

Saved Notations

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Notations are a way to record additional user-defined text in transaction entry and are saved as part of the transaction. Sometimes notations are used repeatedly on many transactions. In that case, to save time and ensure accuracy, a notation can be saved and reused in other transactions. Transaction Search can be used to find all transactions that include that same notation. The notation prints on many reports in CenterPoint. It's also printed on the Standard (detail) check stub and the description area of a basic invoice.

[Save a Notation](#)

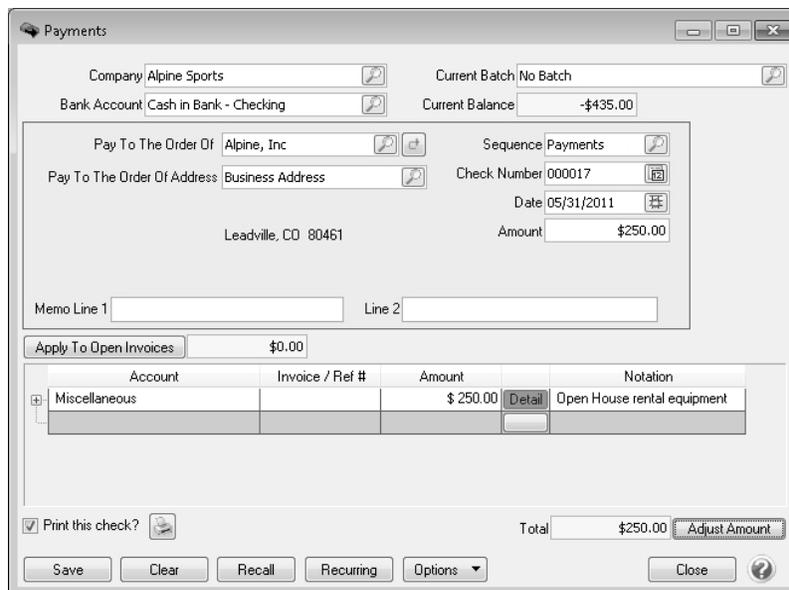
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Save a Notation

Each transaction screen includes a detail area where the accounts, items, quantities, etc are specified for the entry. Within that detail section, each line of data will include a detail button that is either Gray, Red or Green (depending on if additional details are required before the entry can be saved). Below is an example of a Payment transaction displaying the Detail button.



Company: Alpine Sports Current Batch: No Batch
 Bank Account: Cash in Bank - Checking Current Balance: -\$435.00

Pay To The Order Of: Alpine, Inc Sequence: Payments
 Pay To The Order Of Address: Business Address Check Number: 000017
 Leadville, CO 80461 Date: 05/31/2011
 Amount: \$250.00

Memo Line 1: Line 2:

Apply To Open Invoices: \$0.00

Account	Invoice / Ref #	Amount	Detail	Notation
Miscellaneous		\$ 250.00	Detail	Open House rental equipment

Print this check? Total: \$250.00 Adjust Amount

Buttons: Save, Clear, Recall, Recurring, Options, Close

1. From within any transaction screen, select the **Detail** button found in the detail section.
2. Click **Notation**.
3. On the Notations screen, under Available Notations, click **Notations**.
4. From the List screen, click **New**.
5. In the **Abbreviation** box, enter an optional 10 character abbreviation that you can easily identify the notation by. The abbreviation can be used during transaction entry to recall a transaction. If notation recall is selected, the abbreviation

can be entered into the Notation box and CenterPoint will automatically display a matching notation, otherwise, it will display a list of saved notations.

6. In the **Name** box, enter a name that you can easily identify the notation by. The name can be used during transaction entry to recall a transaction. If notation recall is selected, the name can be entered into the Notation box and CenterPoint will automatically display a matching notation, otherwise, it will display a list of saved notations.
7. In the **Notation** box, enter a notation that will be used in transaction entry. When the notation is recalled during transaction entry, the full notation will become part of the transaction.
8. Click **OK** to save the notation and return to the List tab, or click **Close** to save the notation and close the Notations screen.
9. **Click OK** to return to the Detail screen.

Use a Saved Notation

1. On any transaction screen, after you enter the Header and Detail Line information and the Detail button is Red or Green, click **Detail**.
2. Click **Notation**.
3. On the Notations screen, under Available Notations, select the notation you want to attach to this transaction, click the green arrow button to move the notation to the Notation list, and then click **OK** to close the Notations screen.
4. Click **OK** to close the Detail screen and return to the transaction entry screen.

Change a Saved Notation

1. From the Detail button on any transaction screen, click **Notation**.
2. Click **Notations**. Select the notation you want to change, and then click **Edit**.
3. Make any desired changes to the notation detail. Click **Save** to save your changes or **Cancel** to close the window without saving changes.
4. Click **Close** to close the Notations screen.
5. Click **OK** to return to the Detail screen.

Delete a Saved Notation

1. From the Detail button of any transaction screen, click **Notation**.
2. Click **Notations**. Select the notation(s) you want to delete, and then click **Delete**.
3. At the "Are you sure you want the item deleted?" message, click **Yes**.
4. Click **Close**.
5. Click **OK** to return to the Detail screen.