



How to Add Collaborative Daily GM Notes in efish

With our latest update, **Daily GM Notes are now collaborative** — multiple users can enter and edit notes at the same time without losing progress. These notes appear in the **Daily Detail Email** (sent out the following day) for those with permission.

Featuring:

- **Real-time collaboration:** Multiple users can now add and edit notes **simultaneously** without losing any content.
 - efish will let you know who else is writing notes at the same time as you
- Improved note stability and save performance.
- Seamless user experience across devices.

To be aware of:

- Collaborative Notes feature only applies to the “GM Journal” section as well as any “Long Text” fields, if you have any “Short Text” or “Number” fields, it’s possible they may be over written if another user saves updates to those fields after you. You must click **SAVE** at the bottom once you are ready to save your notes before leaving the page so any entries in those fields are not lost.
 - **To configure your locations Notes fields or change them all to Long Text, navigate to Administration > Location Settings > Custom Tracking Tab > and change the “input type” field to “Long Text” to ensure collab notes are enabled for that field.**

Location: Beach Blonde Go

Item Label	Input Type	Active	Modules
1. Opening Manager	Long Text	<input checked="" type="checkbox"/>	Daily Journal: <input checked="" type="checkbox"/> Required: <input checked="" type="checkbox"/> Weekly Journal: <input checked="" type="checkbox"/> Required: <input checked="" type="checkbox"/>
2. Closing Manager	Short Text	<input checked="" type="checkbox"/>	Daily Journal: <input checked="" type="checkbox"/> Required: <input type="checkbox"/> Weekly Journal: <input checked="" type="checkbox"/> Required: <input type="checkbox"/>
3. Schedule Feedback	Number	<input checked="" type="checkbox"/>	Daily Journal: <input checked="" type="checkbox"/> Required: <input checked="" type="checkbox"/> Weekly Journal: <input checked="" type="checkbox"/> Required: <input type="checkbox"/>

Submit Changes

Accessing Daily GM Notes from the Daily Journal:



1. Click **Add/Edit GM Entries** in the upper-right corner of the Daily Journal screen.

Entering Notes in the GM Reporting Tab:

Navigation: Need Help? | Operations | Reporting | Accounting | Administration | Home | Aim | Sign Out

You are now logged in

Send Message | Message History

Daily Journal for Tuesday, March 18, 2025

Mon < Tue 03/18/2025 > Wed | Location: Beach Blonde | Add/Edit GM Entries | Reimport PCS Data

	Week To Date	Last year	%	Period To Date	Last year	%	Year To Date	Last year	%
Net	\$186,395.78	\$0.00	+100.0%	\$4,085,045.87	\$0.00	+100.0%	\$4,085,045.87	\$0.00	+100.0%

Tabs: Sales | Categories | Discounts/Comps | Voids | Labor | Items | Profit Centers | Employee Summary

Day Totals

Date	Net Sales	%	Discounts	% of Sales	Checks	%	Guests/Customers	PPA	SPMH Sales Per Man Hour	%	Labor Cost	% of Sales
2025-03-18 Tuesday	\$23,726.24		\$954.55	4.0%	397		425	\$55.83	\$227.48		\$999.98	4.2%
Last Week 03/11/2025	\$12,638.78	+83.4%	\$1,121.37	8.7%	402	-1.2%	428	\$30.23	\$128.23	+77.4%	\$997.78	7.7%
Last Month 02/18/2025	\$3,543.16	+569.6%	\$693.46	15.4%	66	+483.6%	71	\$49.90	\$24.49	+628.3%	\$1,579.26	44.5%
Last Year 03/19/2024	(NO DATA)											

1. Inside the **GM Reporting Tab**, enter notes in each applicable field:

Add/Edit GM Entries

Beach Blonde | Sat < Sun 03/23/2025 > Mon

B E A C H B L O N D E - 0 3 / 2 3 / 2 0 2 5

Tabs: GM Reporting | Cash Reconciliation | Paid Outs To Process | Inventory | Labor Settings

Active Users:

O P E N I N G M A N A G E R

Normal | B | I | U

User # 1 Typed this
User # 2 Typed this AFTER User 1 completing and saving their notes

2. Closing Manager: User # 1 Typed this

3. Schedule Feedback: 1.00

G M J O U R N A L

Normal | B | I | U

User # 1 Typed this
User # 2 Typed this prior to User 1 completing and saving their notes
User # 2 Typed this AFTER User 1 completing and saving their notes

User # 1 Typed this
User # 2 Typed this prior to User 1 completing and saving their notes

* />

Send Email Upon Saving

Save | Cancel



- o efish will let you know who else is writing notes at the same time as you if anyone starts a new note while you are writing yours, both your changes will be saved.

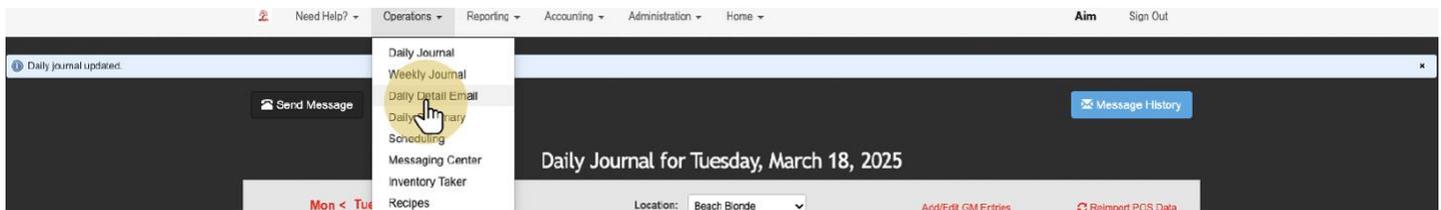
2. **GM Journal** — use this for the **most important notes**, as it is featured prominently in the Daily Detail Email.

When you're done:

1. To have it **emailed automatically the next day**, simply click **Save**.
2. To **send an update to a previous daily detail email immediately**, check **Send Email Upon Saving** and click **Save**.

You can view the Daily Detail Email at any time:

1. Go to **efish > Operations > Daily Detail Email**
(Only visible if your role has permission)
2. Inside, you'll see **all the GM Notes for the selected date**.



Sat Sun 03/23/2025 Mon

Location: Beach Blonde

Daily Detail Report

2025-03-23 - Beach Blonde

1. Opening Manager

User # 1 Typed this

User # 2 Typed this AFTER User 1 completing and saving their notes

2. Closing Manager

User # 1 Typed this, User # 2 Typed this AFTER User 1 completing and saving their notes

3. Schedule Feedback

2.00

Notes

User # 1 Typed this

User # 2 Typed this prior to User 1 completing and saving their notes

User # 2 Typed this AFTER User 1 completing and saving their notes