

Crowe Notes Optimizer for Microsoft Dynamics® AX

Improve efficiency
and accuracy with
standardized notes

With the Crowe Notes Optimizer, you can standardize notes across your organization and drive more actionable and accurate insights from your data. Standardize your notes to save time, reduce data errors, and improve communications. The Crowe Notes Optimizer helps you enhance the level of service you provide to customers, vendors, and suppliers.

crowe.com/axapps

Benefits

- Improve internal and external communications by standardizing notes
- Reduce the need for manual note entry on purchase orders, sales orders, production orders, and shipping documentation
- Access standard notes through data queries to drive actionable insights
- Automatically transfer notes between multiple Microsoft Dynamics AX order types

For purchasing information,
request the purchasing guide
crowe.com/axappsguide

Predefined note setup

Standard, predefined notes can be set up in advance by managers, and note codes can be used so end users don't have to search for and select the notes each time.

Features:

- Create and customize note descriptions
- Classify notes by type (sales, purchasing, receiving, etc.)
- Classify notes as internal or external (to set restrictions)
- Attach standard notes to items, customers, and vendors

Copy notes (1 - cma)

Primary	Secondary
Prospect to Sales quotation (header):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Customer to Sales quotation (header):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Customer to Sales order (header):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Customer to Sales agreement (header):	<input type="checkbox"/>
Delivery address to Sales quotation (header):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Delivery address to Sales order (header):	<input type="checkbox"/>
Delivery address to Sales agreement (header):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Vendor to RFQ (vendor):	<input checked="" type="checkbox"/> Purchasing,Receiving,Note
Vendor to Purchase order (header):	<input checked="" type="checkbox"/> Purchasing
Vendor to Purchase agreement (header):	<input checked="" type="checkbox"/> Purchasing,Receiving,Note
Released product to Sales quotation (line):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Released product to Sales order (line):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Released product to Sales agreement (line):	<input checked="" type="checkbox"/> Packaging,Production,Deli
Released product to RFQ (line):	<input checked="" type="checkbox"/> Purchasing,Receiving,Note
	Sales quotation (header) to RFQ (header): <input checked="" type="checkbox"/>
	Sales quotation (line) to RFQ (line): <input checked="" type="checkbox"/>
	RFQ to Purchase order: <input checked="" type="checkbox"/>
	Sales quotation (line) to Sales order (line): <input checked="" type="checkbox"/>
	Sales quotation (header) to Sales order (header): <input checked="" type="checkbox"/>
	Sales order (header) to Purchase order (header): <input checked="" type="checkbox"/>
	Sales order (line) to Purchase order (line): <input checked="" type="checkbox"/>
	Sales order (header) to Production order: <input checked="" type="checkbox"/>
	Sales order (line) to Production order: <input checked="" type="checkbox"/>
	Sales order (header) to Transfer order (header): <input checked="" type="checkbox"/>
	Sales order (line) to Transfer order (line): <input checked="" type="checkbox"/>
	Sales order (header) to Shipment: <input checked="" type="checkbox"/>
	Sales order (line) to Load (line): <input checked="" type="checkbox"/>
	Sales agreement (header) to Sales order (header): <input checked="" type="checkbox"/>
	Purchasing,Receiving,Note: <input checked="" type="checkbox"/>
	Purchasing,Receiving,Note: <input checked="" type="checkbox"/>
	Purchasing,Receiving,Note: <input checked="" type="checkbox"/>
	Packaging,Production,Deli: <input checked="" type="checkbox"/>
	Packaging,Production,Deli: <input checked="" type="checkbox"/>
	Purchasing,Receiving,Note: <input checked="" type="checkbox"/>
	Purchasing,Receiving,Note: <input checked="" type="checkbox"/>
	Production: <input checked="" type="checkbox"/>
	Production: <input checked="" type="checkbox"/>
	Packaging,Delivery,Loadin: <input checked="" type="checkbox"/>
	Packaging,Delivery,Loadin: <input checked="" type="checkbox"/>
	Delivery,Loading,Note: <input checked="" type="checkbox"/>
	Delivery,Loading,Note: <input checked="" type="checkbox"/>
	Packaging,Production,Deli: <input checked="" type="checkbox"/>

Learn more

Request a demonstration at crowe.com/appsdemo or contact us for more information:

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Standard notes (1) - Note code:				
File New Delete				
Overview General				
Note code	Type	Description	Restriction	
1	Production	COMPLY TO ASME CODE A36	Internal	
12	Purchasing	NON CONFORMING PRODUCT	External	
14	Receiving	RECEIVING HOURS	External	
16	Receiving	RECEIVING SPECS	External	
18	Receiving	MILLTEST REPORTS	External	
19	Production	WIPE DOWN ALL COLD FINISH	Internal	
20	Purchasing	MATERIAL SAFETY DATA SHEETS	External	
21	Delivery	EXACT DIESEL COMBUSTION	External	

Note:
MATERIAL TEST REPORTS SHALL ACCOMPANY EACH ITEM UPON DELIVERY

Copy notes

Once notes are defined, users can easily copy notes across your organization, reducing inconsistencies and inaccuracies.

Features:

- Ability to copy multiple notes across the organization
- View primary and secondary notes by note type (production, delivery, receiving, etc.)
- Notes automatically flow between related AX forms, for example:
 - Items and/or customers to sales quotes to sales orders to production orders to shipping documentation
 - Items and/or vendors to purchase orders

FAQs

Can I copy my existing notes from Microsoft Dynamics AX into the app?

- Yes, our app is fully integrated with Microsoft Dynamics AX 2012 so you can view and copy your existing notes.

Can end users define new notes or is this restricted only to administrators?

- Yes, end users can now easily create, copy, and modify notes.