

# Setting up Note Templates

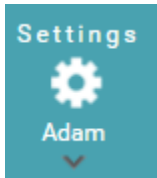
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Below are steps to show you how to set up Note Templates.

## Step-by-step guide

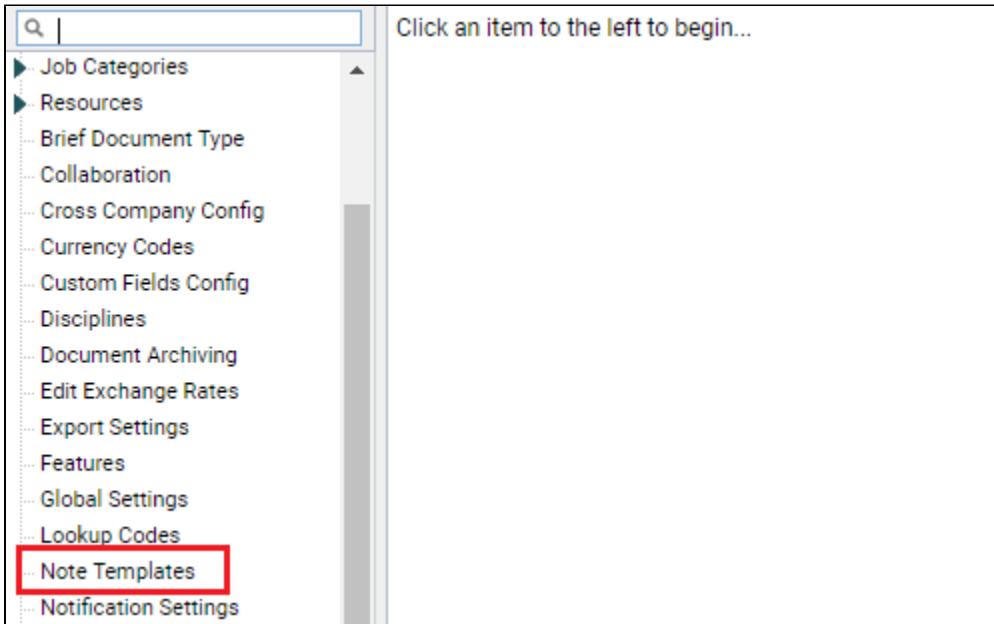
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1. Click the **Settings** button on the Ribbon.



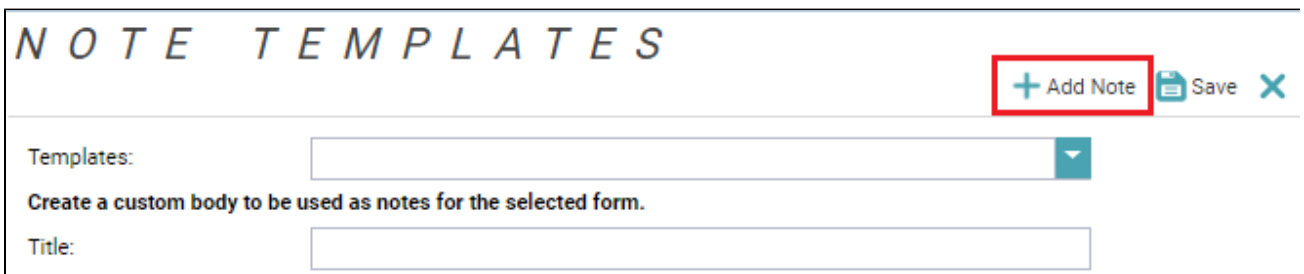
The *Configuration* screen appears.

2. Click the **Note Templates** item on the Configuration tree.



The *Note Templates* screen appears.

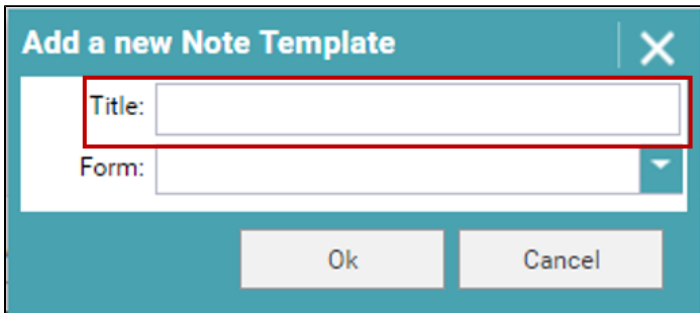
3. Click the **Add Note** button on the Toolbar.



The *Add a new Note Template* dialog appears.

4. In the **Title** field, enter a descriptive name for the note.

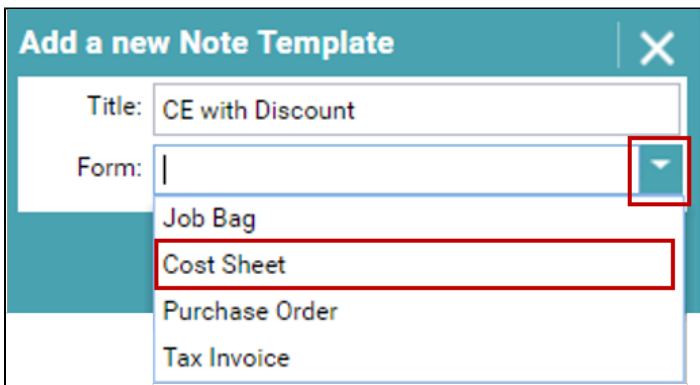
In this example, **CE with Discount** was entered.



