



Setting Up & Using Notes Everywhere

ECi DDMS®

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About Notes Everywhere

You can use notes throughout DDMS to provide important information. This feature keeps details directly at your fingertips. Notes Everywhere allows you to create customer notes and vendor notes. Customer notes are associated with the Customer database; Order Entry application; Accounts Receivable application and A/R invoices; and existing project notes. Vendor notes are associated with the Vendor database; Purchase Order entry, Accounts Payable application and A/P invoices.

Note: This feature is not included in all software packages and requires authorization. Notes Everywhere is in the Platinum package and packages C and D. For more information, contact ECi sales.

You begin using notes by setting up parameters. You can specify that the Notes Everywhere Monitor window automatically open when you open DDMS. This window remains on top of other windows, so you can easily view notes for the selected customer, vendor, or invoice. What's more, the selected customer or vendor is automatically recognized when you retrieve the record and the notes display for you. The Notes Everywhere Monitor window blinks, notifying you that the selected customer has notes. You also set password parameters. See **Setting Up Notes Everywhere Parameters**.

Notes Everywhere works with Campaign Manager. When setting Notes Everywhere parameters, you also set parameters for Campaign Manager. For more information on Campaign Manager, see your online help.

Next, you set up the codes and descriptions to use in the Note Everywhere Setup window.

After parameters have been set, you can set up the codes and descriptions to use in the Note Setup dialog box. You can set up notes for email. Using Notes Everywhere parameters, you can also password-protect this feature. Give the password to only those people with access to the Note Setup dialog box.

After you enter the codes and descriptions, you can begin setting up notes for Customers, Vendors, Order Entry, Purchase Order Entry, Accounts Receivable, Accounts Payable, Furniture, and so on. You do this using the Notes Monitor. See **Setting Up Notes Everywhere**.

Setting Up Notes Everywhere Parameters

Before using Notes Everywhere, you must be authorized. Then you must set up parameters. Remember, when setting up parameters for Notes Everywhere, you can also set parameters for Campaign Manager, if needed.

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- 1 From the DDMS Master Menu, double-click

