

# ENHANCED NOTES

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## Enhanced Notes

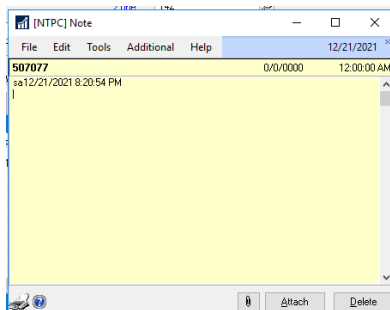
Enhanced Notes add-on extends the standard Dynamics GP notes functionality by providing the following features:

- Multiple notes storage – each with author and time/date stamp
- Each note can be emailed to multiple recipients and/or groups
- Dynamics tasks can be associated with a note, assigned to another Dynamics user, and given a due date
- Existing notes prior to install of Enhanced Notes are retained
- Notes categorisation for selective viewing
- Any individual note is not editable; changes are entered as a separate note, thus retaining an accurate history
- Each user's ability to delete Dynamics notes is individually enabled
- A full print of the notes is available
- Enhancement is provided on transaction, record, and window notes

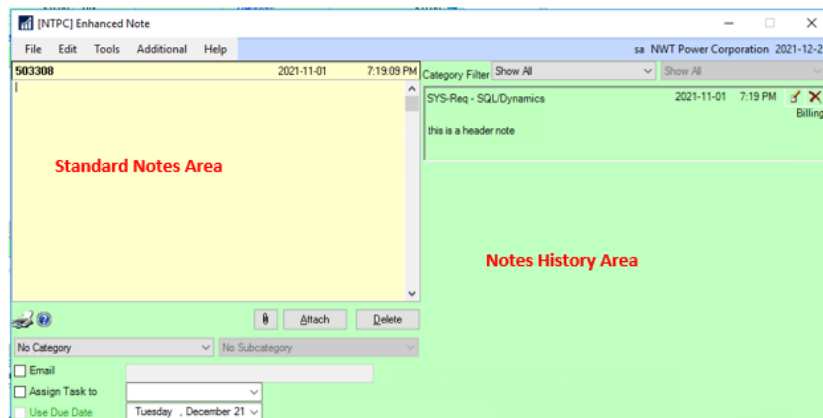
## Enhanced Note Window

The new Enhanced Note window looks similar to the old notes window and is accessed anywhere you access Dynamics GP Notes.

Old note window:



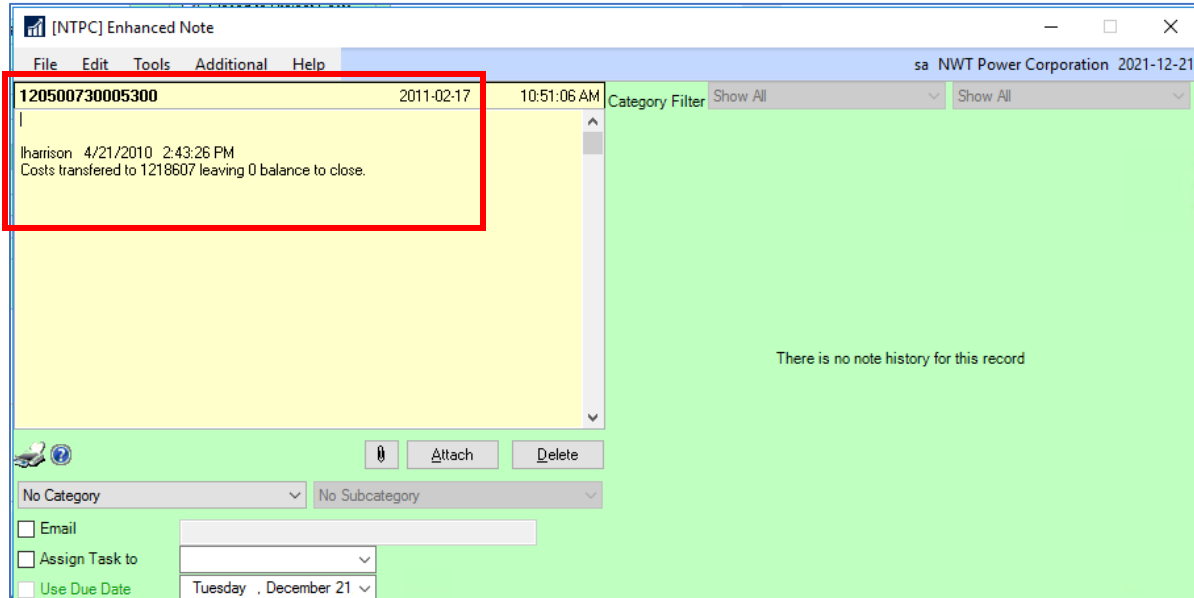
New Enhanced Note window:



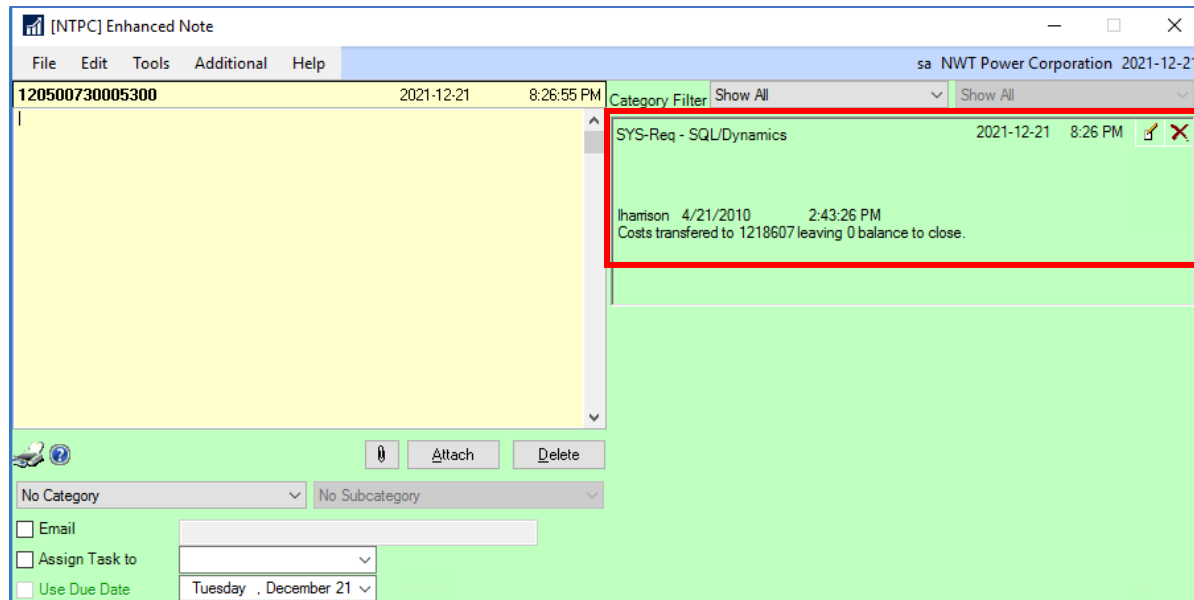
## Transferring an existing note (pre-Enhanced Notes installation) to History

Any notes information in the system prior to the Enhanced Notes installation will be sitting in the Standard Notes Area. To retain the note, click the **Attach** button before adding anything new and the original note will be transferred and become the first history entry.

Example: Note on a project prior to the Enhanced Note installation.

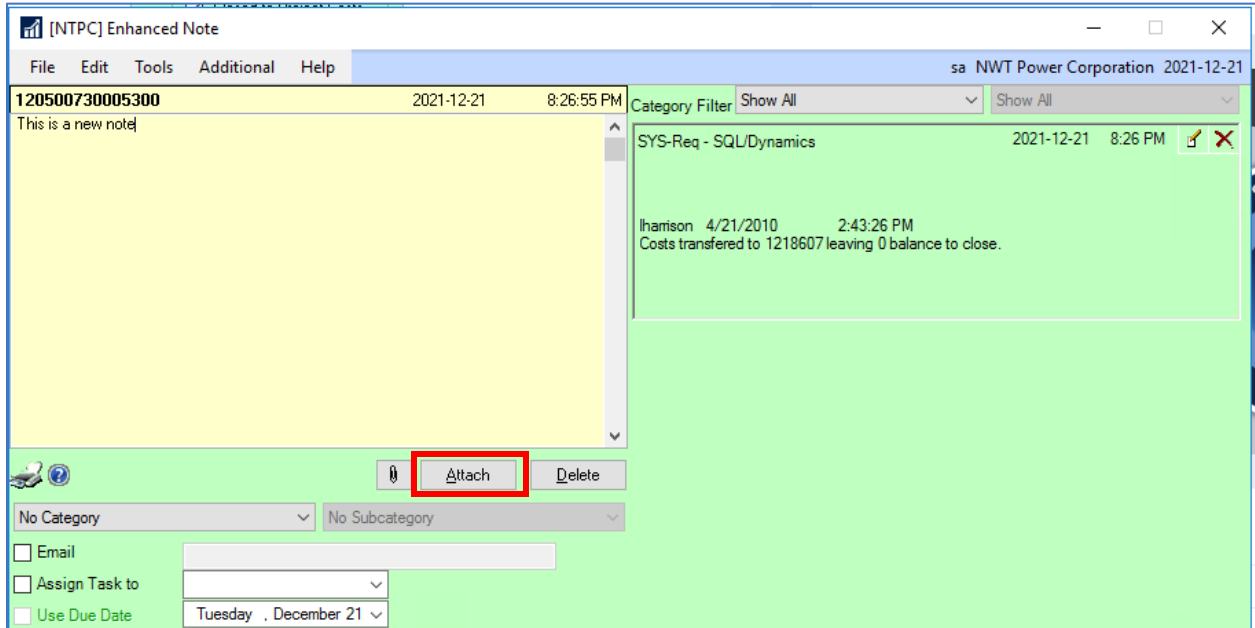


Click **Attach** to add the note to the history:



## Inserting/Adding a Note

Type a new note using the standard method, then click **Attach**.

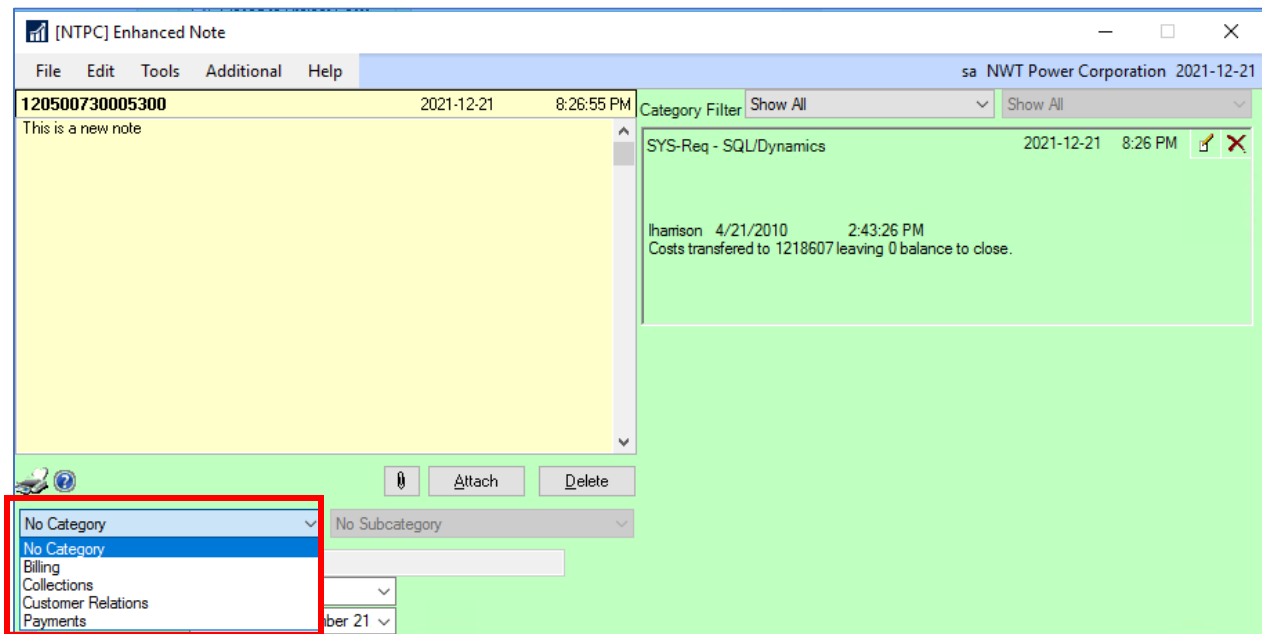


The most recent note will appear at the top of the Notes History area.

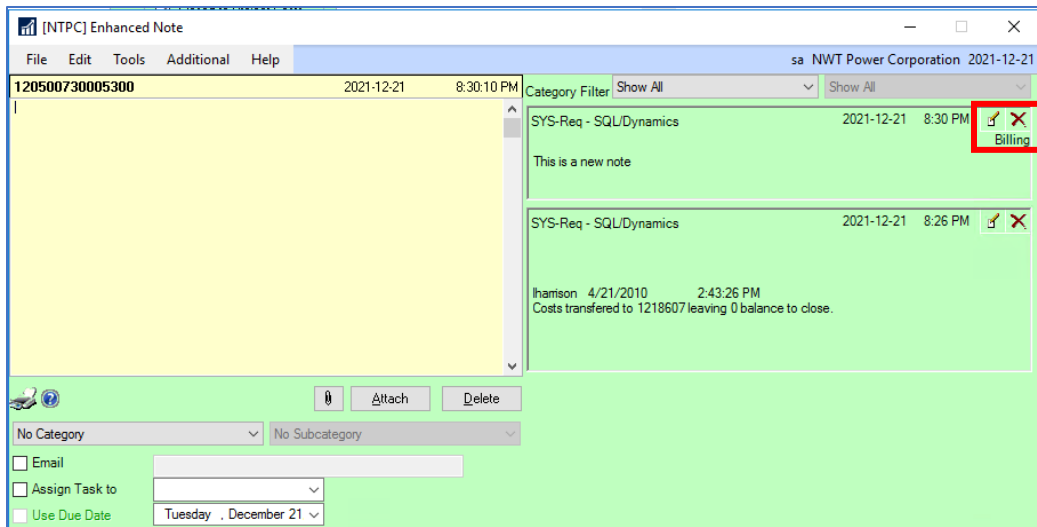
Notes can only be edited or deleted by authorized users once they are stored in History.

## Categorising Notes

To assign an optional category to a note, select the category/subcategory from the drop-down lists under the notes input area **before attaching** it.



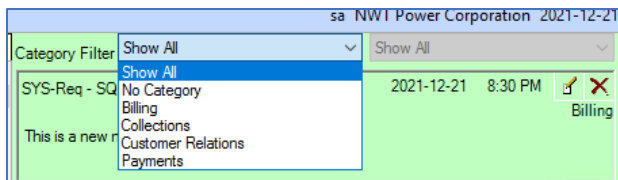
The category of each note is then displayed for each note.



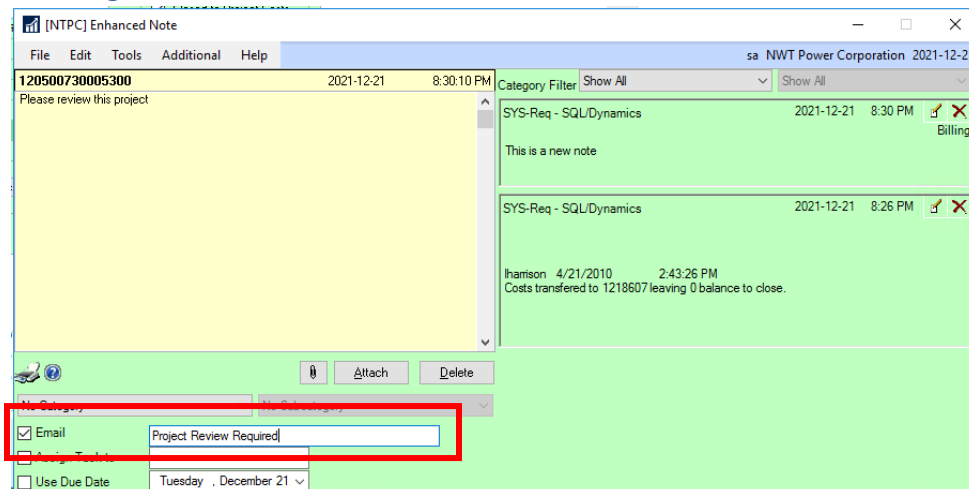
You can filter the notes to display those with a particular category. Select the required category from the drop-down Category Filter list above the note's history area. You can also filter further by selecting the subcategory from the drop down.

*Show All* is the default category displaying all notes with and without a set category.

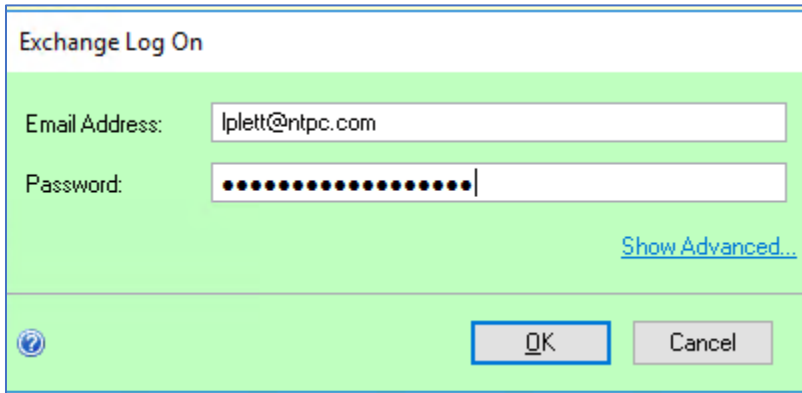
*No Category* displays those notes without a set category.



## Sending a Note as an email

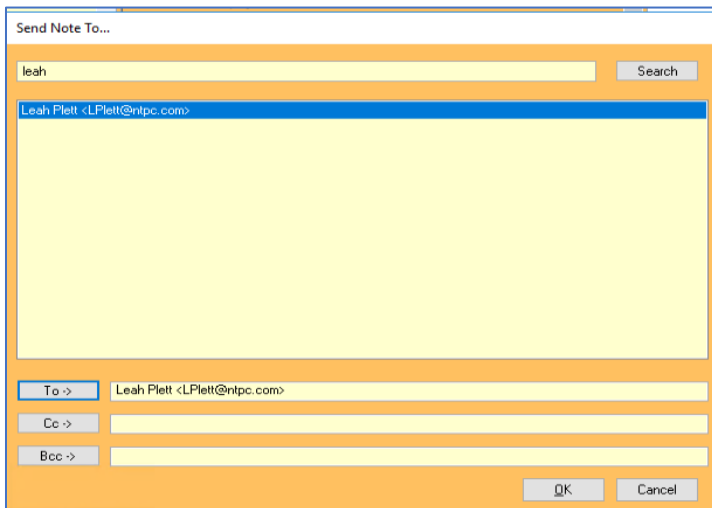


1. Enter the note text in the usual way.
2. Select the email option **before** the Note is attached. A note cannot be emailed once it has been attached.
3. Enter a subject for the email in the box to the right of the checkbox. If there is a default subject assigned to the category it will be populated in the text box. Leave the text box empty for the default subject.
4. If you wish to include a Due Date on the email, then select the Use Due Date option and pick a date from the calendar.
5. Click the **Attach** button.
6. You will have to login to your email using your email address and password:



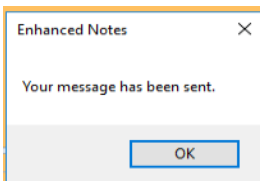
The image shows a dialog box titled "Exchange Log On" with a light green background. It contains two input fields: "Email Address:" with the text "lplett@ntpc.com" and "Password:" with a series of black dots. A blue link "Show Advanced..." is located below the password field. At the bottom, there is a help icon (question mark in a circle), an "OK" button, and a "Cancel" button.

7. Add recipients by searching in the address book. Click OK.



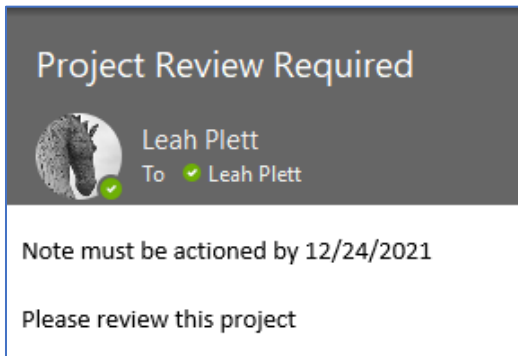
The image shows a dialog box titled "Send Note To..." with an orange background. It features a search bar with the text "leah" and a "Search" button. Below the search bar is a list of search results, with "Leah Plett <LPlett@ntpc.com>" selected and highlighted in blue. At the bottom, there are three fields for "To ->", "Cc ->", and "Bcc ->", with "Leah Plett <LPlett@ntpc.com>" entered in the "To" field. "OK" and "Cancel" buttons are at the bottom right.

You will receive confirmation the email has been sent:

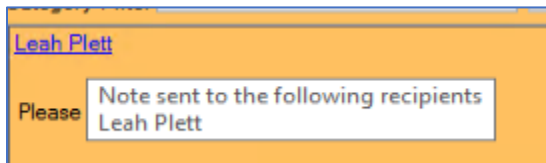


The image shows a small dialog box titled "Enhanced Notes" with a white background and a close button (X) in the top right corner. The text inside reads "Your message has been sent." and there is an "OK" button at the bottom.

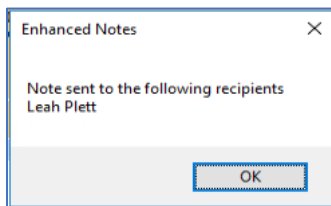
The email will look like this:



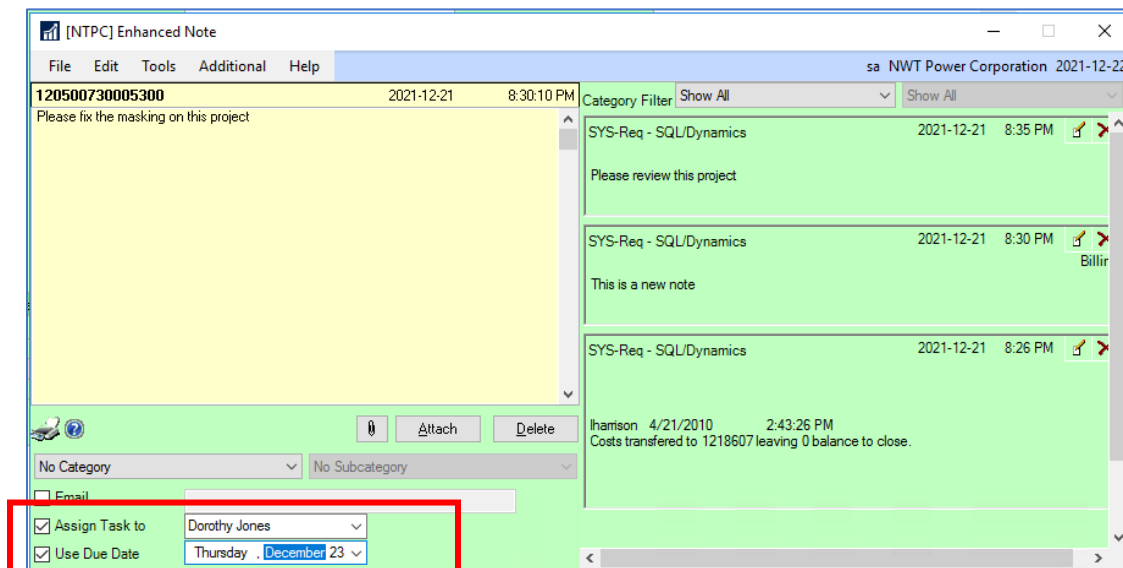
Any note that has been sent as an email is shown in the enhanced Notes History area with the Author name as a hyperlink. Hover on the hyperlink to briefly view details of the recipient.



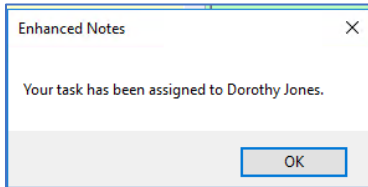
Click on the hyperlink to display details on the recipients until OK is clicked.



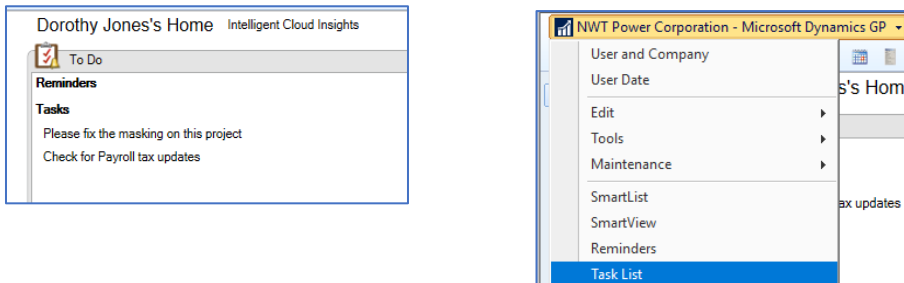
### Setting the note as a Dynamics GP task



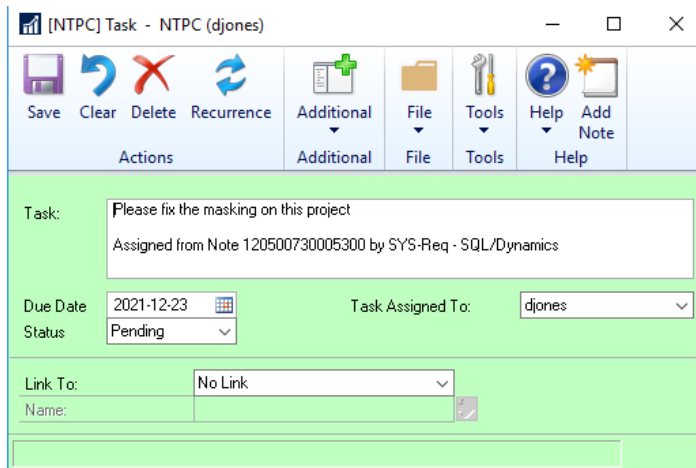
1. Enter the note text in the usual way.
2. Check **Assign Task To** and pick an individual. Do this before the note is attached. A note cannot be assigned to a task once it has been attached.
3. If you wish to include a due date on the task, then select the Use Due Date option and pick a date from the calendar.
4. Click the **Attach** button. When the note is attached, successful assignment of the task is indicated.



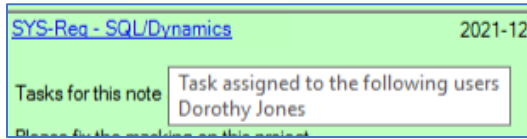
The task will appear in the assignees Dynamics GP Home page To Do area once it is due. To view all your tasks, click on the Dynamics GP menu -> Task List.



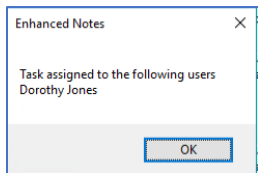
The due date set in the note will set the due date in the assigned task. Details of who created the task and the related note name are also automatically added to the task.



Any note that has been assigned as a task is shown in the Enhanced Notes Extension area with the Author name as a hyperlink. Hover on the hyperlink to briefly view details of the users that have had the task assigned.



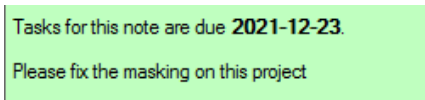
Click on the hyperlink to display details of the users that have been assigned the task and click OK to close the window.



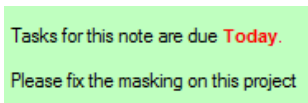
\*You can check both the Email and Assign task to options to send an email to inform a user of a note task assignment.

## Due Dates

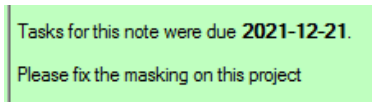
Due dates in the future are shown as 'are due <date in black>'



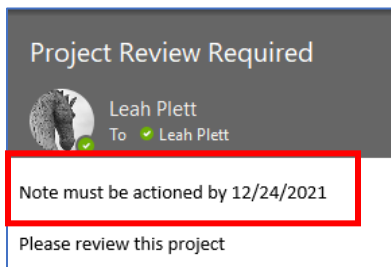
Tasks due today are shown as 'are due <Today in red>'



When the due date is passed the note will show 'were due <date in black>'

