

How To Add a Note on an Application



This guide provides a straightforward process for adding notes to application records, ensuring that important changes and updates are documented efficiently. By following the simple steps outlined, users can easily track modifications, such as name changes, enhancing communication and record-keeping. The guide also emphasizes the importance of saving notes and confirms successful entries, making it a valuable resource for maintaining accurate application records.

1

When viewing an application, click the **Notes** tab to view any existing notes or add a new note

The screenshot displays the Matrix Security Watchdog application interface. At the top, the navigation bar includes 'Dashboard', 'Applications', and 'Reports'. The 'Applications' tab is active, showing a breadcrumb trail: 'Dashboard > Applications > Johana Frantz'. Below this, a 'Back to Applications' link is visible. The application ID '331FRAN69198D' is shown with a status of 'Awaiting Verification'. The candidate's name 'Johana Frantz' is prominently displayed, along with a 'Withdraw' button and the creation date 'Created: 01 Aug 2025'. A horizontal tab bar at the bottom of the header section contains 'Summary', 'Details', 'Notes', 'Documents', and 'History'. The 'Notes' tab is highlighted with an orange circle. The 'Summary' section below contains a 'Candidate Details' table and a 'Checks Required' section.

Candidate Details	
Candidate Name	Johana Frantz
Date Of Birth	26/05/1942
Reference	331FRAN69198D
Group Name	Business Services - Recruitment
Organisation	Business Services Ltd
Position Applied For	Credit Operations Analyst
Consent Date	01 Aug 2025 - 13:12:50
Application Status	Awaiting Verification

Checks Required

2

Click **Add Note** to add your own note to the application

The screenshot displays the Matrix Security Watchdog web application. At the top, the navigation bar includes the 'matrix security watchdog' logo, tabs for 'Dashboard', 'Applications', and 'Reports', and a user profile 'B Businessservices All'. Below the navigation bar, the breadcrumb trail reads 'Dashboard > Applications > Johana Frantz'. A link '< Back to Applications' is visible. The application ID '331FRAN69198D' is shown next to a status button 'Awaiting Verification'. The user's name 'Johana Frantz' is displayed with a profile icon and a 'Withdraw' button. The creation date 'Created: 01 Aug 2025' is noted. A tabbed interface at the bottom shows 'Summary', 'Details', 'Notes' (selected), 'Documents', and 'History'. Under the 'Notes' tab, the section 'Application Notes' contains an 'Add Note +' button, which is circled in orange, and a message stating 'No notes have been added to this application'.

3

Enter a note title in the 'Title' field

The image shows a screenshot of the Matrix Security Watchdog application interface. On the left, the main dashboard for user Johana Frantz is visible, showing application details for '331FRAN69198D' with a status of 'Awaiting Verification'. On the right, a 'Note' modal form is open. The 'Title' field in this modal is highlighted with an orange circle, indicating where the user should enter a note title. The modal also includes a 'Note Type' dropdown menu, a rich text editor for 'Note Content', and 'Cancel' and 'Save' buttons at the bottom.

4

Add the details of the note in the 'Note Content' section

The screenshot displays the Matrix Security Watchdog interface. On the left, the application details for '331FRAN69198D' are shown, including the user 'Johana Frantz' and a status of 'Awaiting Verification'. The right panel is a 'Note' form with the following fields:

- Title ***: A text input field containing 'Changed surname'.
- Note Type ***: A dropdown menu with 'Note' selected.
- Note Content ***: A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, indent, outdent, paragraph, heading) and a large text area. An orange circle highlights the text area.

At the bottom of the 'Note' form, there are 'Cancel' and 'Save' buttons.

5

Click **Save**

The screenshot displays the Matrix Security Watchdog interface. On the left, the application details for '331FRAN69198D' are shown, including the applicant's name 'Johana Frantz' and a status of 'Awaiting Verification'. The 'Application Notes' section is currently empty. On the right, a 'Note' modal is open, allowing the user to add a new note. The modal includes a 'Title' field with the text 'Changed surname', a 'Note Type' dropdown set to 'Note', and a 'Note Content' text area containing the text 'I have changed the applicants surname from ~~Frantzxx~~ to Frantz'. The 'Save' button at the bottom right of the modal is highlighted with an orange circle.

matrix
security watchdog

Dashboard Applications Johana Frantz

Dashboard > Applications > Johana Frantz

< Back to Applications

331FRAN69198D Awaiting Verification

Johana Frantz

Summary Details Note

Application Notes Add Note +

No notes have been added to this application

Note

Title * Note Type *

Changed surname Note

Note Content *

I have changed the applicants surname from ~~Frantzxx~~ to Frantz

Cancel Save ✓

6

A message will be displayed on-screen confirming the note has been successfully saved

The screenshot displays the Matrix Security Watchdog interface. At the top, a green notification bar with a checkmark icon states "Note was successfully saved", which is circled in orange. The header includes the Matrix logo, a breadcrumb trail "Dashboard > Applications > Johana Frantz", and a user profile "Businessservices All". Below the header, a "Back to Applications" link and the application ID "331FRAN69198D" with an "Awaiting Verification" status are shown. The main section features the applicant's name "Johana Frantz" and a "Withdraw" button. A tabbed interface at the bottom shows "Notes" as the active tab, with other tabs for "Summary", "Details", "Documents", and "History". Under "Application Notes", there is an "Add Note +" button and a table with one entry. The table has columns for Date, Title, Note, Created By, and Query. The entry shows a date of "6 Aug 2025 - 09:56", a title of "Changed surname", a note describing a surname change, and was created by "Businessservices All". At the bottom left, a "Results per page" dropdown is set to "10" and shows "1 to 1 of 1 items".

matrix security watchdog

Dashboard > Applications > Johana Frantz

Note was successfully saved

Businessservices All

< Back to Applications

331FRAN69198D Awaiting Verification

Johana Frantz

Withdraw

Created: 01 Aug 2025

Summary Details Notes Documents History

Application Notes Add Note +

Date	Title	Note	Created By	Query
6 Aug 2025 - 09:56	Changed surname	I have changed the applicants surname from Frantzzz to Frantz	Businessservices All	

Results per page 10 1 to 1 of 1 items