe Smith - Joe's Company

Account Ref: Add product Product

Search: History, Notes, SMS, Email

Description	Date & Time	Attachment	Activity type
<b>New message</b> Paul I would like to inform your fitter appointment has been sched fitter appointment has been sched...	18/03/2024, 12:25 PM	Attachment	SMS
<b>Quotation accepted</b> Marsh I would like to inform your fitter appointment has been sched fitter appointment has been sched...	18/03/2024, 12:25 PM	-	Email
<b>Notes</b> Martin Luther I would like to inform your fitter appointment has been sched fitter appointment has been sched...	18/03/2024, 12:25 PM	Attachment	Notes
<b>Production notes</b> Nitish rana I would like to inform your fitter appointment has been sched fitter appointment has been sched...	18/03/2024, 12:25 PM	-	SMS

Total: 20.00, 1234.65, 456.00, 412.43, 3428.00

Show more

## History Section:

Name	Description	Date & Time	Attachment	Activity type
<b>New message</b>				
David Paul	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	1 attachment	SMS
<b>Quotation accepted</b>				
Michel Marsh	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	-	Email
<b>Notes</b>				
Martin Luther	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	1 attachment	Notes
<b>Production notes</b>				
Nitish rana	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	-	SMS

## Attachments section:

Only the notes captured for attachments will be displayed here and by clicking on the file will open the attachment. +1 indicates more than one attachment.

Name	Description	Date & Time	Attachment
<b>New message</b>			
David Paul	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	1 attachment
<b>Notes</b>			
Martin Luther	I would like to inform your fitter appointment has been sched fitter appointment has been sched....	18/03/2024, 12:25 PM	1 attachment +1

### **Points that remember:-**

1. When you click on the "All activities" drop-down, we will show the six options such as "History, Notes, SMS, Email, Production notes, Attachment" as per the mentioned sequence.
2. By default, all the above six tabs are enabled and shown as a horizontal scroll.
3. If any of the above tabs are unchecked in the all activities drop-down, the respective tab will be disappeared. This needs to be applied when we click on the show more screen.
4. This tabs disappear will be work voice versa. If we do changes to all of the job all activities, that will reflect in the show more screen, and also if we do changes on the show more screen, that will be reflect in to the job all activities.
5. For all the tabs ("History, Notes, SMS, Email, Production notes, Attachment") when we mouse hover each row, we need to show the description as a tool tip message. Screens are added for your reference,
6. This tool tip message needs to be shown for in the Show more screen and all activities screen in the job.
7. From the attachments, when we click on the attachment, it should be open as a preview of where we developed in the live system. This also needs to be worked both on the Show more screen and all activities screen in the job.

Joe Smith - Joe's Company
Job Status: Text Value
Job Ref No:

Account Ref:  
Order Status: Office
Invoice No:

Add product
Contact info
Work sheet
Send P/O
🌐
📄
☰

Product	Description	Qty	Item price	Net price	VAT	Gross price	Status		
<input type="checkbox"/>	Roller blinds	1100, 1500, White Plastic Chain,	2	121.45	324.43	3245	2343.56	<input checked="" type="checkbox"/>	⋮
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<input type="checkbox"/>	Roller Blinds	1100, 1500, Black Plastic Chain, Face	4	143.65	123.54	123.54	5674.732	<input type="checkbox"/> Ready	⋮
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Total			20.00	1234.65	456.00	412.43	3428.00		

Dates
Appointments
Task

Fitter	David	22 / 03 /2021	📅
Measurer	Mike	22 / 03 /2021	📅
Surveyor	Paul	22 / 03 /2021	📅

Show more
Check measure
+

Price Details
Invoice & Payments
Checklist

**Net Price**

**VAT**

**Gross Price**

**Total Paid**

**Outstanding A**

Dear John,

I hope this email finds you well. I wanted to express my gratitude for considering My Blinds Company for your project needs. As discussed, I am pleased to provide you with a detailed quotation for the services/products you require. Please find the quotation attached for your review.

Quotation Amount: \$8,630.75

Validity: This quotation is valid until 08-26-2024.

We appreciate the opportunity to work with you and look forward to the possibility of collaborating on this project. Your satisfaction is our top priority, and we are committed to delivering high-quality results.

We eagerly await your response.

Best Regards,

admin

**All activities**

History

May 15, 3:25 PM | Email by kane L. | I hope this email finds you v

May 15, 3:25 PM | Email by henry | I hope this email finds you v

May 15, 3:25 PM | Email by Joans | I hope this email finds you v

Show more
+