

DASH

USER GUIDE

FILE NOTES

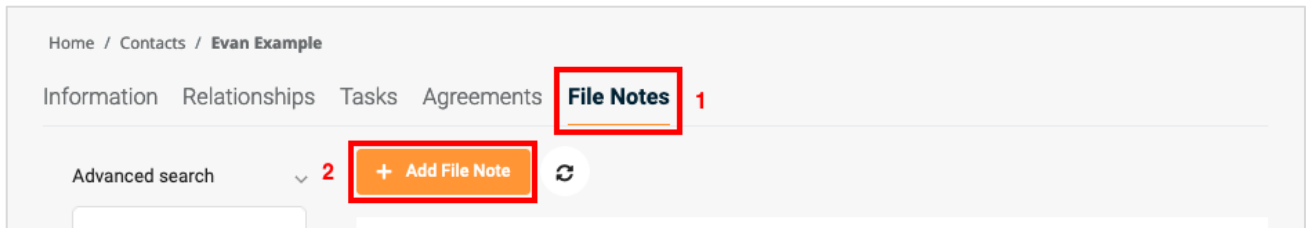
Contents

| | |
|---|-----------|
| 1 Adding File Notes | 2 |
| Tagging Users | 3 |
| Attachments | 4 |
| Adding Comments in File Notes | 4 |
| File Note Dates | 4 |
| 2 Creating a File Note Template | 5 |
| 3 File Note Categories | 7 |
| Creating File Note Categories | 7 |
| Editing and Deleting File Note Categories | 8 |
| Adding Categories to Existing File Notes | 8 |
| Removing Categories From File Notes | 9 |
| Searching in File Notes | 9 |
| 4 Deleting File Note Threads and Replies | 10 |
| Deleting a Reply | 10 |
| Deleting a File Note Thread | 11 |

1 Adding File Notes

File notes in DASH can be accessed via the **File Notes** tab when in a selected contact. You can create a file note by doing the following:

1. When in a selected contact, click on the **File Notes** tab
2. To add a new file note, click on the **+Add File Note** button



3. (Optional) Select a **File Note Template** via the dropdown to use a created template for the file note message.
 - This option will only be displayed if you have any File Note Templates. For information about how you can create your own file note templates, please refer to the 'File Note Templates' section in the guide.
4. In the displayed pop-up, enter a **Subject** name
 - You can think of the subject name as a folder for a file note in which you can have notes relating to the subject.
5. (Optional) You can select one or more categories which apply to the file note.
 - Please refer to the 'File Note Categories' section in this guide for information on how you can create and add categories to file notes.
6. (Optional) If the contact has a partner, you can **deselect** the partner if the file note is not relevant to them



7. Enter text for the message in the file note
 - The message field is a required field.
 - You can tag other users in DASH by typing @ and then selecting the user you want to tag. More information about tagging can be found in the Tagging Users section.
8. (Optional) You can add attachments by either clicking on **attachments** or by dragging the file you want into the message field.
 - For more information about what files are supported, please refer to the Attachments section.
9. (Optional) Set the File note date by clicking on the checkbox and then specifying the date
 - This really is only for when you want to back date a file note, if you're not using the option the date will be automatically set to the time that the file note is added.
 - Please refer to the File Note Date section for more information about the required formatting for the date field.

10. Click on **Add** to create the file note
 - This button will only be enabled once the required fields (Subject and Message) have been completed

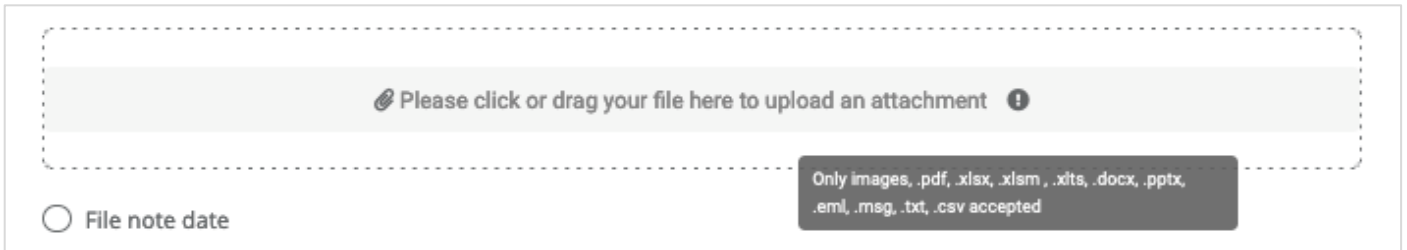
Tagging Users

When creating a file note or adding a comment, it is possible to tag other users in the file note. To tag a user, type the @ symbol into the message field. This will display a dropdown displaying all the users in the group where you will be able to select the user you want to tag.

When tagged, the user will receive a notification that they have been tagged, who they were tagged by and will also be provided with a link to navigate to the file note where they were tagged.

