

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 Jobs or the same Document Type.

Screen layout

NOTE TEMPLATES

+ Add Note Save X

Templates: [dropdown]

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

Title: [input]

Please select a note template

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

Field Help

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

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