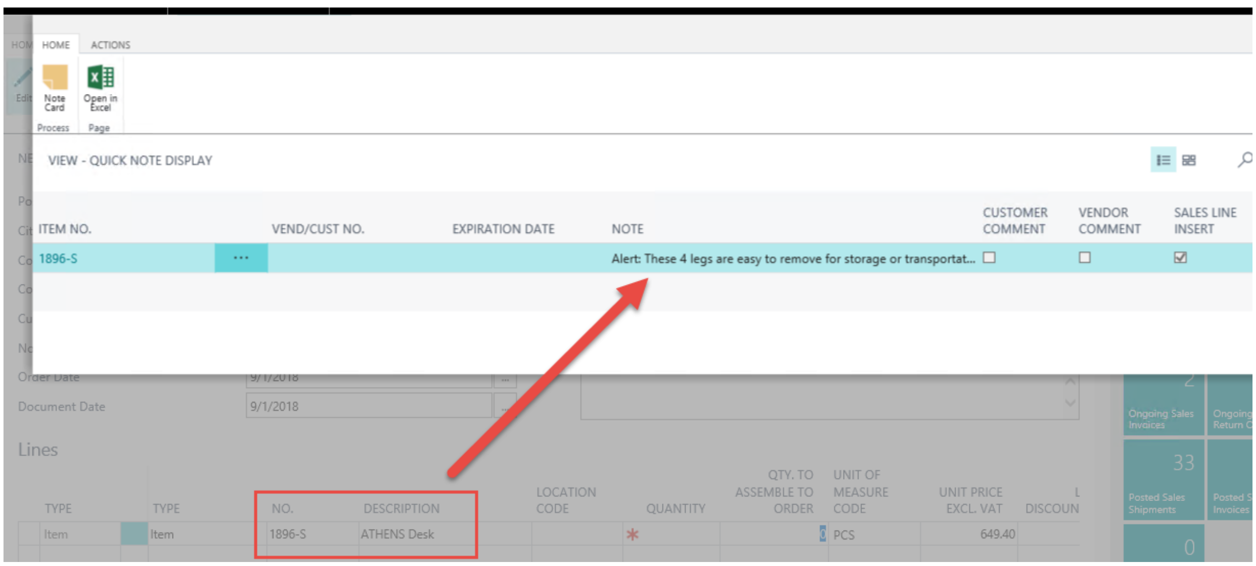
Pop-Up Notes
Setup Guide

For Microsoft Dynamics 365 Business Central
Granule ID: 14005160



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[Video Version of this Setup Guide here]

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Application Description

Purpose

The purpose of Pop-Up Notes is to streamline your internal communications. Pop-Up Notes gives you the ability to repeatedly issue Notes and reminders to "Pop-Up" electronically. Instead of scribbled on memos or scraps of paper that are easily misplaced or accidentally thrown away you now use Pop-up Notes right within Business Central. Notes taped to computer screens or laid in desk chairs will become a thing of the past.

No longer will you have to coordinate the schedules of two or more people just to relay information. No more mental notes to try and remember to tell something to a co-worker because you just got a busy signal or found their desk empty. Pop-Up Notes accommodates the convenience of all employees' company wide, while ensuring delivery.

Pop-Up Notes can pertain to Customers, Vendors, Items, and Service Items or combinations of Customers/Items and Vendors/Items. They serve as reminders to whoever is entering a transaction for that Customer, Vendor or Item.

Features:

- Pop-Up Notes specific to a Customer (& for a Specific Item)
- Pop-Up Notes specific to a Vendor (& for a Specific Item)
- Pop-Up Notes for Items. If non-specific to a Customer or Vendor, it is available to Pop-Up for all Customers and Vendors.
- Easily create the same Pop-up Note for a group of Items.
- Easily specify which documents will display these Pop-Up Notes, such as: Sales, Purchase or Service
- Pop-Up Notes are available for Service Items, Service Documents, and Service Contracts.
- The Service Item Card can display the Service Item Pop-Up Notes, as well as the connected Item No. and Customers Pop-Up Notes.
- Pop-Up Notes Automatically Pop Up when entering the Customer or Vendor on Sales, Service, Contract, and Purchasing Documents.
- Pop-Up Notes automatically pop up when entering Service Items and Items on Sales, Service and Purchasing Documents.
- Effective & Expiration dates on each Pop-Up Note control when the note pops up.