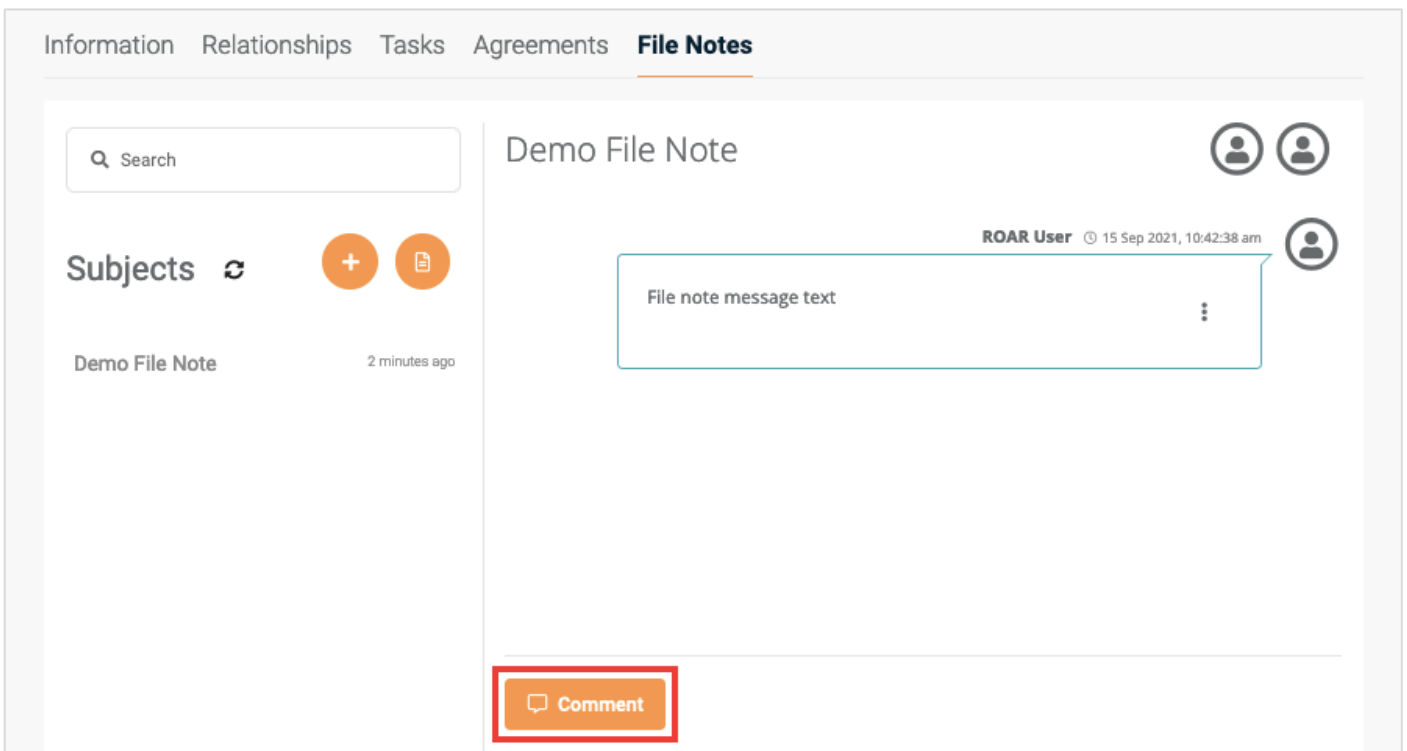
Attachments

When creating a file note or comment, files can be attached to the file note message. The following file types are supported as attachments; images, pdf, xlsx, xlsxm, xlts, docx, pptx, eml, msg and txt. You can also see the supported files for attachments by hovering your cursor over the **info icon**.



Adding Comments in File Notes

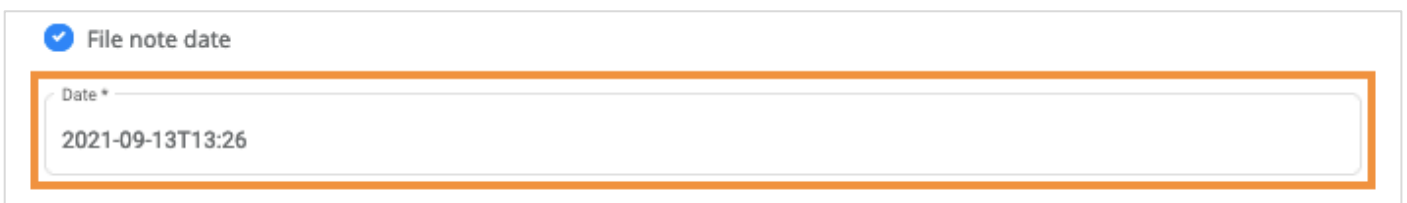
Subjects are essentially folders which you can add additional comments related to the file note. This can be done by clicking on the **Comment** button in a selected button. The process is essentially the same as adding a file note, except that you won't have to add a subject name since you're adding to an existing Subject.



File Note Dates

You can specify the date of the file note. It is recommended that you copy and paste the date in that field. Please be aware that the date needs to be entered in the following format:

- YYYY-MM-DDThh:mm
 - Time (Thh:mm) is in 24hr format
 - An example file note date of **2021-09-13T13:26** would correspond to a file note creation date of 13 September, 1:26:00 pm



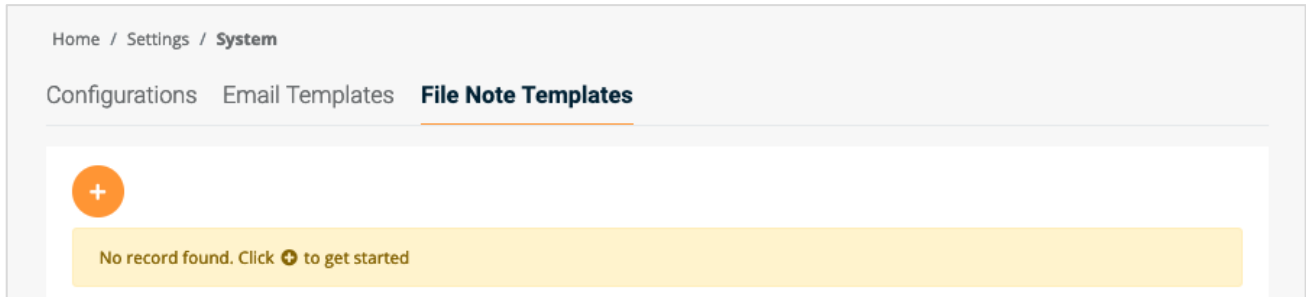
2 Creating a File Note Template

File Note Templates are something that you can create to have some default/prepopulated text set up for file notes that you will be creating on a regular basis. So rather than having to type things up repeatedly, you can use a template to form the basis of the file note message/content and then amending it as necessary.