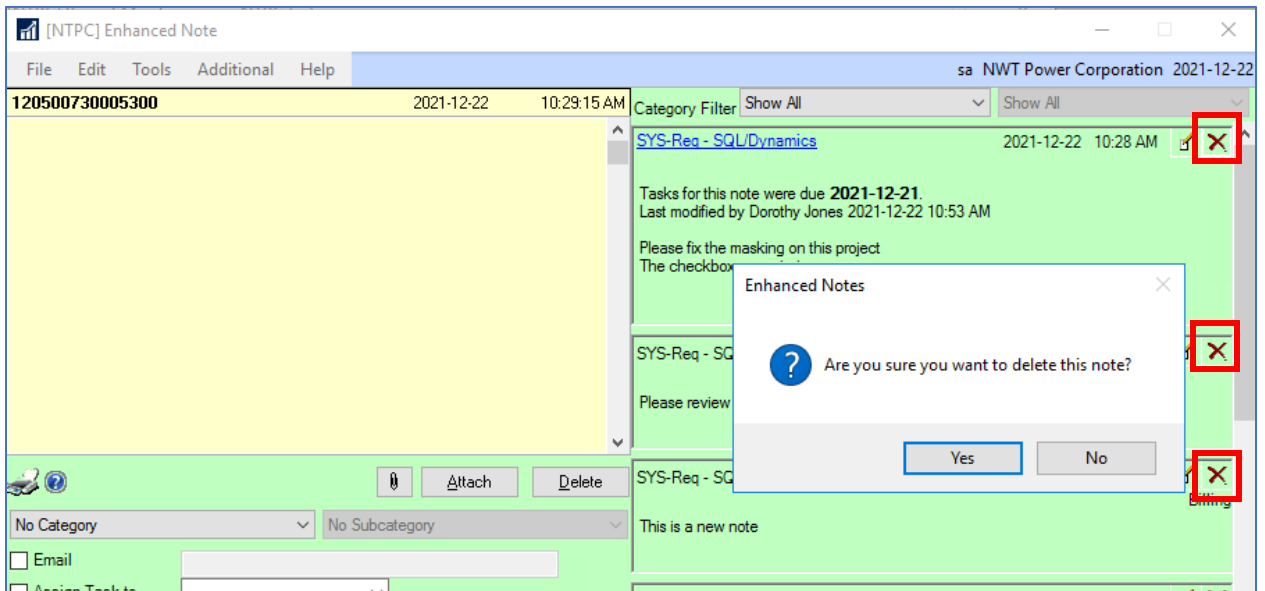


The due date requirements are inserted as a line at the top of the email with the notes text below.

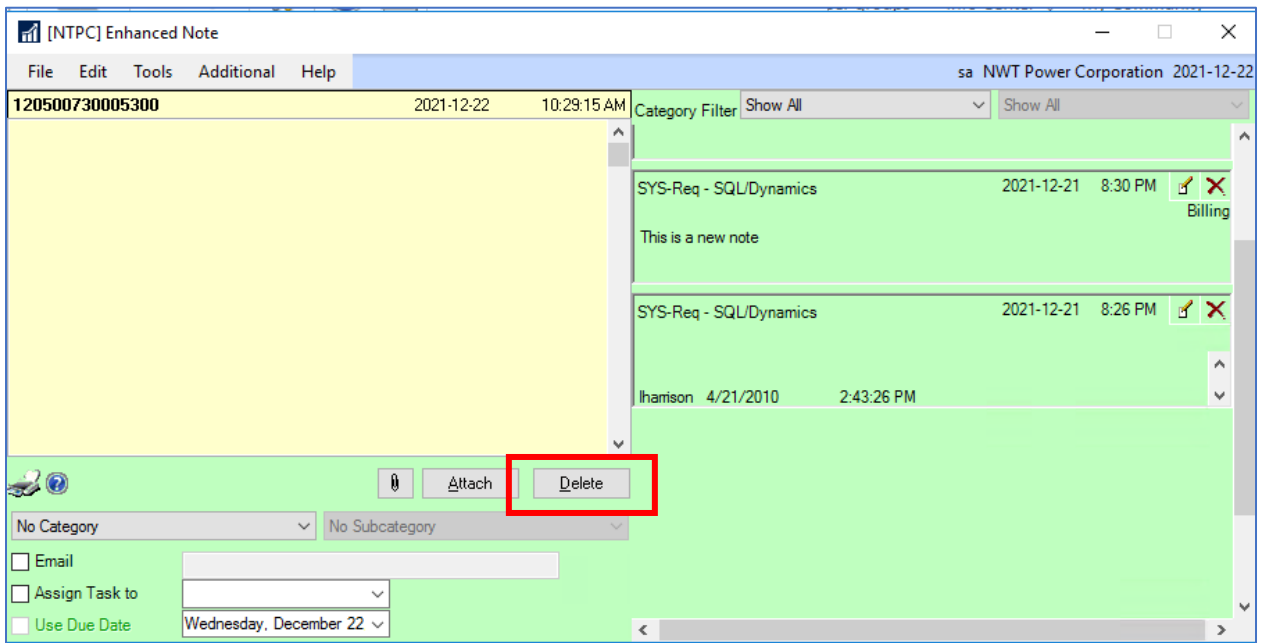


## Deleting Notes

1. Each note has an individual delete button. If you have permissions to delete notes, click the delete button. Chose Yes or no from the prompt.

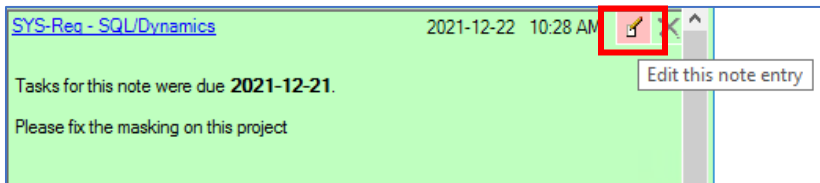


2. If you have permissions, you can delete all the notes in history at once using the Delete button in the standard note area.

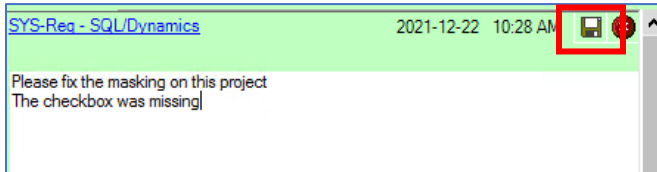


## Modifying Historical Notes

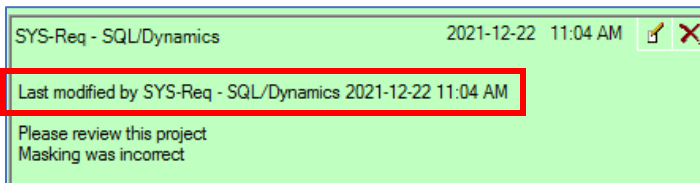
1. If you have permissions to modify notes, click the edit button. This will switch the note to edit mode.



