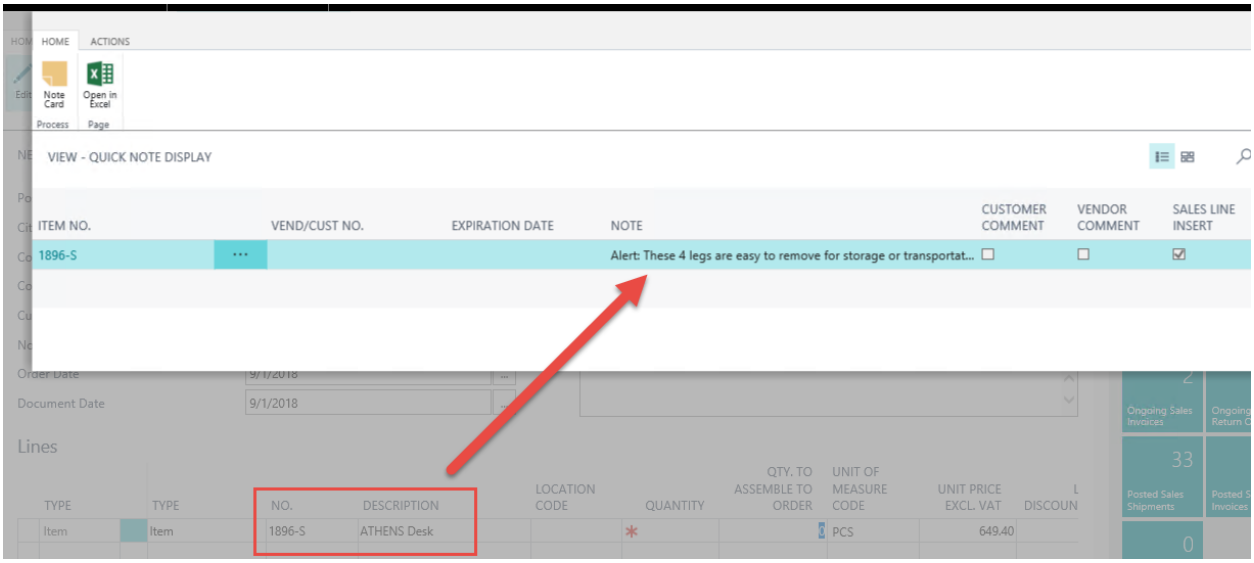
Pop-Up Notes Workflow Guide

For Microsoft Dynamics 365 Business Central
Granule ID: 14005160



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Video Version of this Workflow Guide Here

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Application Description

Objectives

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 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 particular 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:

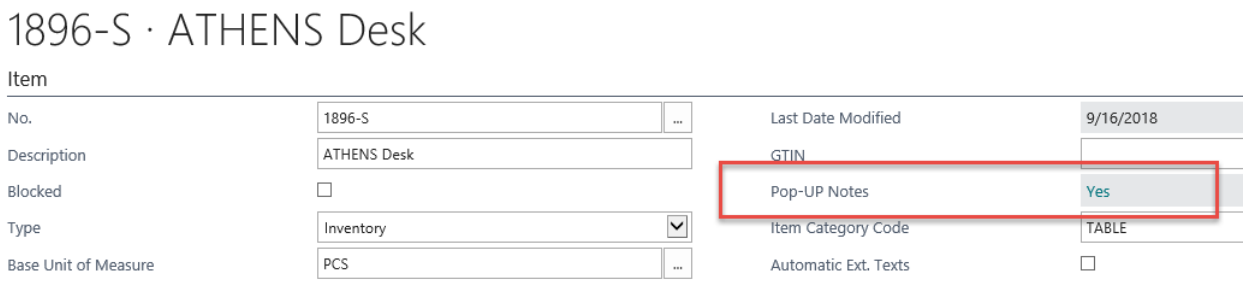
- Business Central General Ledger
- Sales & Receivables, Basic Invoicing

Works in Conjunction with:

