



Notes

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

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

The screenshot shows the 'ORCEWF - O/E Order Entry' window. Several fields are circled in brown, with arrows pointing to notes in a separate window. The notes include:

- Extended Note for Customer, created 'On The Fly'**: linked to the Customer field (1200).
- RMA Note for Customer, with colour coding**: linked to the Order Date field (15/01/2019).
- Item Note**: linked to the Item field (A1-105/0).
- Note with hyperlink for Customer/Item combination**: linked to the Item field (A1-105/0).

The notes window also displays a table for 'Customer Aging - 1200' and 'RMA Notes - 1200'.

From 1200	To	Amount Due
Current - 20211001		
1	30	0.00
31	61	0.00
62	92	0.00
Over	92	1,736.76

RMA Notes - 1200

All returns to be refunded - do not leave a "credit" on Ronald's account.

Item Notes - A1-105/0

Replacement bulb. Can also use A1-106/0 as an alternative replacement bulb if running low on stock.

Customer/Item Notes - 1200/A1-105/0

Refer to the technical specification for A1-105/0 for Ronald Black

<C:\Orchid\Customer 1200 Documents\A1-105-0 Technical Specs.xlsx> <C:\Orchid\Customer 1200 Documents\A1-105-0 Technical Specs.xlsx>

Notes linked to Customer and/or Item

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Customer Aging - 1520

Outstanding A/R Balance	1,317.03
A/R Pending Balance	0.00
O/E Pending Orders	17,359.85
Other Pending Balance	0.00
Total Outstanding Balance	6,882.71
Credit Limit	45,000.00
Credit Limit Exceeded By	0.00

Customer Credit Status - 1520

Order Number	Order Description	Expected Ship Date	Purchase Order No...
ORD00000000104		2/10/2018	OCT2018
ORD00000000105	Large order for new project	2/10/2018	RENEWAL 2019
ORD00000000111		29/10/2019	
ORD00000000112		5/11/2019	
ORD00000000115	Order for the trade show. Must deli...	30/11/2020	
ORD00000000123	Christmas order	11/12/2020	
ORD00000000125	Christmas gifts for vendors - Desk...	14/12/2020	PO123-XMAS GIFTS
ORD00000000131	North Sydney - new office lamps &...	15/12/2020	
ORD00000000133	Embossed note books for Christmas	16/12/2020	

Customer Aging - 1520

From 1520	To	Amount Due
Current - 20211001		0.00
1	30	0.00
31	61	0.00
62	92	0.00
Over	92	1,317.03

Customer RMA Notes - 1200

All returns to be refunded
Ronald's account.

Customer 1200 Mr. Ronald Black

Credit limit has changed from 40,000 to 55,000

The change was done by ANNE doing an Update to the customer's record.

The change was done on 18/01/2021 at 16:44:08

Access Notes via screen icon

Create a new Note

Note created by Extender

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.

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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

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