



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

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

Smart decisions. Lasting value.™



Learn more

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

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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	MILL TEST REPORTS	External
19	Production	WIPE DOWN ALL COLD FINISH	Internal
20	Purchasing	MATERIAL SAFETY DATE SHEETS	External
21	...	EXACT PIECE COUNT BOND	Internal

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.