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

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

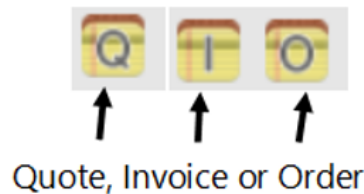### How Do You Add Notes to a Quote, Order or Invoice?

Notes (popup)

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.