

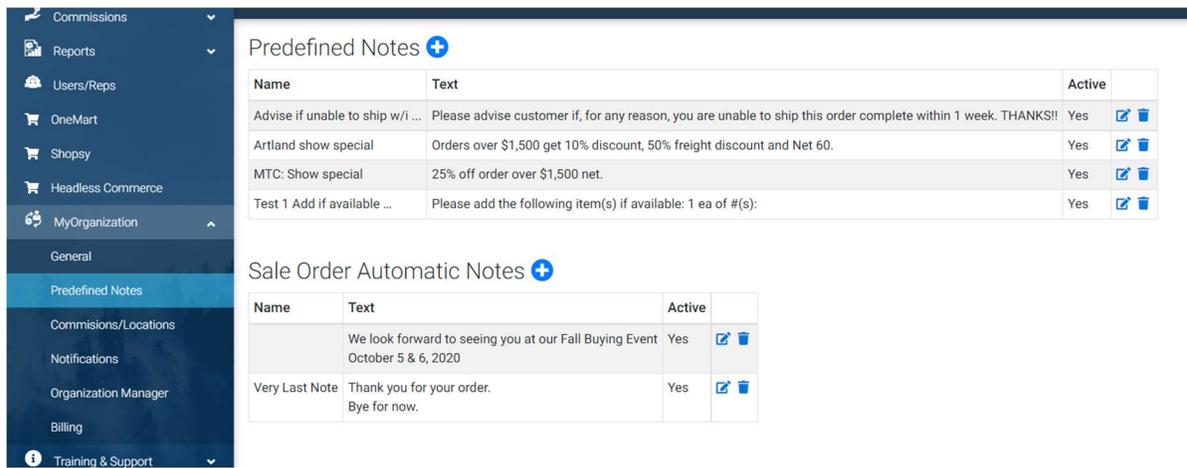
How to use and insert Pre-Defined Notes and Automatic Sales Notes

In RepDesk you can use the "Pre-Defined Notes" and "Automatic Sales Notes" to insert notes for the customer or vendors in any sales order.

You can create notes in four different sections in RepDesk.

*Please note that all category of notes will be visible to vendors and customers on any sales order.

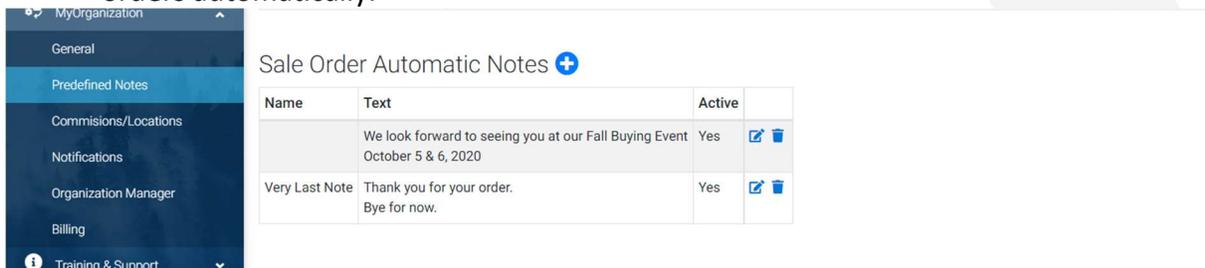
1. Predefined Notes in My Organization section are notes that can go in any sales order.



Name	Text	Active	
Advise if unable to ship w/i ...	Please advise customer if, for any reason, you are unable to ship this order complete within 1 week. THANKS!!	Yes	 
Artland show special	Orders over \$1,500 get 10% discount, 50% freight discount and Net 60.	Yes	 
MTC: Show special	25% off order over \$1,500 net.	Yes	 
Test 1 Add if available ...	Please add the following item(s) if available: 1 ea of #(s):	Yes	 

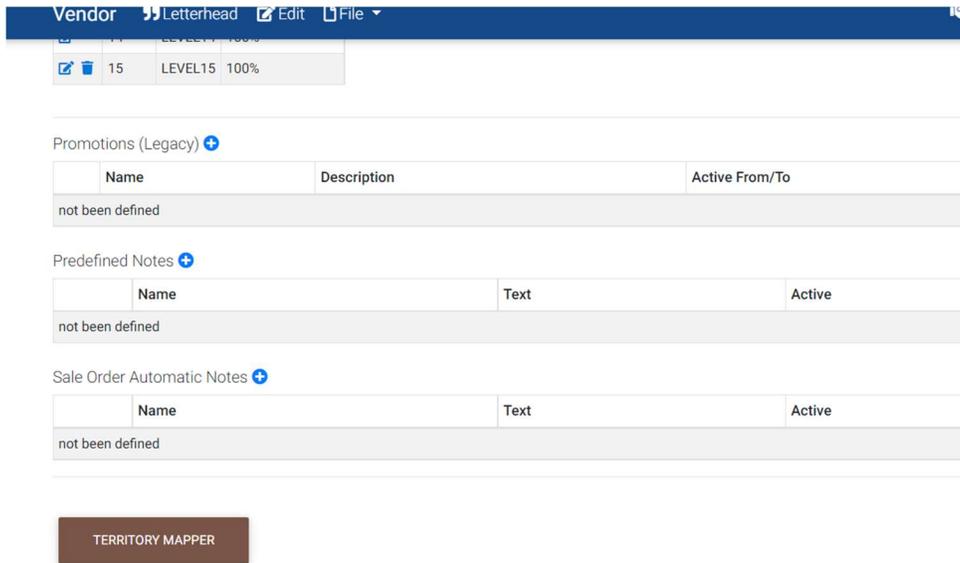
Name	Text	Active	
	We look forward to seeing you at our Fall Buying Event October 5 & 6, 2020	Yes	 
Very Last Note	Thank you for your order. Bye for now.	Yes	 

2. Sales Order Automatic Notes can be added here. These notes will be added to all sales orders automatically.



Name	Text	Active	
	We look forward to seeing you at our Fall Buying Event October 5 & 6, 2020	Yes	 
Very Last Note	Thank you for your order. Bye for now.	Yes	 

- In the Vendor Account you can create Predefined Notes that you can add when entering the credit card info. These are typically used when you have something specific to communicate to the Vendor.



The screenshot shows a software interface for a Vendor Account. At the top, there is a navigation bar with 'Vendor', 'Letterhead', 'Edit', and 'File' options. Below this, there is a table with columns for 'Name', 'Description', and 'Active From/To'. The first row contains the text 'not been defined'. Below this table, there is a section titled 'Predefined Notes' with a plus sign icon. This section contains a table with columns for 'Name', 'Text', and 'Active'. The first row contains the text 'not been defined'. Below this, there is another section titled 'Sale Order Automatic Notes' with a plus sign icon. This section contains a table with columns for 'Name', 'Text', and 'Active'. The first row contains the text 'not been defined'. At the bottom of the screenshot, there is a brown button labeled 'TERRITORY MAPPER'.

- In the Vendor Account you can create Automatic Sales Notes that will automatically be sent to this specific Vendor in every order. *Note any notes can be seen by Vendor and Customer.

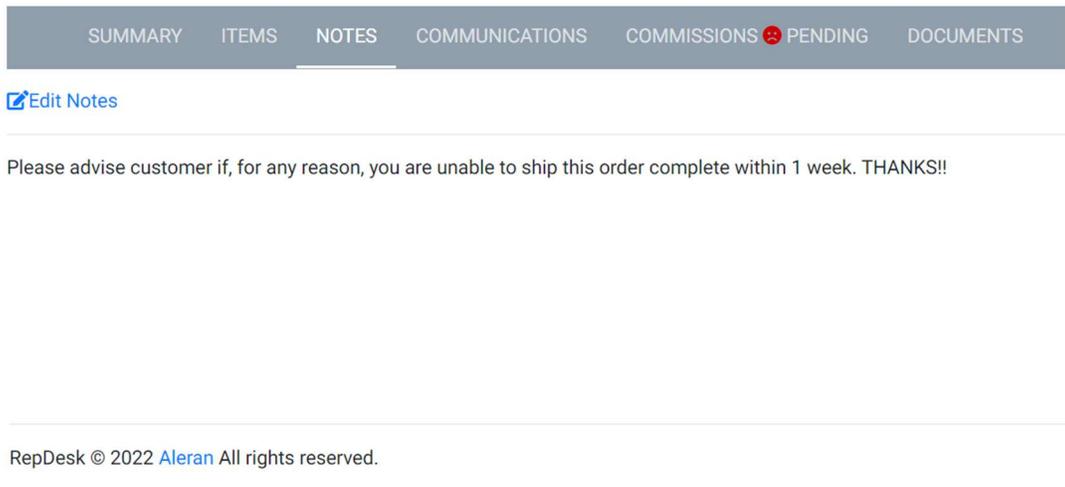


The screenshot shows a software interface for a Vendor Account. It features a section titled 'Sale Order Automatic Notes' with a plus sign icon. Below this title is a table with columns for 'Name', 'Text', and 'Active'. The first row contains the text 'not been defined'. Below the table, there is a brown button labeled 'TERRITORY MAPPER'.



