



FACT SHEET



Clever Comments

Use free-form notes on documents & screens so important info is never missed

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Wish you could add important announcements or information to your invoices? Want an easy way to improve order accuracy by informing your users of individual customer preferences?

Clever Comments allows you to add free-form comments to sales orders, dispatch notes, picking documents and much more, as well as allowing you to add pop-up notifications to customer screens within Dynamics 365 Business Central.

Benefits

- Simple setup – type your comment, configure rules and away you go!
- Set time frames against comments and notifications
- Completely formattable
- Improves accuracy and efficiency
- Useful for delivery and packing instructions, Christmas closing hours and much more

Requirements

Dynamics 365 Business Central or Premium

Don't worry, customers won't see all their notes!

Set the comments to internal or external only and set rules per customer type, type of order, document type etc. - so only the comments relevant to that customer or document are inherited.

For time sensitive comments set an expiration date against comments and notifications so that they disappear when they are out of date or no longer required.

Edit - Comment Editor

Comment Type CUST

Comment Importance Important

Date From

Date To 31/12/2024

Format **B I U** x_2 x^2 **A** [List Icons]

All shipments to this customer **MUST** contain the following:

- Certificate of Conformity
- Warranty Document

OK Cancel

SM-00001

Comment Sheet Search New More options

Important (1)

All shipments to this customer **MUST** contain the following:

- Certificate of Conformity
- Warranty Document

Edit Delete Created: 08/12/22 14:19 by ADMIN

Standard (1)

Comment Type CUST

General

Code CUST Expiry Period

Description Customer General Comments Include on Internal D...

Comment Source Customer Include on External D...

Inheritance

Name	Inherit	Display Type	Conditions
Finance Charge Memo	<input type="checkbox"/>	None	No
Job	<input type="checkbox"/>	None	No
Reminder	<input type="checkbox"/>	None	No
Sales Blanket Order	<input checked="" type="checkbox"/>	None	No
Assembly Blanket Order	<input type="checkbox"/>	None	No
Sales Credit Memo	<input checked="" type="checkbox"/>	None	No
Sales Invoice	<input checked="" type="checkbox"/>	None	No
Sales Order	<input checked="" type="checkbox"/>	None	No
Assembly Order	<input type="checkbox"/>	None	No
Inventory Movement	<input type="checkbox"/>	None	No
Inventory Pick	<input type="checkbox"/>	None	No
Production Order	<input type="checkbox"/>	None	No
Warehouse Shipment	<input type="checkbox"/>	None	No
Warehouse Pick	<input type="checkbox"/>	None	No
Sales Quote	<input checked="" type="checkbox"/>	None	No
Assembly Quote	<input type="checkbox"/>	None	No
Sales Return Order	<input checked="" type="checkbox"/>	None	No
Inventory Put-away	<input type="checkbox"/>	None	No
Warehouse Receipt	<input type="checkbox"/>	None	No
Warehouse Put-away	<input type="checkbox"/>	None	No
Service Contract	<input checked="" type="checkbox"/>	None	No
Service Contract Quote	<input checked="" type="checkbox"/>	None	No
Service Credit Memo	<input checked="" type="checkbox"/>	None	No
Service Invoice	<input checked="" type="checkbox"/>	None	No
Service Order	<input checked="" type="checkbox"/>	None	No
Warehouse Shipment	<input type="checkbox"/>	None	No
Warehouse Pick	<input type="checkbox"/>	None	No
Service Quote	<input type="checkbox"/>	None	No

Your customers will never miss a change in opening hours ever again!

Your employees can't say they didn't know about individual customer requirements either!





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Never miss important customer preferences again!

For more information, email us at hello@cleverdynamics.co.uk
or visit: cleverdynamics.co.uk/clever-comments