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Setting Up Notes Tabs on Sales Documents

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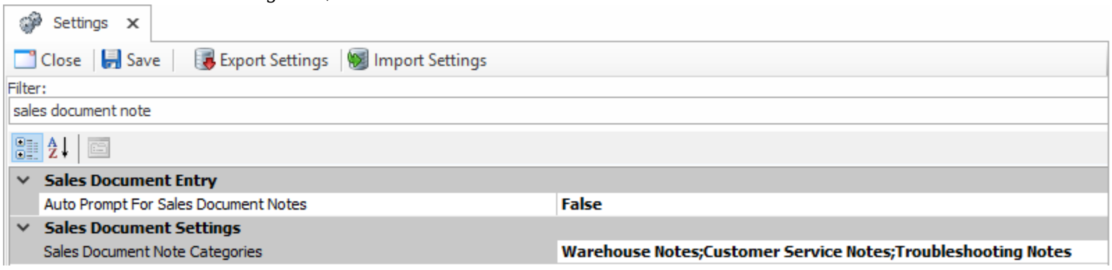
Overview

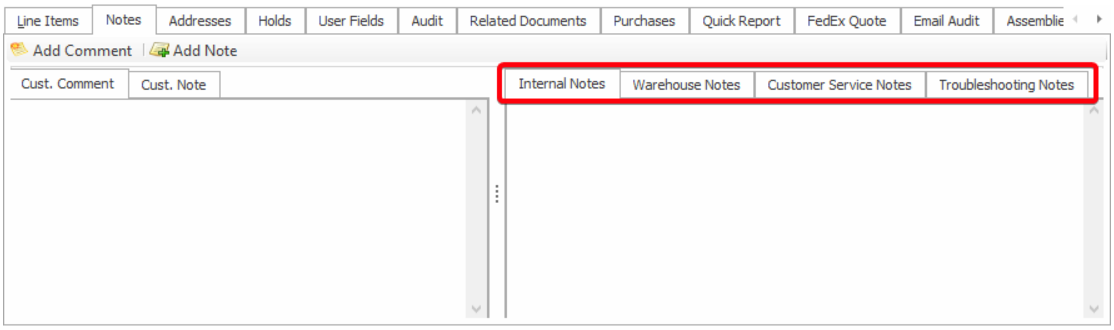
The Sales Document Notes tab can be modified to include additional customized tabs. Access to these customized tabs can be restricted by security group.

Usage

To add customized tabs to the notes field, navigate to the settings module to define the tab names. In the setting Sales Document Note Categories, enter a semicolon delimited list of the names desired for each tab.



After saving any changes made, the named notes tabs will now be visible on the sales document.



Note: Notes on the sales document are limited to 7,799 characters total on all note tabs. Entered notes longer than 7,799 characters will be trimmed (there is currently no notice given) and additional notes entered will not save

Security

Sales Document Notes - Named Notes Access List - List of different note tabs that are accessible. * for all. Defaults to '*'.

Settings

Sales Document Settings > *Sales Document Note categories* - Define custom note categories. Place an * at the end of the note name to disable printing. This item has no default value.