

Notes

For Sage 300 ERP (Accpac)



Updated for v2014



Customized reminders and notes on screen Your information here and now Makes a good system better and easier

What is Notes?

Notes, from Orchid Systems, lets you attach an electronic note to Sage 300 ERP (Accpac) fields, to help users complete their daily tasks more effectively. You record your own information in a Note, giving you context and data sensitive pop-up notes from any Sage 300 ERP (Accpac) screen, excluding grids (lines). You can also include photos in the pop-ups.

An easy way to guide Users with messages that say what you want, when they need it.

Messages can be about specific data or fields, or customers or products. Notes messages can show every time a field/screen is used or tied to specific data, e.g. users, specific customers and products. No need to look up Operations Manuals, find a lost reminder or have wrong data: an easy online message can solve these issues.

Setup can be customized with user definable Note types and colors, notification by pop up message or system tray icon to indicate different types of messages, and role-based Notes to target your messages to the right people. This tool is impressively flexible.

Notes is part of the Information Manager suite of productivity tools from Orchid.

How it Works

Notes can be used in different ways, as you require, to help users in their daily activities. Customer information. e.g. Note that a Customer is closed for deliveries after 3pm, Customer X in San Diego only orders the black model, or is closed this week. AR Collections set of Notes, e.g. about when invoices are paid.

Product information. e.g. Note that a product is on Special discount, or no back orders allowed, or Model 123 is being replaced by Model 456. Procedural. Notes can be used as guides to data entry, such as what a field is used for. The Note can be either a pop-up Note on screen or a red icon – set up as flashing or not - in the system tray where a less in-your-face indication is required (access Note via Function key).

The Benefits

- Increase accuracy: reduce mistakes in data collection.
- Time saving: necessary information on screen when needed, no chance of forgetting.
- Increased customer service with special information on what customers require.
- Reduced training, with pop up guides for common questions.
- Ensures information is shared and not lost.

The screenshot shows the 'SAMLTD - A/R Customers' window. The customer record for Mr. Ronald Black (Customer Number 1200, Group Code RTL) is displayed. A pop-up note is overlaid on the window, containing the following text:

Use the RTL (Retail Group) for Retail KPI's to be applied to the sales reporting

Urgent : Must deliver before 3.00 pm.
Must use the back entrance in Little Alfred Street. Street address is Alfred Street. Turn left into Whaling Road.

Always double check the sales people codes and relative percentages on this customer.

Callouts explain the note's color coding and system behavior:

- Note for Group Code - RTL, yellow
- Note for Customer Number - 1200, red
- Note for Customer, grey
- System remembers if you change size of Notes box
- Color can be set for Note type, and over-riden for an individual Note, e.g. for importance, Urgent

(Notes for Customer Code - 1200 and Group Code - RTL)



Notes

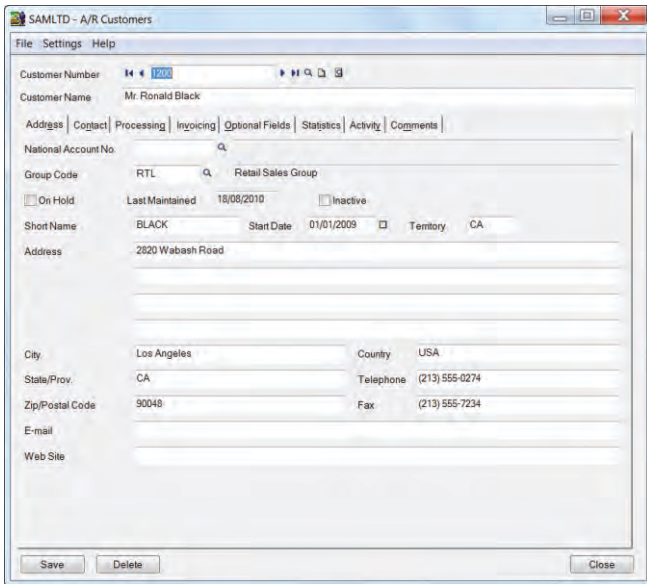
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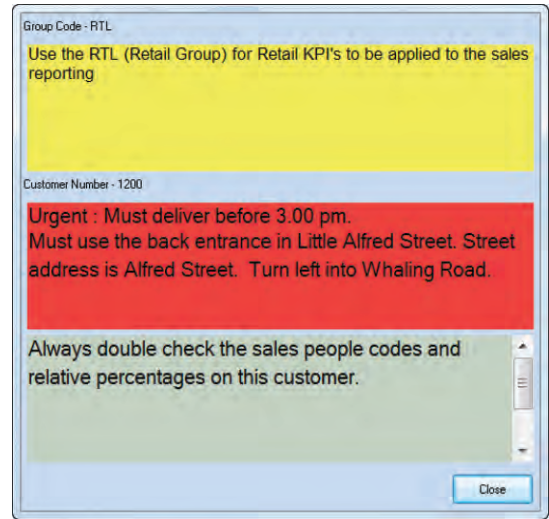
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Key Features

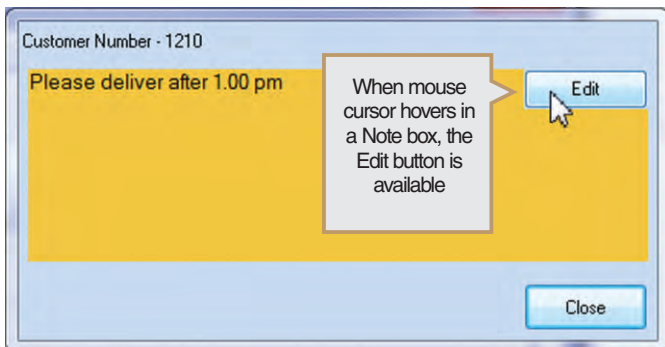
- On screen pop-up alerts provide users with relevant information when capturing data – at their fingertips.
- Configurable alert types – pop-up text box, or flashing or colored icon in System Tray.
- Definable Note types to separate various Notes by function.
- Definable Note colours to indicate importance and attract attention.
- Can now display pictures in the "alert" box.
- User roles: different roles can have different access to Note types.
- Associate Notes with a Customer, a role or a particular Sage 300 ERP screen.
- Data conversion utility from Zippy Notes included.
- Developed in the Sage 300 ERP SDK, with its look and feel, security, customization capabilities, data integrity checking and more.



(Main Sage 300 ERP screen)



(Show Notes on 2nd screen or side by side)



(Edit a Note from your transaction screen)

The Suite. Information Manager

Orchid Supplementary Data is part of the Information Manager suite of productivity tools. Other tools are:

- Info Explorer** A Business Intelligence tool: cube viewer to report with "slicing & dicing" and with write-back for budgeting.
- Data Views** Turn Sage 300 ERP (Accpac) Optional Fields into columns to simplify and accelerate reporting.
- Report Runner** Easy to use, security driven Crystal and General Ledger Financial Report Launcher.
- Optional Tables with Spreadsheet Add-in** Create your own data structures to store information which is normally held outside of Sage 300 ERP. Dynamically link Spreadsheets to your Supplementary Data in Sage 300 ERP, with Read and Write Back capabilities. Great for budgeting and forecasting!
- Process Scheduler** Schedule Cube extracts, Reports and to optimize system usage.
- Document Management Link** Attach documents to any Sage 300 ERP transaction or master file record from Microsoft SharePoint and allow triggering of SharePoint workflows to drive key processes. If SharePoint is not required, the Link works with a shared directory.

Minimum Requirements

Notes 2014 requires Sage 300 ERP (Accpac) 2014 System Manager.

Further details from your Sage Software Solution Provider.

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