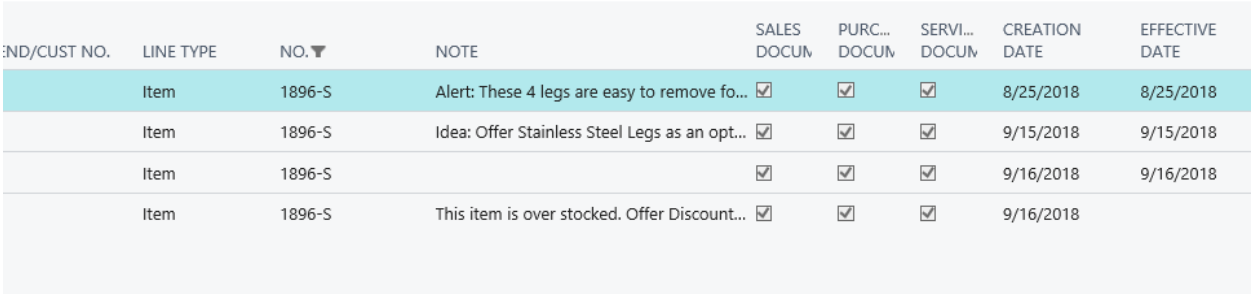
- Customers, Vendors, Items, and Service Items.
- Sales: Quotes, Orders, Invoices, Credit Memos, Blanket Orders, & Return Orders
- Purchase: Quotes, Orders, Invoices, Credit Memos, Blanket Order & Return Orders
- Service Contracts and Services Contract Quotes
- Service Quotes and Service Orders

Workflow

There is not much training to Pop-Up Notes. Once the Granule is set up, you are able to view the Pop-Up Notes from Master records like Customers, Vendors, Items and Service Items. There is a Boolean field on the Master Card that indicates that Pop-up Notes exist. If Notes have expired, then the check mark will not appear.

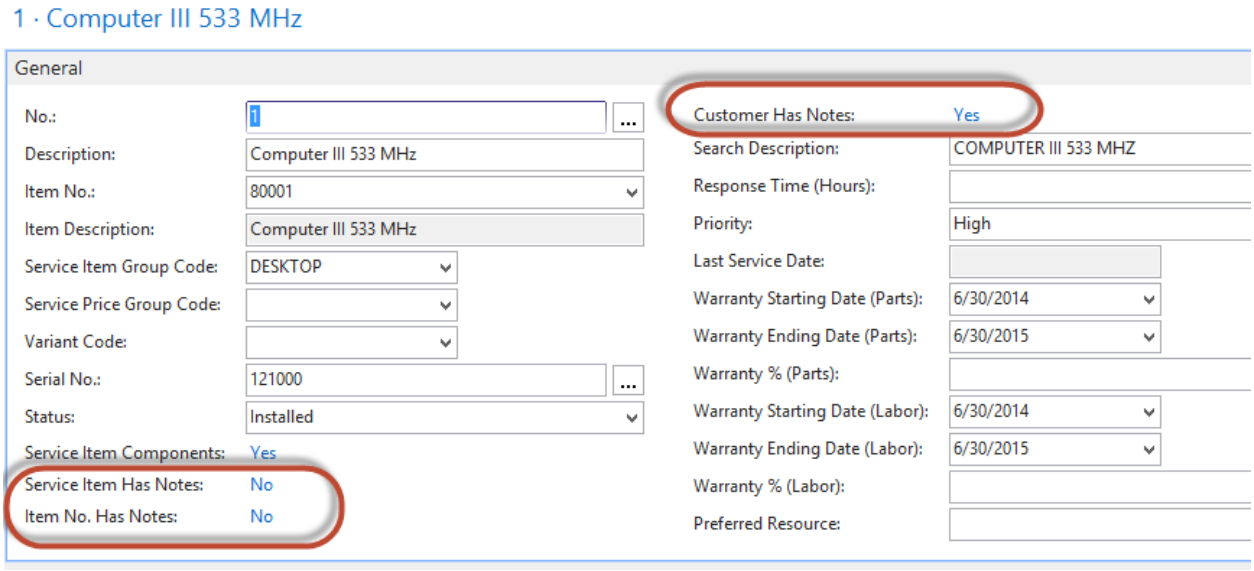


Clicking the Pop-up Notes check box will bring up the Pop-Up Note(s) for this item or customer.



