



# 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)

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



## Adding & Editing Notes

These options are available to both Sage 300 desktop and web screen users:

- 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

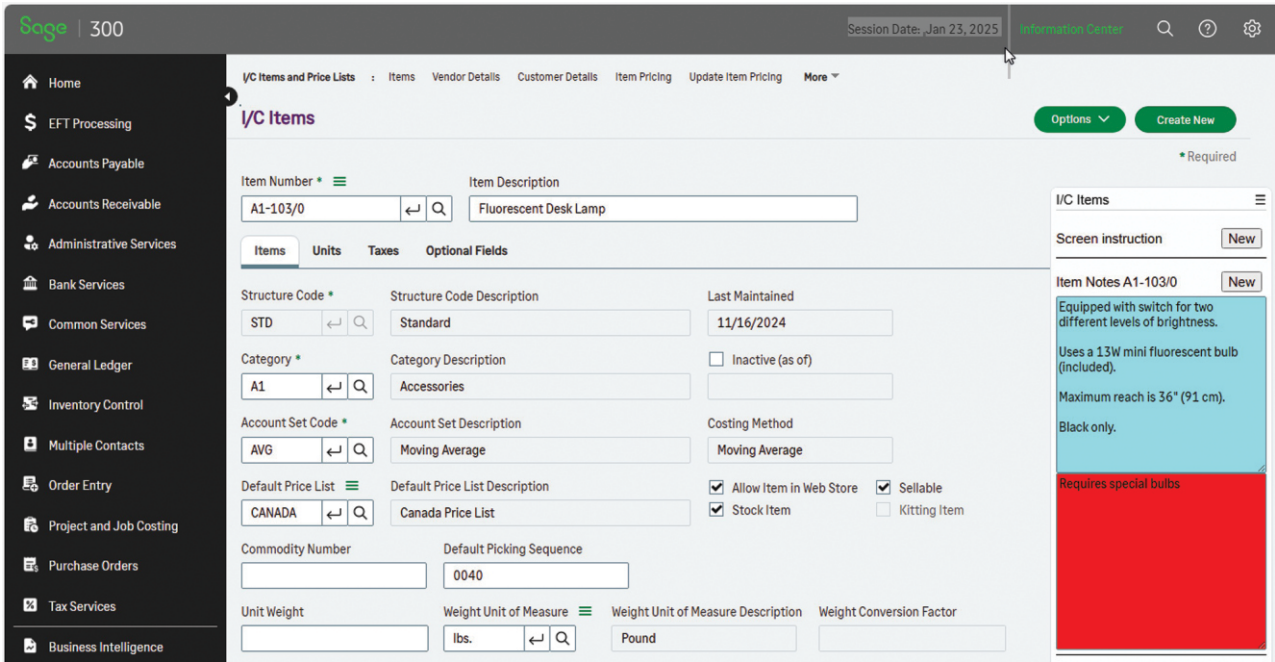
The screenshot shows the 'ORCEWF - O/E Order Entry' window. On the left, the 'Customer' field (1200) and 'Item' field (A1-105/0) are circled. On the right, a 'Notes' panel is open, displaying several notes with arrows pointing to their respective triggers in the main window:

- Extended Note for Customer, created 'On The Fly'**: Triggered by the Customer field.
- RMA Note for Customer, with colour coding**: Triggered by the Customer field.
- Item Note**: Triggered by the Item field.
- Note with hyperlink for Customer/ Item combination**: Triggered by a combination of Customer and Item fields.

The notes in the panel include:

- Customer Aging - 1200**: A table showing amounts due for customer 1200.
- RMA Notes - 1200**: A yellow note stating "All returns to be refunded - do not leave a 'credit' on Ronald's account."
- Item Notes - A1-105/0**: A note stating "Replacement bulb. Can also use A1-105/0 as an alternative replacement bulb if running low on stock."
- Customer-Item Notes - 1200/A1-105/0**: A note with a hyperlink: "Refer to the technical specification for A1-105/0 for Ronald Black" and a link to a technical specs file.

Sage 300 Desktop screen: Notes linked to Customer and/or Item



Sage 300 Web Screen example

## Presentation Options

- 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
- Sage 300 Desktop users can include rich text, hyperlinks, and even small images

## 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

Sage 300 Desktop users can combine Notes with Orchid **Extender** 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](http://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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