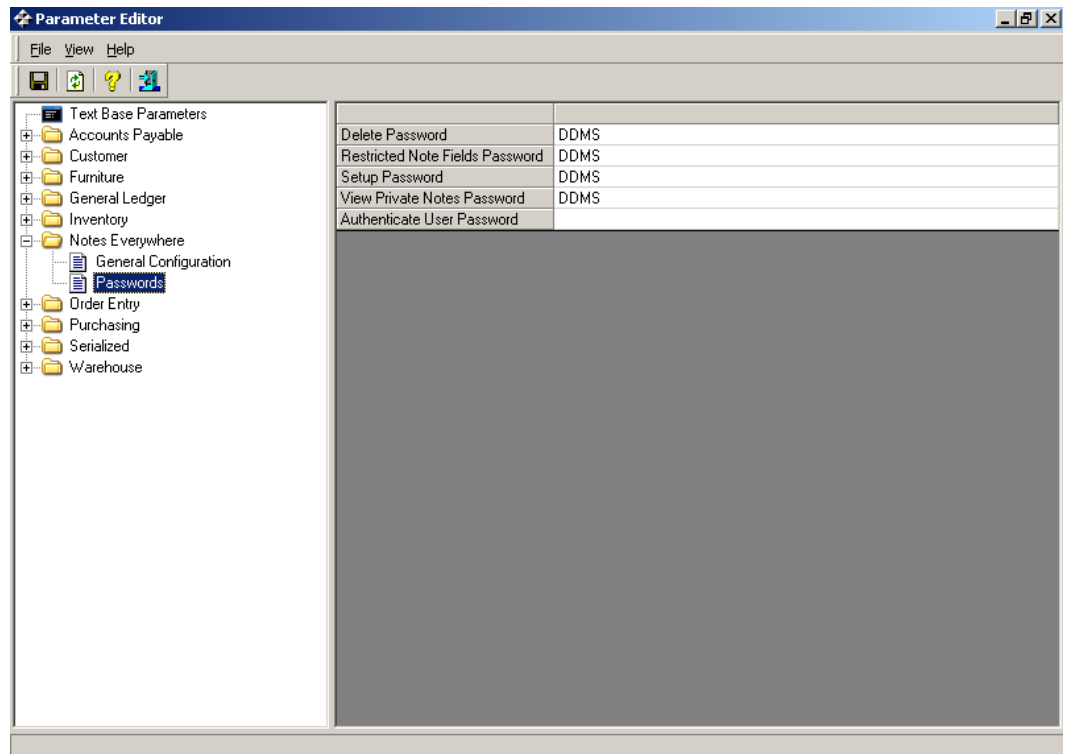



click



- 2 From the Parameter Editor window, double-click Notes Everywhere.
- 3 Click General Configuration.
- 4 In the Auto Launch text box, you can specify whether to launch notes when opening DDMS. Type **Y** to automatically open notes when opening DDMS. Type **N** if you do not want Notes to open automatically. *DDMS recommends that you set Auto Launch to Y.*
- 5 In the Path to Attachments text box, enter the path where attachments are stored. *Attachments must be stored on a network for this function to work.* (This box works with Notes Everywhere and Campaign Manager.)

Figure 1: The Notes Everywhere Passwords Parameters



- 6 In the SMTP Server Name text box, enter the IP address from which emails are sent. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)
- 7 In the Email From Name text box, enter the email name from which you are sending the email, for example, ECIMarketing. (This box works with Notes Everywhere and Campaign Manager.)
- 8 In the Email From Address text box, enter the email address from which you are sending the email, for example, marketing@eci2.com. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)
- 9 In the User Name Used for E-mail Authentication text box, enter the user name for your Microsoft Exchange Server. (This box works with Notes Everywhere and Campaign Manager.)
- 10 Next, set password parameters. Click Passwords, as shown in Figure 1.
- 11 In the Delete Password text box, enter the password for deleting notes.
- 12 In the Restricted Note Fields Passwords text box, enter the password to restrict user access when adding on to notes. The system prompts you for this password when changing notes.
- 13 In the Setup Password text box, enter the password to restrict user access to notes setup.
- 14 In the View Private Notes Password text box, enter the password for viewing private notes.
- 15 In the Authenticate User Password text box, enter the password for your Microsoft Exchange Server. (This box works with Notes Everywhere and Campaign Manager.)
- 16 When finished, click  to save your changes.

Setting Up Notes Everywhere

First, you must create notes. Remember, when setting up Notes Everywhere, you can also set up notes for Campaign Manager.

- 1 From the DDMS Master Menu, click the Databases menu.
- 2 Click Notes then select Notes Setup.

Note: If you set up passwords in the Notes Everywhere Parameters, you are prompted for the password you entered in the Setup Password text box. Enter the password and click OK.

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- 3 The Notes Everywhere Note Codes window opens, as shown in Figure 2. You can set up notes for A/P, A/R, Customers, Furniture, Order Entry, Purchase Order Entry, Serialized, and Vendors. This window displays the notes you have created. You can also create new codes, modify codes, or delete codes. You use this code to identify notes throughout the system.

This window displays the user-defined note code, whether this note is for use with Campaign Manager, whether you specified to send an email, and the note code description.

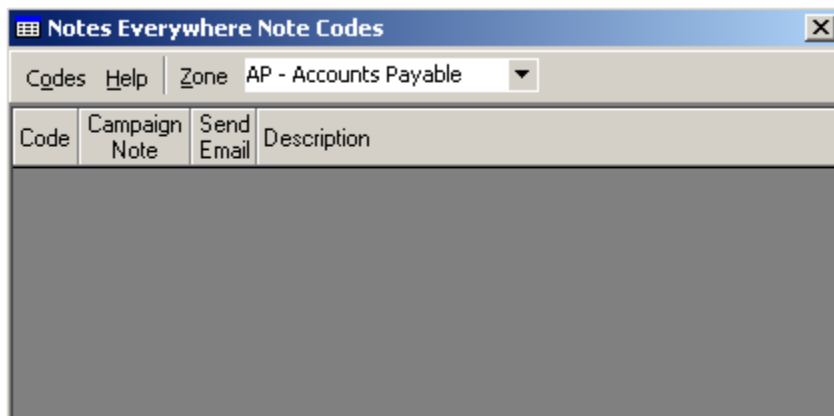
First, you must select the zone for which to create a note. Click the drop down arrow in the Zone box and select the zone, Customer, for example.