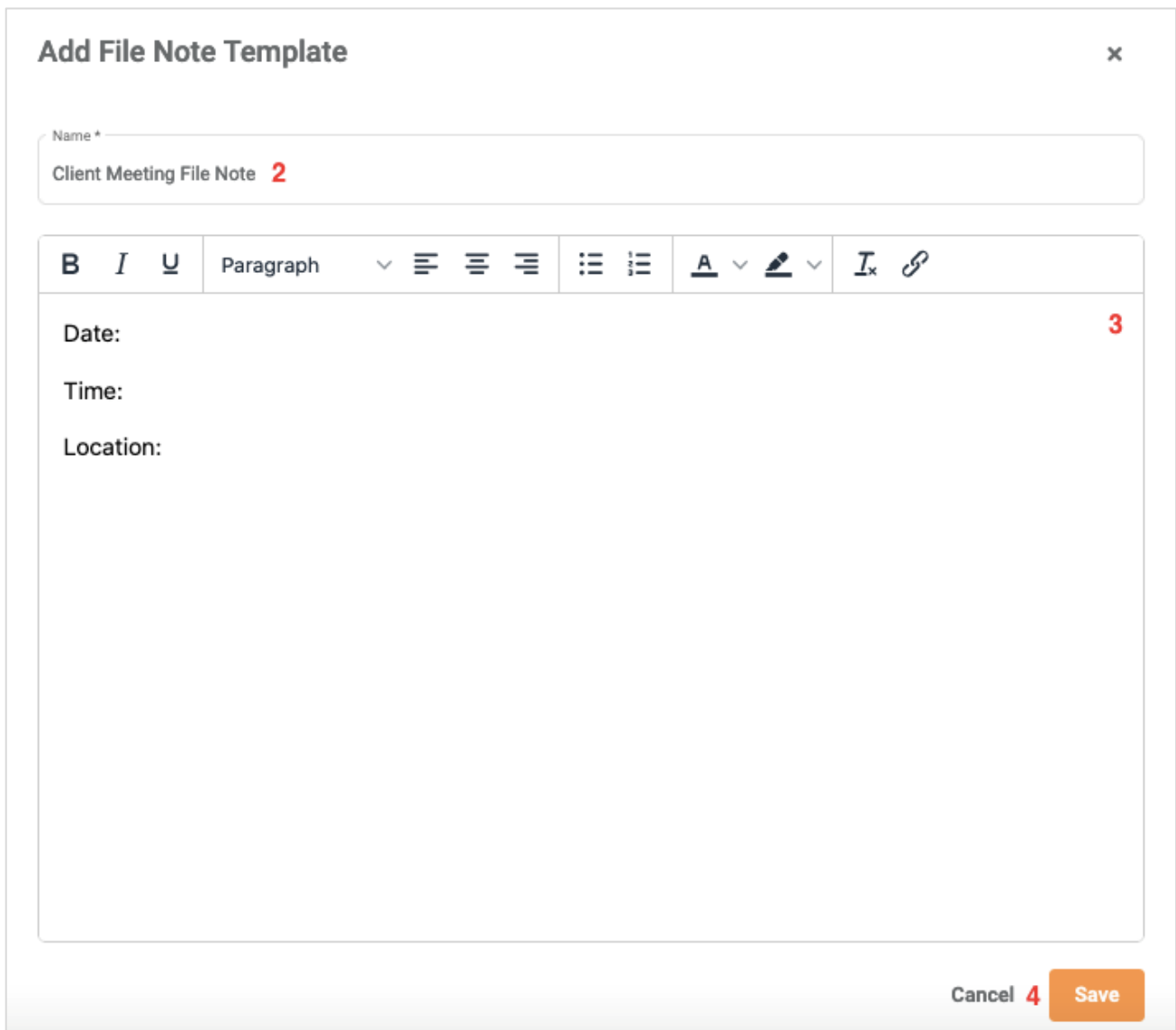
File Note templates can be added via **Settings > System > File Notes Templates**

You can add a new file note template by doing the following:

1. Click on the + button



2. Add a **Name** for the file note template
3. Add text to the **Message** field
4. Click on **Save**

A screenshot of a 'Add File Note Template' form. The form has a title bar with 'Add File Note Template' and a close button (x). Below the title bar is a text input field labeled 'Name *' containing the text 'Client Meeting File Note' followed by a red '2'. Below the input field is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), paragraph, list, text color (A), background color, strikethrough (Ix), and link. The main text area contains the text 'Date:', 'Time:', and 'Location:' followed by a red '3'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

Once a file note template has been created, you will be able to select the template for use when creating a new file note or when adding a comment to an existing file note.

The screenshot shows a form titled "Add File Note" with a close button (x) in the top right corner. Below the title is a "Subject *" input field with a "New" button on the right. Underneath is a "Contact" section with two buttons: "Evan Example" and "Emily Example", each with a checkmark and a person icon. Below the contact section is a "File note template" dropdown menu, which is highlighted with an orange border. The dropdown menu shows "Please select" and a list of templates, with "Client Meeting File Note" selected and highlighted in light blue. A search bar is visible at the top of the dropdown list.

Note: The **File note template** field will only displayed if a file note template has been created in your group.

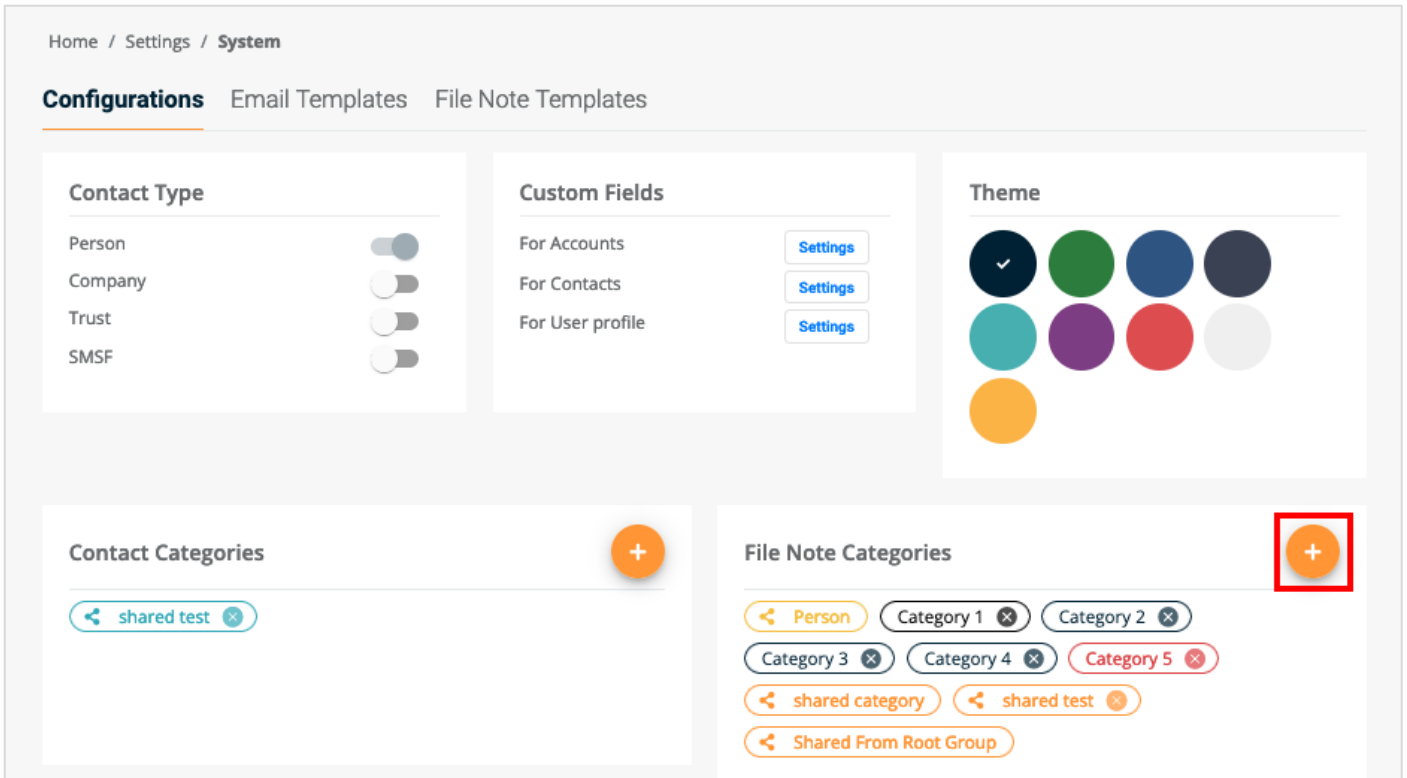
3 File Note Categories

You can create file note categories that can be assigned to the file notes to keep thing organised. This section of the guide will take you through how you can create file note categories, add them to existing file notes as well as how you filter and search through a contact’s file notes.

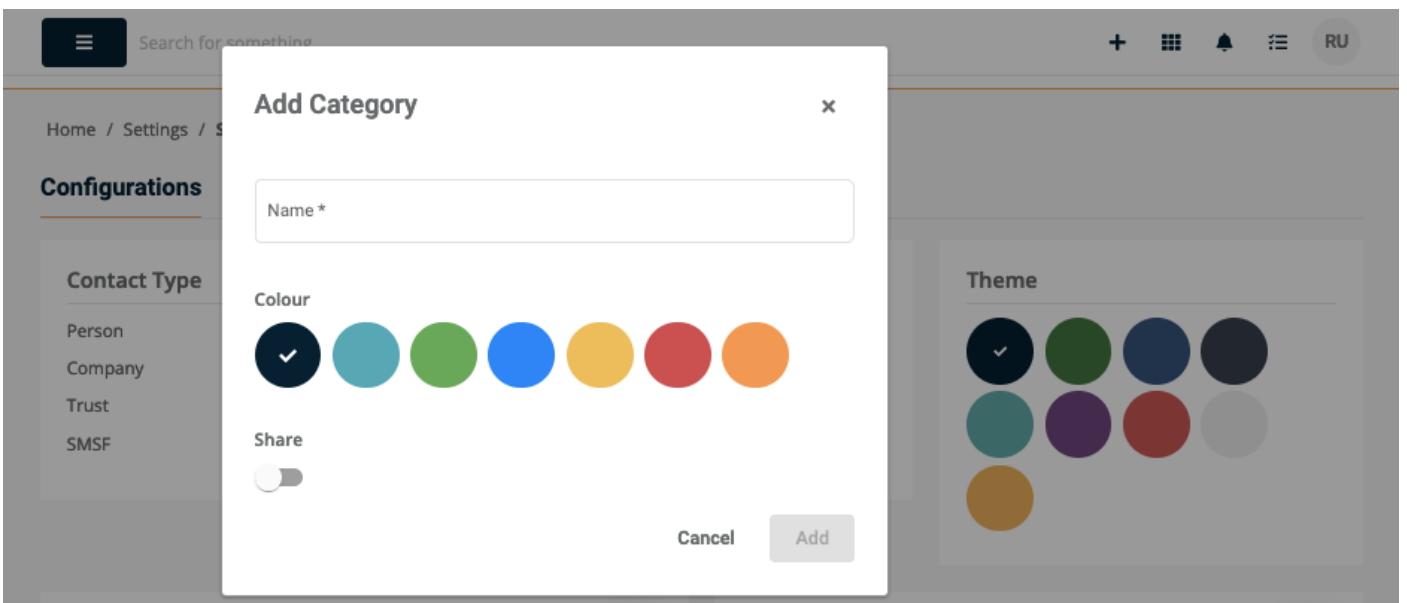
Creating and editing file note categories requires access to the Settings page in DASH.

Creating File Note Categories

You can create file note categories in **Settings > System**. Under the File Note Categories section, click on the + button to create a new file note category.

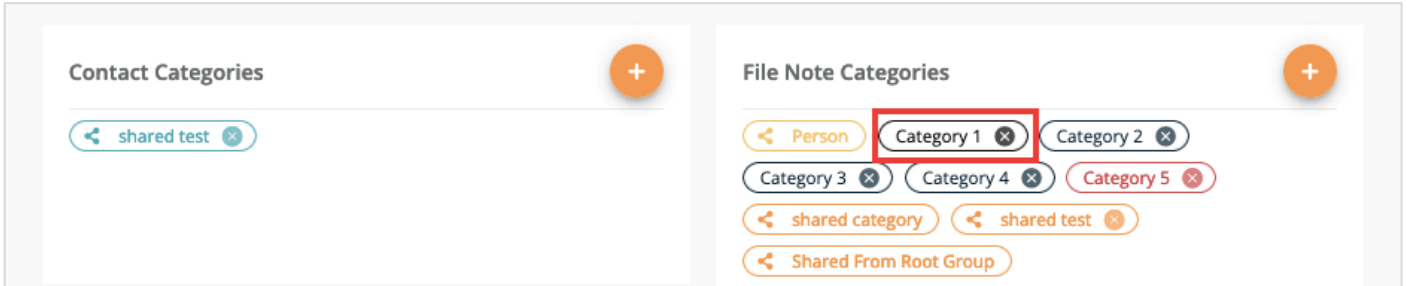


A pop-up will be displayed where you can provide the **Name** of the category as well as select the **Colour** you want associated with the category. The **Share** function determines whether the category will be shared to any subgroups so can be left off if you are not a dealer group.

