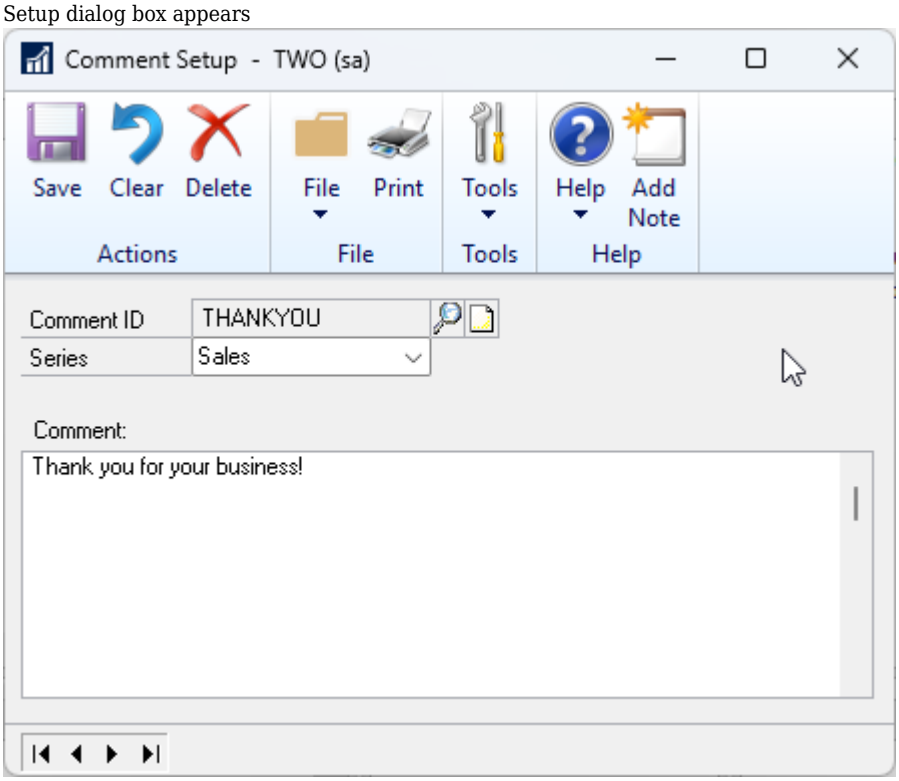
Setting Up PreSaved Comments

Cavallo Support - 2026-02-16 - 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:

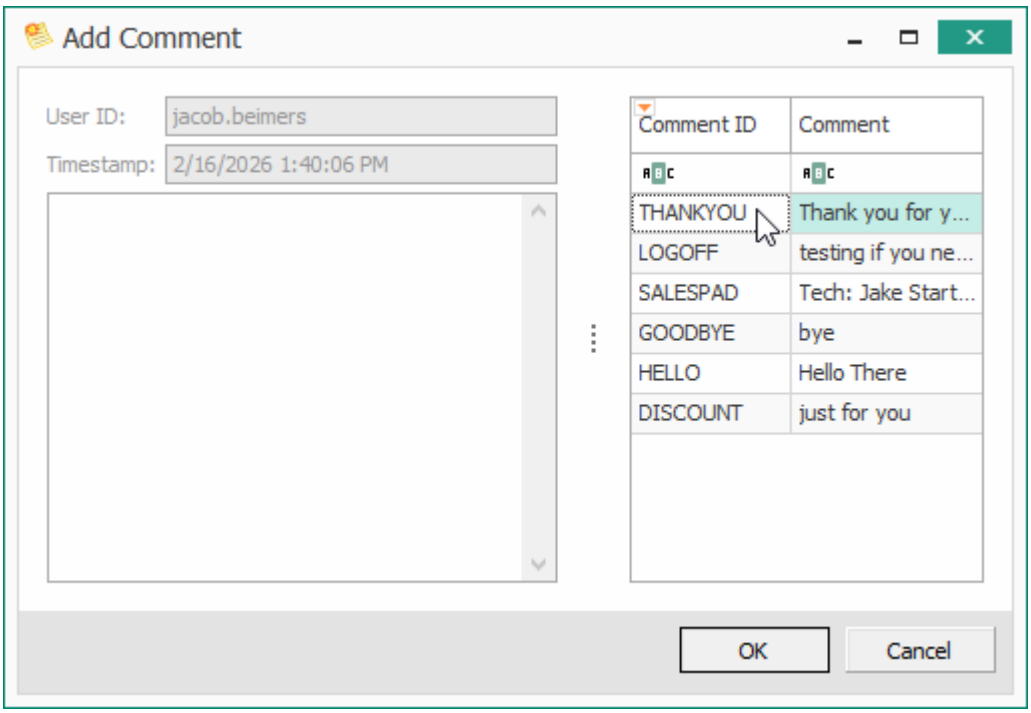
1. Open Microsoft Dynamics™ GP
2. Go to **Microsoft Dynamics GP** button > **Tools** > **Setup** > **Company** > **Comments**. The Comments Setup dialog box appears



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



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:

