

# Note Templates

The Note Templates setting allows you to specify the message (or part of the message) you want to populate in the Financial Notes section on the Job Bag or Details section on financial documents. You can set it so that some of the information related to the Job or document prepopulates by default in the financial note or details tab.

You can set multiple Notes Templates for the same document or Job Bag.

## Contents

- [Setting up Note Templates](#)

▼ [Screen layout](#)

▼ [Field Help](#)

Fields	Description
Add Note	Allows you to add a financial note.
Templates	Insert the desired note into the note editor.
Title	Shows a descriptive name for the selected note. This title can be edited.