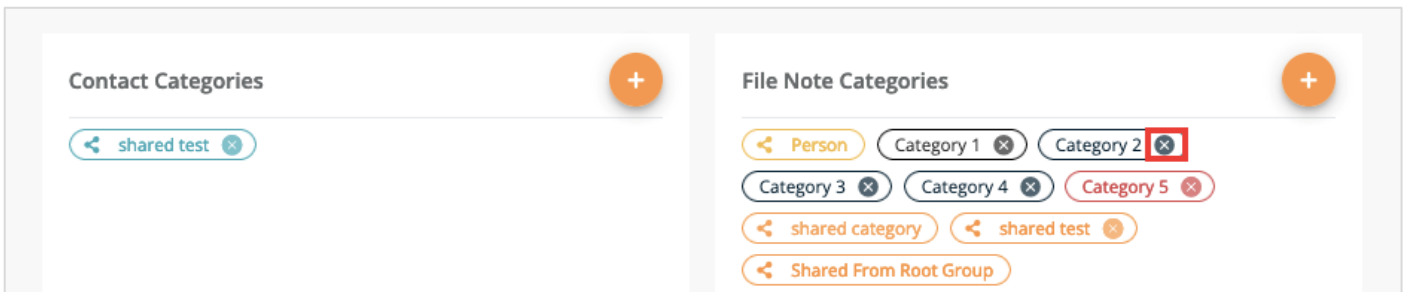


Editing and Deleting File Note Categories

Once a file note category has been created, you can edit a category by clicking on the **created file note category**. You can only edit file note categories that you have created in your group. If a category from your parent group has been shared to you (denoted by the share icon and the lack of an x icon), that category will not be something that you can edit.

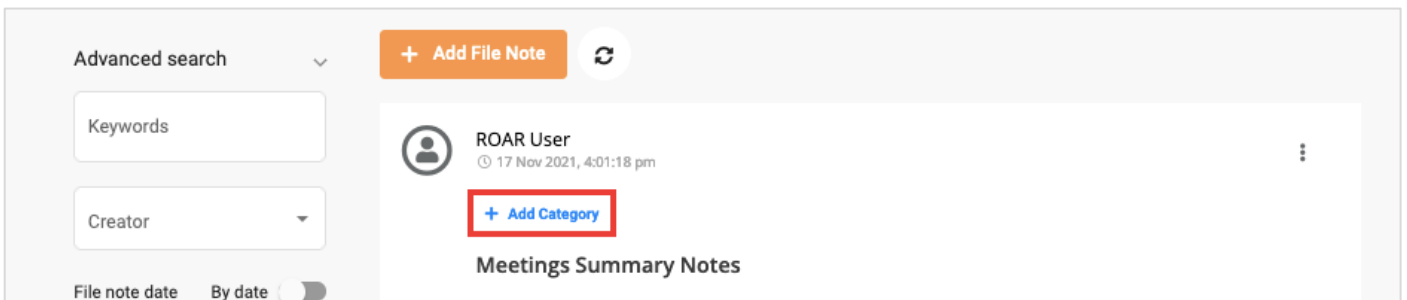


To delete a file note category, click on the **x** for the category. You will then be prompted to confirm that you want to remove the category. This cannot be reversed and will also remove the category from all file notes that the category was assigned to.

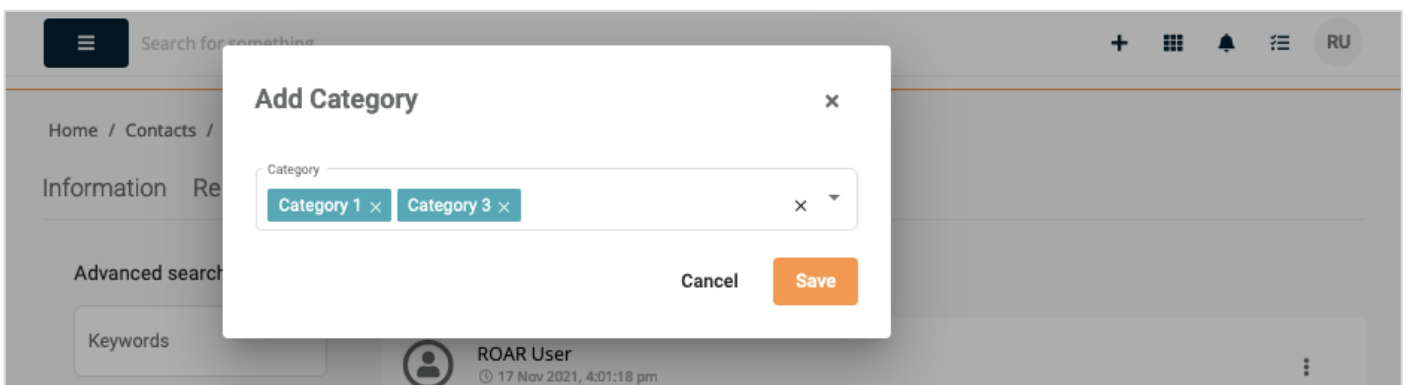


Adding Categories to Existing File Notes

You can add file note categories to existing file notes by clicking on the **+ Add Category** button.