2. Make your changes and press the save button.



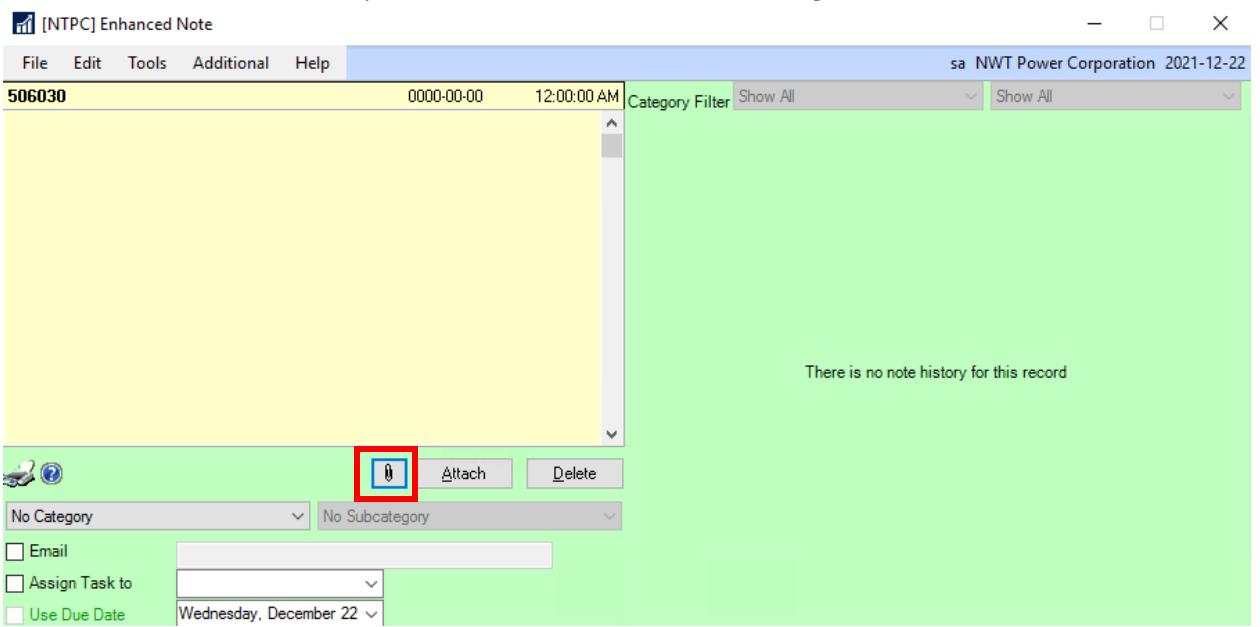
A log will display who last edited a note entry.



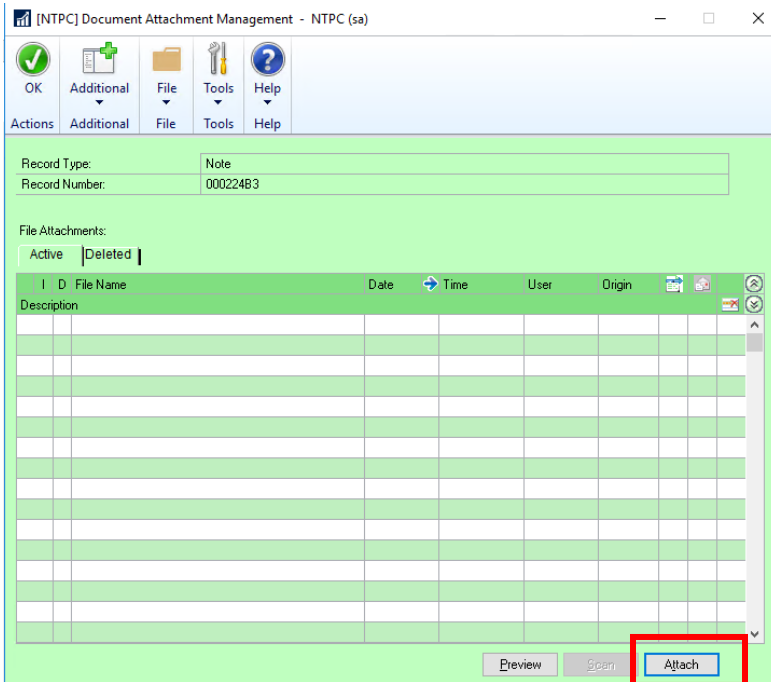
## Attachments

You can attach files to a note.

