

Configuration

Default Notes Maintenance

Where is Default Notes Maintenance Located?

- **Configuration > Default Notes Maintenance**

Why & When Default Notes are Used

Create a default note when specific information is required on multiple documents and you don't want to re-type it on each one. Set the default, and apply it to multiple documents quickly by simply calling up a code.

How to Create Default Notes

1. **Configuration > Default Notes Maintenance**
2. Click on an order type. There are three options: **Sales Order, Purchase Order, or Transfer Order.**
3. Each order type has specific documents associated with it. Any current notes will populate in the grid.
4. Click **New** to add a new row in the grid.
5. Click in the empty space below the **Code** column and type a code. Continue along the row and type in the text field. The text is exactly what will be printed on the document.
6. Click the document types where you would like this note option to appear.

BOL	LI	SI	Inv	OC	CanExp	Pass	SOREPORT
Bill of Lading	Loading Instruction	Shipping Instruction	Invoice	Order Confirmation	Canadian Export	Bill of Lading	Sales Order Report

7. **Save and Close** when you are finished.

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For Sales Order, the document types are as follows: