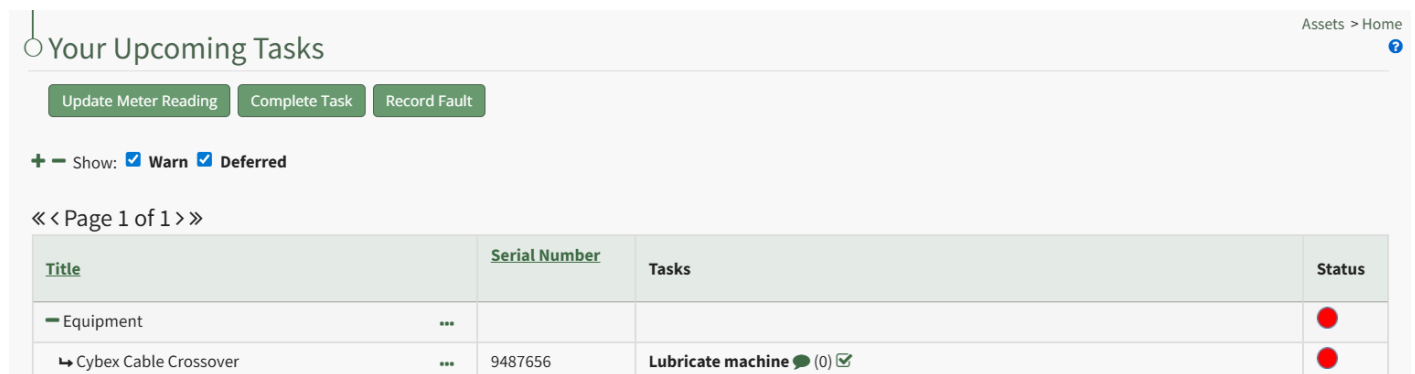


Add Interim Notes to a Task without Completion

To add interim notes to a task without completing the task, you will need to pull up the specific task you wish to add a note to. This could be done from the Upcoming Task Table or from an Asset's Task Schedule.

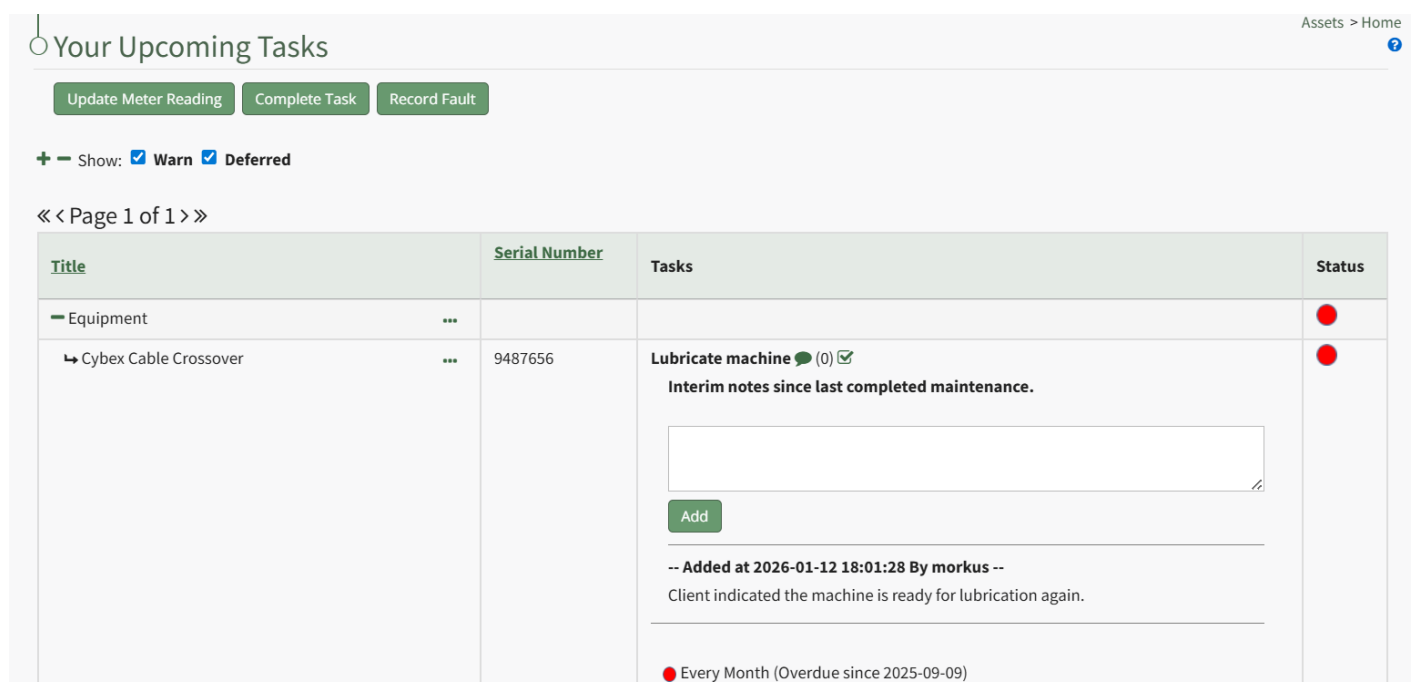
To Add Interim Notes from the Upcoming Task Table

To add interim notes to a task from the Upcoming Task Table, open the Assets Module Home Page from the Main Menu.



