

Custom Messages

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Overview

You now have the ability to create a Shortcut to a longer custom message within Order Time. These act as snippets and can be used for internal notes or Custom Messages for your customers.

New (3/14/25): Custom Messages can now be used in all large text fields. Including Activities, Item Descriptions and more!

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Adding a Custom Message

To access your Custom Messages click on the Gear icon in the upper right corner of the screen. Under the General section, click on **Profile Lists**. On the Profile Lists, under the **Sales** section click on **Custom Messages**.

- Enter a *Name* for your Custom Message. (Limited to 10 characters)
- Select if the Custom Message is *Active* and then enter the Custom Message's *Template*. The template is what will be shown each time you select that specific Custom Message.
- Click on **Save** when done.

The screenshot shows a software interface with a navigation bar at the top containing icons for Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. Below the navigation bar is a breadcrumb trail: Admin > Profile Lists > Custom Messages. The main content area is titled "Custom Message" and is divided into two sections. On the left, there is a "Records" table with two entries: "TERMS" and "TEST", each with a green plus icon to its right. Below the table, it says "Total Records: 2". On the right, there is a "TERMS" configuration form. It includes a "Name" field with the value "TERMS", an "IsActive" checkbox that is checked, and a "Template" text area containing the text: "Acceptance of AgreementUse Constitutes Acceptance.NumberCruncher.com, Inc. ("our", "we", "us" or the "Company") provides its Services (as defined below) to you (the "Customer", "your" or "you") through its web site located at".

Utilizing the Custom Messages

To use the Custom Messages you will click into a memo type field from the Memo and Instructions tab of a transaction.

Then on your Keyboard press: **Alt + G**

This will bring up a pop up box to the right side of the field you are in that contains a dropdown menu. There you will select the Name of the custom message you want to appear.

The screenshot shows a software interface with a top navigation bar containing tabs: Items, Details, Memo & Instructions, Custom, Payments, Ship Docs, Dependency, Dependency Item, Attachments, Open Activities, and Activity History. The 'Memo & Instructions' tab is active. Below the navigation bar, there is a 'Memo' section with a text area containing a legal disclaimer. Above the text area are buttons for 'Save', 'Date Stamp', 'Delete', and 'Cancel'. To the right of the text area, a dropdown menu is open, showing 'TERMS' and 'Cancel'. The 'TERMS' option is highlighted with a red box. Below the text area, there is a 'Shipping Instructions' section with an 'Edit' button. In the top right corner, there is a sidebar with a table containing financial data:

Additional Fee Amou
FL (7,000 %)
Total Amount
Paid Amount
Balance