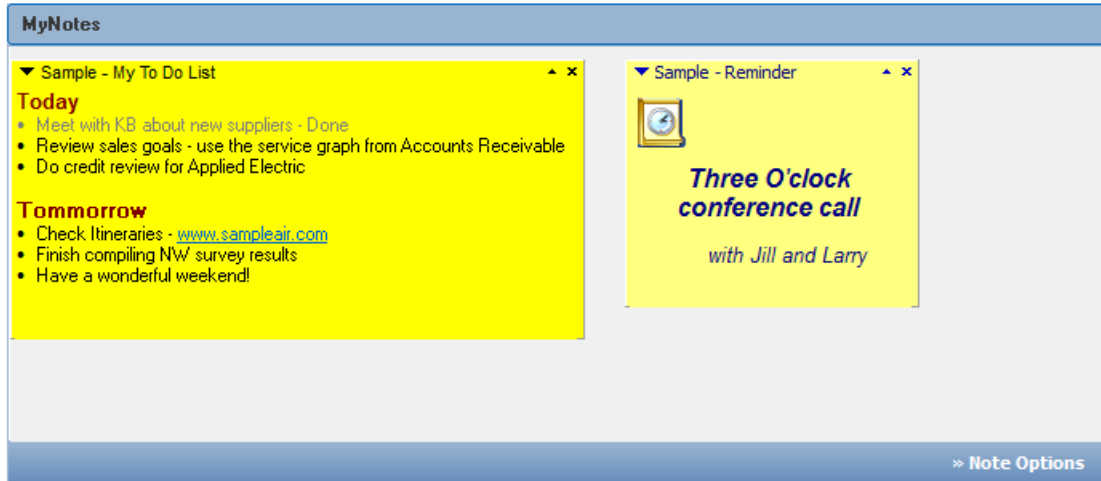## MyNotes

MyNotes is a versatile, fully integrated note system within CertiflexDimension. It combines the simplicity of handwritten "sticky note" with the power and flexibility of a computer application. MyNotes is designed to store and track these personalized "sticky notes" and allows the user to define pop-up alarms and reminders.


Configuring MyNotes

A single user's **MyNotes** preferences operate independently of those created by all other CertiflexDimension users. This allows each user to configure their **MyNotes** preferences to uniquely fit their individual needs.

To change the **MyNotes** configuration, click >**Note Options** in the lower right corner of the MyNotes window and select **Configure Notes…** from the drop-down menu. Configuration options are broken into two sections: **Preferences** and **Templates**.

Preferences

- **Empty MyNote Trash Bin upon Exit of Dimension:** If enabled, all notes in the trash bin will be permanently deleted when you exit CertiflexDimension.
- **Enable Sound Effects:** If enabled, sound effects will emit when notes are deleted, expanded or collapsed.
- **Minimize Note Width:** Defines the width of a note when in a minimized state.
- **Play sound when reminder activates:** Enables a sound that coincides with the activation of a reminder.
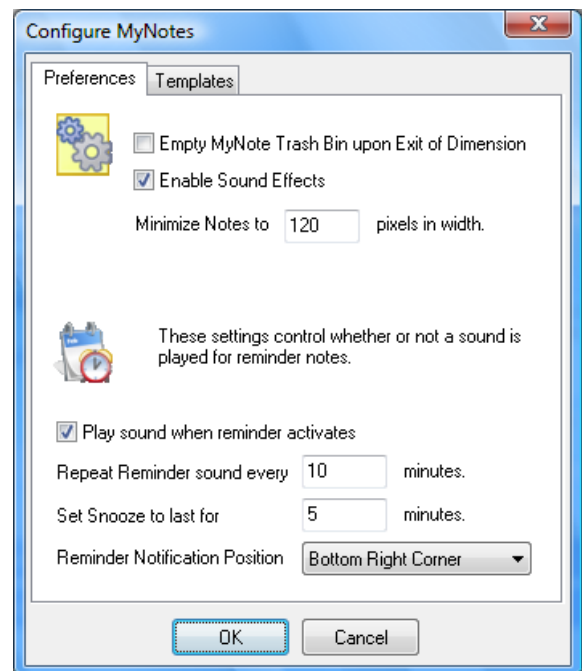
- **Repeat Reminder sound interval:** Defines the length of time between repeated reminder sounds. To keep the sound from repeating, set to '0' minutes.
- **Snooze interval:** Defines the duration of the snooze feature.
- **Reminder Notification Position:** Defines the screen location where the notification message for a note alarm appears.