END/CUST NO.	LINE TYPE	NO.	NOTE	SALES DOCUM	PURC... DOCUM	SERVI... DOCUM	CREATION DATE	EFFECTIVE DATE
	Item	1896-S	Alert: These 4 legs are easy to remove fo...	☑	☑	☑	8/25/2018	8/25/2018
	Item	1896-S	Idea: Offer Stainless Steel Legs as an opt...	☑	☑	☑	9/15/2018	9/15/2018
	Item	1896-S		☑	☑	☑	9/16/2018	9/16/2018
	Item	1896-S	This item is over stocked. Offer Discount...	☑	☑	☑	9/16/2018	

From Service Management, the Service Item displays flags for three components. See below: (Business Central Image is coming soon)



In this example above the Item No. related to the Service Item has a Pop-Up note. What Item No. is that? How can you see the note? The Customer related to this service item also has Pop-Up notes. What Customer is it? How can you see the Customer's Pop-Up note?

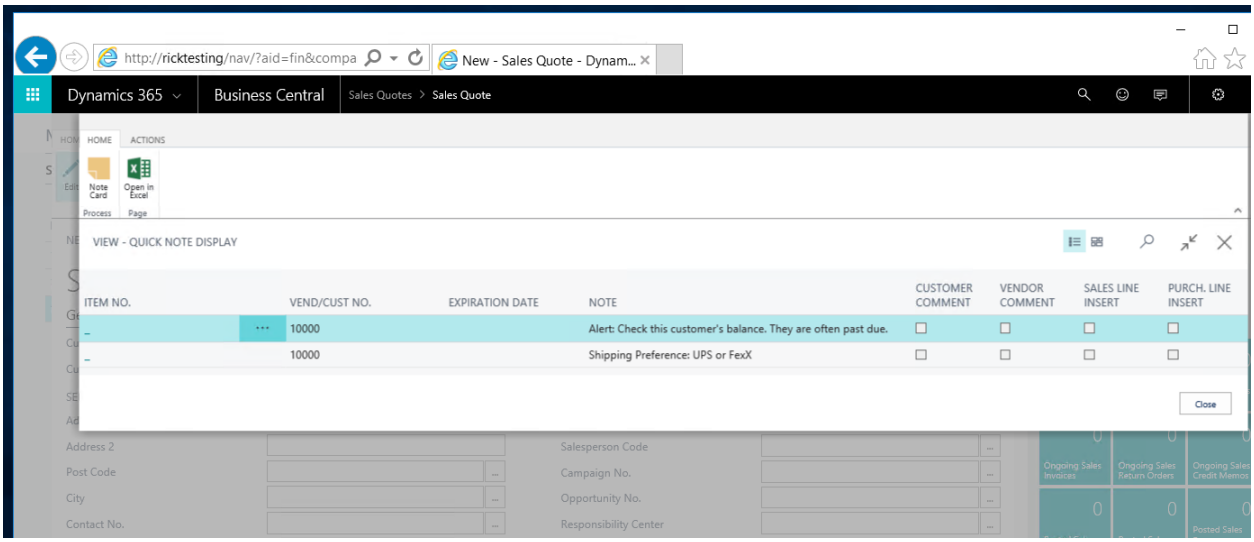
There is more than one way to see the Item and Customer's Pop-Up note but the quickest way is to just click on the check boxes.

Does this Service Item have a Pop-Up note? How can you tell? The answer is No. There is no check mark in the Service Item Has Notes?

Data Entry Automatic Pop-Up display:

The main benefit of Pop-Up Notes is that it will automatically display (Pop-Up) the notes upon entry of the Customer, Vendor, Item and Service Item on all Sales, Service and Purchase Documents.

Below is an example of the Customer note popping up on a Sales Quote. This Note was flagged to Pop-Up on Sales and Service Documents.



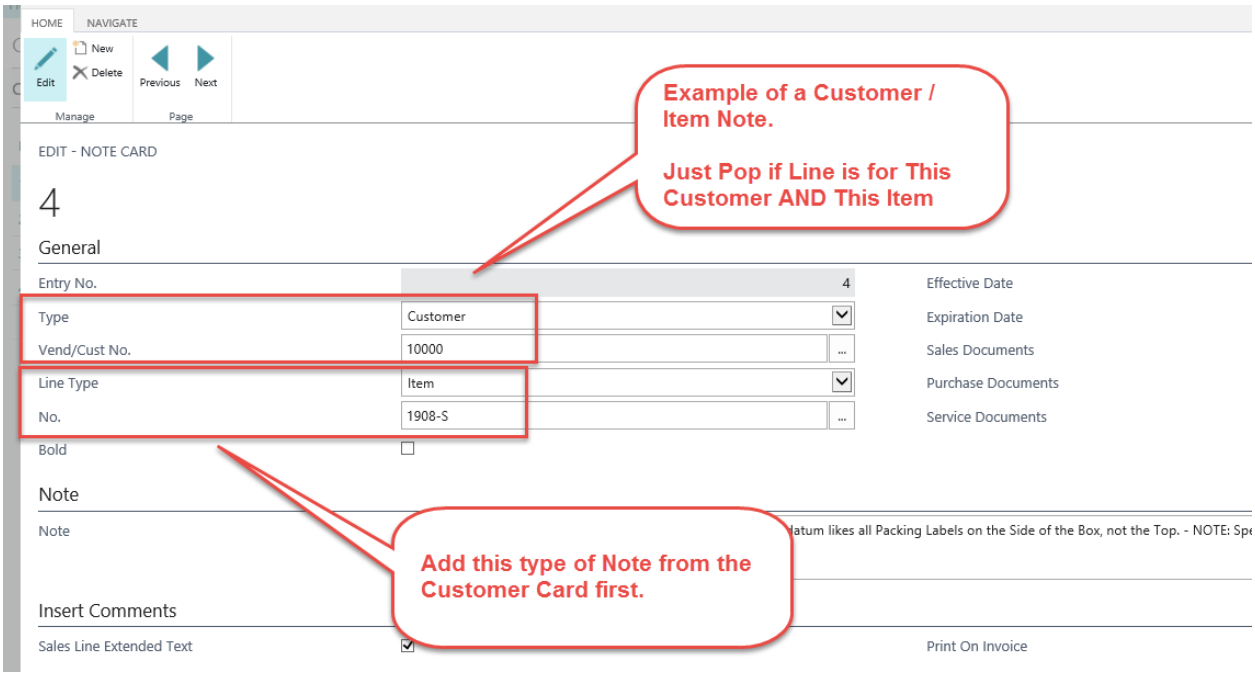
You use the ESC Key or Click on “Close” form box in the lower right corner of the note form to exit the note. (ESC with left hand is quickest)

The Quick Note Display as seen above is Non-editable. The Note Card button will allow you to view the Pop-Up Note Entry screen. If you do not want some users to have access to the Note Card, the button would have to be removed or made non-visible based on some criteria. (not part of the base product)

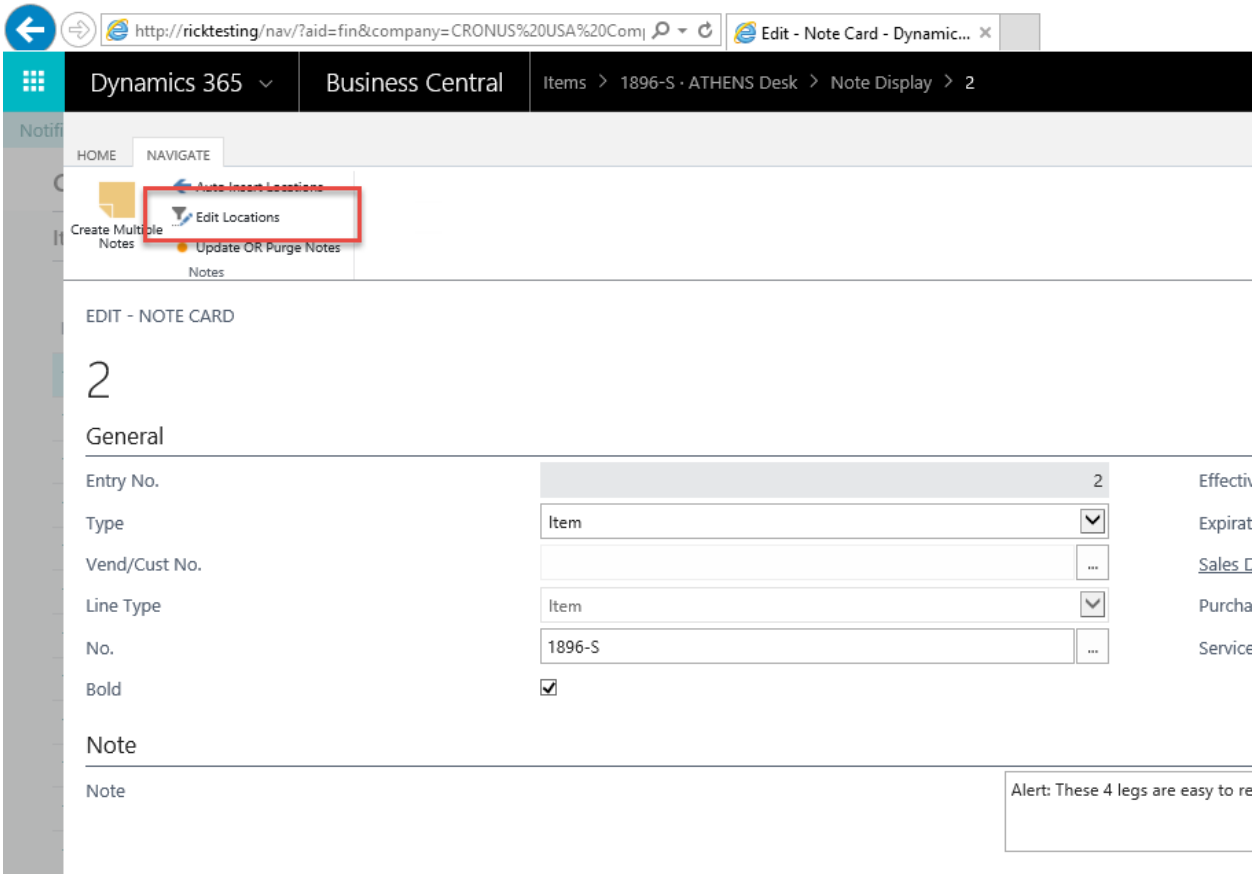
Pop-Up Notes Special Features

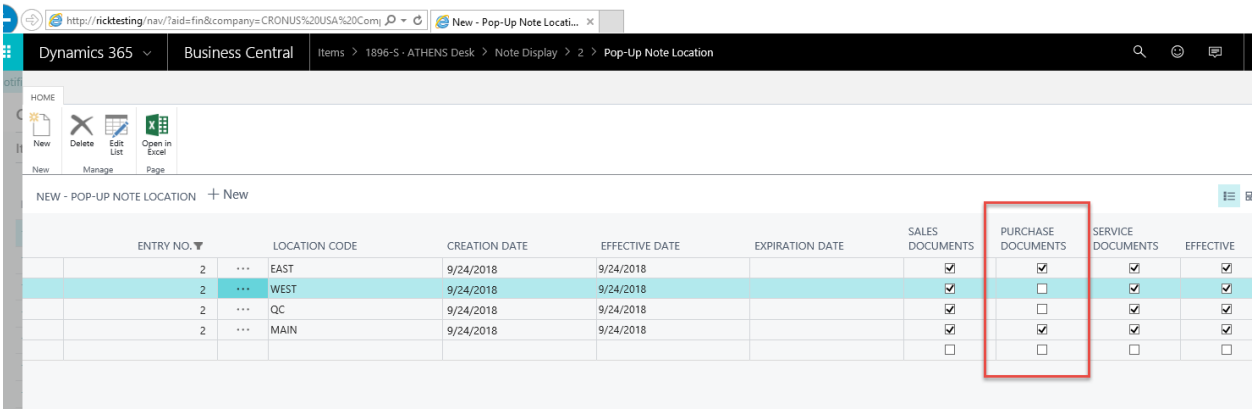
- Item Specific Notes and Customer/Item Specific Notes can be flagged to become automatically inserted comments on Sales Lines. Like Extended Text but allows the comments to be Customer/Item specific and with an Activation and Expiration dates. Note this does not create an entry in "Comments" but simply puts the note on the sales line.

