Note Shortcut Maintenance

Megan De Freitas - 2024-12-03 - Setup

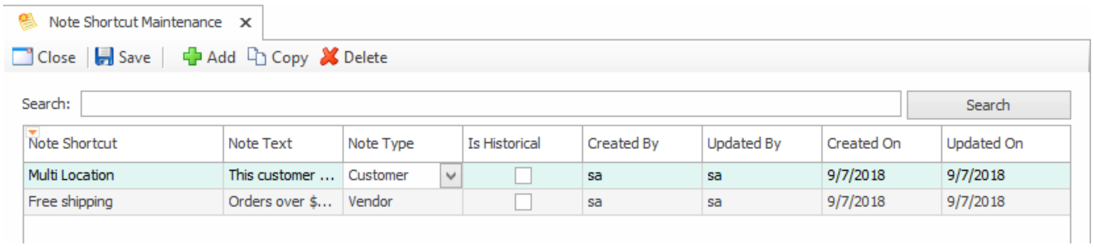
Overview

In this module, users can easily create and maintain note templates. Once the shortcuts have been created, they can be added to:

- Sales Documents
- Purchase Orders
- Contacts
- Customers
- Vendors
- Case Tracker

Creating a Shortcut

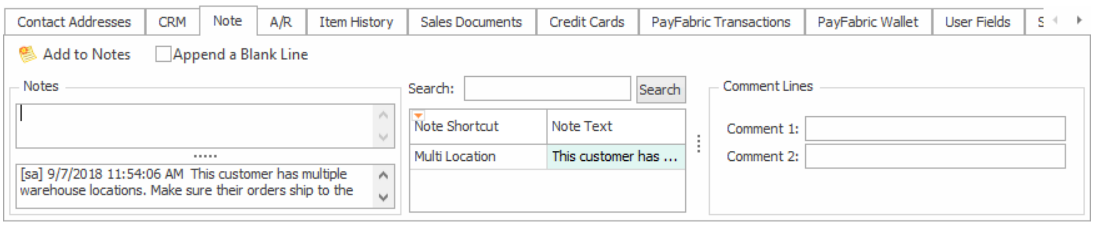
To create a new Note Shortcut, click the **Add** button. The **Note Type** field determines where the shortcut will be available to be added. Shortcuts can be copied to multiple locations using the Copy button.



Using Note Shortcuts

To add an existing note shortcut, navigate to the Notes tab that matches the Note Type field for the desired shortcut. For example, to add a Customer Note Shortcut to a customer, navigate to the Notes tab on the Customer card.

Double-click on the desired shortcut to add it to the Note Staging window, and finalize by clicking on the **Add to Notes** button and saving the changes.



Security

Note Shortcut maintenance - Gives access to the module to create, edit, and delete note shortcuts.

CRM Note Entry - Allows notes to be added to the CRM card.

Customer Addr Card - Grants access to the Customer Addr card.

Customer Note - Allows notes to be added to the Customer card.

Purchase Order Notes - Allows notes to be added to purchase orders.

Sales Document Notes - Allows notes to be added to sales documents.

Vendor Note - Allows notes to be added to vendors.

Security Sub-Settings

The securities above all have the *Can Access Note Shortcuts* sub-setting, which must be set to True in order to add shortcuts to the respective Notes fields.