



LSI

FACTS Notes

Fall Business & Educational Seminar 2007

Overview

- Communicate!
- Types of notes
- Setup and security
- Anatomy of a note
- Urgent notes
- Exporting notes
- Printing notes

Communicate!

- Note system is all about communication
 - Communicate to coworkers, customers, vendors
 - Memory may not be trustworthy given volume of data
 - Late breaking information (credit issues, etc.) may change



Types of notes

- Entity notes
 - Document notes (header / liner)
 - Document note access





Entity notes

- Customer
- Item
- Vendor
- Bank
- AR document
- MC Bill of Material (7.6)
- MC Formulation (7.6)

Document notes (header / line)

- Quotes
- Sales orders
- Warehouse transfers
- Purchase order entry
- Manufacturing Control Bill of Materials (7.6)
- Manufacturing Control Formulation (7.6)



Document note access

01-FACTS 7.5 Demo, Sales Order Document 001584 Southeastern Industrial Supply (SOE210)

File Edit View Options Go To Help

Customer Ship-To Init Whse **01 Atlanta Warehou** Document **001584**

Southeastern Industrial Supply
12490 South Peachtree Street
Atlanta, GA 30348

Southeastern Industrial Supply
1145-A Fulton Industrial Park
Atlanta, GA 30223

Price Level **0**
Ordered
Requested

Reference # Ship Via

Item Adjustable Height Steel Stools 17"-22" HT adj./color: GREY GM% 26.47

☐ Ship Direct

Ordered Committed Backordered Price Extension

Wh EA EA

LN#	Item	Flags	WH	Ordered	UM	Committed	Backorder	Price	T	UM
001	I102		01	4	EA	4	0	57.50	U	EA
002	I100		01	3	EA	3	0	156.25	U	EA
003	With quick-release straps		01						U	
004	I100		01	1	EA	1	0	400.00	C	EA
005	I199	BT	01	20	EA	0	20	2.95	U	EA
006	I101		01	1	EA	1	0	440.87	S	EA
add										

Weight: **728.000** Units: **29** Mdse: **1598.62** Ext: **1598.62**

Deposits Header Line Detail Done

VERY GOOD CUSTOMER

Setup and security





- Configure notes administrators
- Administrator options
- High level security settings
- Category specific security


Configure notes administrators


01-FACTS 7.5 Demo, User Code F/M (SMF410)

Help

User Code  **George U. Invencent** 

General **Security**


Password  [Email Address](#)

Valid Companies 

Track User ☐





Req Escape Code ☐

Security Codes:



[Administrator Privileges](#)

User-defined Fields	<input checked="" type="checkbox"/>	Allow Report Exports to Excel	<input checked="" type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	Allow Reports to File on Client	<input checked="" type="checkbox"/>
Reports	<input checked="" type="checkbox"/>		

 Save  Delete  New  Exit

Enter password, F1=None

Administrator options

01-FACTS 7.5 Demo, Note Entry (SME710)

