

<u>Knowledgebase</u> > <u>SalesPad</u> > <u>Setup</u> > <u>Setting Up PreSaved Comments</u>

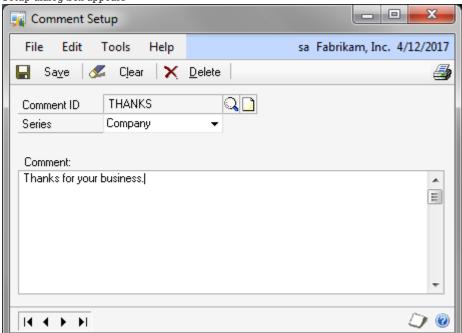
## **Setting Up PreSaved Comments**

Cavallo Support - 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:

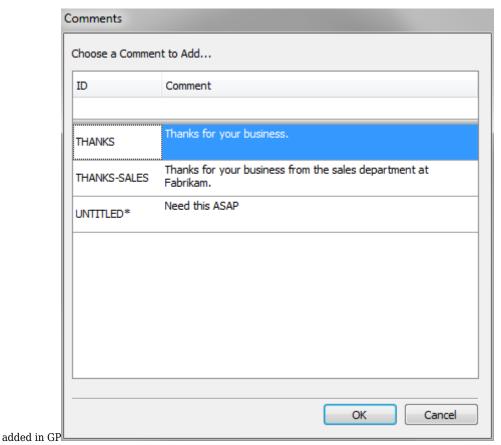
- 1. Open Microsoft Dynamics™ GP
- 2. Go to **Microsoft Dynamics GP** button > **Tools** > **Setup** > **Company** > **Comments**. The Comments Setup dialog box appears



- 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



4. Select the comment you wish to add and click  $\boldsymbol{OK}$ 

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