Benefits:

- Keeping the staff informed.
- Remember important details about a Customer, Vendor, Item or Service Item.
- Important info. & details are stored easily & auto-delivered to prompt users
- Reminders of Vendor Promotions and Promises on Shipping or Terms.
- Reminders on Customer requirements, expectations and/or promises.
- Pop-Up Notes is perfectly served as Alerts & Reminders.

Dependencies:

- Business Central Essentials

Works in Conjunction with:

- Customers, Vendors, Items, and Service Items.
- Sales: Quotes, Orders, Invoices, Credit Memos, Blanket Orders, & Return Orders
- Purchase: Quotes, Orders, Invoices, Credit Memos, Blanket Order & Return Orders
- Service Contracts and Services Contract Quotes
- Service Quotes and Service Orders

Developers Guide

Hardware Requirements:
The hardware requirements for POPUP Notes are the same as the minimum requirements for Microsoft Dynamics Business Central.

Software Requirement:
A prerequisite for using POPUP Notes is that you must also be licensed for Microsoft Dynamics Business Central Starter Pack.

Version Tags: All objects that contain changes for this application will have a version tag that begins with the following letters: POPN

Depending on the version you are installing, some of the objects will have version tags with numbers that correspond to the version in which the enhancement was introduced.

Such as:
POPN10.0.0 would indicate that the improvement was introduced when the current Microsoft Dynamics Business Central version was 2017 or version 10.

If the version tag has a number as follows, this would indicate that the improvement was introduced when the Microsoft Dynamics Business Central was available with a cumulative update of 7.

POPN10.0.7

Object No. Range:

Pop-Up Notes Add-on objects are within the following ranges

	Start	**End**
Tables:	**14005020**	**14005029**
Pages:	**14005018**	**14005029**
Reports:	**14005020**	**14005029**
Codeunits:	**14005020**	**14005029**

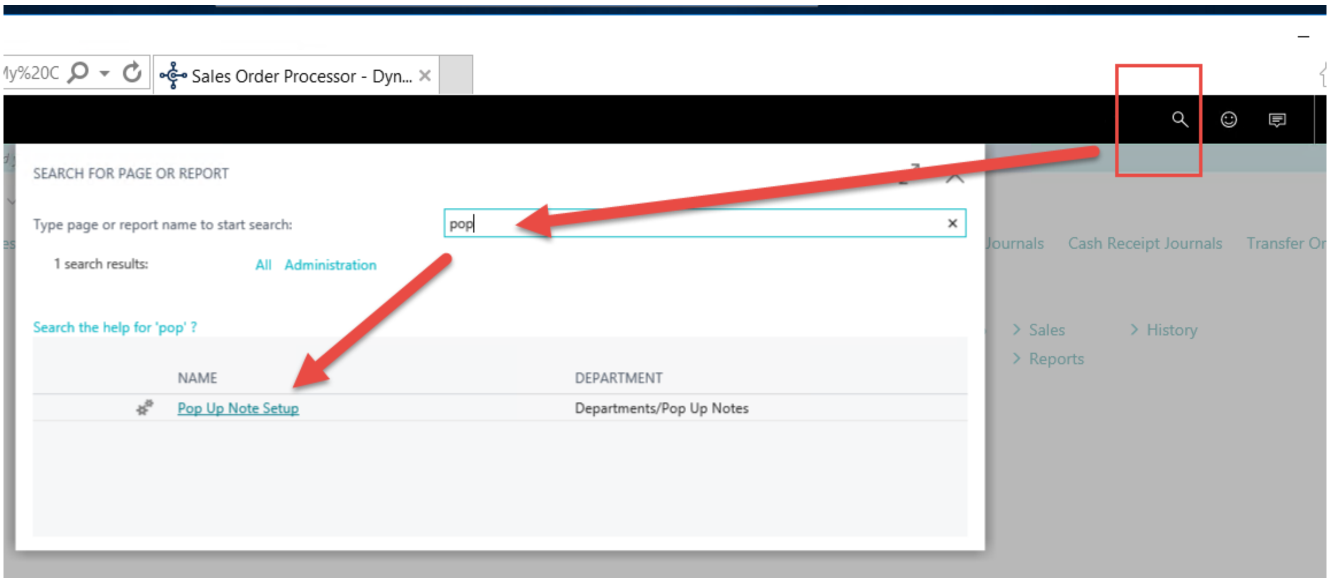
Development Guidelines:

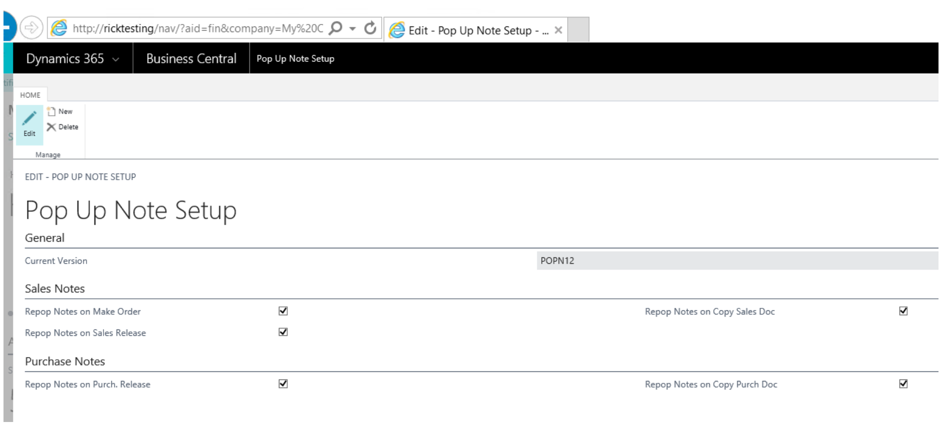
Our products are delivered as Extensions. They can be 'uninstalled'.
They can easily be upgraded to next version.

POPUP Notes was built using Microsoft Dynamics Business Central standard development tools. The best source for development instruction would be the full Microsoft Dynamics Business Central development guide.

Setup

Use “Search” to get to the Pop-Up Notes Setup Screen:





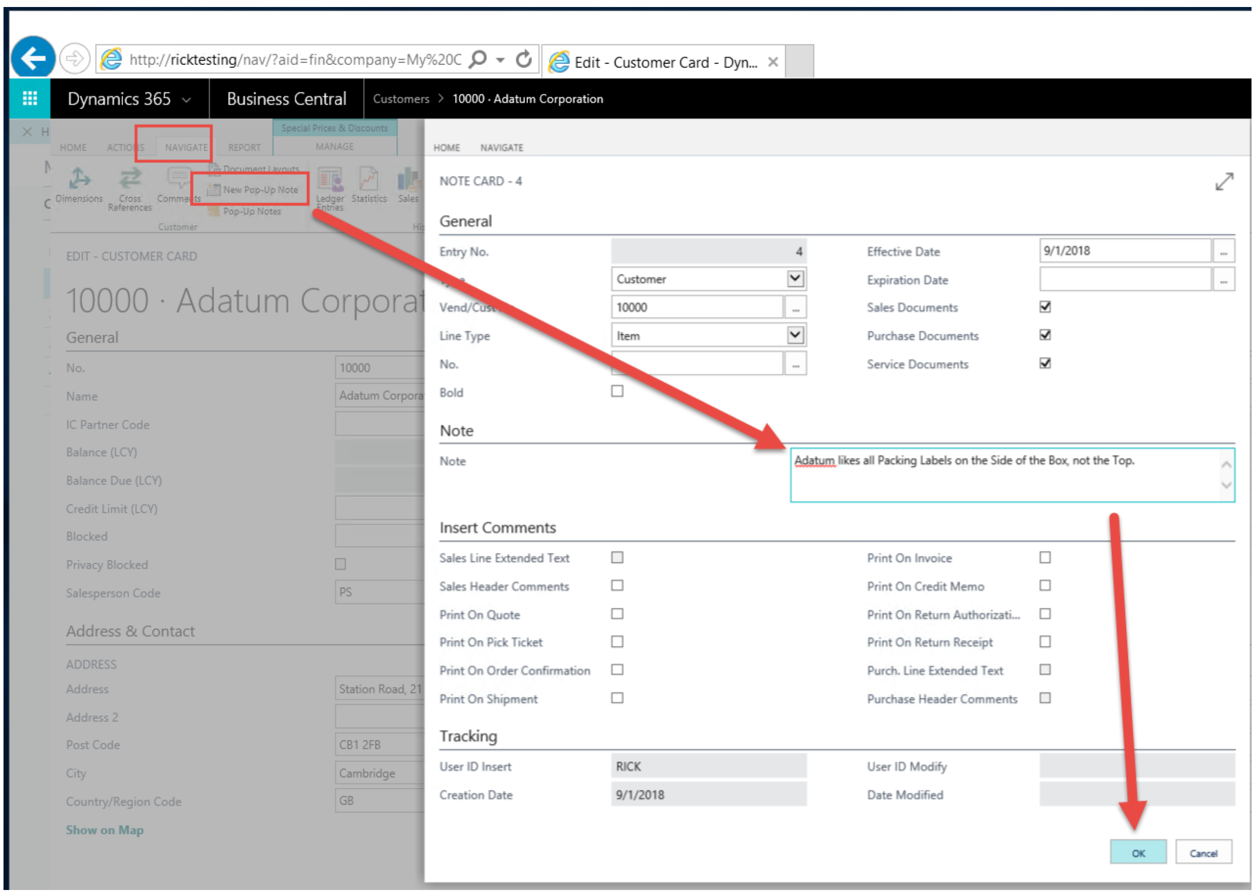
Set Sales Notes and Purchase Notes to YES, as shown above.
(Remove the Checks later if not needed to re-pop the note.)