File **Admin** Category Help



Note Type **CUST** Customer

Customer **C100** Southeastern Industrial Supply

Category **GENR** General Information Urgent Only ☐

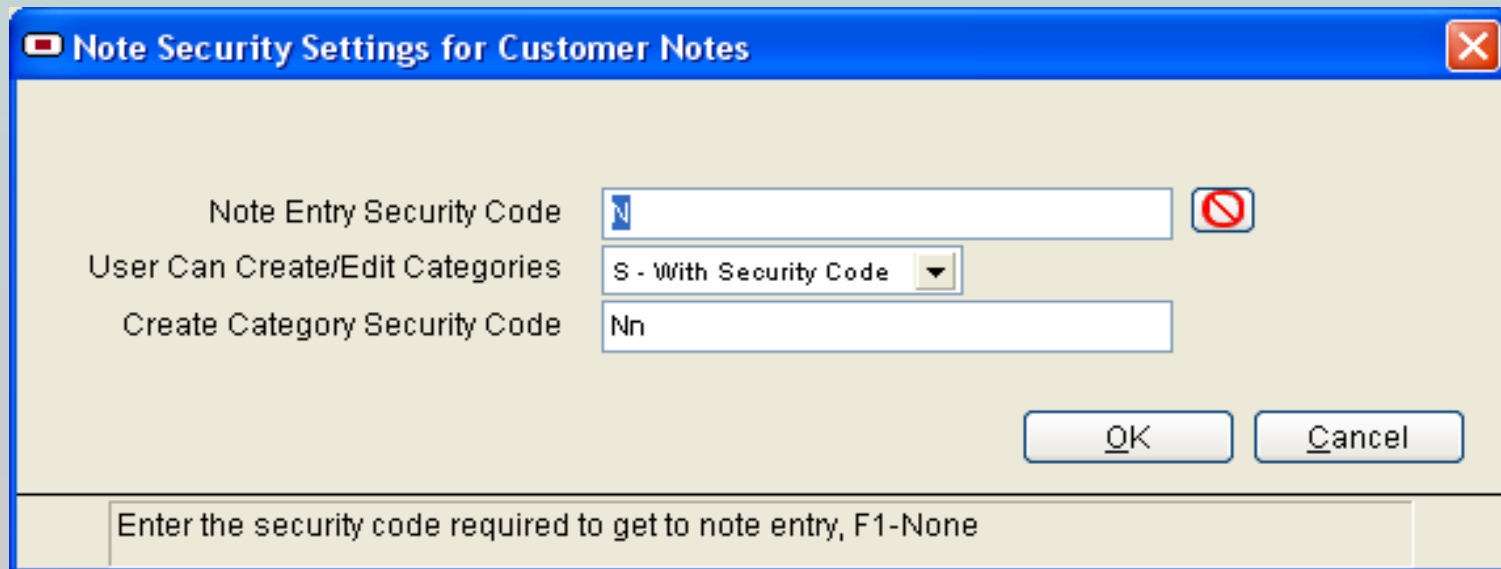
Date/Time	Urgent	Subject	User
02/19/2005, 8:22 PM		***** TAKE ANY CUSTOMER COMPLAINTS DIRECTLY TO ROX	GUI
02/19/2005, 8:21 PM		JOHN S. REQUESTS MEETING WITH SALES STAFF RE: NEW	GUI
02/19/2005, 3:39 PM		COURTESY VISIT. SPOKE WITH JOHN S. REGA	SSI

add


List From  

High level security settings

- Access from admin menu - security
- Set security code(s) required for note entry
- Set security code(s) required for category maintenance
- Options for create / edit – yes/no/with security code



The screenshot shows a Windows-style dialog box titled "Note Security Settings for Customer Notes". It contains three input fields and two buttons. The first field, "Note Entry Security Code", has the value "N" and a "no" icon (a red circle with a diagonal line) to its right. The second field, "User Can Create/Edit Categories", is a dropdown menu currently showing "S - With Security Code". The third field, "Create Category Security Code", has the value "Nn". At the bottom right are "OK" and "Cancel" buttons. A status bar at the bottom of the dialog contains the text "Enter the security code required to get to note entry, F1-None".

Note Entry Security Code	N	
User Can Create/Edit Categories	S - With Security Code	
Create Category Security Code	Nn	

OK Cancel

Enter the security code required to get to note entry, F1-None

Category specific security

- Access from category menu – create / edit
- Allows further control for sensitive subjects like collections
- Determines if notes can be edited or deleted

The screenshot shows a Windows-style dialog box titled "Editing Category for Customer Notes". The dialog has a blue title bar with a close button (X) in the top right corner. The main content area is light beige and contains the following fields and controls:

- Category ID:** GENR
- Description:** General Information
- Security Code Required to View Notes:** A text input field followed by a "None" button with a red prohibition icon.
- Security Code Required to Create Notes:** A text input field followed by a "None" button with a red prohibition icon.
- Allow Changing Notes:** A dropdown menu currently showing "A - Always".
- Allow Deleting Notes:** A dropdown menu currently showing "A - Always".
- Change/Delete Override Security Code:** A dropdown menu with options "A - Always" (highlighted), "N - Never", and "U - Only Notes They Created". To its right is a text input field and a "None" button with a red prohibition icon.

At the bottom of the dialog are three buttons: "OK", "Defaults", and "Cancel". Below the main content area is a status bar with the text "Allow users to delete notes? (A/U/N)".

