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Portal > Knowledgebase > ASI SmartBooks Knowledgebase > Quotes, Orders & Invoices > How Do You Add Notes to a Quote, Order or Invoice?

How Do You Add Notes to a Quote, Order or Invoice?

Tammy Mason - 2022-07-21 - in Quotes, Orders & Invoices

How Do You Add Notes to a Quote, Order or Invoice?

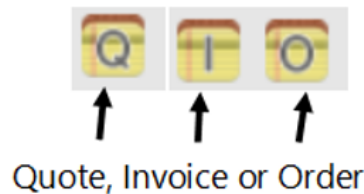
Notes (popup)

Quote	(Select) <input type="text"/>	<input type="button" value="Edit"/>	Program	(S) <input type="text"/>	(Select) <input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="+ New Customer"/>	<input type="button" value="+ New Invoice"/>	
Order	108		Customer	UNI001	University of Northers Iowa	<input type="button" value="Edit"/>	Status	<input type="button" value="Open"/>	<input type="checkbox"/> Hold <input type="button" value="🔔"/>

A note icon will alert you if a note has been added to a Quote, Order, or Invoice. All notes can be accessed from the note icon on the edit window. Now you can visually see, without changing the view, that a note has been applied.

Grey letter indicates there is no note. Green underlined letter indicates a note exists.

- **No note exists**



- **Notes Exist**



Notes

Update Close

Code 101 Central City Mercedes

Quote Notes