Templates

MyNotes can accommodate up to twelve different types of notes. Each of these types has a template to allow the user to easily define the default format style, color and text. When adding a note from within the Service Center, the user will be prompted to select the type of note to add. The template for the selected note type is created as the new note is entered. There are 4 variable keywords that can be used when modifying templates. These variable keywords are replaced with "live" data when a new note is created. For example, the variable keyword <DATE> would be replaced with the actual date of when the note was created. Variable keywords must be entered exactly as they appear below:

<DATE> - the computer's short date.
<LONGDATE> - the computer's long date.
<TIME> - the computer's time setting
 <C> - initial placement of the editor cursor.
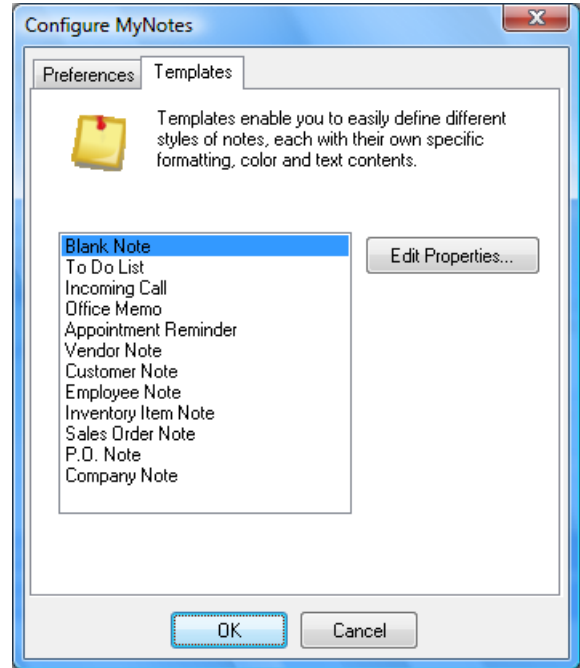
> **NOTE:** The last seven templates are used when adding notes from within a CertiflexDimension accounting module. For example, when viewing a customer record from the **Accounts Receivable > Review Customer** screen, the user could add a note by clicking the **MyNotes** icon. The system would then copy the user's template for customer notes, including the default note contents, and automatically replace the variable keywords (Number, Name, etc) with the information from the currently viewed customer.

