



Elementz



Microsoft Dynamics

User Productivity

BENEFITS

Improve tracking of notes entry.

Automatic author, date and time stamp feature ensures easy access to notes originator.

Maintain the integrity of notes history.

Notes in history are protected from change and users can be denied permission to delete notes.

Maximise information retrieval efficiency.

To ensure easy management of multiple notes, a categorisation and filtering feature allows you to focus on a specific type of note.

Increase activity communication.

From a Note, assign a task with a required due date to a user which will appear on the users GP dynamics home page.

Update other users.

Send email to other users or groups of users with a copy of the Note.

Enhanced Notes for Microsoft Dynamics GP10

Significantly improve the information recording and communication within your business use of Dynamics GP.

The Enhanced Notes add-on quickly and easily installs into Dynamics GP to provide users with the ability to retain multiple notes at transaction, record and window level.

Allows users to document and view the information required to improve the quality and speed of decision making and query resolution.

Debtor Maintenance window showing details for Debtor ID AARONFIT0001. The window includes fields for Name, Short Name, Statement Name, Address ID, Contact, Address, City, County, Postcode, Country Code, Country, Phone 1, Phone 2, Phone 3, Fax, Carrier Zone, Shipping Method, and Tax Schedule ID.

MINIMISE INFORMATION RETRIEVAL TIME by categorising and filtering notes

Enhanced Note window showing a list of notes for Debtor ID AARONFIT0001. The selected note is dated 22/09/2009 at 13:10:48. The note content includes tasks for renewal of regular order and a reminder to ensure client security staff are informed of delivery arrangements. The window also shows a list of users and tasks assigned to the note.

DISSEMINATE ACTIVITIES ACROSS YOUR ORGANISATION by assigning tasks and sending emails

FEATURES

ENHANCED NOTES

Multiple Notes Storage	<p>Provide your employees with a full free text information storage capability within Dynamics GP.</p> <ul style="list-style-type: none">• Create multiple notes at transaction, record and window level• Each note can be up to 2kB• View multiple notes in the Extension/History area.
Retain Existing Notes	<p>Preserve current Notes:</p> <ul style="list-style-type: none">• Notes recorded in Dynamics GP prior to installation of the Enhanced Notes add-in are retained.
Maintain Accurate Notes History	<p>Ensure the origination details are available:</p> <ul style="list-style-type: none">• The system automatically records and displays the Notes author name• Automatic date and time stamp for each note• Only authorised users can edit historical entries
Control User Notes Deletion ability	<p>Maintain the integrity of Notes history</p> <ul style="list-style-type: none">• Notes that have been assigned to history are not editable. Changes must be entered as a separate note.• Permission to delete Notes is controlled at User level
Notes Categorisation	<p>Efficiently locate Notes</p> <ul style="list-style-type: none">• A categorisation system for Notes can be set up to best match your organisations use of the facility.• Any category assigned to a note is displayed in the Extension/History area.• Display of Notes can be filtered by selecting a particular category• A display of notes with No category is available
Assign tasks from Notes	<p>Link activities to Notes</p> <ul style="list-style-type: none">• Assign a task associated with a Note to an individual user or all members of a User role group.• The Author name of any Note that has had a task assigned from it appears as a hyperlink listing the user(s).• The Task will appear in the To Do area of the assigned user(s) Dynamics GP Home Page.
Send emails from Notes	<p>Immediately inform other users of the contents of a Note.</p> <ul style="list-style-type: none">• As the Note is assigned the originator has the option of sending it as an email.• The author name of any Note that had an email sent appears as a hyperlink listing the recipients of the email.
Add a due date to tasks or emails associated with a Note	<p>Monitor and flag overdue activities associated with a Note.</p> <ul style="list-style-type: none">• A drop down calendar allows a require date to be set for emails or tasks sent from a Note• Due dates are displayed at the top of each note for ease of monitoring.
Single action Notes history deletion	<p>All the Notes in the Extension area can be removed in a single operation.</p>
Full Notes history printout	<p>All the Notes in the extension area can be printed as required.</p>

For more information about Enhanced Notes for Microsoft Dynamics GP

Visit www.isc-software.com

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