

Knowledgebase > SalesPad > Setup > Note Shortcut Maintenance

# Note Shortcut Maintenance

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## 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.

👏 Note Shortcut Maintenanc	e x										
🖹 Close   📕 Save   📲 Add 🗅 Copy 💥 Delete											
Search:							Search				
Note Shortcut	Note Text	Note Type	Is Historical	Created By	Updated By	Created On	Updated On				
Multi Location	This customer	Customer 🗸		sa	sa	9/7/2018	9/7/2018				
Free shipping	Orders over \$	Vendor		sa	sa	9/7/2018	9/7/2018				

#### 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.

Contact Addresses	CRM Note	A/R	Item History	Sales Documents	Credit Cards	PayFa	bric Transactions	PayFabric Wallet	User Fields	s⊣►		
🌕 Add to Notes 🛛 Append a Blank Line												
Notes Search: Search Comment Lines												
			~ >	Note Shortcut	Note Text		: Comment 1:					
				Multi Location	This customer	has	: Comment 2:					
[sa] 9/7/2018 11:54:06 warehouse locations. M												

## 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.