



Automagic Note Copy Utility For SyteLine / CloudSuite



Introducing LogicData's Automagic Note Copy Utility

Fully integrated with SyteLine / CloudSuite

- When your purchaser is ordering parts, do they sometimes forget to include the governmental requirement notices?
- Does he or she sometimes forget to include shipping instructions for delivery?
- Have you ever had one of your customers call to complain that the instructions were not included in their order?
- Do you sometimes wonder if all the relevant information is provided to your customers when they order from you?
- Is saving time and preventing mistakes high on your priorities list?

If so, our Automatic Note Copy Utility is for you.



Remembering to add all the notes to customer orders, purchase orders and other items is fraught with the possibility of error. With our new utility, you can set up your notes to populate automatically. This cuts out the possibility of human error and saves your people a good amount of time.

Our Automatic Note Copy Utility is inexpensive, easy to use and easy to install. In most cases the customer can install it themselves.

How does it work?

You use the new Note Copy Setup screen to identify which notes should be copied from where to where. In the

example below, you've specified that any note on an inventory item that has the subject "Copy To PO" will automatically copy to a PO Line for that item.

Note Copy Setups

Source IDO Collection: Source User Defined Types

Source Note Subject:

Target IDO Collection: Target User Defined Types

Target Note Subject:

You then go to your item and add a note that has the same Note Subject that you input above, along with the text you wish to appear on every PO Line for that item:

Items

Item: No Logo

Object Notes

Subject:

Internal Reusable System

Attach Link Open Link Created: 3/19/2022

Note

All materials used in fabrication of purchased component must be sourced in the United States.

Attach Detach Reusable...

Thereafter, whenever you add a purchase order line for the PP-PCB item the above note will automatically populate on the PO Line.

We've enabled this feature between the following records:

From	To
Item	<ul style="list-style-type: none"> • RFQs • Customer Order Lines

	<ul style="list-style-type: none"> • Customer Order Blanket Lines • Purchase Orders • Purchase Order Blanket Lines • Job Orders • Job Materials • RMAs
Customer	<ul style="list-style-type: none"> • Incidents • SROs • Customer Orders • Projects
Vendor	<ul style="list-style-type: none"> • Purchase Orders • Vendor RFQs



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