

# Overview of Notes

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This guide provides an overview of various note icons and fields used in aACE. It is intended for general users.

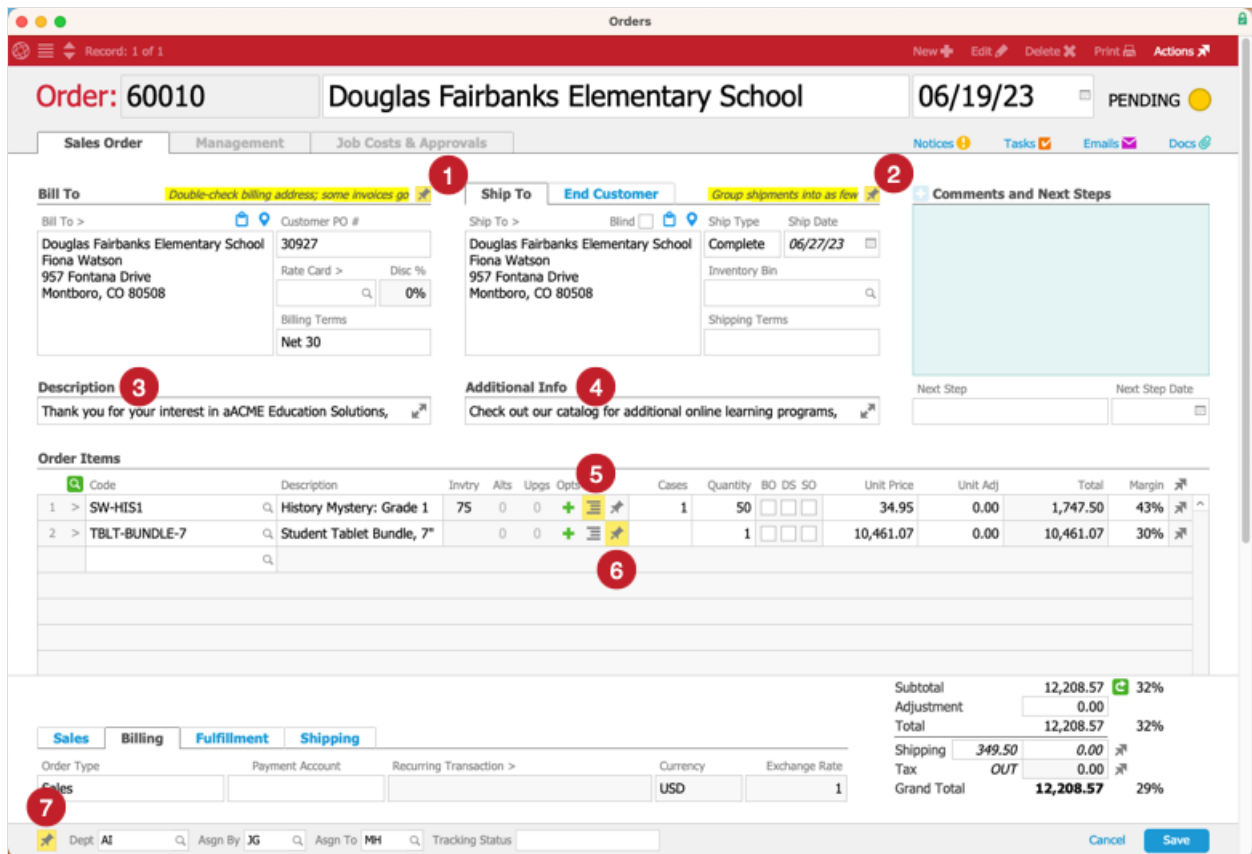
You can enter various notes at the [detail view](https://aace6.knowledgeowl.com/help/overview-of-the-detail-view) of most records.

Some note fields *only* display their information on the specific record where you initially entered it. This information does *not* flow through to related records.

However, certain note fields transfer information from the initial record to related records. For example, the Additional Info field for a sales order will transfer the information there to the related quote or invoice that you send to the customer. These notes should be used for information applicable to several records (e.g. notes regarding shipping or invoicing) or that you want external viewers to be aware of. (See below for details.)

## Note Fields and Icons

There are multiple fields on a detail view where you can add and view notes. These fields function consistently across all modules. However, there may be slight variations in the placement and titles for note icons and fields. This guide uses the Order module as an example.





1. **Bill To Pin** – This Pin field draws information from the company record. The info also displays on the internal view of the related invoice record.
2. **Ship To Pin** – This Pin field draws information from the company record. This info also displays on the internal view of the related shipping record.
3. **Description** – Information entered at order entry. This info displays on the internal view of the related invoice record. This info also displays on the quote or invoice you send to customers.
4. **Additional Info** – Information entered at order entry. The info in this field displays on the internal view of the related invoice record. This info also displays on the quote or invoice you send to customers.
5. **Additional Info** – Information from the LIC record (i.e. the [Default Value for Order Item Addt'l Info](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#DefaultValueSection)). This info displays on the related shipping and invoice records. This info also displays on the quote or invoice you send to customers.
6. **Order Item Pin** – Internal notes about specific items on the order.
7. **Order Pin** – Internal notes about the entire order.

## Using Notes Fields

aACE provides three types of note fields. Each type of note field includes specific



functionality.

### Pin Icons

Click a Pin icon (  ) to display a popup field where your team members can review, update, or delete the note information. After you record a note in the popup field, the icon is highlighted in yellow (  ). In some places, the first few words of the note are displayed directly on the record.

Notes you enter using a Pin icon *only* display internally.

### Additional Info Icons

Additional Info icons (  ) are typically found in portal lists. Click the icon to display a popup field where your team members can review, update, or delete the note information. After you record a note in the popup field, the icon is highlighted in yellow (  ).

Some Additional Info fields are auto-populated with content from a related record. For example, LIC records include a field for default additional info. Info that you enter in that field for the LIC is transferred to an Additional Info field on orders, shipments, and invoices.

Notes you enter using an Additional Info icon are typically made visible to *external* groups.

### Description Field and Additional Info Field

These text fields include resize icons that you can click-and-drag to expand each field and view all content.

Notes that you enter using these fields are made visible to *external* groups.