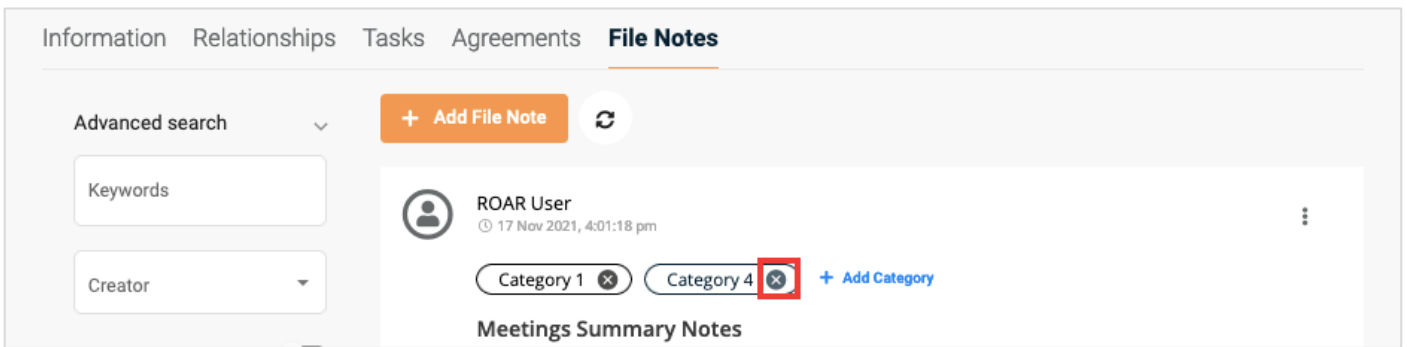


This will open a pop-up where you will then be able to select one or more categories to apply to the file note from the drop-down. Once you have selected the categories that you want assigned to the file note, click on **Save**. The categories will be applied to the file note.



Removing Categories From File Notes

You can remove a category assigned to the file note by clicking on the **x** button for the category tag that you wish to remove. You will then be prompted to confirm, after which the category will be removed from the file note.

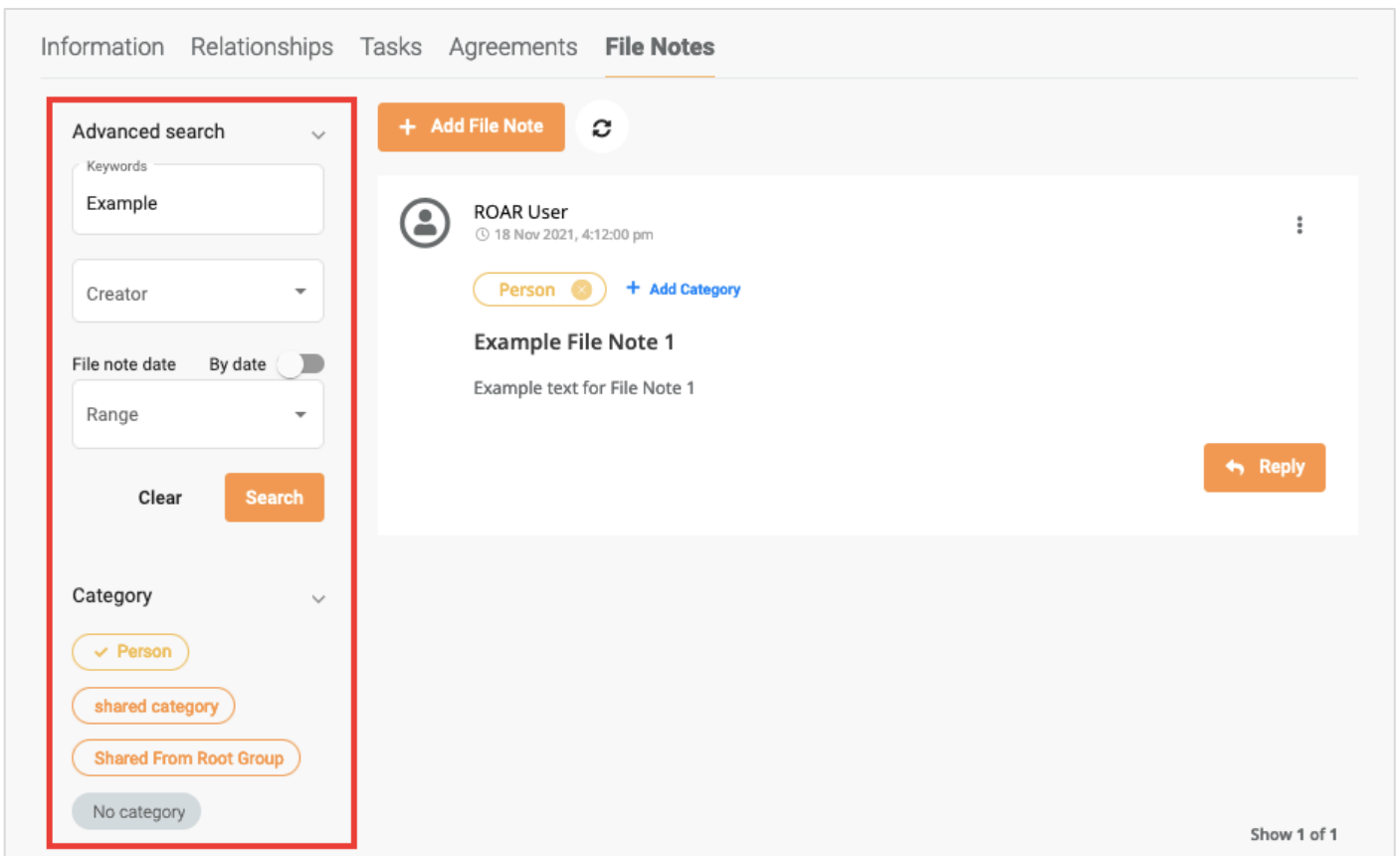


Searching in File Notes

In the File Notes tab in a selected contact, you will find an **Advance Search** and **Category** filters on the left hand side. Under Advanced Search, you will be able filter the file notes displayed against keywords, the creator of the file note as well as the date range parameters.

For the File note date, you will be able to select a range from the drop-down options. You can also toggle the 'By date' switch which will then allow you to specify a 'from' and 'till' date for situations where you have a more precise knowledge of the date range you would like to have displayed.

Additionally, under Categories, you will be able to pick which categories that you want to have displayed. Categories that have been selected will be denoted by a tick and you can deselect categories clicking on the category tag again.