The screenshot shows the 'Your Upcoming Tasks' interface. At the top right, it says 'Assets > Home'. Below the header, there are three buttons: 'Update Meter Reading', 'Complete Task', and 'Record Fault'. A filter section shows 'Show: Warn [checked] Deferred [checked]'. Below that is a pagination control '« < Page 1 of 1 > »'. The main table has four columns: 'Title', 'Serial Number', 'Tasks', and 'Status'. The first row shows 'Equipment' with a red status dot. The second row shows 'Cybex Cable Crossover' with serial number '9487656' and task 'Lubricate machine (0) [checked]', also with a red status dot.

Click the dialogue icon to the right of the specific task title, which expands the Upcoming Task Table with a textbox for interim notes since the task was last completed. Input the interim notes and click the "Add" button.



This screenshot shows the same 'Your Upcoming Tasks' interface, but the 'Lubricate machine' task is expanded. The 'Tasks' column now contains 'Lubricate machine (0) [checked]' followed by 'Interim notes since last completed maintenance.' Below this is a text input field with a small 'x' icon in the bottom right corner. Underneath the input field is a green 'Add' button. Below the button, there is a timestamp: '-- Added at 2026-01-12 18:01:28 By morkus --' and a note: 'Client indicated the machine is ready for lubrication again.' At the bottom of the expanded task, there is a red dot icon followed by the text 'Every Month (Overdue since 2025-09-09)'.

Any previously added notes will show beneath the text box, indicating the time, date, and user who made the interim notes.

To Add Interim Notes from an Asset's Task Schedule

To add interim notes to a task that is not visible on the Upcoming Task Table, select the My Assets Page in the Assets Module on the Main Menu. Identify the asset you wish you add interim notes to, and click the three-dot icon to the right of the asset/sub-component name opening the My Assets Context Menu.

The screenshot shows the 'My Assets' interface. At the top, there is a search and filter section with a search box, a 'Tags' dropdown menu, and a checkbox for 'Show out of service assets and components'. Below this is a table of assets. The table has columns for Title, Serial Number, Meters, Tags, and Status. A context menu is open over the 'Slow Flow Room' asset, showing options like 'Complete Task', 'Record Fault', 'Update Meter Reading', 'View', 'Run Report', 'History', 'Files', 'View Components', and 'Manage Components'.

Title	Serial Number	Meters	Tags	Status
+ Equipment	...	No Meters		Red
+ Jump at it Cafe	...	No Meters		Yellow
+ Lockers	...	No Meters		Green
Meter	...	No Meters		Green
Sauna	...	No Meters		Red
+ Slow Flow Room	...	No Meters		Green

Select the "Manage Components" option, opening the Manage Asset Components Page.

Manage Components of Equipment + ⋮

Filters

Search **Tags**

Show archived assets Show out of service assets and components

Set Filter **Clear**

+ -

« < Page 1 of 1 > »

Title	Serial Number	Meters	Tags	Status
Equipment ⋮		No Meters		●
↳ Bench Press ⋮		No Meters		●
↳ Bench Press Machine #1 ⋮		No Meters		●
↳ Bench Press Machine #2 🔧 📄 🚫 ! ⋮		No Meters		●
↳ Cybex Cable Crossover ⋮		No Meters		●
↳ Hack Squat Machine ⋮		No Meters		●
↳ Hammer Strength Iso-Lateral DY Row ⋮		No Meters		●
↳ Pec Fly and Rear Delt ⋮		No Meters		●

Select the three-dot icon to the right of the asset/component you wish to add interim notes to and select Task Schedule from the context menu.

Task Schedule for Equipment ⋮

Assets > Manage Assets > Equipment > Tasks

● Equipment 🔧 📄 🚫 !

Refresh Status **Take out of service** **View Components** **View Cost and Time**

Meters
No Meters

Add Task **Create Permissive Group** **Apply Task Template**

Filters

Search **Tags**

Set Filter **Clear**

With Selected Show completed tasks Show generator tasks

« < Page 1 of 1 > »

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	● Inspect all joints for appropriate tightness 🔧 📄 🚫 ! ⋮	Regular		No	2026-01-12 08:31:04	● Ad Hoc (No triggers have been defined)
<input type="checkbox"/>	● Oil joints 🔧 📄 🚫 ! ⋮	Regular		No	2026-01-12 08:31:04	● Ad Hoc (No triggers have been defined)

This opens the asset's Task Schedule Page.

Select the dialogue icon to the right of the task you wish to add a note to, expanding the task table to show a textbox for interim notes between maintenance.

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Inspect all joints for appropriate tightness (0) Interim notes since last completed maintenance. <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-top: 5px;">Add</div>	Regular		No	2026-01-12 08:31:04	Ad Hoc (No triggers have been defined)

Input the desired notes and select the "Add" button.

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Inspect all joints for appropriate tightness (0) Interim notes since last completed maintenance. <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-top: 5px;">Add</div> -- Added at 2026-01-13 09:13:30 By morkus -- Visibly loose joint on midsection.	Regular		No	2026-01-12 08:31:04	Ad Hoc (No triggers have been defined)

The note will now show beneath the textbox. The system automatically includes a time/date stamp and the User ID of the individual that added the note.

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