Anatomy of a note

- Note components



Note components

The screenshot shows a 'Note Entry' dialog box with the following components and annotations:

- Entity:** Points to the 'Item' field, which contains 'Pallet Loading Hand Truck 1000 lb capacity'.
- Urgent flag:** Points to the 'Urgent' checkbox, which is currently unchecked.
- Category:** Points to the 'Category' field, which contains 'GENR'.
- Subject:** Points to the 'Subject' text box, which contains 'RECEIVED NOTICE FROM VENDOR THAT THIS'.
- Body of note – supports cut & paste for entry:** Points to the large text area containing the note text: 'RECEIVED NOTICE FROM VENDOR THAT THIS MODEL WILL BE DISCONTINUED FIRST OF YEAR. NEW MODEL WILL HAVE 1200 LB CAPACITY AND WILL WEIGH LESS (MAGNESIUM ALLOY CONSTRUCTION) EXPECT A 10% PRICE INCREASE.'
- Export options:** Points to the 'Exports' button.

The dialog box also includes a status bar at the bottom with the text 'Enter the subject of the note' and a 'Cancel' button.



Urgent notes

- Urgent notes “auto deploy”
 - Urgent notes



Urgent notes “auto deploy”

- Ever need an automatic reminder?
- Provide updated information for customer service reps

The screenshot displays two overlapping windows from the O1-FACTS 7.5 Demo software.

01-FACTS 7.5 Demo, Next Sales Order (SOE210)

Doc/Cust: C101 Ship-To: Init Whse: 01

Reference #: Ship Via: UPS

Item: ☐ Ship Direct Ordered Committed B

Wh: ☐ ☐ ☐ ☐ ☐

LN#	Item	Flags	WH	Ordered	U

Weight: .000 Units: 0 Mdse

CHECK "SHIP TO" ADDR

01-FACTS 7.5 Demo, Important Notes on File (SMI710)

Help

Customer: **C101** Deluxe Equipment Warehouse

Note Type/Category	Urgent	Subject
Customer/General Information	Y	CONFIRM SHIP-TO ADDRESS

Buttons: All Notes Urgent Only Print Entry Done

CHEC

Urgent notes

- Pops in entries / file maintenances
- Visibility in inquiries

01-FACTS 7.5 Demo, AR Customer Inquiry - Customer Order (ARI610)

Options View Sort By Export Print Help

Go To Starts with

Customer	Name	Notes	City, State	Days
C101	Deluxe Equipment Warehouse	U	Douglasville, GA	30
C102	Roark Architectural, Inc.	Y	Acworth, GA	30
C103	Taggart Transcontinental		Waco, TX	75

Aging as of 08/27/07

	CURRENT	1-30	31-60	61-90	OVER 90
Total:		11712.13			
Disputed:		.00			
	.00	.00	.00	.00	11712.13
Disputed:	.00	.00	.00	.00	.00

