



Document	iDynamics Internal Notes		
Title	<i>User guide</i>		
Class.	<i>Dynamics 365 Business Central</i>		
Code	IN-USG	Date	4 DE FEBRUARY DE 2019

IDYNAMICS INTERNAL NOTES

USER GUIDE

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INDICE

1. INTERNAL NOTES	1
1.1. CREATE NOTES	1
1.2. DISPLAY.....	2
2. INSTALLATION GUIDE.....	3
2.1. INSTALLING THE EXTENSION	3
2.2. ASSIGNING PERMISSIONS	4
2.3. PERMISSION SET BY USER	5
2.4. PERMISSION SET BY USER GROUP.....	5



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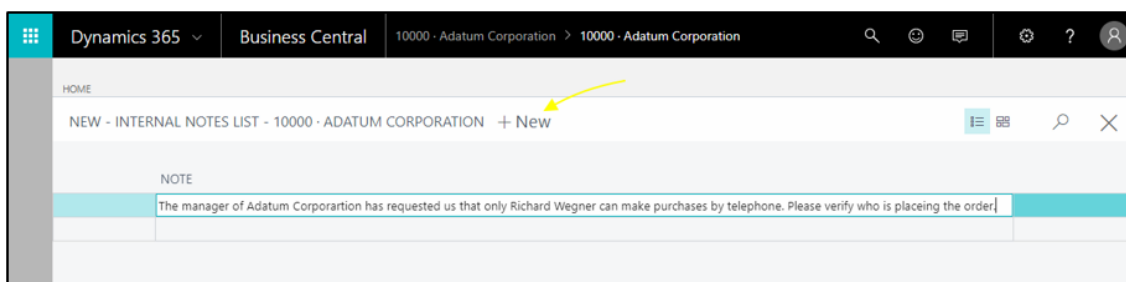
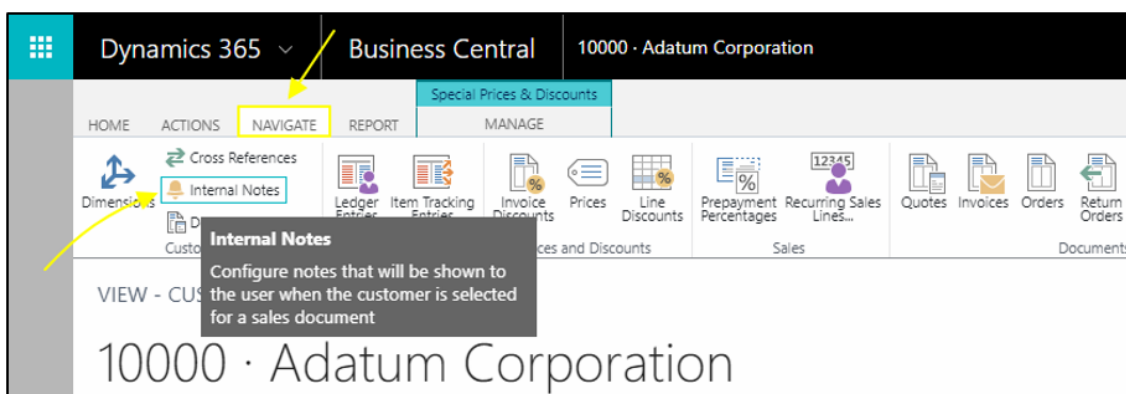
1. Internal Notes

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:





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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.

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The notification area at the top displays a message: "Adatum Corporation: The manager of Adatum Corporation has requested us that only Richard Wegner can make purchases by telephone. Please verify who is placing the order." A yellow arrow points from this notification to the "Adatum Corporation" text in the "General" section of the form. The form fields include Customer Name (Adatum Corporation), Contact (Robert Townes), Posting Date (4/9/2018), Order Date (4/9/2018), Due Date (5/9/2018), Requested Delivery Date, and External Document No.

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.

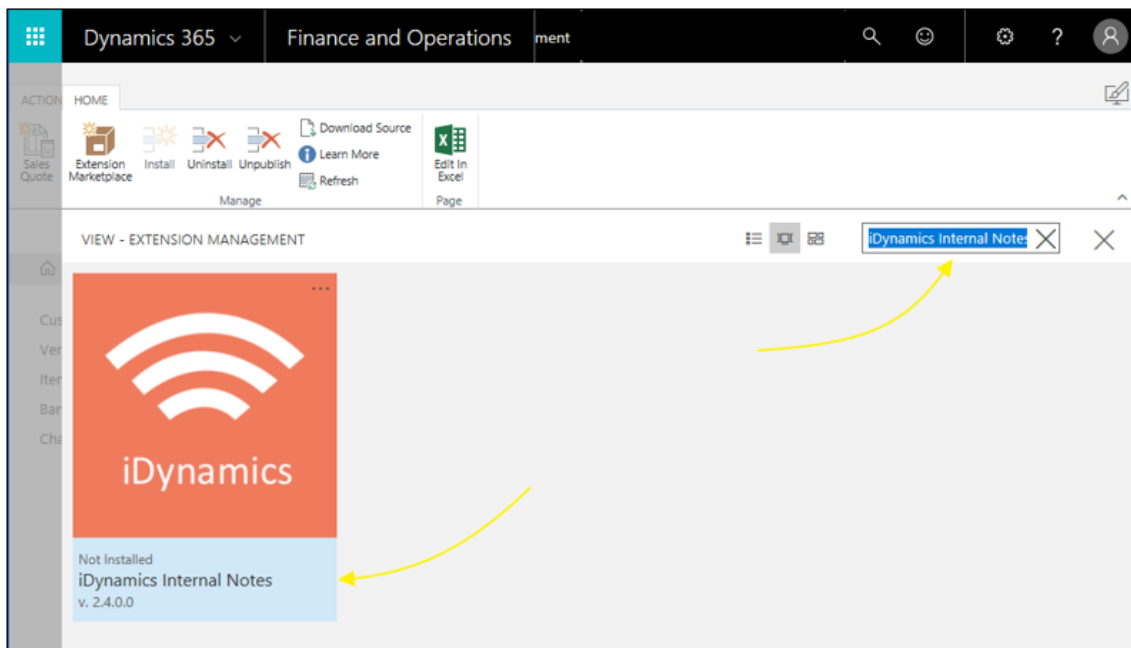


Document	iDynamics Internal Notes		
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2. Installation Guide

2.1. Installing the extension

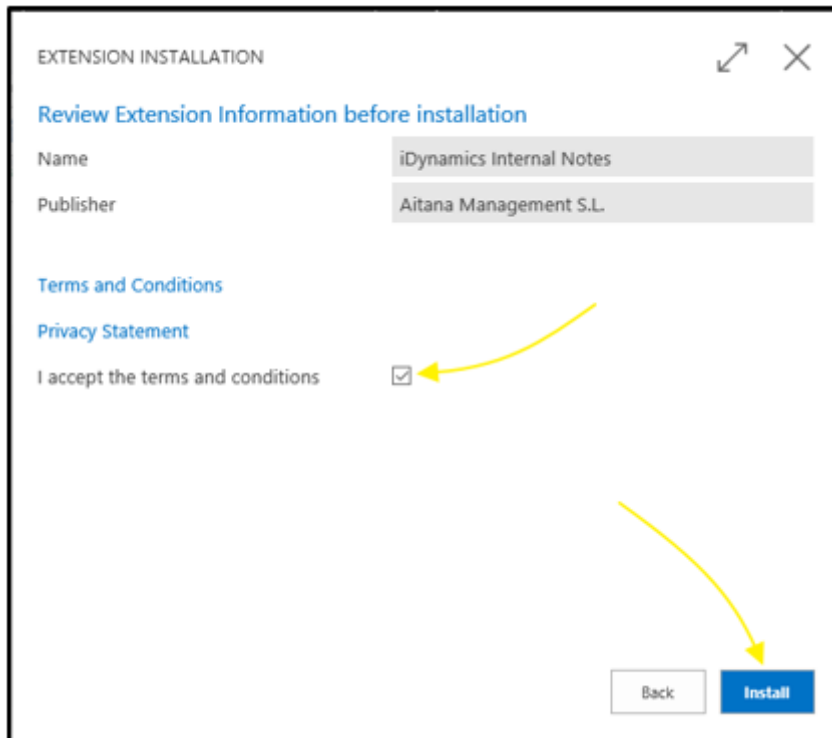
From the Extension Management Page, search “iDynamics Internal Notes” and select the extension.