The screenshot shows a dialog box titled "Add a new Note Template" with a close button (X) in the top right corner. It contains two input fields: "Title:" and "Form:". The "Title:" field is highlighted with a red border and contains the text "CE with Discount". The "Form:" field is empty. At the bottom of the dialog, there are two buttons: "Ok" and "Cancel".

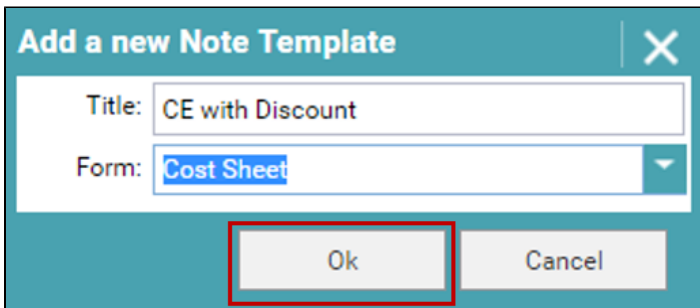
5. Click the drop down arrow in the **Form** field, and select the form or document the note will apply to.

In this example, **Cost Sheet** was selected.



The screenshot shows the same dialog box as before, but the "Form:" dropdown menu is open. The dropdown list contains the following items: "Job Bag", "Cost Sheet", "Purchase Order", and "Tax Invoice". The "Cost Sheet" item is highlighted with a red border. The "Title:" field still contains "CE with Discount". The dropdown arrow in the "Form:" field is also highlighted with a red box.

6. Click the **OK** button to create the note.



The screenshot shows the dialog box with the "Form:" dropdown menu closed and "Cost Sheet" selected. The "Ok" button is highlighted with a red border.

The new note will become the current item in the **Title** field of the *Note Templates* screen.

7. Enter the note that is to appear on the details field of the form, in the note editor.

In this example, **Job: {Job No} is {FormName}** was entered.

# NOTE TEMPLATES

+ Add Note Save X

Templates: Cost Sheet - CE with Discount

Create a custom body to be used as notes for the selected form.

Title: CE with Discount

The following templates are available for use in the Financial Note Body:

- {Logged on UserName} - The currently logged in User's Name
- {Company Name} - The name of the current company logged into
- {Current Date} - The current date
- {Job No} - The current number of the job
- {Job Status} - The current status of the job
- {Product Name} - The name of the Product on the job
- {Element} - The element specified on the job
- {Form Name} - A user friendly name for the form
- {Doc No} - The document number of the document
- {Doc Notes} - Notes on the related document
- {Job Remarks} - Remarks specified on the job the document belongs to
- {Doc Status} - The status of the document
- {Customer Name} - The name of the Customer linked to the document
- {Job Customer Name} - The name of the Customer on the job the document belongs to
- {Media Start Date} - The media start date as specified on the job
- {Size} - The size as specified on the job
- {Colour} - The colour as specified on the job

8. Click the **Save** button to make your changes permanent.

# NOTE TEMPLATES

+ Add Note  Save X

Templates:

Create a custom body to be used as notes for the selected form.

Title:

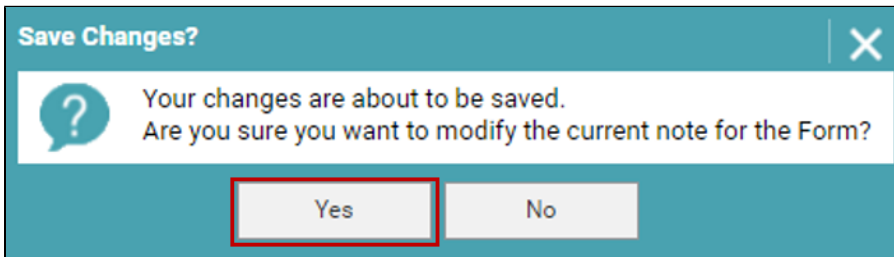
Job: {Job No} is {FormName}

The following templates are available for use in the Financial Note Body:

- {Logged on UserName} - The currently logged in User's Name
- {Company Name} - The name of the current company logged into
- {Current Date} - The current date
- {Job No} - The current number of the job
- {Job Status} - The current status of the job
- {Product Name} - The name of the Product on the job
- {Element} - The element specified on the job
- {Form Name} - A user friendly name for the form
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- {Doc Status} - The status of the document
- {Customer Name} - The name of the Customer linked to the document
- {Job Customer Name} - The name of the Customer on the job the document belongs to
- {Media Start Date} - The media start date as specified on the job
- {Size} - The size as specified on the job
- {Colour} - The colour as specified on the job

A *Save Changes?* dialog appears.

9. Click the **Yes** button to continue.



Once the note template is set up you will be able to use it on your CEs.

**COST SHEET**  
27

Go To: Job : 37      Date: 14 March 2017

Category: Print Production      Order No:

Product: 4 series      Status: Billed

Client: BMW South Africa      % Billed: 100.00

Description: 4 series, 4 series billboard      Terms:

Attention:      Issuer: Adam

Details:

**Select Text to Append**

Doc. No: 27 - Mar 28 2017 11:17AM

Job: 37 is (FormName)

Work Type	Un								
DTP	Hours	6.00	3,500.000	Internal		21,000.000	21,000.000	21,000.000	
Copy/Script	Hours	4.00	785.000	Internal		3,140.000	3,140.000	3,140.000	
Print	Hours	8.00	25,000.000	20.25	0.000	200,000.000	40,500.000	240,500.000	190,000.000
Courier	Hours	2.00	1,520.000	20		3,040.000	608.000	3,648.000	3,040.000

## Related articles

## Content by label

There is no content with the specified labels