Open Docs: 3902.40

Exit

Enter characters customer must start with

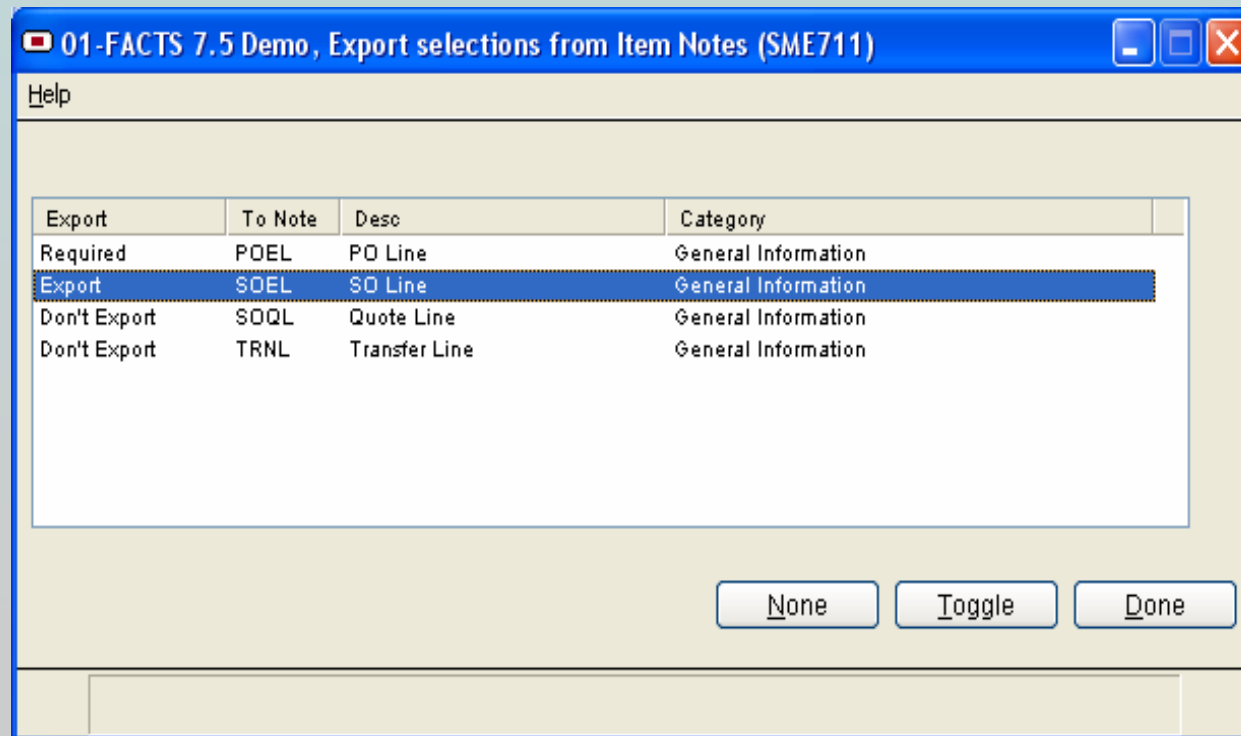
Exporting notes

- Exporting notes
 - Export options



Exporting notes

- Have notes follow you into transactions automatically
- Use for notifications, extended descriptions, etc.
- Cannot skip “required” exports



Export options

- Select audience for exports (internal / external / both)

Importing Notes

Note Type **SOEL** SO Line

Doc # **001584**

Line # **006**

Category **GENR** General Information

Subject **HARDWOOD BASE WITH STAINLESS STEEL HANDLES** Urgent ☐

Note
HARDWOOD BASE WITH STAINLESS STEEL HANDLES. HANDLE EMPLOYS PATENTED NEW "RIGHT-FLEX" TECHNOLOGY TO INSURE OPERATOR COMFORT. WHEELS USE TREATED IRON BEARINGS FOR SMOOTH OPERATION. BASE COVERED WITH NON- SKID, WEATHER-RESISTANT, SILICON PAD.
DIMENSIONS: HEIGHT 48" (@ handle top) BASE 58" X 62" X 8" (14" from floor to base top) WEIGHT 215 LB

☒ Print on Pick Ticket
☒ Print on Invoice
☒ Export to PO/Transfer
☒ Print on PO/Transfer

OK **Exports**

Enter the subject of the note VERY GOOD CUST

Printing notes

- Option found in note display
 - Customer listing




Option found in note display

01-FACTS 7.5 Demo, Note Entry (SME710)

File Admin Category Help



Note Type **CUST** Customer




Customer **C101 Deluxe Equipment Warehouse**



Category  **General Information** Urgent Only ☐

Date/Time	Urgent	Subject	User
02/19/2005, 8:28 PM	Y	CONFIRM SHIP-TO ADDRESS	GUI
02/19/2005, 8:23 PM		TALKED TO BILL THRAYER RE: MULTI-WEEK	GUI
02/19/2005, 3:39 PM		CHECK WITH SALLY BEFORE CONFIRMATION OF SALES. THI	SSI

add

List From  



  




Customer listing

01-FACTS 7.5 Demo, Customer Listing (ARR740)

Template Print Options Custom Report Layout Help


Order Beginning  **First**
Ending  **Last**



Properties

Branch  **Atlanta Branch**
Code Beginning  **First**
Ending  **Last**

Status
Info
Include

Notes

☐ Urgent
 Category  **All**

Beginning Date  **First**
Ending Date  **Last**

Template Printer Layout

Enter the category to print, F1-All, F2-Search