Notes Framework - Expanded

Overview

Pop-ups are notices that appear on record using the **Notes** tab and at POS (point of sale) to **remind associates** of important notes. Previously only available as Customer Notes, the framework has been expanded to include additional features found throughout the Edge to manage your alerts when working more completely with services, vendors, inventory items, and categories.

Adding Notes in Edge

The steps for adding notes to the newly expanded areas remain the same as when it was introduced originally with **Customer Notes**. The only **exception** is for **Vendors** which has been updated to include a **second note type** to give you more control on where your notes will appear.

For more detailed instructions on adding notes, please see the Customer Notes Revamp section on the EdgeUser website for documentation and tutorial videos.

> **NOTE:** To make a pop-up note appear in POS, you must check the box labeled **Emphasize/Pop-Up** and select the start and end dates using the **Pop-Up Dates** fields.

Adding Notes – Categories, Inventory Items, Job Intake

To add new notes:

1. Navigate to the desired location:

    a. **Inventory** > **Categories** > select either **List** or **Add**.

    b. **Inventory** > **Items** > then choose **Find, Add, Assemble,** or **Build**.

    c. Open **POS** > enter **Associate** and **Customer** > then choose the appropriate **Intake** button.

2. Click the **Notes** tab.

3. Click **Add** at the bottom of the window.

4. Fill out the form as desired and click **Save/Close** to save your note.

Adding Notes – Vendors

To add new **Vendors** notes:

1. Navigate to **Inventory > Vendors > Find** or **Add**.

2. Click the **Notes** tab.

3. At the bottom of the **Notes** window, you will see **two** add buttons: **Add Vendor Note** and **Add Vendor Item Note**.
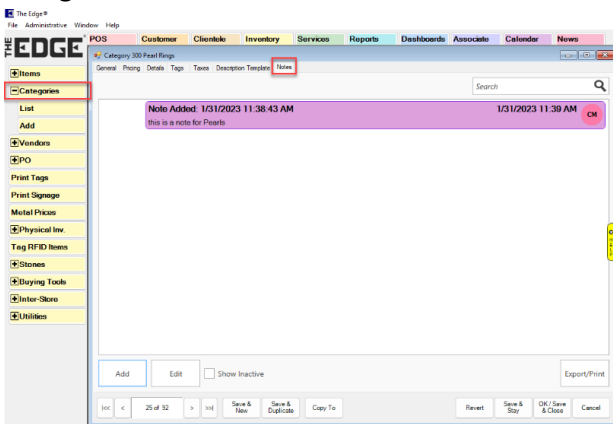

a. **Add Vendor Note**: Notes will **ONLY** appear on the **Vendor record** itself. Creating a pop-up note using this option means the note will **only** pop-up when accessing this vendor record.

b. **Add Vendor Item Note:** Notes will appear on **BOTH** the **Vendor** record and the **Item** record. Creating a pop-up note using this option means the note will pop-up in **POS** as well as the **item** record.

4. Click the **Add** option that best matches how and where you'd like your notes to appear.

5. Fill out the form as desired and click **Save/Close** to save your note.
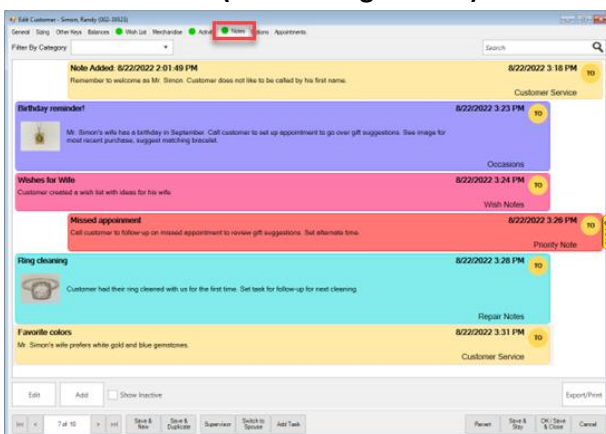
Accessing Notes in Edge

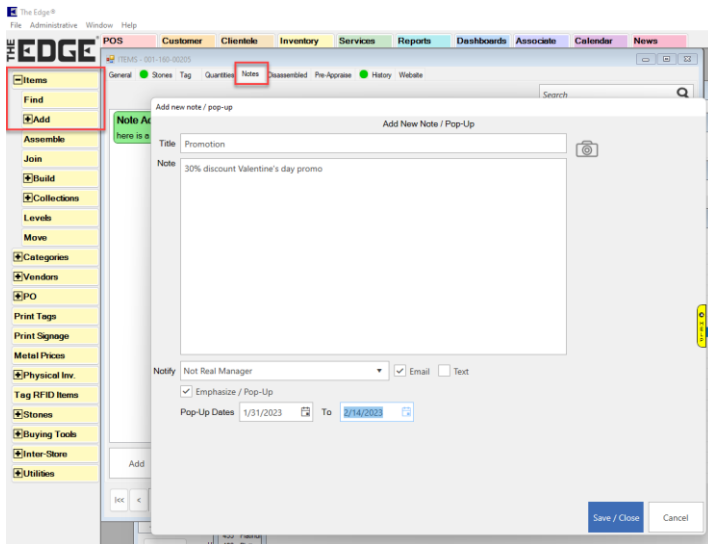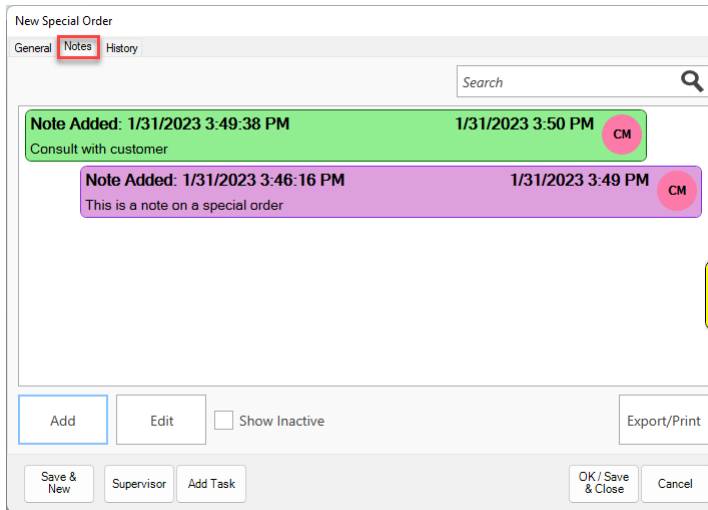Notes can be accessed using the **Notes** tab from the following places:

➢ **Categories**

➢ **Customer Record (Pre-existing feature)**

➢ **Inventory items**

➢ **Special Order/Repair/Custom Job Intake**

➢ **Vendors**