- 4 To add a code, click Codes then select Add Code (Ctrl + A). (You can also right-click the Code or Description boxes to add, open, or delete codes.) The Note Setup dialog box opens, shown in Figure 3.
- 5 In the Note Code box, enter a three-digit alphanumeric code to identify this note.
- 6 If this note is to be used with Campaign Manager, click Campaign Note.
- 7 In the Description box, enter the description for this note.
- 8 If you are emailing this note, you must select either Send Internal Email or Send External Email or you can select both.

To send an internal email, click Send Internal Email. Go to **Step 9**.

To send an external email, click Send External Email and go to **Step 15**.

Figure 2: The Notes Everywhere Note Codes Window



For more information on the Contacts database, refer to your online help.

- 9 The To Primary Salesperson button is automatically selected. You can enter the contact type in the Contact Type box. This information comes from the Type box in the Contact database.
- 10 Use the Specify Address box to enter the email address for this salesperson.
- 11 Enter the subject of the email in the Subject box.
- 12 Enter the text of the email in the Body box.
- 13 You can also include the text of the note with this email. To do this, click Include Text of Note.
- 14 You can also include the log with this email. The log contains the customer list showing which names were removed or added. To send the log with the email, click Include Log. If you are sending an external email as well, go to **Step 15**. If you are finished, go to **Step 20**.
- 15 Use the To buttons to select whom to send the external email. If you click C-INFO, all the customers in the Customer Master tab with an email address in the E-Mail box receive the campaign.

Figure 3: The Note Setup Dialog Box

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The C-INFO file contains additional customer name and contract information, which is displayed in the Additional Name and Contact boxes in the Master tab of the Customer window.

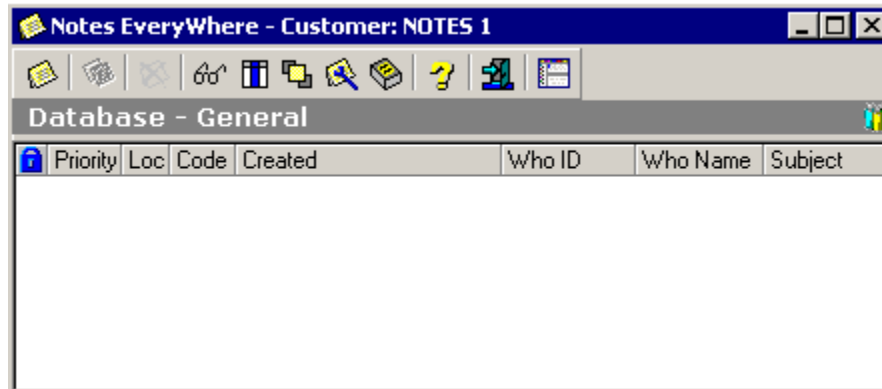
If you store customer email addresses in the Contact database, you may want to use those email addresses. To do this, click Customer Contact Type then enter the contact type in the text box.




- 16 In the Subject box, enter the email subject.
- 17 In the Body box, enter the body text for this email.
- 18 You can also include the text of the note with this email. To do this, click Include Text of Note.
- 19 To add an attachment to this note, click Attachments and select a file as you normally would. *Attachments must be stored on a network for this function to work.*
- 20 When finished, click OK.
- 21 The system returns to the Notes Everywhere Note Codes window displaying the note you just created. This window displays the user-defined note code, whether this note is for use with Campaign Manager, whether you specified to send an email, and the note code description.

Using Notes Everywhere


- 1 From the DDMS Master Menu, click the Databases menu.
- 2 Click Notes, then select Open Monitor or type **Ctrl + M**. The Notes Everywhere Monitor dialog box opens. See Figure 4. You can use this box to set up preferences.

