# *IDYNAMICS INTERNAL NOTES*

# *USER GUIDE*

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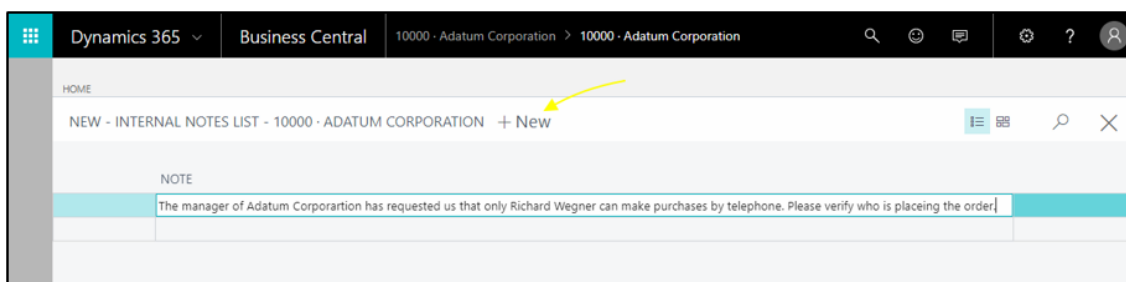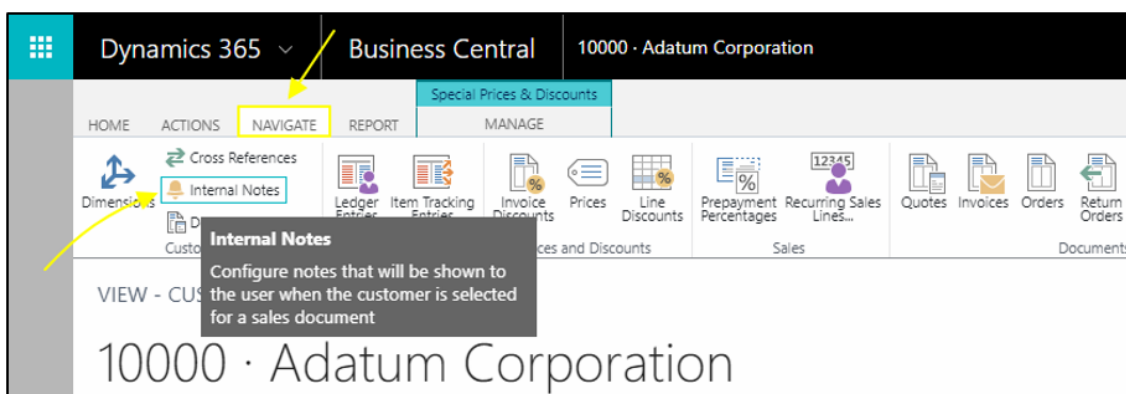| Document | iDynamics Internal Notes | | |
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# INDICE

# 1. Internal Notes

The extension allows the definition of internal notes linked to customers and suppliers, so that when a user selects a customer or a supplier (sales and invoicing) in a sales document, purchase or services, these internal notes are displayed.

To visualize these internal notes, it is used the available notification model from Dynamics NAV 2017, showing them at the top of the page, without disturbing the user interface.

## 1.1. Create Notes

The users are able to create notes linked to customers and suppliers from the button called "Internal Notes" in the "Navigate" section in the list type pages and in the file of them:

## 1.2. Display

When a user selects a sale's customer (or purchase supplier) in a sales document, purchase or services, it is displayed the customer's name (or supplier's name) continued by the internal notes that they have linked.



In case you have several notes, it is possible to access to all of them pressing "Show complete notes".

As we are treating with integrated notification in the notification area of the page and they are not open as emergent sales, it doesn't affect to the automatic processes, such as automatic invoicing.

