



ISTechSupport

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Using Evo Notes

Notes in Evo-ERP allow the entry of memo style notes of virtually unlimited length associated with any data object in the system – part numbers, customers, specific orders, even specific order line items. These Notes can be designated a specific type and depending on type can print on various documents. The printing of these Notes requires that the “Enable Evo Notes System” in SD-A be set to Y but the entry of notes is independent of this setting.

Note Types

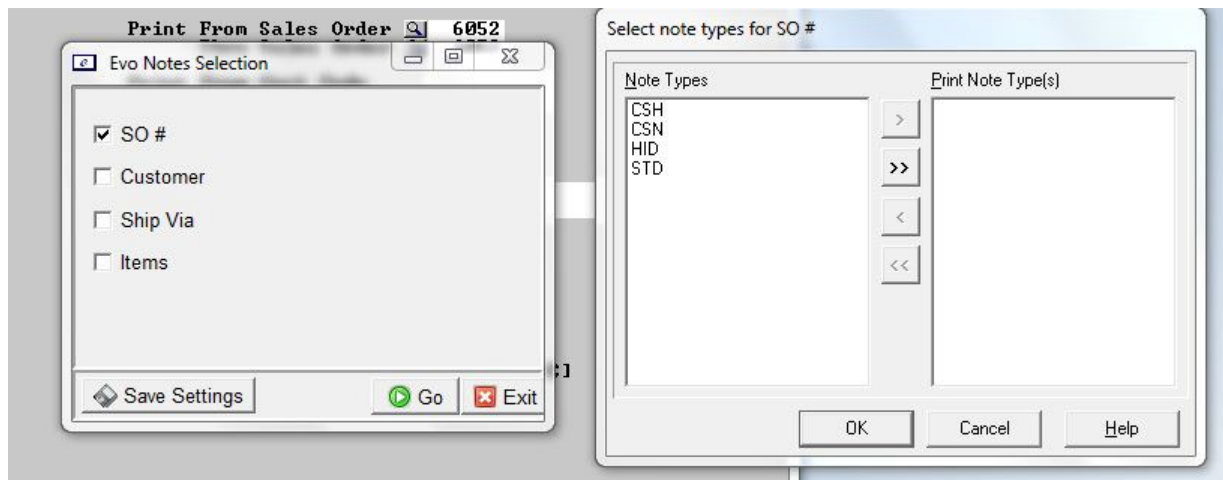
The system is preset with five Note Types - CSN (Classic Synchronized Note), CSH (Classic Synchronized Hidden Note), STD (Standard Note), HID (Hidden Note) and PRD (Paperless Product Notes). You can add as many other types as you like at SM-N-A. If you have a mixed network with some users running DBA Classic and others running Evo-ERP then for notes associated with Customers, Vendors, Work Orders, Purchase Orders and Sales Orders, you should use CSN and CSH types for any notes that you want DBA Classic users to be able to see. Also, if you have “Enable Evo Notes System” set to N then the CSN and CSH notes will be the only ones that can be printed

Notes Database

The Evo Notes are stored in the ISNOTES file for each company. Notes are identified by an ID which contains the key file(s) and value(s) the note is associated with and a Note Type. They are also flagged with the date and time created and the User ID who created it.

Printing Notes

When the Evo Notes system is enabled in SD-A, then when printing documents such as Invoices, a window will pop up prompting for selection of which associated Notes to print.



Once you place a checkmark in the box to indicate that you want Notes associated with the Sales Order to print, a second window opens where the type of Note to be printed can be chosen. These selections can be saved so that you do not need to make the selection again in the future. So you can create a Note Type called PMT for payment instructions and attach a PMT Note to a customer and then select the PMT Note type for invoices but not Packing Slips and the note would print on the Invoices for any customer that has a PMT Note type. Or attach a Note Type SHP to a particular Ship Via code and all packing slips for orders assigned to that Ship Via could print the note.

"EN" RTMs for Notes

The RTMs that print the Evo Notes are all named "EN..." or "IEN..." for the International forms. The Evo Notes sections of the RTMs are separate subreports and contain a field called Note Title and one called IS.NOTE.NOTE. The Note Title contains the Note type and where it came from (associated with part number, customer, etc.) and can be made invisible if you do not want to print this information. If you currently do not have the Evo Notes System enabled, then your forms printing will call "T6..." or "IT6..." RTMs which do not have the subreports for the notes. If you have customized your T6 RTMs, you will have to use the RTM Editor to make those same customizations to the corresponding "EN" RTM before you can enable the Evo Notes System and print the Evo Notes. You can not simply rename a "T6" RTM to "EN" because it does not have the Note subreports.

Note Alerts

When you are entering a Note, there is a check box that can be clicked to make the note an Alert. If you make a Note an Alert, then whenever the data element the Note is associated with is accessed using a new Windows style program, an Alert window will pop up indicating that there is an Alert Note associated with the data.

Control Viewing/Changing Notes

When entering a Note, there is a "View" setting that controls who else can see or change the note. If it is set to P then the note is a private note and only the originator can see it; if it is set to "O" then it is View Only meaning that other users can see it but only the originator can make changes to it. When Note Types are set up in SM-N-A a default View setting per type can be designated.

Accessing Notes using ODBC

Notes are stored in the ISNOTES file. The IS.NOTE.ID is the unique identifier that defines what the note is associated with. IS.NOTE.TYPE is the type and the body of the Note is in IS.NOTE.ALPHA which is a 6000 character field.

Synchronizing Evo and Classic Notes

You can use SM-N-C & SM-N-D to synchronize between the old style Classic notes and the new Evo Notes. You can go in either direction and in either case, the notes in the destination file will be deleted and replaced with the originating note. If you synchronize Classic to Evo Notes, Note types other than CSN & CSH will not be touched.