



## Notes Review

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### Overview

Notes Review is a function in SalesPad that will block users from creating a sales document until they review the notes. A popup will show the notes to the user and allow them to adjust the notes if the proper securities have been enabled. In this document, you will learn where and when Notes Review is activated. Any relevant securities and settings will be explained at the end of the document.

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### Notes Review

#### Setup

In order to use Notes Review, you will first need to enable the *Notes Review* security.

Security

✓ Select All | Select None | Copy From... >>

Acc...	Name
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Inventory Adjustment Notes*
<input checked="" type="checkbox"/>	Item Notes*
<input checked="" type="checkbox"/>	Notes Review
<input checked="" type="checkbox"/>	Purchase Advisor Notes
<input checked="" type="checkbox"/>	Purchase Order Notes*
<input checked="" type="checkbox"/>	Sales Document Entry*
<input checked="" type="checkbox"/>	Sales Document Notes*

✕ ☒ [Name] = 'Inventory Adjustment Notes' Or [Name] = 'Purchase Advisor Notes' Or [Name]... Edit Filter

You will also need to enable the *Auto Prompt For Sales Document Notes* settings.

Filter:  
auto prompt

Sales Document Entry	
Auto Prompt For Notification Email	False
Auto Prompt For Sales Document Notes	True

**Auto Prompt For Sales Document Notes**  
Automatically prompt for Sales Document Notes when creating a new document. Defaults to 'False'.

**Note:** Do not activate the *Auto Prompt for Sales Document Notes* setting without activating the *Notes Review* security. If the security is disabled, there will be a security violation that will block the user from creating any sales documents.

#### Usage

Notes Review will prompt users to change or add any notes. This window will pop up when a new document is saved in the system.

Comments & Notes

Add Comment | Add Note

Cust. Comment	Cust. Note	Internal Notes

OK Cancel

Here, you can add comments and notes to the Sales Document. If you use the **Add Note** button, it will add an internal note to the document. To add Cust. Notes, you must go to the customer card. For more information on Customer Notes and Comments, refer to the [Customer Card | SalesPad Desktop](#) documentation.

#### Security and Application Settings

##### Securities

*Notes Review* – Allows users to see the Notes Review window.

##### Settings

*Auto Prompt for Sales Documents* – Shows the Notes Review window on saving a new document.