# 2. Installation Guide

## 2.1. Installing the extension

From the Extension Management Page, search "iDynamics Internal Notes" and select de extension.
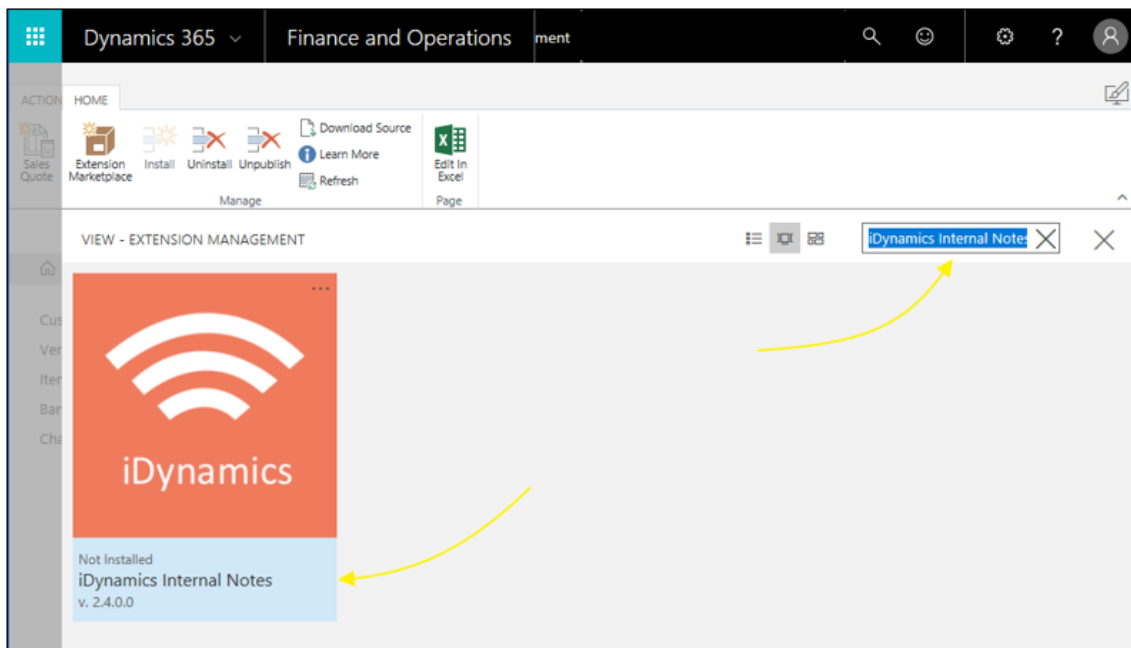


Accept the terms and conditions and press "*Install*".

## 2.2.  Assigning Permissions

In order for users to use the Internal Notes functionality, it is necessary to assign them permissions. From Users List View, we can use the options "*Permission Set by User*" or "*Permission Set by User Group*".
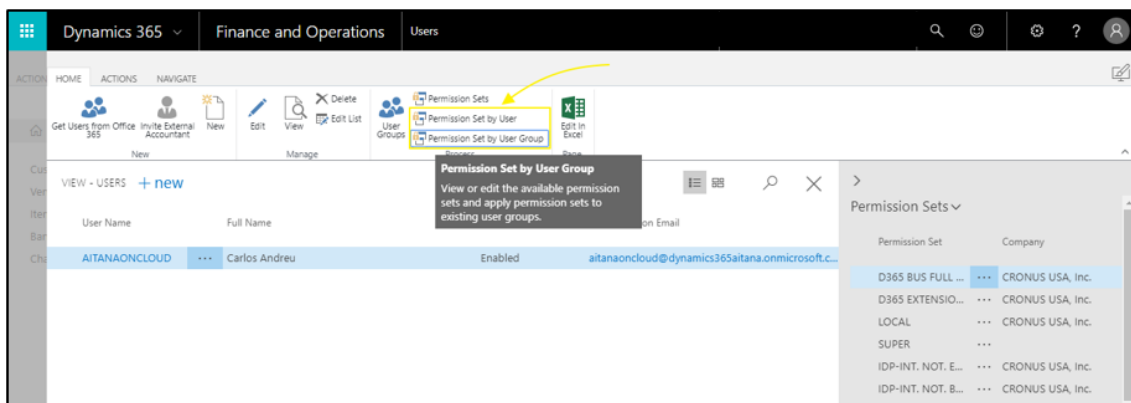


There are two permission sets available. "IDYN-INTNOT, BASIC" for users that only view the internal notes. And "IDYN-INTNOT, EDIT" for users that need create, edit, view and delete the internal notes.

## 2.3. Permission Set by User

Select the "permission set" and assign it to the users.



## 2.4. Permission Set by User Group

Select the "permission set" and assign it to the users groups.