Your Done!

Let's Create your 1st Note:

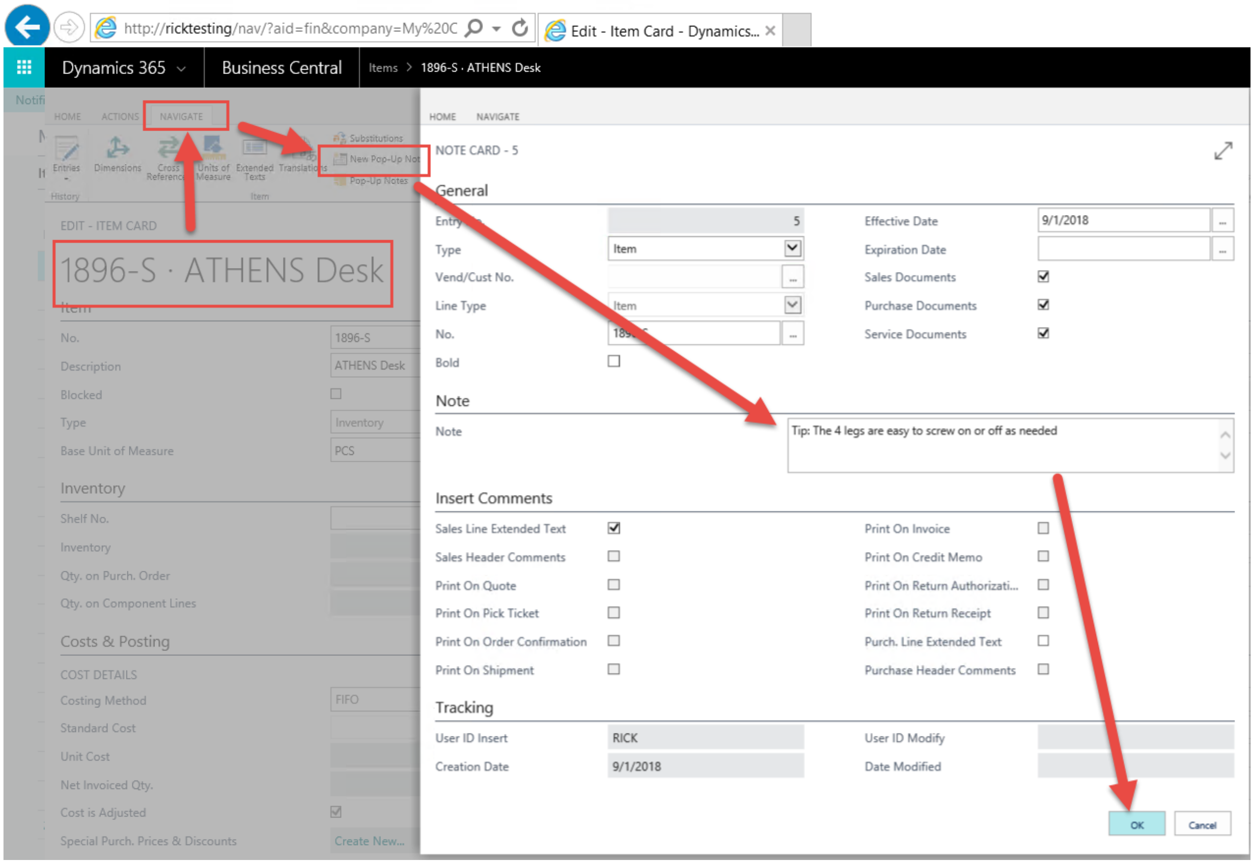
Insert Notes from Master Files: Customer Card, Vendor Card, & Item Card
Using popup note entry from the Customer, Vendor and Item Card area is for the off hand, i.e. less frequent inserts of notes. The inserting of notes from the "master" files puts the note record in a temporary condition until you close it and if the note is not filled in then the temporary note record is never inserted, but if you do insert a note the span of time the record is open in a temporary condition can be a cause of multiple user interference, which causes a record is already in use and the loss of the entered note.