Accept the terms and conditions and press “*Install*”.

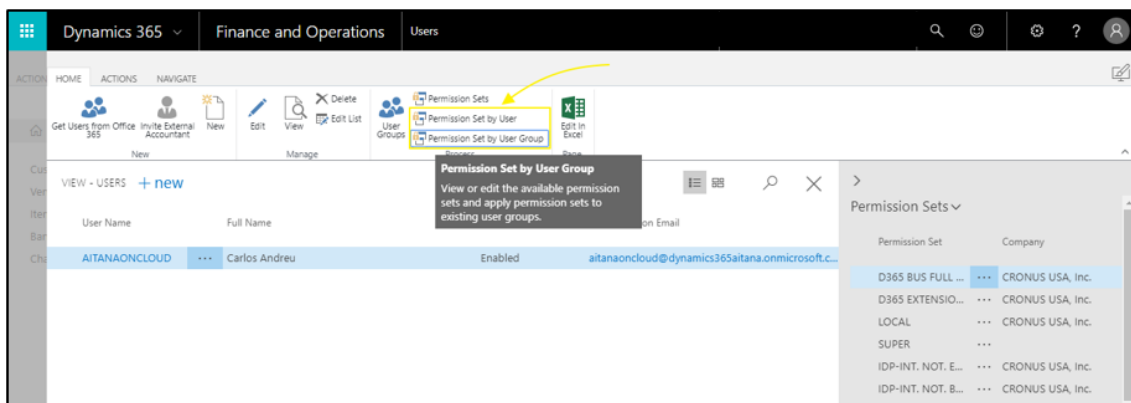


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2.2. Assigning Permissions

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.



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2.3. Permission Set by User

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

Role ID	Name	Extension Name	All Users	AITANAONC...	CARLOS.AN...
QUICKBOOKSDATAMIGR...	QuickBooks Data Migration	QuickBooks Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUICKBOOKSSYNCHRON...	QuickBooksSynchronization	_Exclude_QuickBooksSynchronizatio_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QBODATAMIGRATION	QBO Data Migration Permissions	QuickBooks Online Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICSGBP DATAMIGR...	Dynamics GP Data Migration	Dynamics GP Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	View Internal Notes	iDynamics Internal Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Edit Internal Notes	iDynamics Internal Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SALESANDINVENTORYFOR...	Sales And Inventory Forecast	Sales and Inventory Forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AZUREEVENTEMITTER	AzureEventEmitter Permissions	_Exclude_AzureEventEmitter_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAYPALSTANDARD	PayPalStandard Permissions	PayPal Payments Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YODLEEBANKFEEDIMPORT	YodleeBankFeedimport Permissio	Envestnet Yodlee Bank Feeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SC - SANA APP	Sana Commerce APP User	Sana Commerce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IMAGE ANALYZER	Image Analyzer	Image Analyzer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.4. Permission Set by User Group

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

Role ID	Name	Extension Name	All User Group	D365 ACCO	D365 ADMIN	D365 BUS FULL ACCE!	D365 EXTEH MGT	D365 FIN. & PURCI	D365 FINAN	D365 FULL ACCE!	D365 GLOB DIM MGT	D365 INTER ADMIN	D365 OPPO MGT
ANONYM. D...	Anonymous Data...	_Exclude_AnonymizedDataSharin...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUICKBOOK...	QuickBooks Data...	QuickBooks Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUICKBOOK...	QuickBooksSynch...	_Exclude_QuickBooksSynchroniz...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QBODATAM...	QBO Data Migrat...	QuickBooks Online Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS...	Dynamics GP Dat...	Dynamics GP Data Migration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	View Internal Not...	iDynamics Internal Notes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Edit Internal Notes	iDynamics Internal Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SALESANDI...	Sales And Invent...	Sales and Inventory Forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AZUREEVEN...	AzureEventEmitte...	_Exclude_AzureEventEmitter_	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAYPALSTA...	PayPalStandard P...	PayPal Payments Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YODLEEBAN...	YodleeBankFeed...	Envestnet Yodlee Bank Feeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SC - SANA...	Sana Commerce...	Sana Commerce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IMAGE ANA...	Image Analyzer	Image Analyzer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>