Figure 4: The Notes Everywhere Monitor Window



Note: If this dialog box is blank when you open it, for example, the  and  buttons are grayed out, click . In the Note Options dialog box, click Customer and enter an ID number. Then click OK. For more information, see **Setting Up Options**.

If you have campaigns set up for Campaign Manager, these display first in the Notes Monitor dialog box. Campaigns are displayed with a light blue background.

You can use this dialog box to add notes or you can open the notes manager by clicking . (You return to the notes monitor by clicking



On the left side of the Notes Everywhere Manager window, notes are sorted by folders. See Figure 5. For example, double-click the Customers folder to see the notes for customers. (You can also click the + sign next to Customers.) Under the Customer folder, the notes are sorted by departments (if you selected the Display Customer Departments option in

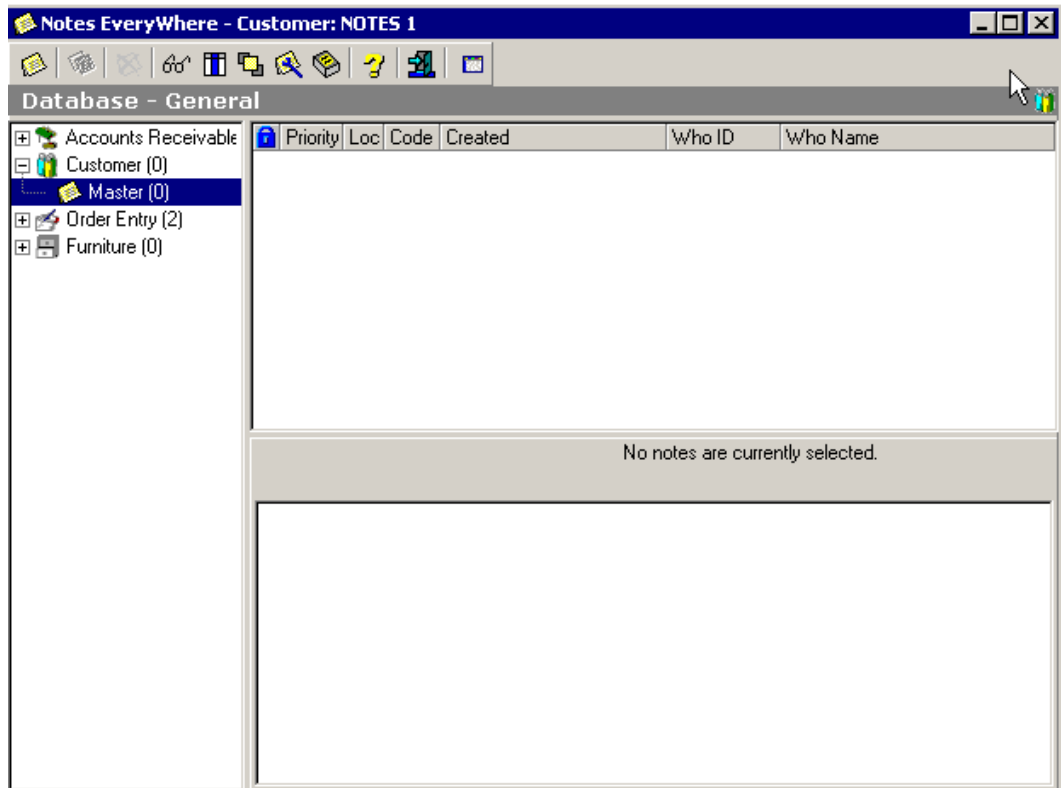



Figure 5: The Notes Manager Window

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the Note Options dialog box) and the display indicates how many notes are in each department. The notes for these departments display on the right side of the window.

Note: You can sort notes by clicking the grid at the top of the screen. For example, click Priority to sort by priority. However, if you have campaign notes created, these are always at the top. A line separates campaigns from notes.

3 In the Notes Everywhere Monitor and Notes Everywhere Manager windows, you can create new notes, add to notes, delete notes, or set preferences.

- To create a new note, click . In the Notes Everywhere Manager window, right-click the folder name and select New, as shown in Figure 6.

You can also highlight a note in the right side of the Notes Everywhere Manager window then right-click and select New. See **Adding Notes**.


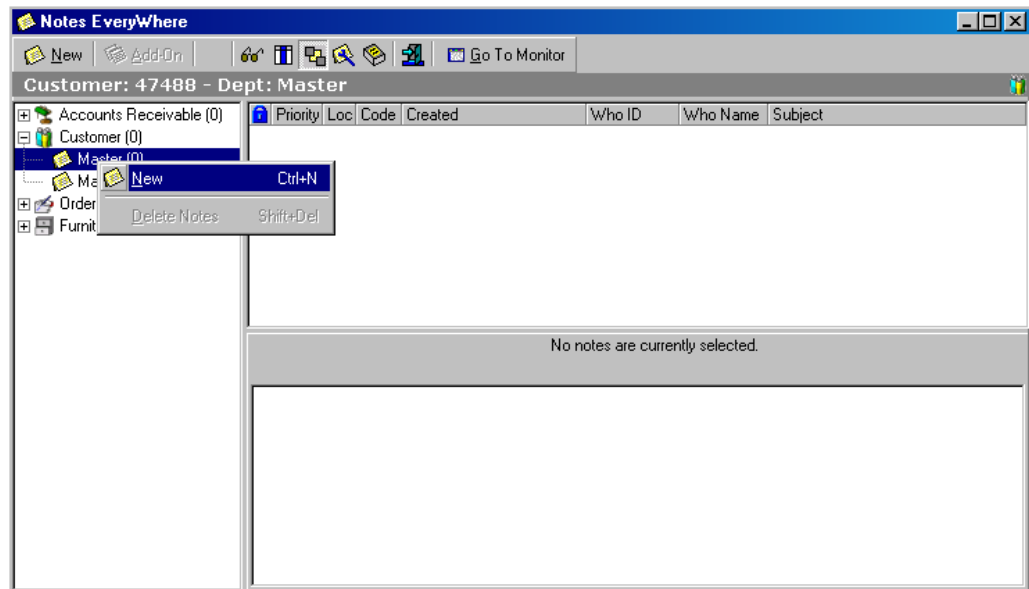




- To add to a note, highlight the note. Click  or right-click and select Add-On. See **Adding to Existing Notes**.

Figure 6: The Notes Everywhere Manager Window



- To delete a note, highlight it. Then click  or right-click and select Delete. See **Deleting Notes**.

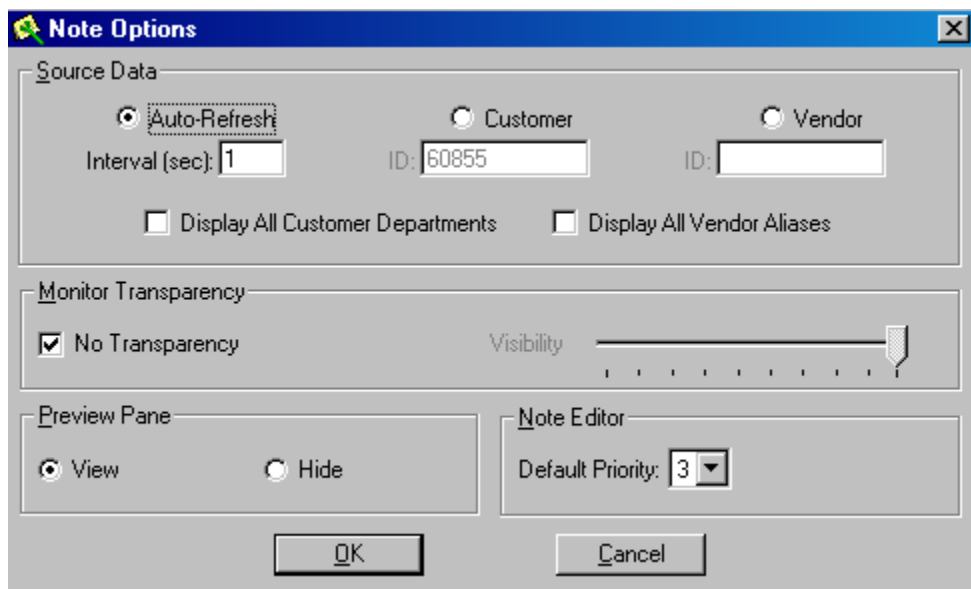
To set preferences:

- Change grid (column) information by clicking . (You can also highlight a note, right-click and select Modify Columns or type **Ctrl +M**.) The Hide/Show Columns dialog box opens. Click to select the columns to show and clear the columns to hide. Then click Apply. To not make any changes, click Cancel.
- In the Notes Everywhere Monitor window, you can specify whether to have the window float on top of other windows. Click  to toggle the floating option on and off.
- Change the appearance of the information in the Notes Everywhere Monitor or Manager windows by clicking .

The Note Options dialog box opens. You can use this dialog box to change the folders that appear and change how the notes display. Click each box to change and enter the new information over the existing information. For more information, see **Setting Up Options**.

- 4 To add notes, go to the heading **Adding Notes**.

Figure 7: The Note Options Dialog Box




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To add on to notes, go to **Adding to Existing Notes**.

To delete notes, go to **Deleting Notes**.

To view private notes, go to **Viewing Private Notes**.

Setting Up Options

- 1 From the Notes Everywhere Monitor window or Notes Everywhere Manager window, you can set options. To do so, click .
- 2 The Note Options dialog box opens, shown in Figure 7. You use this dialog box to customize Notes Everywhere.

Click Auto-Refresh to automatically refresh the notes information when you make a change. For example, if you are going to create notes for several different customers, you might want the Notes Everywhere Monitor dialog box to refresh itself with each new customer you select in the Customer database. To do this, select Auto-Refresh. As you scroll through the Customer database, the Notes Everywhere Monitor dialog box displays the notes for each customer you are viewing.

In the Interval box, enter the number of seconds of how often the information should automatically refresh. For example, for the information to automatically refresh every thirty seconds, enter 30.

Note: If you set the Auto-Refresh option and do not have the Customer or Vendor database open, the Notes Everywhere Monitor and Notes Everywhere Manager windows are blank. To view your notes again, go to the Note Options dialog box and click Customer or Vendor and enter the ID.

You can also select whether to work with customer notes or vendor notes. If you normally work only on customer notes, click Customer. If you normally work with vendor notes, click Vendor. You can also specify a specific customer number or vendor number. Enter the number in the corresponding ID number box.

- 3 Click the Display All Customer Departments check box to display customer departments in notes.
- 4 Click the Display All Vendor Aliases check box to display vendor aliases in notes.
- 5 You can set the level of transparency for the Notes Everywhere Monitor window. To make the window solid, click No Transparency. To set transparency, clear the No Transparency box then use your mouse to drag the Visibility arrow to set the transparency. (You can also use your arrow keys to move the Visibility arrow.)

- 6 Click View to display the preview pane in the bottom right hand portion of the Notes Everywhere Monitor window. Click Hide if you do not want the preview pane to display in the bottom right hand portion of the Notes Everywhere Monitor window.
- 7 Use the drop down arrow in the Default Priority box to select the priority of this note. You can select a number between one and five, with one being the highest priority.
- 8 Click OK.

