Notes

"The easy way to attach context-sensitive notes to Sage 300 screens"

WE'VE TAKEN INFORMATION SHARING TO THE NEXT LEVEL.

Why use Notes?

Improve productivity and customer service by displaying relevant information where and when it's needed in feature-rich, context-sensitive Notes.

Flexible Configuration

You specify where and when Notes will appear in Sage 300 by linking them to:

- Any screen (including 3rd Party modules developed in the SDK)
- Any field (including grid fields, but not check-boxes or drop-downs)
- Any 2 fields (e.g. a combination of Vendor & Item)
- Any data (e.g. specific Customers, Items, batches, transactions)
- Any user (by configuring role-based rules)

💡 Use Notes to support on-the-job training by providing pop-up data-entry guidelines

Adding & Editing Notes

- Maintain Notes without leaving the Sage 300 screen using New and Edit buttons
- If configured for a screen but not yet created, click a menu bar icon to enter a Note
- Alternatively, a pop-up window can automatically prompt for entry of a new Note
- Optional role-based rules restrict who can see, add, edit, or delete Notes
- Import Notes from a CSV file

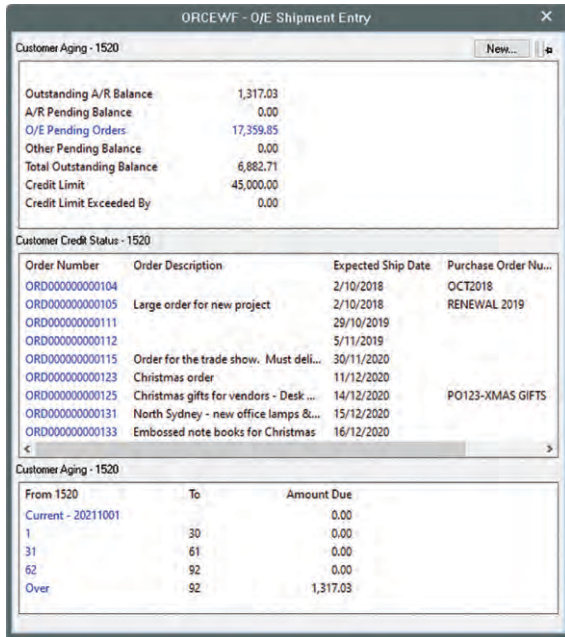*Notes linked to Customer and/or Item*

Extended Note for Customer, created 'On The Fly'

RMA Note for Customer, with colour coding

Item Note

Note with hyperlink for Customer/ Item combination

Work smarter with Orchid

Various 'Extended Notes', with drill-through
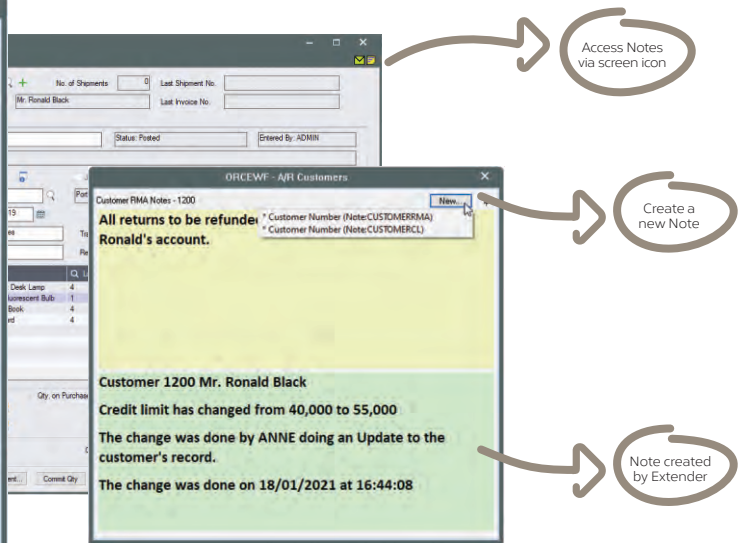
💡 Combine with Orchid **Optional Tables** to dynamically display sets of structured custom data

Presentation Options

- Include plain text, rich text, hyperlinks and even small images
- Set Note colours, e.g. to indicate importance and attract attention
- Choose how Notes appear (Alert Box, auto pop-up, flashing tray icon)
- Display Notes wherever the linked data is displayed, or only on specific screens
- Pin the Notes window to the Sage 300 screen, or let it float

Use Case Examples

There are countless ways Notes could add value to your Sage 300 implementation. Here are just a few:

- **Procedural notes** to guide data entry – great for educating new users
- **Customer-specific notes,** e.g. this Customer doesn't accept deliveries after 3pm
- **Item-specific notes,** e.g. this product line will soon be discontinued
- **Dual-key notes,** e.g. Customer X has special labelling requirements for Item Y

Extended Notes

Combine Orchid **Extender** with Notes to generate dynamic, feature-rich content, such as:

- **Conditional Notes** (e.g. extra info required for web orders)
- **'On the Fly' Notes** (e.g. real-time item availability checks)
- **Enhanced Functionality** (e.g. drill through to open transactions from OE screen)
- **Data from other Sage 300 companies** (e.g. Stock Levels, AR Balances)
- **Cloud Integration** (e.g. retrieve latest exchange rates or freight charges)

> 💬 Truly, my mind is overflowing with the possibilities of the interplay between Extender and Notes…such a game-changer.
> DAVID GELULA, GELULA CONSULTING, IL, USA

More information

Further information about Notes, including videos, is available from Orchid's Website: www.orchid.systems/products.

Minimum Requirements

Notes requires Sage 300 System Manager. Orchid Extender is required for 'Extender Script' Note Type, or to create a Note from an Extender event. Orchid Optional Tables is required for 'InfoSet' Note Type. Features relate to the latest supported version.

Contact your Sage Software Solution Provider

V-21.1

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