



28 A guide to using notes

You can create your own list of standard notes and dispute reasons using note templates within Budget Manager.

Note templates can be created by:

A system administrator - notes templates created in this way will be available for general use by all organisations.

Specific organisation administrators - notes templates created in this way will only be available to the organisation the specific administrator making them belongs to.

How to create a notes template

To create a notes template, simply follow the instructions below:

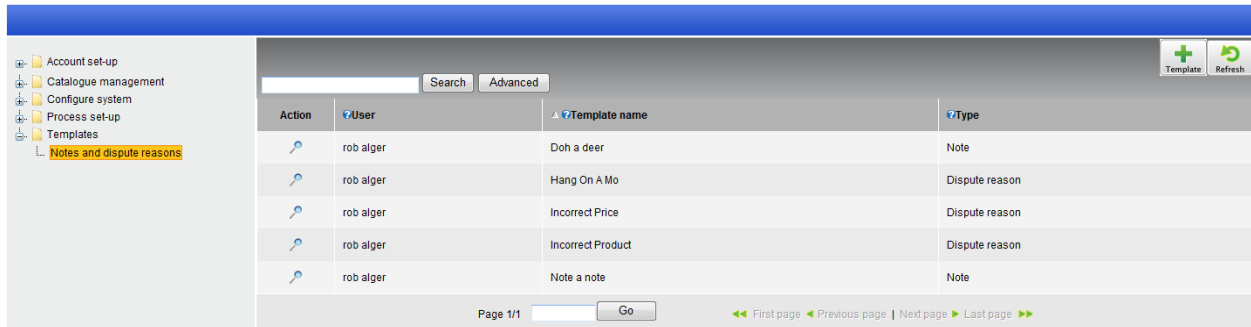
1. Go to the Administration function.
2. Expand the Templates folder.
3. Click on Notes and Dispute Reasons.
4. Click on the Add button.
5. Select the template type (Note or Dispute Reason).
6. Input the dispute / note details.

A screenshot of the Budget Manager software interface. On the left is a navigation menu with categories like 'Account set-up', 'Catalogue management', 'Configure system', 'Process set-up', and 'Templates'. Under 'Templates', 'Notes and dispute reasons' is highlighted. The main area shows a 'Main details' form with three fields: 'Template name:' with the value 'Delivery Instructions', 'Template type:' with a dropdown menu set to 'Note', and 'Template text:' with a text area containing 'Three flight of stairs'. In the top right corner of the form area, there are 'Save & Close' and 'Close' buttons.

Please note: Fields marked with an asterisk (*) are mandatory.

Once you have completed all the relevant information, click on the Save and Close button.

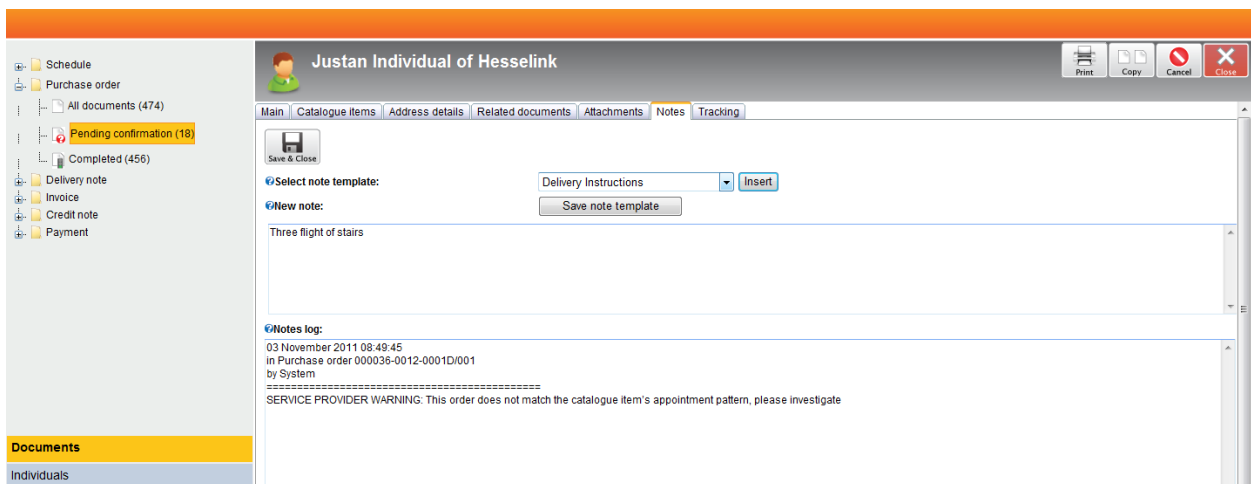
The note or dispute reason will now be listed in the Administration function/Templates/Notes and Dispute Reasons folder, as shown below.



Action	User	Template name	Type
	rob alger	Doh a deer	Note
	rob alger	Hang On A Mo	Dispute reason
	rob alger	Incorrect Price	Dispute reason
	rob alger	Incorrect Product	Dispute reason
	rob alger	Note a note	Note

Page 1/1 Go ◀ First page ◀ Previous page | Next page ▶ Last page ▶

Note templates can also be applied to documents where there is a Notes tab available. Simply select the template title and click the insert button. The note text will automatically be added to the notes field.



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Main | Catalogue items | Address details | Related documents | Attachments | Notes | Tracking

Save & Close

Select note template: Delivery Instructions

New note:

Three flight of stairs

Notes log:

03 November 2011 08:49:45
In Purchase order 000036-0012-0001D/001
by System
=====
SERVICE PROVIDER WARNING: This order does not match the catalogue item's appointment pattern, please investigate

Fig.3 Adding a note to a document

To save the note to the document, click the Save & Close button.