1. Click the Attachment icon to open the Document Attachment Management window.

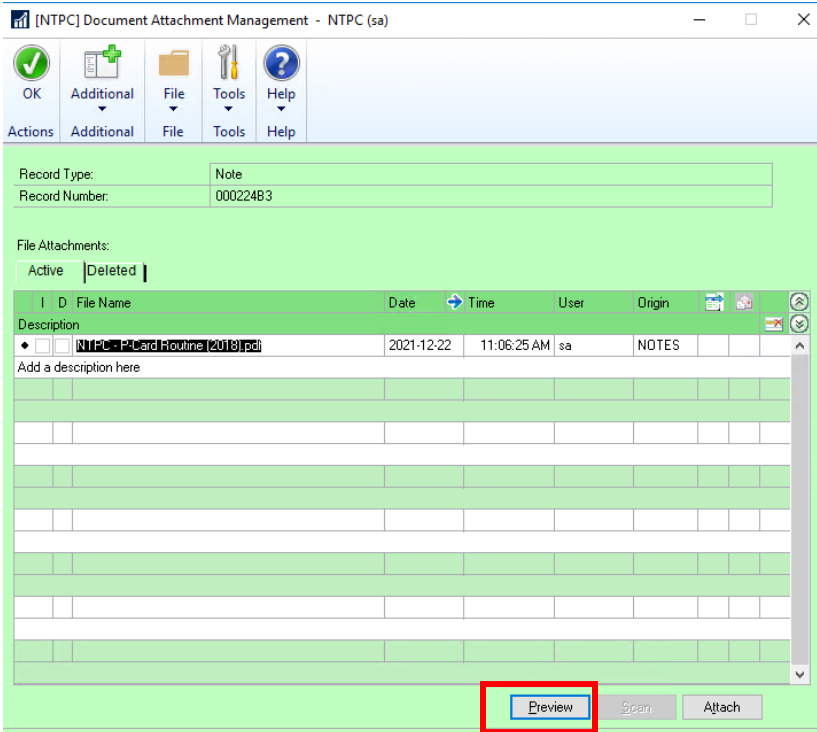


2. Click the **Attach** button. Browse and select the file to attach.

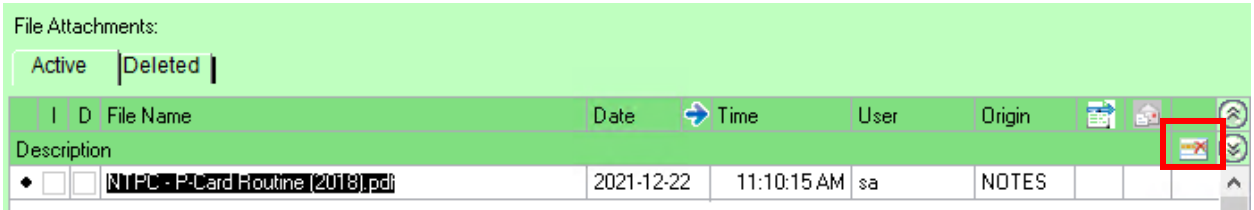


3. Add an optional description. Click OK.

4. Preview an attachment by clicking on an attachment in the grid and clicking **Preview**.

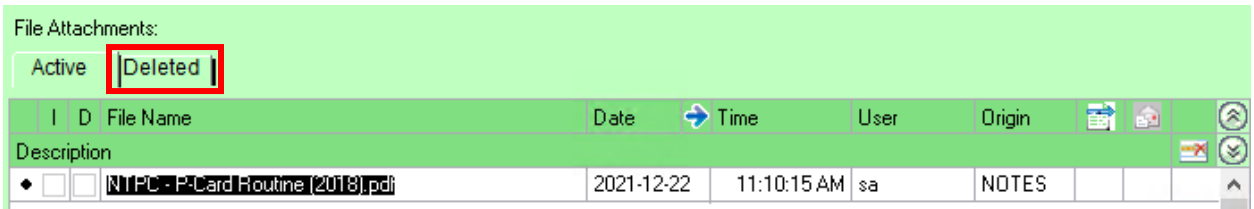


5. Delete an attachment by selecting an attachment in the grid and clicking the Delete icon.



OR Right click on a row and select Delete Row.

Deleted Attachments are just moved to the Deleted tab and are never permanently delete.



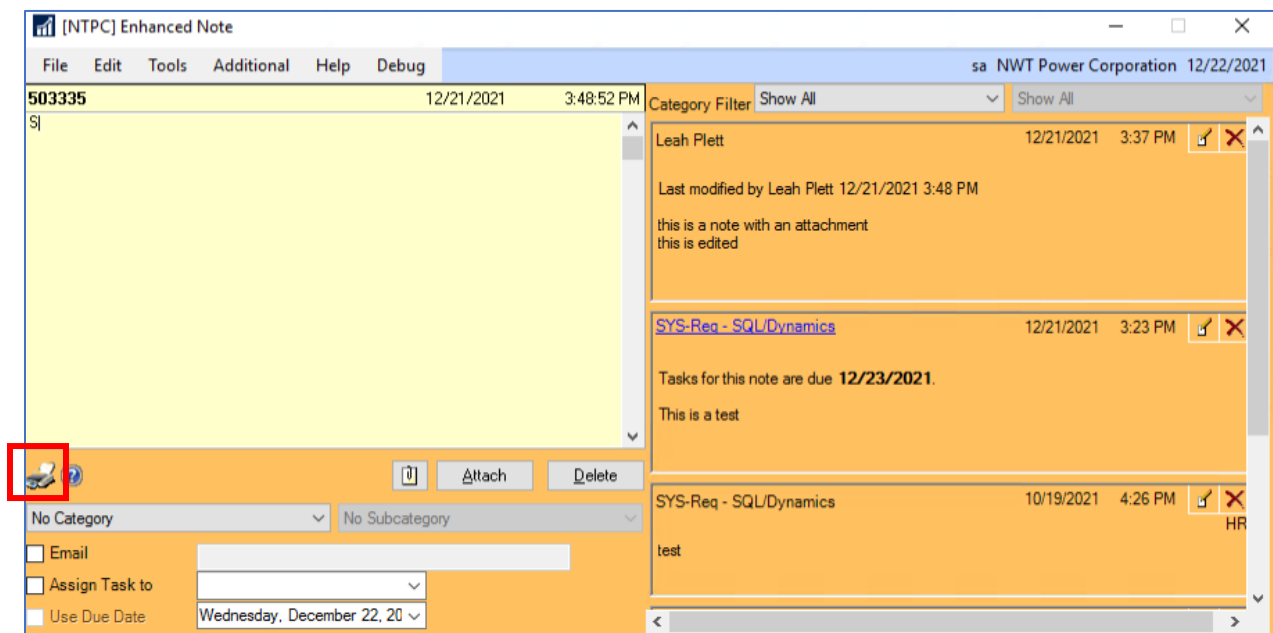
6. You can tell if a Note has an attachment as the icon will display differently.



## Printing Enhanced Notes

A full print of the notes is available.

Use the **Print** button in the notes window to print the full notes history.



Screen Output - Enhanced Notes

File Edit Tools Find Help Debug sa NWT Power Corporation 12/22/2021

Print Send To Modify 100% Completed 1 Page Page 1

Company: NWT Power Corporation Page: 1  
 System: 12/22/2021 3:58:56 PM User ID: SYS-Req - S  
 User Date: 12/22/2021

RECORD NOTES REPORT

Note ID: 503335  
 Created By: Leah Plett 12/21/2021 3:37:01 PM  
 Category:  
 Sub Category:  
 this is a note with an attachment  
 this is edited

Created By: SYS-Req - SQL/Dynamic 12/21/2021 3:23:37 PM  
 Category:  
 Sub Category:  
 This is a test

Created By: SYS-Req - SQL/Dynamic 10/19/2021 4:26:30 PM  
 Category: HR  
 Sub Category:  
 test

Created By: SYS-Req - SQL/Dynamic 10/19/2021 4:25:35 PM  
 Category: HR  
 Sub Category:  
 test