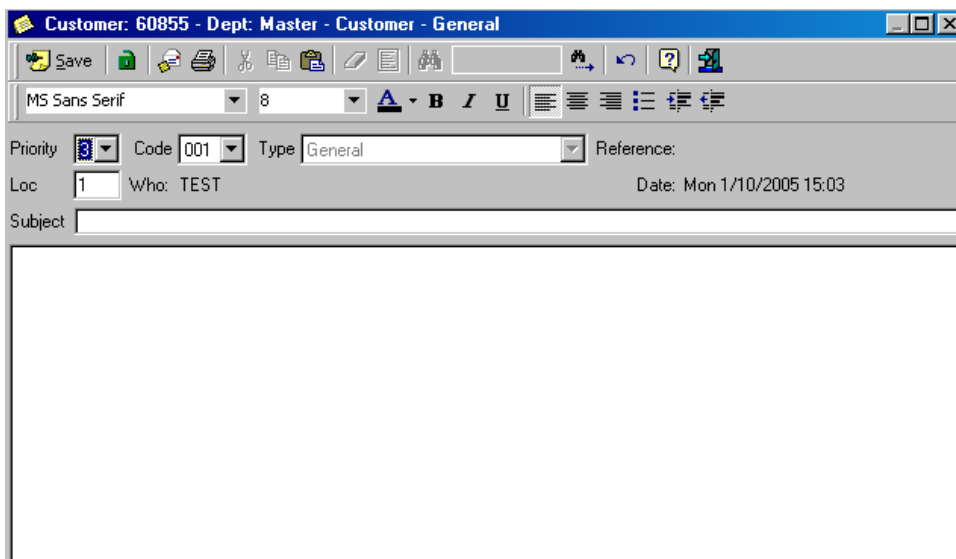
Adding Notes

You can add notes in several places. You can repeat the following steps in other windows to add notes. For example, to add vendor notes, open the Vendor window and add the vendor notes. In this example, we are adding notes in the Customer window using the Notes Everywhere Monitor and Manager windows. You can also add notes in the Notes Everywhere Note Codes window.

- 1 Go to the Customer window and select the customer for whom to create notes.
- 2 If the Customer Notes window is not open, go to the Master Menu. Click Databases, select Notes, and click Open Monitor (or type Ctrl + M). The Notes Everywhere Monitor window opens.

Note: If you have campaigns set up for Campaign Manager, these display first in the Notes Everywhere Monitor window. Campaigns are displayed with a light blue background.

Figure 8: The New Note Customer Window



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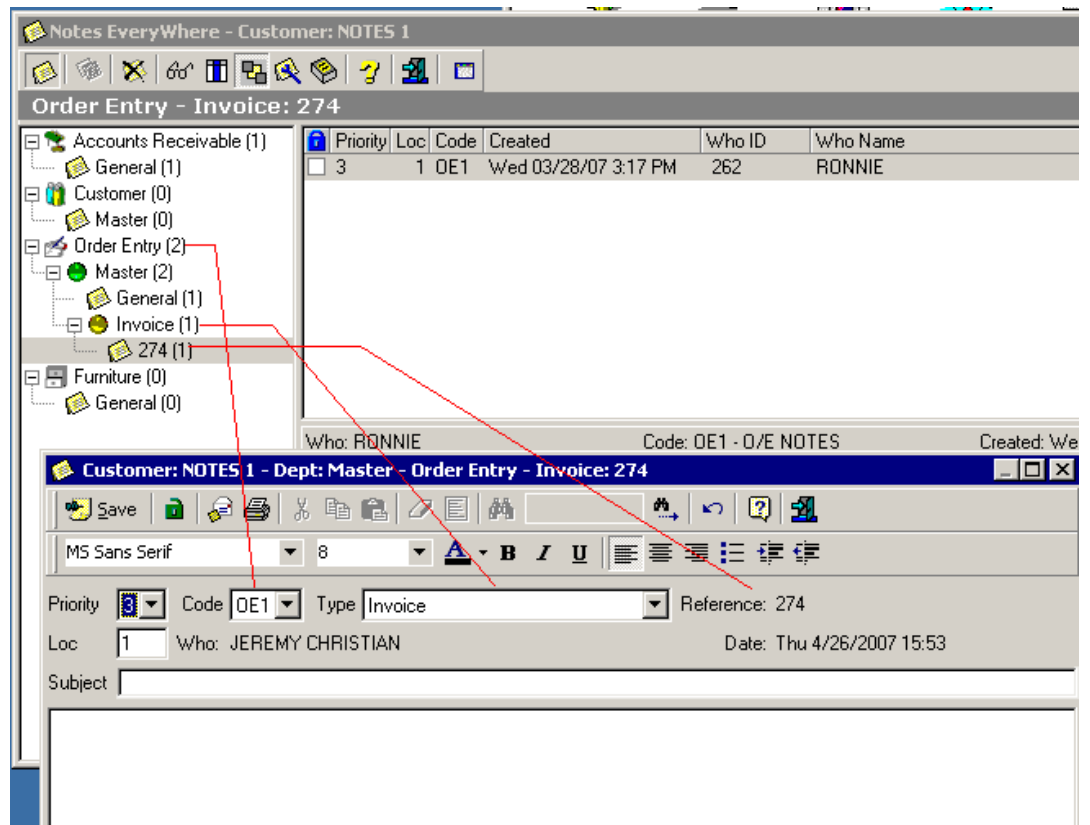
- 3 To add a note, click . (You can also highlight a note, right-click and select New or type **Ctrl + N**.) The Customer Notes window opens, as shown in Figure 8. When creating a note in this window, you can cut and paste text as you normally would. You can also use the Find feature as you normally would.
- 4 Click the down arrow in the Priority box and select the priority for this note. You can select a number between one and five, with one being the highest priority.
- 5 Click the down arrow in the Code box and select the code to use for this note. (This is the note code you created in the Note Setup dialog box. Refer back to the heading **Setting Up Notes Everywhere**, if needed.)
- 6 The Type box is for display only. This box contains the type of note, Invoice, for example. Figure 9 shows an example of how the note information created is displayed in the Notes Everywhere Manager window and the Customer Notes window.

