

Pop-Up Events and Notes

Ensure important workshop tasks are always completed with timely reminders and follow-up actions

What are Pop-Up Events and Notes?

Pop-Up Notes are used to remind users of important tasks or actions that need to be followed up. They are created in various enquiry programs such as Customer, Supplier, Wholegoods and more. Notes appear as reminders within the system and can be assigned to a specific user, department or visible to all users. They make it easier to track tasks, requirements or other critical information.

Pop-Up Event options are included as part of the Gold Sales Prospecting module.

Examples of Pop-Up Notes:

- ✓ **Workshop Reminders:** For instance, if an MOT was done and advisory work needs to be addressed in the future, a pop-up note can be set to appear when a new job is created for the vehicle/machine.
- ✓ **Payment Reminders:** A note might remind you that a customer needs to pay an invoice or has a promised payment date.



Did you know?

Notes can also appear as outstanding actions in the Document Approval system if specified for a user. You can acknowledge these notes to stop them from reappearing or set them to recur at future dates.

1. SETTING UP EVENT CODES

To create or modify event codes, follow these steps:

In Gold, navigate to
System Management > Prospect Data > Event Codes Maintenance > Insert or Amend

1. Use the table below to enter the details for the new or amended event code. Mandatory fields are marked with a * and default settings are marked with a #.

2. Select **OK** when complete.

| Field | Options | Entry |
|---------------------|--|---|
| *Event Code | | Enter a code, up to 6 characters. |
| *Description | | Enter a description for the event. |
| *Priority | Low # Medium High | Enter a priority for the note. Medium shows one * next to the item in the list and High shows two **. |
| *Type | Customer Account Supplier Account Warranty Claim Wholegood Plant Planned Maintenance Serial Item Plant Contract | This selection denotes the areas of Gold where the note will be visible. Select an option from the dropdown menu. |
| Remind User | Display on Input On Action List Input and Action | To ensure the reminder pops-up an entry, select Display on Input or Input and Action . |
| Recurring Event | No # On Action Date On Current Date | If the event is recurring, set the event to recur on either the Action Date or Current Date . After acknowledging the note, a new one will be created based on the interval time. |
| Interval | n Days n Months | Enter the interval in days or months for the note to re-occur. |
| Viewable By | User # Department All | Select whether the note is displayed for an individual user (set when note is created), a department (see section below) or to all users. |
| Department | | If Department was selected above, enter the required department code. |
| Require Action Date | No # Yes | Set to Yes to require an action date for each note. The note will only be displayed from the selected action date, so if a future date is chosen, the note will remain hidden until that date. |
| Require Expiry Date | No # Yes | Set to Yes to require an expiry date for recurring notes. The note will stop displaying after the expiry date. |
| Workshop View | No # Yes | Set to Yes for the wholegood, plant or serial item event to only pop-up in the Workshop module. |
| Comment | | Enter the standard comment for the note. This can be amended when an individual note is created. |

2. CREATING EVENTS AND POP-UP REMINDERS

2.1 Setting Customer Events

Scenario:

A customer has promised to settle their account in two weeks. To ensure the payment is received on time, you can create a reminder note that will appear on the action list in two weeks. This will prompt the assigned user to verify whether the payment has been made. Follow the steps below to set this up.

In Gold, navigate to
Customer Enquiry > Select the Customer > Events tab > Insert

1. Use the table below to fill in the key entry fields.

2. Select **OK** when complete.

3. Customer events created after the specified date will trigger a pop-up reminder when the account is accessed in Gold, if **Remind User** is enabled on the Event Code.

| Field | Entry |
|------------------------|---|
| Event Code | Only event codes linked to a type of Customer Account are permitted. |
| Action User/Department | Enter the user initials or select from the lookup. This will display the note on the Action List for the specified user. If for a department, this is displayed. If the event is set for all, this cannot be changed. |
| Action Date | Enter the date for the event to appear on the action list for the operator. |
| Comment | Any standard comment for the note code will be displayed and can be amended if required. |

2.2 Setting Pop-Up Reminders In Workshop

Scenario:

A vehicle or wholegood requires a reminder for future work the next time it enters the workshop. You can create a Wholegood note, which will automatically appear when the item is brought in for service. This ensures the necessary tasks are not overlooked. Follow the steps below to set this up.