- Customer Specific Notes can be flagged to auto insert Sales Header Comments Or to say specifically what documents to print on.



Edit Locations Option:





When the field “Sales Header Comments” is checked, you will still receive the popup note and the notes with the check will be inserted as Sales Document comments in the comment box on the header. Header comments can print on documents based on what field is checked.

When the “No.” field is filled in then the only options is be become a Sales Line Comment ….associated with the “No.” on the Sales Line.

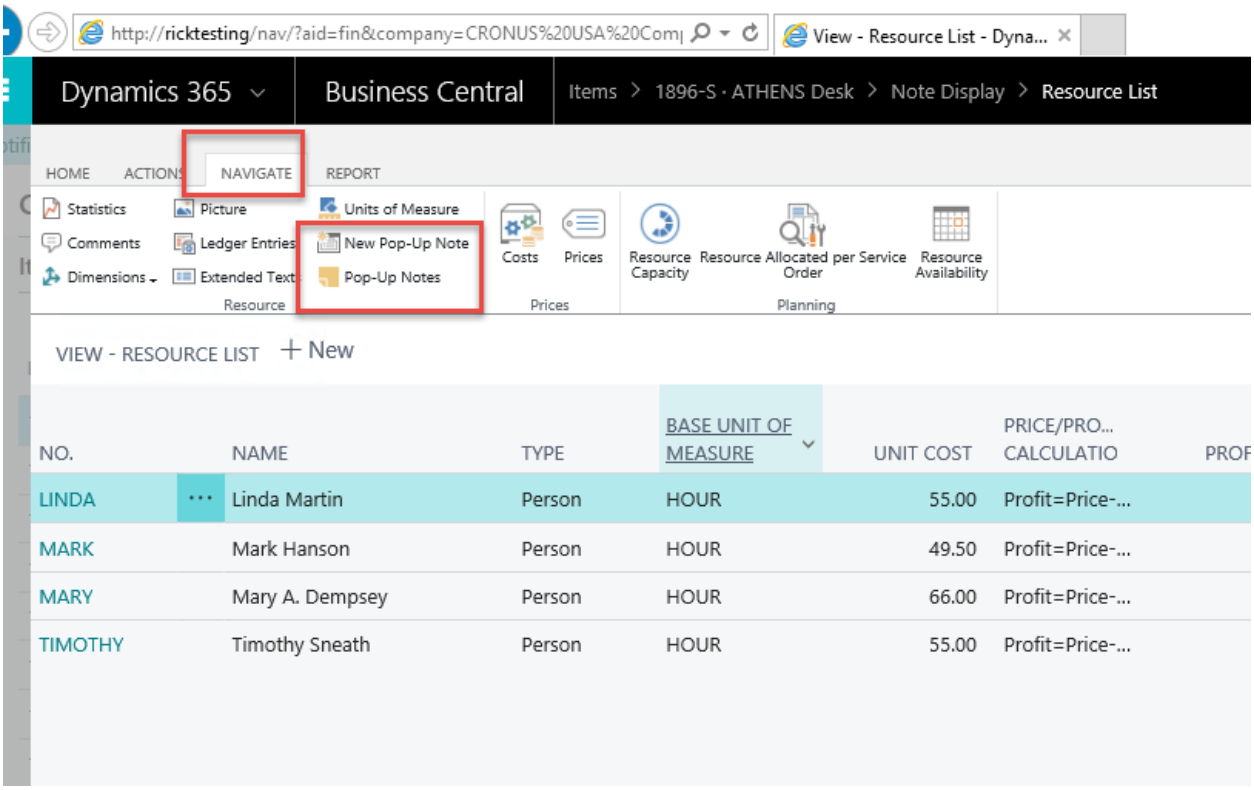
If you place a check in the field “Sales Line Extended Text” then you will still receive the popup note message, but the notes checked will also be inserted as comment lines below the line that you are on when you triggered the note.

