


Adding and Using Notes

Last Modified on 10/02/2018 1:56 pm EDT

The Notes feature is available throughout aACE. Notes can be entered for a record or a line item, so they are useful for capturing specific details. In some cases, notes entered in one record will also be displayed on related records (ex: a note entered on a line item at the Order screen will carry over to that line item in the related invoice and shipment records).

Adding Notes

1. Navigate to the record you want to capture additional details for.
2. Click the gray **Notes** () icon.
3. In the pop-up window, enter the information.
4. Save the note by clicking outside the pop-up window or clicking on the **X** icon in the top-right corner.

Working with Notes

Once a note has been created, the Notes icon is highlighted in yellow.

- To view the full text of a note, click the Notes icon.
- To make changes to a note, view the note and type your updates.
- To delete a note, view the note, then select all the content and delete it.

Notes Flow-Through

In the following screenshot, multiple notes are displayed on an order record. Notes recorded here are displayed on other screens, while notes from certain other screens are accessible here:

1. **Bill To notes** – As priority info, this note displays the first several words right on the record, highlighted in yellow. These notes flow from the order to the related invoice.
2. **Ship To notes** – As priority info, this note displays the first several words right on the record, highlighted in yellow. These notes flow from the order to the related shipment.

3. **Line Item Code notes** – These notes flow from the line item code to the order, related shipment, and related invoice.
4. **Order notes** – These are general notes about the order and appear only in the order record.

Order: 50051 Regina County Area School District 02/09/2018 OPEN

Bill To *Lauren says to bill the Mastercard we have on file.* 1
 Customer (Bill To) > Regina County Area School
 Contact > Lauren Padilla
 A/R Balance > 0.00 Credit Available > 25,000.00
 Sales Rep > MH Customer PO # Billing Terms Disc %
 Credit Card

Ship To *Lauren asked that we use extra bubble wrap.* 2
 Ship To Company > Regina County Area School
 Ship To Contact > Lauren Padilla
 Delivery Type > Courier Service
 Ship Together > FedEx Ground
 Courier Account # > 32145687 Shipping Terms FOB

Description
 Thank you for your business!

Order Items

Line Item Code	Description	Cases	Quantity	BO	Unit Price	Adjustment	Extended Price	Total	Tax Profile
1 > Tblt-2	Student Tablet, 8" screen		30		505.99	0.00	505.99	15,179.70	DEF

Sales / Fulfillment 4
 Campaign > Type > Sales Account Manager > NW Referral Company >
 Lead > Sales Priority > Normal Job > Fulfillment Priority > Normal Start Date > 02/09/18 End Date > 02/23/18

Summary
 Subtotal 15,179.70
 Adjustment 0.00
 Total 15,179.70
 Shipping 0.00 0.00 PSO
 Tax DEF 0.00 0.00 Exempt
Grand Total 15,179.70
 Payment Due 0.00 ?
 Credit Card MC ...4111 (12/20)

Dept: AI Assigned By: Caitlin Nascher Assigned To: Ned Walker Tracking Status:

Line Item Code Note

Orders

Record: 10 of 10

New + Edit Delete X Print Actions

Order: 50051 Regina County Area School District 02/09/2018

OPEN

Sales Order Management Job Costs & Approvals

Notices Emails Docs

Bill To

Customer (Bill To) > **Regina County Area School**

Contact > **Lauren Padilla**

A/R Balance > **0.00** Credit Available > **25,000.00**

Sales Rep > **MH** Customer PO # > Billing Terms > **Credit Card**

Description

Thank you for your business!

Ship To

Ship To Company > Use Bill To X Ship To Contact >

Activities & Comments

Order Item Notes

A larger version of the Student Tablet.

Order Items

Line	Item Code	Description	Case	Quantity	Unit Price	Adjustment	Extended Price	Total	Tax Profile
1	Tbit-2	Student Tablet, 8" screen		30	505.99	0.00	505.99	15,179.70	DEF

Sales / Fulfillment

Campaign > Type > **Sales** Account Manager > **NW** Referral Company >

Lead > Sales Priority > **Normal** Job > Fulfillment Priority > **Normal** Start Date > **02/09/18** End Date > **02/23/18**

Subtotal 15,179.70

Adjustment 0.00

Total 15,179.70

Shipping 0.00 0.00 *PSO*

Tax *DEF* 0.00 0.00 *Exempt*

Grand Total 15,179.70

Payment Due 15,179.70 ?