In Gold, navigate to
Wholegood > Wholegood Enquiry > Select the Wholegood > Events tab > Insert

1. Use the table below to fill in the key entry fields.

| Field | Entry |
|-------------------------|---|
| Event Code | Only event codes linked to a type of Wholegood are permitted. |
| Action User/ Department | Enter the user initials or select from the lookup. This will display the note on the Action List for the specified user. If for a department, this is displayed. If the event is set for all, this cannot be changed. |
| Action Date | Enter the date for the event to appear on the action list for the operator. |
| Comment | Any standard comment for the note code will be displayed and can be amended if required. |

2. Select **OK** when complete.

3. The next time a job is created for the vehicle/wholegood, a note will appear as a reminder for anyone in the workshop department.



Did you know?

This process works for Plant Equipment and Serial Part notes as well, not just Wholegoods.

2.3 Pop-Up Reminder Actions

When a popup reminder or customer event is triggered, several options are available to help you review, acknowledge, or manage the note. The actions below explain how each option affects the reminder.

Ack

Acknowledge the note, enter a reason, and confirm to stop it appearing again.

Print

Prints the list of notes.

Inc Ack/Exc Ack

Includes or excludes any previously acknowledged notes for the item.

Inc Fut/Exc Fut

Includes or excludes any notes set with future dates.

View Aud

Views an audit trail relating to the notes, from the date it was created.

Ignore

Use Esc or F9 to ignore the note and enter a reason. The note will continue to appear until acknowledged.

3. VIEWING AND MANAGING EVENTS

3.1 Event List

To see a list of all outstanding events for a specific user or department, navigate to the **Document Approval/Events** program.

In Gold, navigate to
Purchase Ledger > Document Management > Document Approval / Events > User Event

| Pln | Created | From | Action | To | Expiry | Sts | Event Cd | Comment |
|-----|------------|------|------------|----|------------|-----|----------|--|
| * | 28/10/2014 | GO | 28/10/2014 | GO | 31/12/1999 | OK | CUSREM | Remind Mr Hogg that he is attending our |
| * | 28/10/2014 | GO | 28/10/2014 | GO | 31/12/1999 | OK | CUSREM | Can the next person please remind Mr New |
| * | 08/05/2014 | RA | 02/06/2014 | AB | 31/12/1999 | OK | CUSPAY | Sending payment by end of month |
| * | 08/05/2014 | RA | 02/06/2014 | AB | 31/12/1999 | OK | CUSPAY | Sending payment by end of month |
| * | 08/05/2014 | RA | 02/06/2014 | AB | 31/12/1999 | OK | CUSPAY | Sending payment by |
| * | 28/10/2014 | GO | 28/10/2014 | AB | 31/12/1999 | OK | CUSPAY | Andrew has promised to sending payment b |
| * | 08/05/2014 | RA | 27/10/2014 | AB | 31/12/1999 | OK | CUSPAY | Promised payment by month end |



Did you know?

Events can be forward to another user by selecting the **Forward**. They can also be acknowledged by selecting **Ack**.

3.2 Events Report (Printing/Exporting)

You can print a list of all outstanding events or export to Excel. Learn how to do this below.

In Gold, navigate to
Purchase Ledger > Document Management > Events Report

1. On the **Select** tab, choose the required options and select **OK**.

2. On the **Print** tab, choose the required options and select **OK** to print or export.



Did you know?

The **Actions** button is visible at the top of the screen in other Gold programs, making it easy to check reminders no matter where you are in the system.



4. USEFUL INFORMATION



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