Open a Customer Card, Navigate Tab, and add a "New Pop-Up Note"



It's just that easy!

Add a note from the Item Card Too!



That was easy.

See the Workflow Guide to do enter a Sales Quote to that Customer for that item!

This completes setting up your first Pop-Up Note(s).

Field Descriptions:

Entry No. – Each Note has its own unique number. This fills in automatically.

Type – You can choose the type of Record to which each Note relates. The choices are Item, Customer, Vendor and Service Item. If the Note relates a combination of records, such as a Customer and an Item, you would select Customer as the type, and then fill in the appropriate Item No. in the Item No. field. Or another example would be select Vendor and then select the Item No. in the Item No. field.

If you select Item or Service Item, you will not be allowed to save a Vend/Cust No. entry. These types of Notes will show up related to the Item or Service Item regardless of the Customer or Vendor.

Vend/Cust No. – Enter the appropriate number if the Type you selected was Customer or Vendor. Leave this field blank if this is an Item or Service Item Note.

Item No. – Enter the appropriate Item No.. If Type is Item, Customer, or Vendor, you will be given the Inventory Item list from which to select. If Type is Service Item, you will be given the Service Item list.

Bold – Check this box if you would like the Note to appear in Bold print when it pops up.

Creation Date – Automatically fills in with the date the Note was created.

Effective Date – Automatically fills in with TODAY's date. However, if the note needs to activate later, then fill in the date you want to Note to start appearing.

Expiration Date – Fill in the date you want the Note to stop appearing. If you leave it blank, the Note will never stop appearing. This date can be entered or changed at any time.

Sales Documents – Check this box if you want the Note to appear when entering sales documents.

Purchase Documents – Check this box if you want the Note to appear when entering purchase documents.

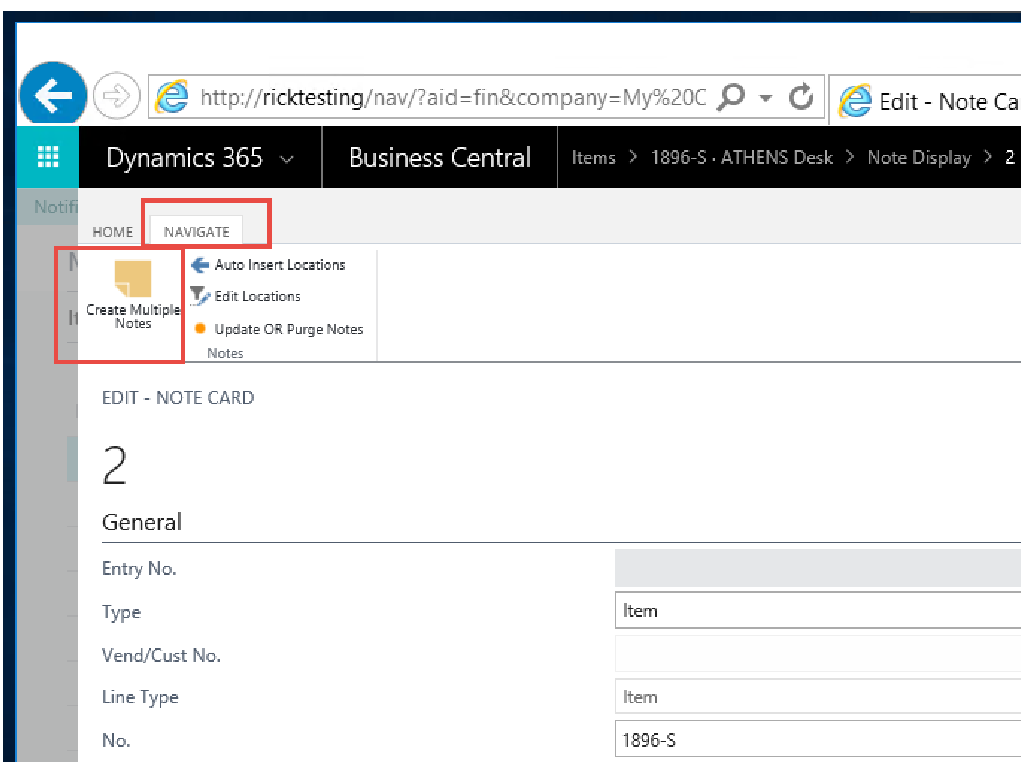
Service Documents - Check this box if you want the Note to appear when entering purchase documents.