Credit Card MC ...4111 (12/20)

Dept AI Assigned By Caitlin Nascher Assigned To Ned Walker Tracking Status Open Order

Line Item Code Note Flowing to Order Record

Orders

Record: 10 of 10

New + Edit Delete X Print Actions

Order: 50051 Regina County Area School District 02/09/2018

OPEN

Sales Order Management Job Costs & Approvals

Notices Emails Docs

Bill To

Customer (Bill To) > **Regina County Area School**

Contact > **Lauren Padilla**

A/R Balance > **0.00** Credit Available > **25,000.00**

Rate Card >

Sales Rep > **MH** Customer PO # Billing Terms

Credit Card

Description

Thank you for your business!

Order Items

Line Item Code	Description	Quantity	Unit Price	Adjustment	Extended Price	Total	Tax Profile
1 > Tbit-2	Student Tablet, 8" screen	30	505.99	0.00	505.99	15,179.70	DEF

Ship To

Ship To Company > Use Bill To X Ship To Contact >

Activities & Comments

Order Item Notes

A larger version of the Student Tablet.

Sales / Fulfillment

Campaign > Type **Sales** Account Manager > **NW** Referral Company >

Lead > Sales Priority **Normal** Job > Fulfillment Priority **Normal** Start Date **02/09/18** End Date **02/23/18**

Subtotal	15,179.70
Adjustment	0.00
Total	15,179.70
Shipping	0.00 0.00 <input type="checkbox"/> <i>PSO</i>
Tax <i>DEF</i>	0.00 <input checked="" type="checkbox"/> <i>Exempt</i>
Grand Total	15,179.70
<input checked="" type="checkbox"/> Payment Due	15,179.70 ?
Credit Card	MC ...4111 (12/20)

Dept AI Assigned By **Caitlin Nascher** Assigned To **Ned Walker** Tracking Status **Open Order**

Line Item Code Note Flowing to Shipment Record

Shipping Log

Record: 1 of 1

New + Edit ✎ Delete ✕ Print 🖨 Actions ↗

Shipment: 50052 Regina County Area School District 2/13/2018

SHIPPED

Outgoing Shipment

Notices 📢 Emails ✉ Docs 📄

Shipped To

Company > Regina County Area School

Shipping Terms FOB

Order > 50051

Purchased

Shipping Cost 24.99

H 10.19 Weight 4.5

Delivery Date 02/13/18

Description

Package IDs

Shipment Item Notes

A larger version of the Student Tablet.

Packing List

Line	Item Code	Description	Order	Quantity	Weight	Bin	Ref #(s)
1	Tblt-2	Student Tablet, 8" screen	> 50051	30	4.5	C-AI	#s

Dept: AI-Shipping Assigned By: Caitlin Nascher Assigned To: Kristie Hernandez Tracking Status:

Line Item Code Note Flowing to Invoice Record

Invoices

Record: 1 of 1

New + Edit ✎ Delete ✕ Print 🖨 Actions ↗

Invoice: 50036 Regina County Area School District 2/13/2018

CLOSED

Invoice Details

Notices 📢 Emails ✉ Docs 📄

Bill To

Customer (Bill To) > Regina County Area

Recur Transaction >

Cust PO # Billing Terms

Credit Card

Invoice Item Notes

A larger version of the Student Tablet.

Payment Comments

Invoice Items

Line	Item Code	Description	Order	Quantity	Unit Price	Unit Adj	Total	Tax Profile
1	Tblt-2	Student Tablet, 8" screen	> 50051	30	505.99	0.00	15,179.70	DEF

Receipts (Payments) Adjustments Refunds

Receipt	Date	Payment Ref	Memo	Amount
> 50043	02/13/18	019101	Regina County Area School	15,179.70

Subtotal 15,179.70
 Adjustment 0.00
 Total 15,179.70
 Shipping 0.00
 Tax DEF 0.00 Exempt
 Grand Total 15,179.70
 Balance 0.00 0%

Dept: AI Assigned To: Drew Sanderson Tracking Status:

