



Using Evo Notes

Notes in Evo-ERP allow the entry of memo style notes of 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

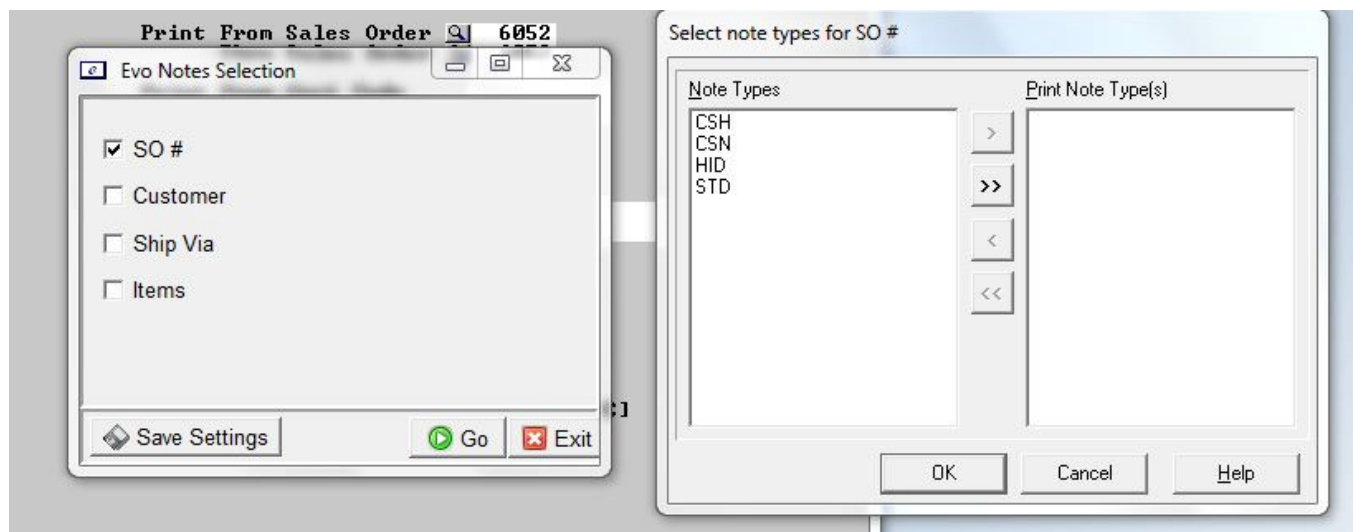
The system is preset with four Note Types - CSN (Classic Synchronized Note), CSH (Classic Synchronized Hidden Note), STD (Standard Note) and HID (Hidden Note). You can add as many other types as you like at SM-N-A. If you have a mixed network with some users running DBA Classic and others running Evo-ERP 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 notes will be the only ones that can be printed. Even if you have all users running Evo-ERP and Evo Notes System turned on, Notes entered as CSN and CSH types associated with Customers, Vendors, Work Orders, Purchase Orders and Sales Orders are available to ODBC connections because they are stored in the old Notes tables as well as the new Memo file.

Notes Databases

The Evo Notes are all stored in the WBTRVMEMO.B database in the main directory (DBAMFG or EVOERP) rather than in separate company files. Notes from all companies are stored in the same file. As a result, your backup procedure needs to make a regular backup of this file as well as the company data located in the company subfolder(s).

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.