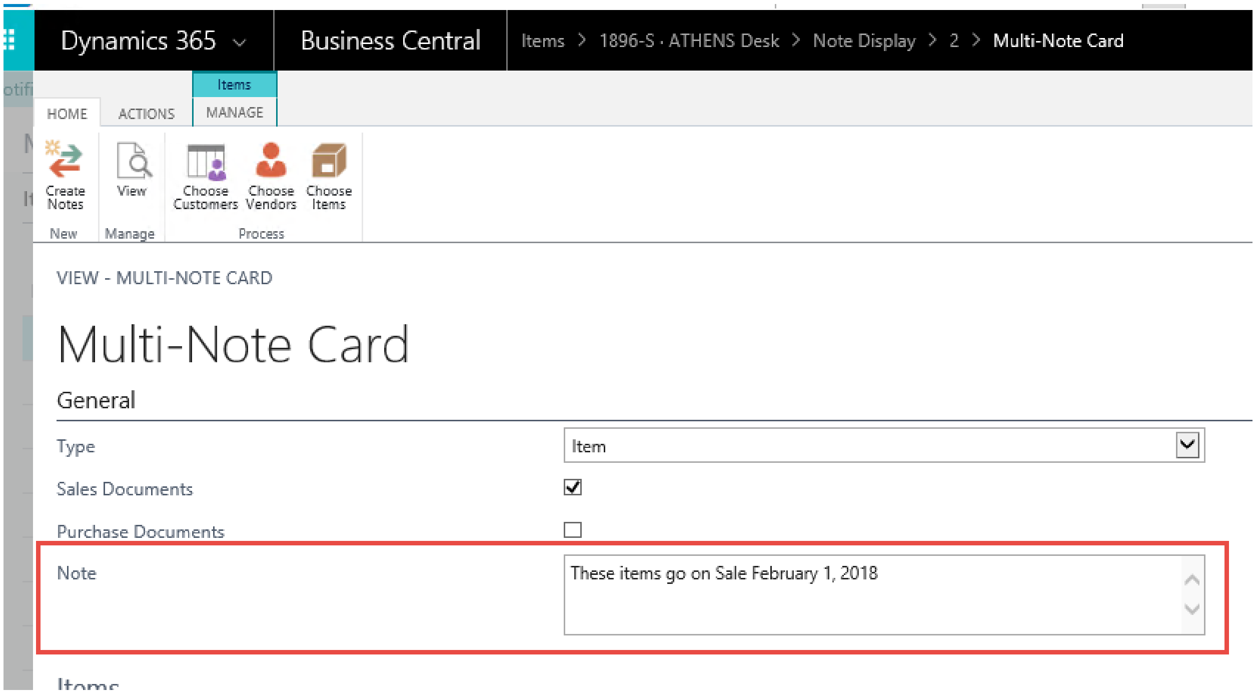
Note – Enter your actual Note here. It is free form text, so the Note will appear exactly as you type it. Sorry there is no spell checker. If you type more that what can show on one line the text will wrap into multiple lines. When you type the note will appear as if it is one long line but wraps when you leave the note field. Enter or moving to another field saves the note. Hitting the Esc Key while you are in the note box will not save what you typed in the field.

Creating Multiple Notes at once:

You can also create several Notes at once. For example, if you had several Items on sale and you wanted to create a Pop-Up Note for each sale Item, you could create one Note, choose all the related Items, and Business Central will create each individual Note for each Item.

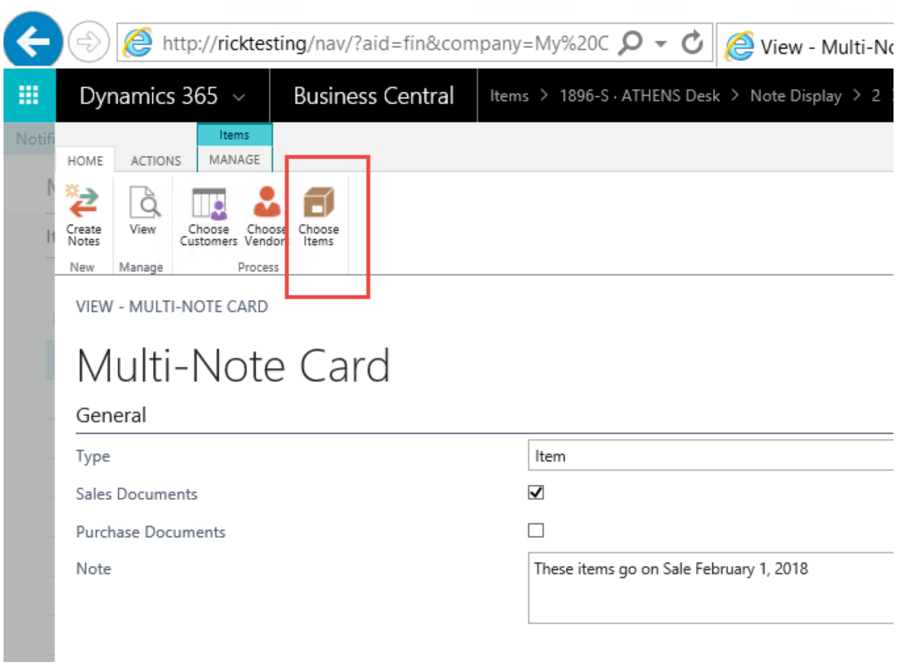
To do this, go to the Note button at the top of the Note card and select Create Multiple Notes.





Note: It does not matter what Note Card you are on when you go into the Create Multiple Notes option.

From here you will enter the note information on the General Tab, and then click "Choose Items" to specify which items the note belongs to.



A new window will open which allows you to choose the items you want to apply this note to.

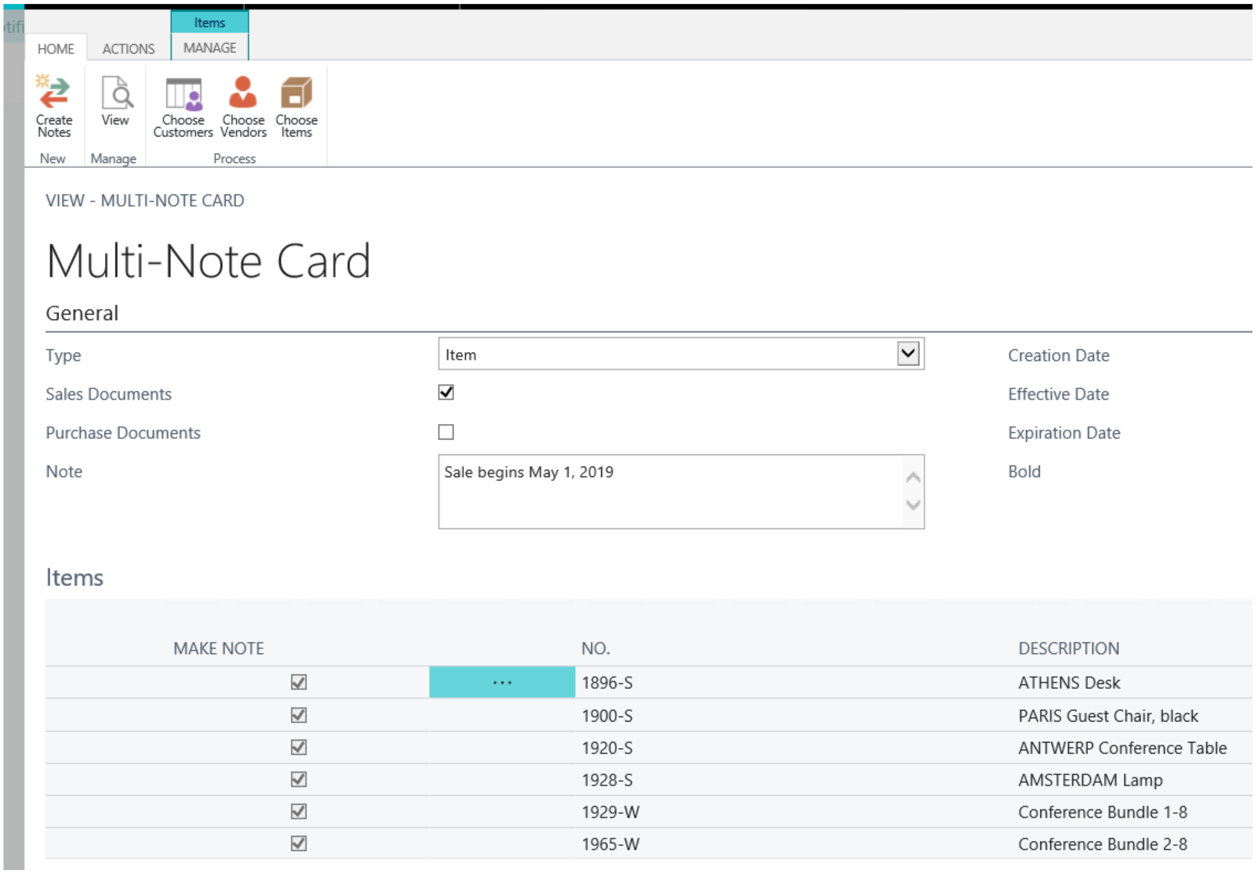
EDIT - ITEMS - 1965-W · CONFERENCE BUNDLE 2-8