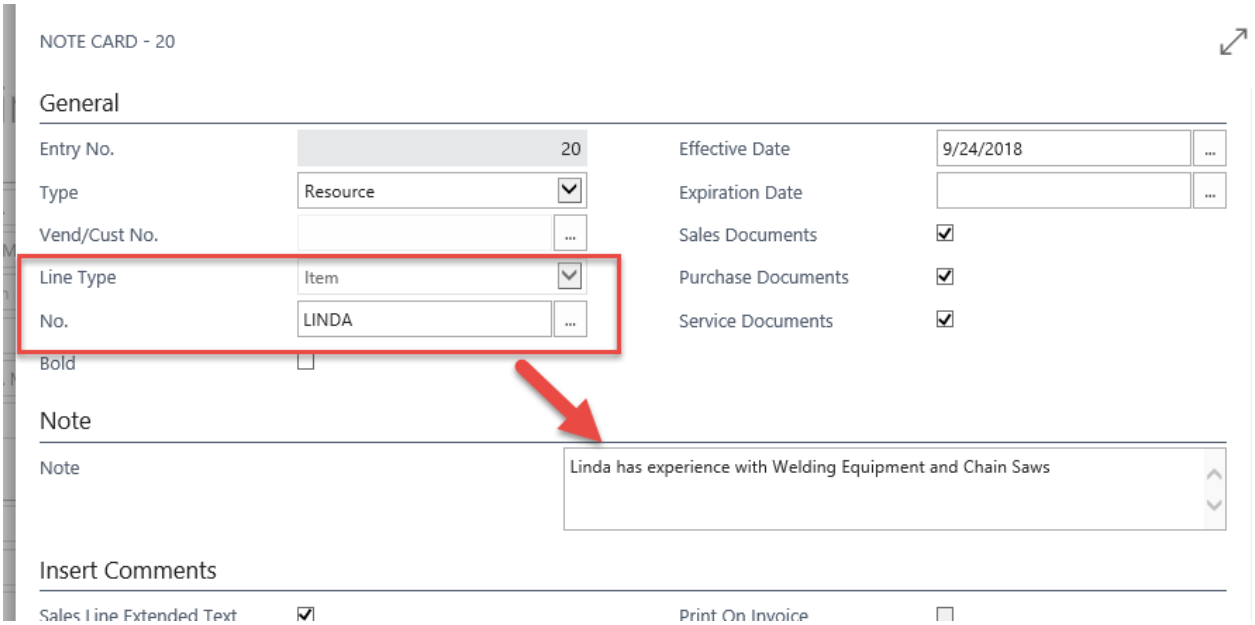
Inserting comments is only available on Sales Documents.

Resources

You can enter a note for Resources. You can have Resource only notes or Resource Customer specific notes. Since Standard Business Central does not use Resources on a Purchase line, you do not have the option of Popup notes related to resources and purchases.

Setup is just the same as Items. See a resource specific note below:





Special Situation: Entering Orders from Customer Card or CRM.

When entering Sales Orders from the Sales Order menu, the Pop-Up Note is triggered by the entry of the Sell-to Customer No.

However when entering Sales Orders from the Customer or Contact card, the Pop-Up Note cannot be triggered from the Sell-to Customer No. so it is triggered from some other field. Our sample date has the "Requested Ship Date" as the secondary popup note trigger.

Please note: The code to pop the note can be moved to some other field based on the client's work flow. You need to find a field that is "always" entered on the sale header other than the Sell-to Customer No.

Special Situation: Using Popup Notes with Extended Text on Items or Resources being Drop Shipped.

You can use the above combination with some minor restrictions. If you have setup Vendor Popup Notes to copy into the Purchase Order Header, or Item or Resource notes to copy to the PO lines, then you will NOT be able to use the "Automatic Extended Text" setting on Items and Resources.

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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