

Working with Assistance Notes

Abstract

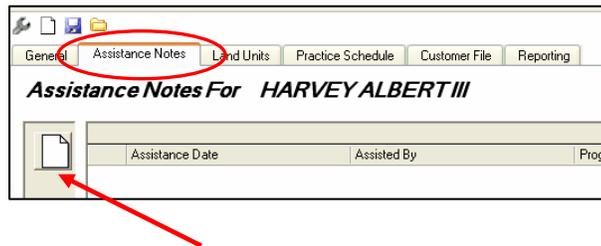
The purpose of this guide is to demonstrate how to add, edit and delete conservation assistance notes.

Steps: Add assistance note – open assistance note – edit assistance note – delete assistance note.

Details

Add an Assistance Note

1. **Click** on the assistance note tab.



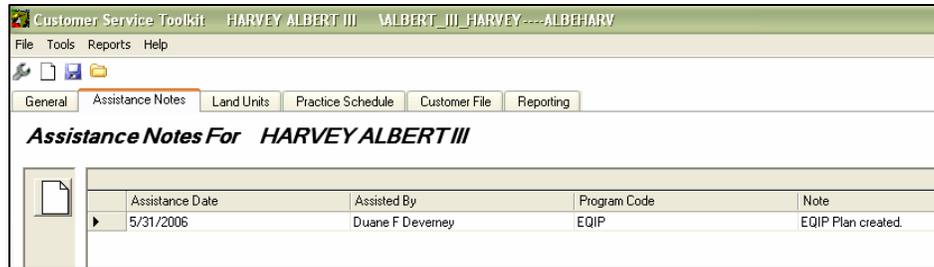
2. **Click** on the **New Note button** and the *New Assistance Note* window will open.
3. Verify that the date is correct. You can back-date or forward-date the note.
4. **Click** the **down-arrow** next to “Program” to pick the applicable program.



5. **Click** in the large, white field and type in your note.
6. Use the Spell Check button when finished.
7. If you are going to write another note for this customer, **click** the **Add New** button.
8. **Click** the **Save** button when note is completed.

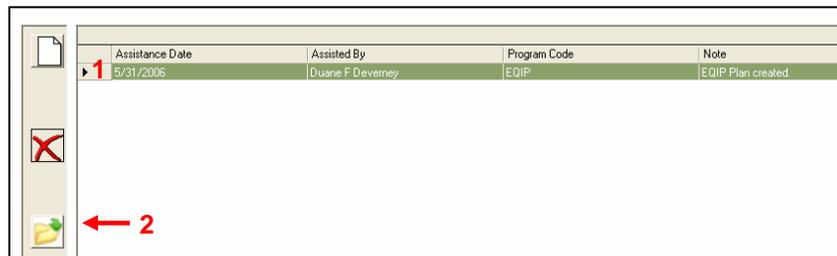
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- The window disappears and your note is listed on the Assistance Notes tab.



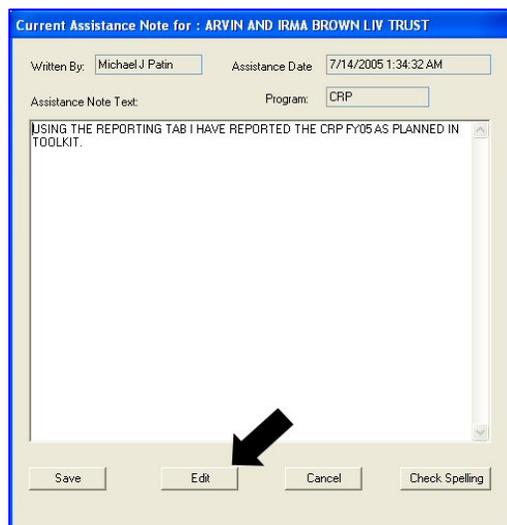
Opening an Assistance Note

- Click** on the assistance note tab.
- There are two ways to open a note; either **double-click** on the note (see graphic below – **1**) or **select** the note and **click** on the **open note** icon (see graphic below – **2**).



Editing an Assistance Note

- Click** on the assistance note tab.
- Open** the desired note.
- When the note opens, **click** the **edit** button.



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15. Make edits to the note.
16. Click the **save** button.

Note: The date will default to today's date and the program code will be blanked out. Change the program code back, and to correct the date.

Note: The program code will need to be re-entered

Deleting an Assistance Note

17. Click on the assistance note tab.
18. Open the desired note.
19. Select the note.
20. Click the **delete note** button. 
21. Confirm the deletion.