MAKE NOTE		NO.	DESCRIPTION
☑	...	1896-S	ATHENS Desk
☑	...	1900-S	PARIS Guest Chair, black
☐	...	1906-S	ATHENS Mobile Pedestal
☐	...	1908-S	LONDON Swivel Chair, blue
☑	...	1920-S	ANTWERP Conference Table
☐	...	1925-W	Conference Bundle 1-6
☑	...	1928-S	AMSTERDAM Lamp
☑	...	1929-W	Conference Bundle 1-8
☐	...	1936-S	BERLIN Guest Chair, yellow
☐	...	1953-W	Guest Section 1
☐	...	1960-S	ROME Guest Chair, green
☐	...	1964-S	TOKYO Guest Chair, blue
☑	...	1965-W	Conference Bundle 2-8
☐	...	1968-S	MEXICO Swivel Chair, black
☐	...	1969-W	Conference Package 1

Select the items you want to make the duplicate Note for.

Say ok\ESC to return to the previous window. You will notice that the item tab has been filled in with the items that you chose in the previous window.

You are almost done!



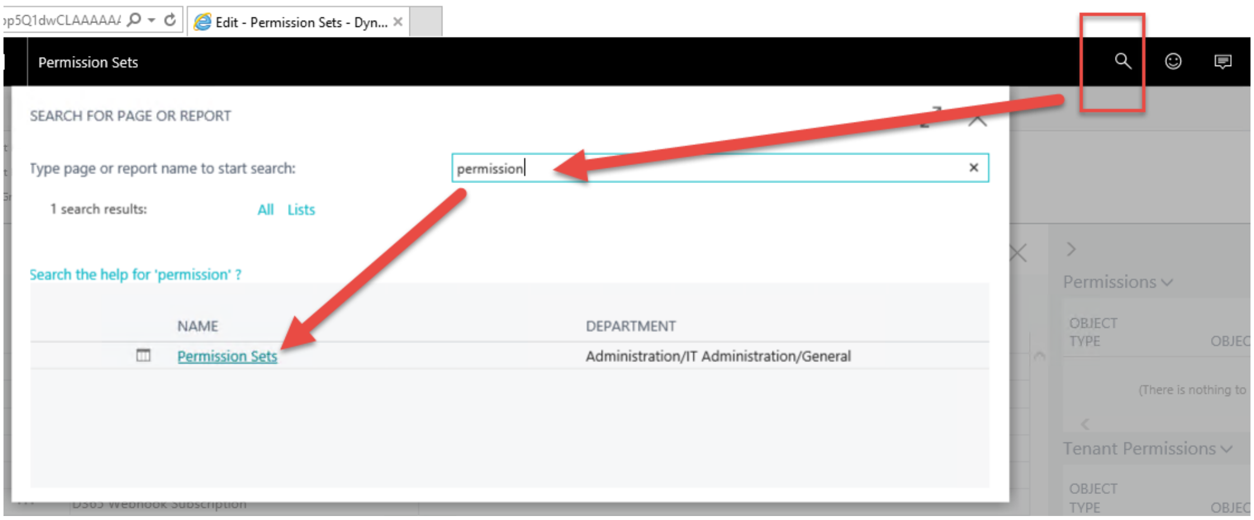
Last step: Click the **"Create Notes"** button to create the notes for the items listed.

All Done!

Security

New in Business Central: Auto Generation of Permission sets.

You can view or change the provided Permission Set here:



Then find Pop on the List:

Be sure to assign “POPN” to users that need access to Pop-Up Notes.

Support

Congratulations on your purchase of Pop-Up Notes! We couldn't be more thrilled for you. Soon, you will be on your way to enjoying and utilizing the features and functionality of this product.

We thank you for your business. Most importantly, Cost Control Software sincerely appreciates your trust in our products.

Should you have any questions or comments regarding our product(s), we encourage you to contact us. Please also contact your local Business Central Consultant if you are considering modifications or seeking new software functionality.

Cost Control Software provides many add-on products. Please visit our web site to learn more about our 24 additional products.

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