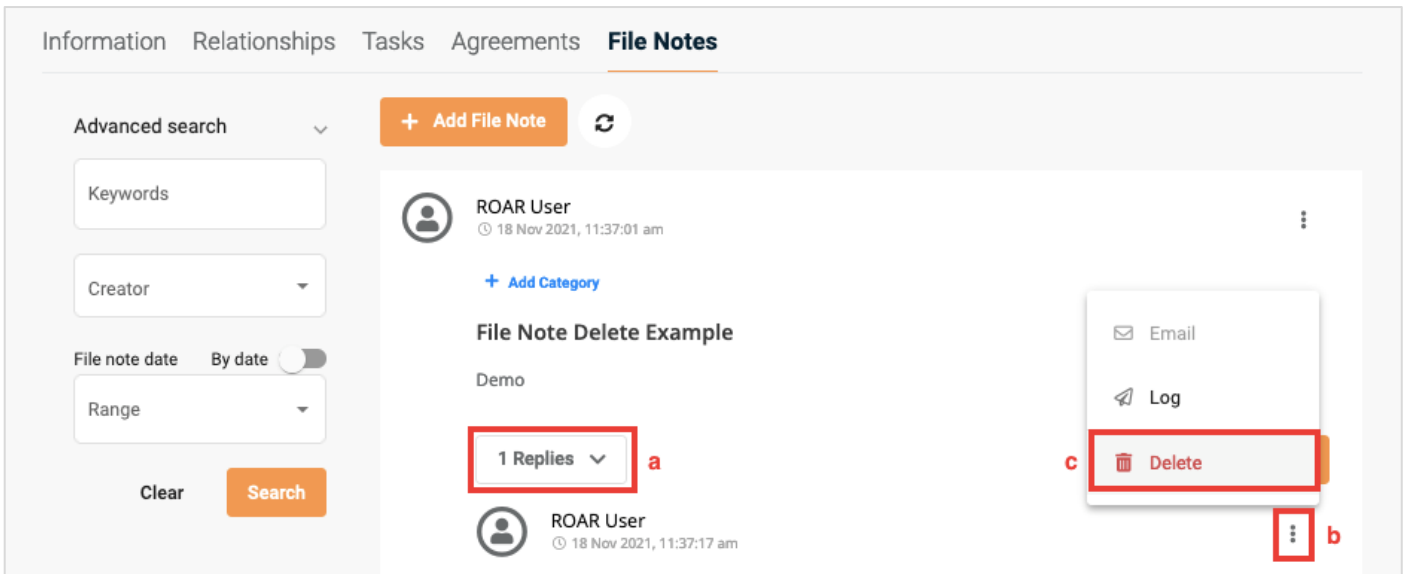
4 Deleting File Note Threads and Replies

Please take extra care when deleting threads or replies as there is no function to undo a deletion of a thread or reply.

When a file note is created, you are essentially creating a thread. The thread can be added to via the addition of replies. In the event that you need to delete replies or the entire thread. Please refer to the sections below for the steps that you can take to either delete a reply or an entire thread.

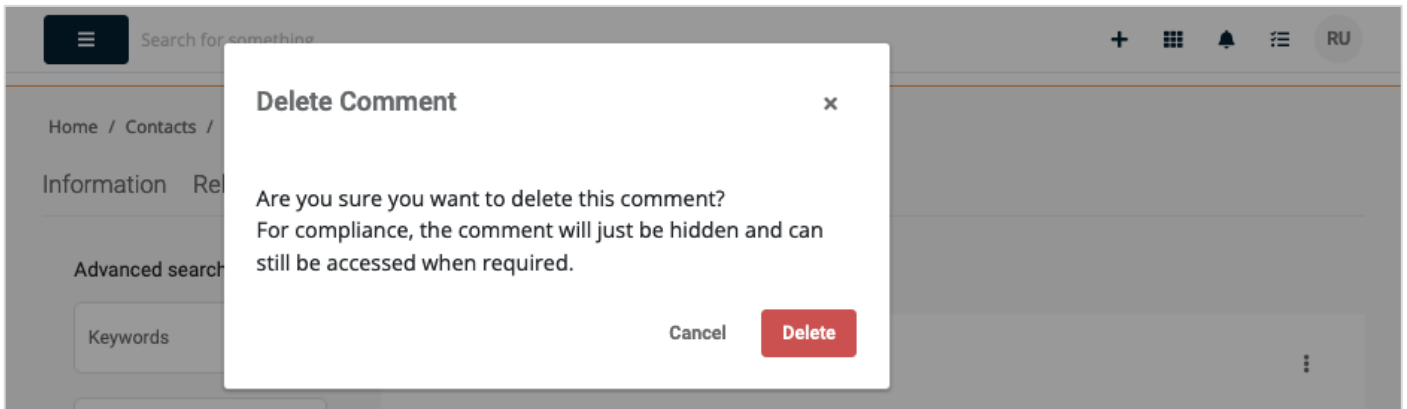
Deleting a Reply

You can delete a reply by first expanding the replies by clicking on **Replies (a)**. Once the replies have been expanded, you can click on the **3 vertical dots (b)** and then on the **Delete (c)** option.



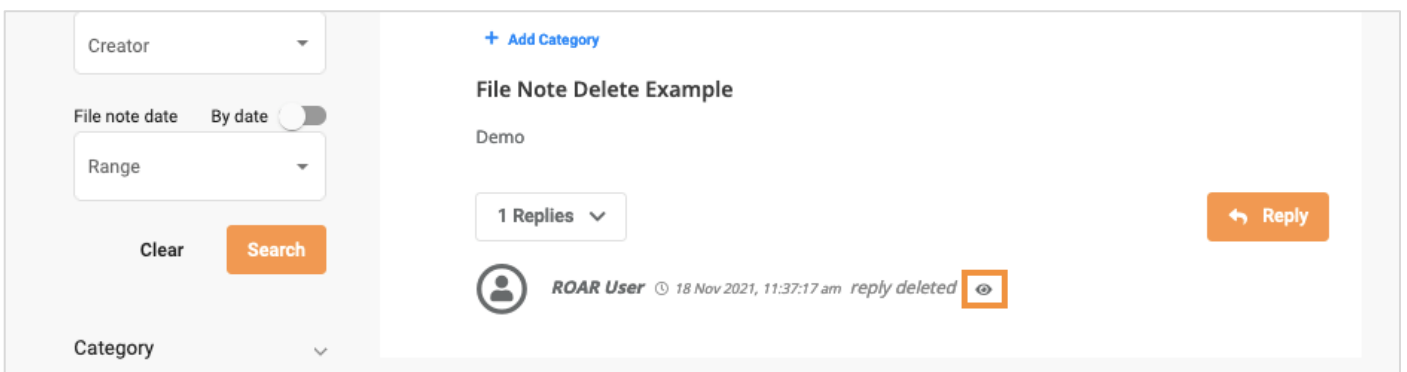
The screenshot shows the 'File Notes' section of a software interface. On the left, there is an 'Advanced search' panel with fields for 'Keywords', 'Creator', and 'File note date'. The main content area displays a file note titled 'File Note Delete Example' by 'ROAR User' from '18 Nov 2021, 11:37:01 am'. Below the title, it says 'Demo' and '1 Replies'. A red box labeled 'a' highlights the '1 Replies' dropdown. To the right of the file note, there is a three-dot menu icon labeled 'b'. A dropdown menu is open, showing options for 'Email', 'Log', and 'Delete'. The 'Delete' option is highlighted with a red box labeled 'c'.