Anatomy of a Note
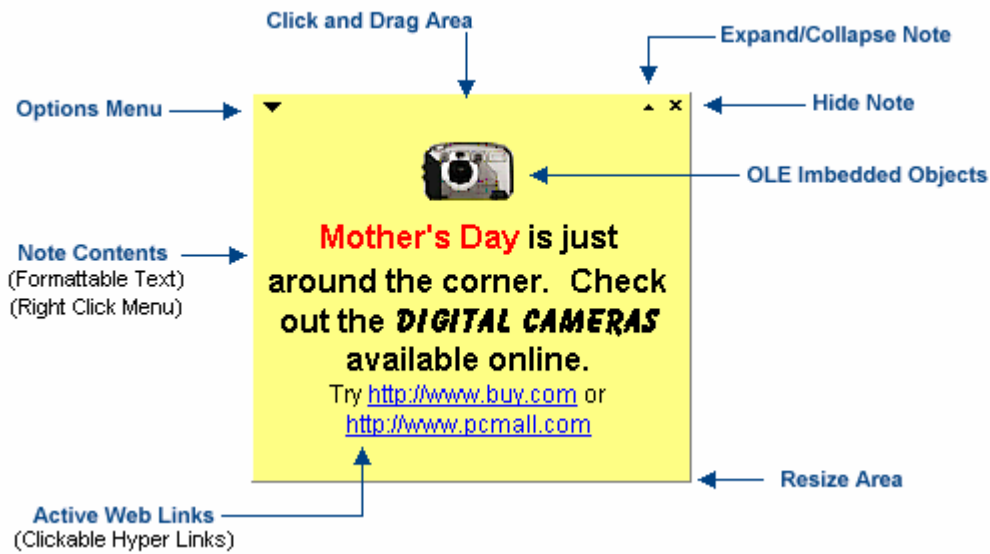
Note Properties

To define a note's properties, click on the ⏷ carrot in the upper left corner of the note. This will expand the **Options** drop-down menu. Select **Note Properties…** from this menu. The note properties are broken into 4 sections: **Settings, Note, Reminder,** and **Expiration.**

Settings
- **Note is Showing:** If enabled, the note will appear on your CertiflexDimension desktop.
- **Note Caption:** The text that appears at the top of a note. Click the **Select…** button to select the font size, style and color.
- **Note Color:** Defines the background color of the note. Click the **Select…** button to change the color.

Note Text
This is the content of the note. Keying text directly into the note area will modify note content. To access additional options and styles, right-click within the text field and a drop-down menu will appear.

Reminder
- **Alarm is Active:** Enables or disables the note's alarm status.
- **Activate On:** Defines the activation date of the alarm.
- **Activate At:** Defines the activation time of the alarm.

Expiration
- **Note Never Expires:** Enables or disables the note's automatic expiration status.
- **Move the note to the trash bin when it expires:** If enabled, the note will be moved to the trash bin when it expires.
- **Expire Date:** Defines the date and time when the note will expire.

Creating a New Note
There are several ways to create a new note. The easiest way is to expand the MyNotes **Options** and select **New Note**. A menu with the available user-definable note templates will be displayed. Select the type of note to add. The new note will be created and placed in the

MyNotes area. A new note can also be added via the **Options** menu of an existing note.

Editing a Note

To change the contents of a note, either type directly into the note area or right-click on the note to expand the edit menu.
This edit menu allows the user to refine their note with various font, paragraph and list styles, inserted objects, and text-sensitive find/replace options.

Resizing and Moving a Note

Notes can be resized and moved using standard Windows mouse interactions.
- **Move a Note**: Click and drag the caption portion of the note.
- **Resize a Note**: Click and drag anywhere along the right or bottom edge of the note.

Hiding/Showing a Note

To hide a visible note, click on the ▼ carrot in the upper left corner of the note and select **Hide Note**. This will remove the note from the **MyNotes** area by setting its showing status to "false."

To show a previously hidden note, either click on the ▼ carrot in the upper left corner of the note or click **>Options,** and then select **Maintain Notes**. Select the desired note and set its showing status to "true."

Sending a Note to a User

To send a note to another CertiflexDimension user, click on the ▼ carrot in the upper left corner of the note to be sent and select **Send Note to User**. A window will appear displaying available CertiflexDimension users. To have the sent note displayed in the recipient user's **MyNotes** area, check the **Show Note in User's MyNotes Area** box.

Maintain Notes

To manage note properties and settings, click **>Note Options** and select **Maintain Notes**. Both visible and hidden notes are listed under the **All Notes** tab. Deleted notes are listed under the **Trash Bin** tab.

All Notes
- **Edit Note:** Displays the note properties screen for the selected note.
- **Hide Note:** Toggles the selected note between hidden and showing status.
- **Delete Note:** Sends the selected note to the trash bin.

Trash Bin
- **Empty Trash:** Permanently removes all notes from the trash bin.
- **Restore Note:** Removes the selected note from the trash bin and restores it to the All Notes listing.