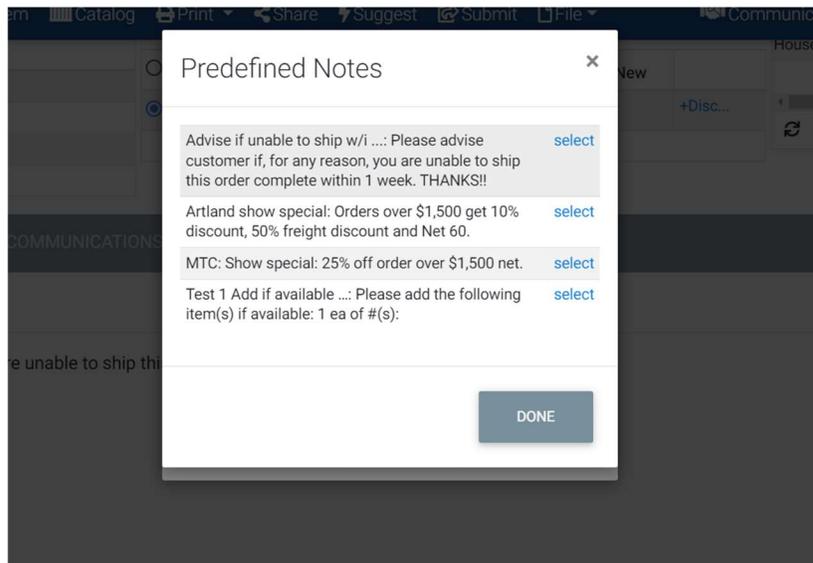
Once you have set up all your notes you will be able to see them and add them in the sales order.

All Automatic Sales Notes created in My Organization will be seen in the notes section of the sales order automatically.



When you click on “Edit Notes”

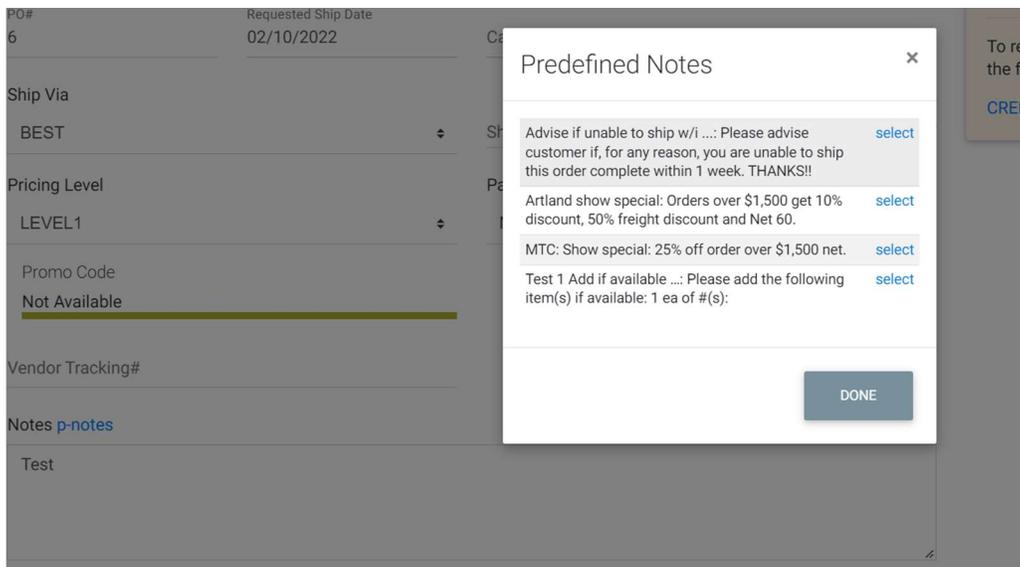
You will be able to select from Pre-Defined Notes that were created in My Organization.



If you click on the Vendors Name in the sales order you can add the Vendor Pre-defined notes.

PO# 6	Requested Ship Date 02/10/2022	Cancel Date
Ship Via BEST		Shipping Account
Pricing Level LEVEL1		Pay Terms NET30
Promo Code Not Available		
Vendor Tracking#		
Notes p-notes		
Test		

Click on p-notes and you will see the Predefined Notes created in the Vendor Account.



Predefined Notes

- Advise if unable to ship w/i ...: Please advise customer if, for any reason, you are unable to ship this order complete within 1 week. THANKS!! [select](#)
- Artland show special: Orders over \$1,500 get 10% discount, 50% freight discount and Net 60. [select](#)
- MTC: Show special: 25% off order over \$1,500 net. [select](#)
- Test 1 Add if available ...: Please add the following item(s) if available: 1 ea of #(s): [select](#)

DONE

