



Setting Up PreSaved Comments

Megan De Freitas - 2024-11-22 - Setup

Pre-saved comments can be set up in Dynamics™ GP and added from a list to sales documents in SalesPad.

To populate the comments list:

1. Open Microsoft Dynamics™ GP
2. Go to **Microsoft Dynamics GP** button > **Tools** > **Setup** > **Company** > **Comments**. The Comments Setup dialog box appears

3. Enter an ID in the **Comment ID** field
4. Select **Sales** from the **Series** drop-down
5. Type the comment in the **Comment** field as you would like it to appear in the list
6. Click **Save**
7. Repeat steps three through six to add more comments to the list
8. Log out and back in to SalesPad

To add a pre-saved comment to a sales document:

1. Open a sales document in SalesPad
2. Select the **Notes** tab
3. Click **Add Comment**. The comments list appears, displaying the ID and comment for each comment added in GP

Comments

Choose a Comment to Add...

ID	Comment
THANKS	Thanks for your business.
THANKS-SALES	Thanks for your business from the sales department at Fabrikam.
UNTITLED*	Need this ASAP

OK Cancel

4. Select the comment you wish to add and click **OK**

The selected comment will appear in the Cust. Comment column in the Notes tab:

File Modules View Help Customer Search Inventory Lookup Sales Docu

Customer Search Sales Documents Card: [AARONFIT0001] Aaron Fitz Electrical

Close Save Print Delete Copy Allocate Dynamics

Document Properties

Document #: ORDER (STDORD)

Customer #: AARONFIT0001 Aaron Fitz Electrical

Cust PO: Sales Rep: ERIN J.

Req Ship: 9/20/2010 Pay Terms: 2% 10/NET...

Ship Method: LOCAL DELIVERY Doc Date: 9/20/2010

Created By: Erin

Shipping Address

Aaron Fitz Electrical
Bob Fitz
One Microsoft Way
Grand Rapids, MI 49506
P:(425) 555-0101
F:(312) 555-0101

☒ Ship Complete
☐ Blind Ship

File Items Notes Addresses Holds User Fields Audit Related Documents Purchases FedEx Quo

Cust. Comment Add Comment

Thanks for your business.

Internal Notes SHIPPING NOTES CONFIG NOTES