You will be prompted to click on **Delete** to confirm that you want to delete the selected comment. Please keep in mind that you will not be able to undo the deletion of a reply.



The screenshot shows a 'Delete Comment' dialog box overlaid on the software interface. The dialog has a title bar with a close button (X). The main text reads: 'Are you sure you want to delete this comment? For compliance, the comment will just be hidden and can still be accessed when required.' At the bottom of the dialog, there are two buttons: 'Cancel' and 'Delete'.

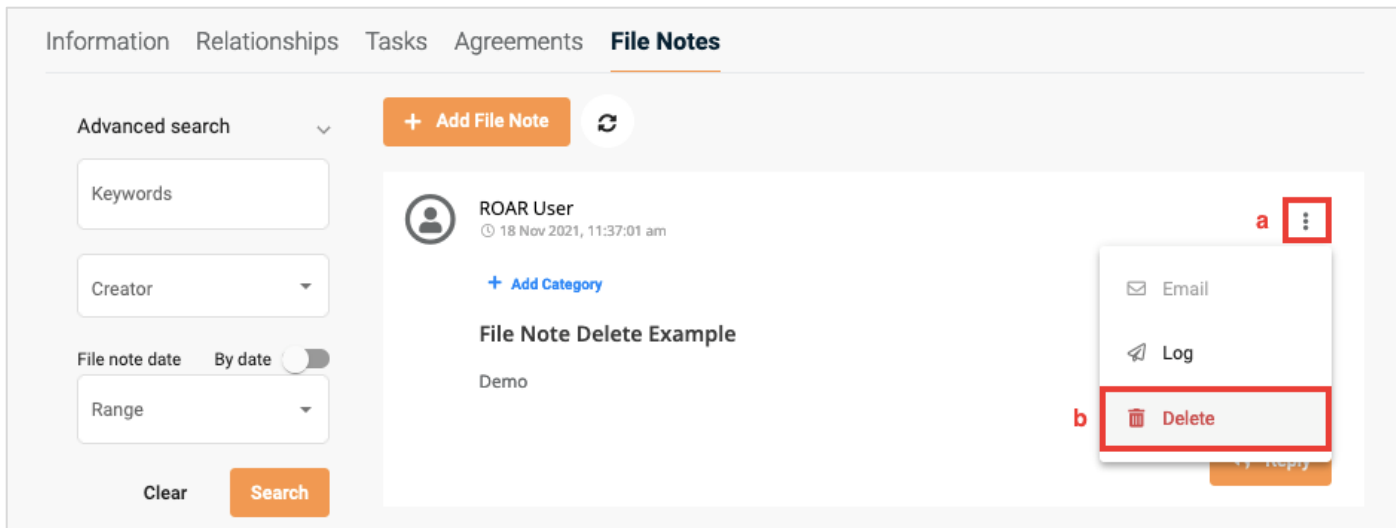
After confirming, the reply will be hidden but you can view the deleted reply by clicking on the **eye icon**.



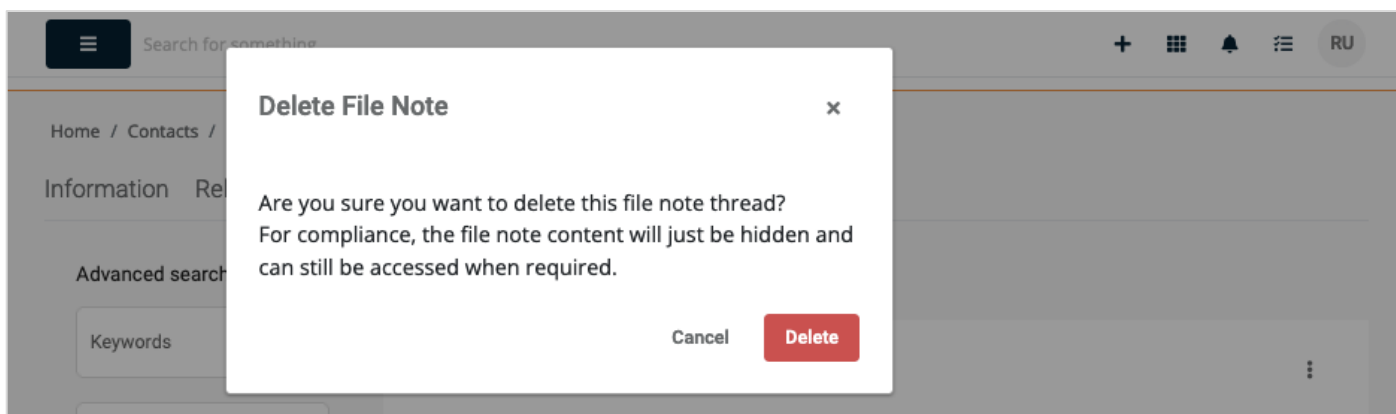
The screenshot shows the 'File Notes' section after the reply has been deleted. The '1 Replies' dropdown is still present. Below it, the reply is shown as 'reply deleted' with a greyed-out text and an eye icon. A red box highlights the eye icon. The 'Reply' button is visible to the right.

Deleting a File Note Thread

To delete a thread, click on the **3 vertical dots (a)** and then click on **Delete (b)**.



After clicking on **Delete**, you will be prompted to confirm that you want to delete the subject. Click on **Delete** to confirm that you want to delete the subject. Please keep in mind that you will not be able to undo the deletion of a file note thread.



After confirming, the reply will be hidden but you can view the deleted thread by clicking on the **eye icon**.