Figure 9: The Information Displayed in the Code, Type, and Reference Boxes



- 7 The Reference box is for display only. For example, if the type is Invoice, this box displays the invoice number.
- 8 In the Loc box, enter the location.
- 9 The Who box is for display only. This box displays the order-writer number that was used for login.
- 10 Click the Subject box and enter the subject for this note.
- 11 Click the large Text box (below the Subject box) and enter the text of this note.

The toolbar at the top of the dialog box has icons for cutting, pasting, and copying text. You can click  to select all text.

You can also select font and font size and search for text by clicking .

- 12 To mark this note as private, click . If you entered a password in the


Restricted Note Fields parameters text box, you are prompted to enter that password to mark this note as private. For information on viewing private notes, go to **Viewing Private Notes**.

- 13 When you finish, click Save.

Adding to Existing Notes

You can add to existing notes in several places. You can repeat the following steps in other windows to add to notes. For example, to add to vendor notes, open the Vendor window and add the vendor notes. In this example, we are adding on to notes in the Customer window using the Notes Everywhere Monitor and Manager windows. You can also add on to notes in the Notes Everywhere Note Codes window.

You cannot modify existing notes; only add to them. When adding to a note, you can perform all the same functions as when you create a new note. For example, you can mark the note as private or copy and paste text.


- 1 Go to the Customer window and select the customer for whom to add to notes.
- 2 If the Customer Notes window is not open, go to the Master Menu. Click Databases, select Notes, and click Open Monitor (or type Ctrl + M). The Notes Everywhere Monitor window opens.
- 3 Highlight the note to which to add text and click . (You can also highlight a note, right-click and select Add-On or type **Ctrl + A**.)

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- 4 When the Customer Notes window opens, you can add more text to the existing note. You can also change the note's priority, code, location, and subject. You cannot change the type or reference.
- 5 Enter the additional text in the lower part of the screen.
- 6 When finished, click Save.



Deleting Notes

From the Notes Everywhere Monitor window and the Notes Everywhere Manager window, you can delete notes. You can also delete notes in the Notes Everywhere Note Codes window.

- 1 Highlight the note to delete.
- 2 Click . (You can also highlight a note, right-click and select Delete or press the Delete key.)
- 3 If you entered a password in the Delete Password box in the Notes Everywhere Parameters, the Enter Password to Delete Note Data message appears. Enter the password and click OK.
- 4 The note is deleted.

Viewing Private Notes

You can view private notes in the Notes Everywhere Monitor window or the Notes Everywhere Manager window.

- 1 Highlight the note to view and click .
- 2 If you entered a password in the View Private Notes Password box in the Notes Everywhere parameters, the Enter Password to View Private Notes dialog box opens. Enter the password and click OK.
- 3 Double-click the note to view.
- 4 When finished, click .