Auto-Populate Pick Ticket Notes

Version 1.0.0.1
Last Updated July 11, 2025

This process enables the **Notes** field in the **Pick Ticket Module** to be automatically populated based on administrator-defined settings when a Pick Ticket is created.

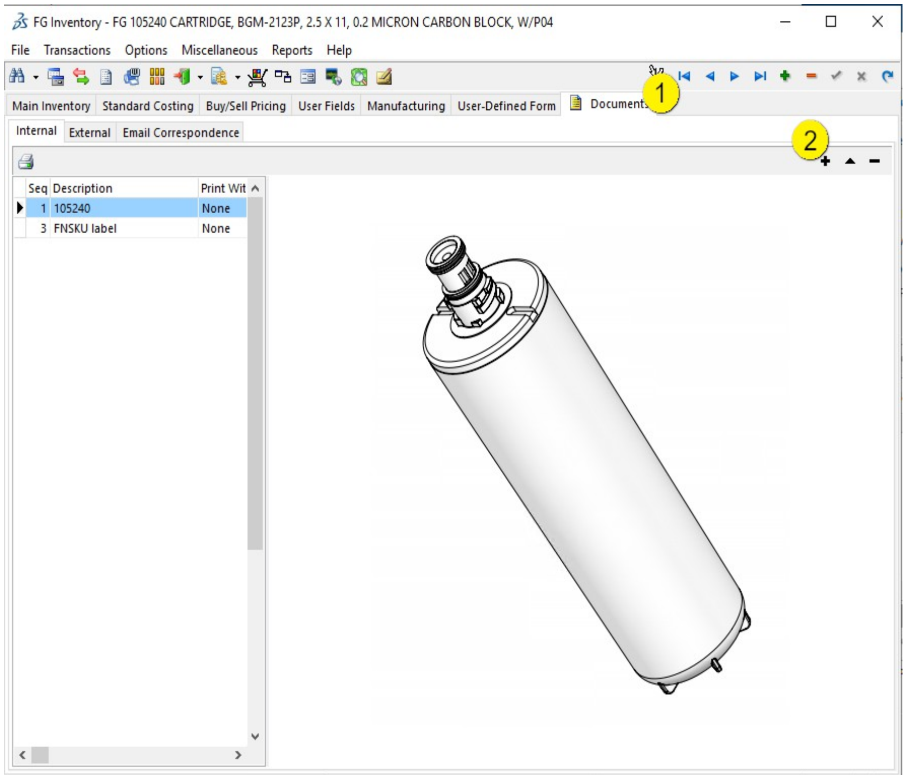
Adding Custom Notes

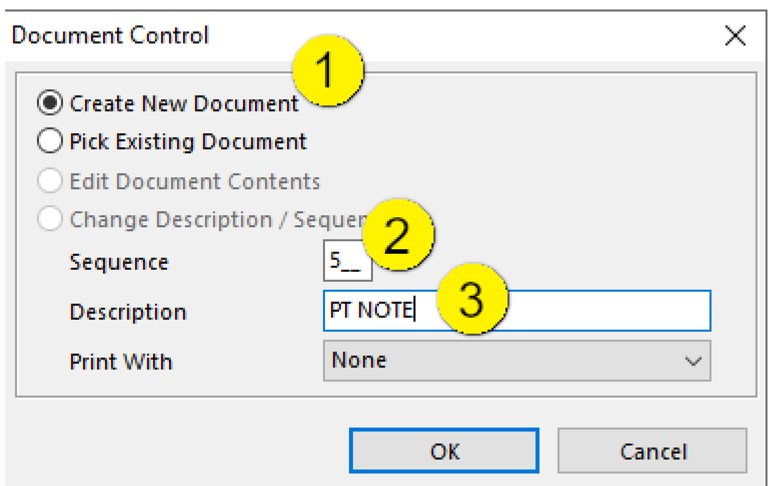
To add a custom note, follow these steps in the **Inventory Module**:

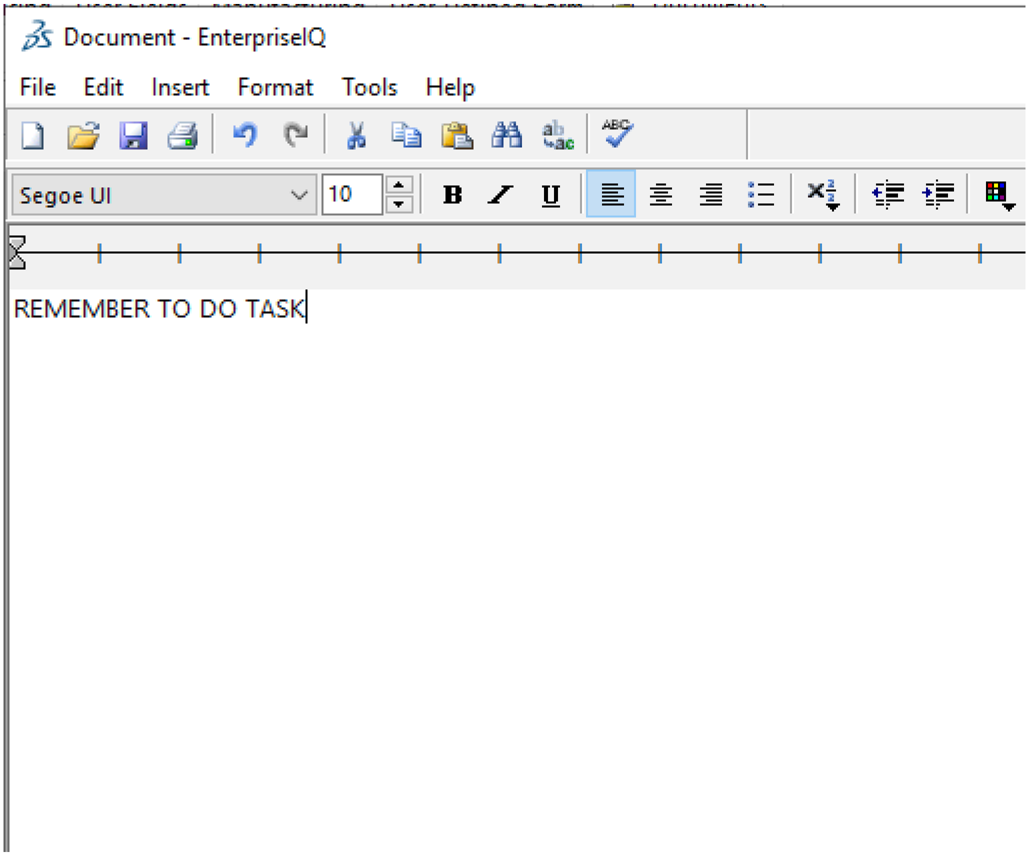
1. Navigate to the **Documents** tab and select the **Internal** sub-tab.
   (Reference: Screenshot 1)(1)
2. Add a new document entry.
   (Reference: Screenshot 2)(1)
3. Ensure the radio button remains set to **"Create New Document."**
   (Reference: Screenshot 2)(1)
4. Keep the default **Sequence** entry as-is.
   (Reference: Screenshot 2)(2)
5. In the **Description** field, enter:
   PT NOTE
   - This must be typed in **ALL UPPERCASE**.
   - If the note is customer-specific, append the **Customer ID** after a space, e.g., PT NOTE A5.
     (Reference: Screenshot 2)(3)
6. The **Document Text Editor** will automatically open.
   (Reference: Screenshot 3)
7. Enter the desired note content.
8. Avoid using:
   - Multiple lines
   - The pipe character |

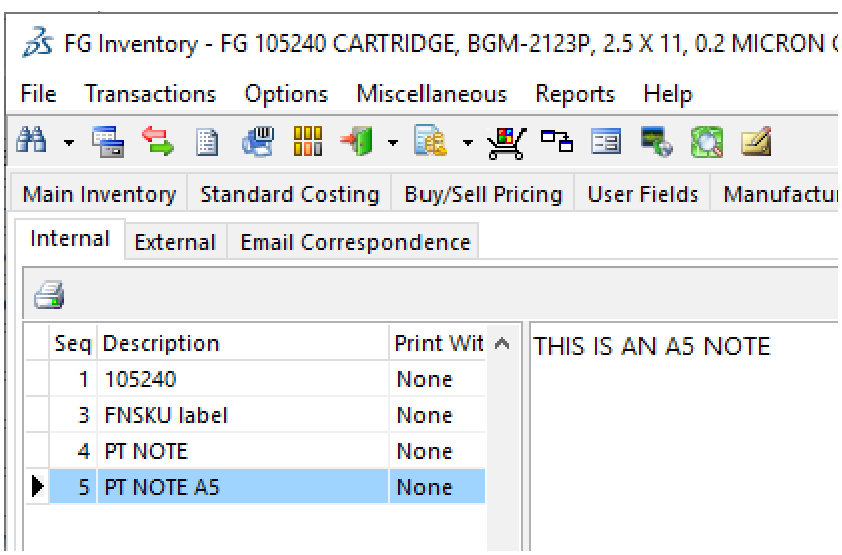
     Note: The **|** *character is reserved by the document editing tool and may cause unexpected behavior.*
9. Save the entry and close the editor.
10. The new note should now appear in the document list.
    (Reference: Screenshot 4)

Screenshots






Document - EnterpriseIQ
File Edit Insert Format Tools Help
Segoe UI
10
REMEMBER TO DO TASK


FG Inventory - FG 105240 CARTRIDGE, BGM-2123P, 2.5 X 11, 0.2 MICRON
File Transactions Options Miscellaneous Reports Help
Main Inventory Standard Costing Buy/Sell Pricing User Fields
Internal External Email Correspondence
Seq Description Print Wit
1 105240 None
3 FNSKU label None
4 PT NOTE None
5 PT NOTE A5 None
THIS IS AN A5 NOTE