Notes: Overview

Section Objectives

At the end of this chapter, you should be able to:

- Create brief notes using the Note to Supplier or Note to Receiver fields
- Create notes using the Attachments function
- View notes
Using Notes

Entering Notes

- You can create optional notes of varying lengths and purposes on requisitions and purchase orders.

- You can enter Brief Notes, limited to 240 characters, through the Note to Supplier and Note to Receiver fields.

- You can enter longer notes by using the Attachments feature.

- Only Notes to Supplier will print on the Purchase Order.
Using Notes

Attachments

- Notes to various individuals at the Header, Lines or Shipments level can be entered through Attachments

- Notes can be viewed only in the region in which they were created. For example, if a note was entered at the Lines level, then it must be viewed at the Lines level.

- On Purchase Orders you are limited to creating attachments of the type “Text”. Although the system allows you to attach files to Purchase Orders, attached files will not go through the fax server, when your order is faxed to a supplier.

- On Requisitions you can create attachments that are Text or Files. Requisitions forward from departments to the Central Purchasing Department, and the buyers are able to see files attached to Requisitions (e.g., E-Quotes).

Points to Remember:

- Note to Supplier
  The only note that prints on a Purchase Order

- Note to Receiver / Note to Payables / Note to Purchasing
  Recipient will be able to view the note, but it does not print on the Purchase Order
Entering One-Time Notes

Enter a Purchase Order for a computer from Dell Marketing LP based on an E Quote for $2,039.

Include notes to the supplier – one using the Note to Supplier field, and one using Attachments. Submit the Purchase Order for approval when it is completed.

1. Navigate to the Purchase Orders screen

2. Enter the Header information

- Supplier – Dell Marketing LP
- Site – RoundRock
- Supplier Contact – Cust Serv, Fax
- Communication Method – Fax
- Description – Computer for Madison’s lab
- Ship-To – Salk-2189

3. Click in the Note to Supplier Field
Entering One-Time Notes

4. Enter the following note:  *Please fax order confirmation to Name @ Fax #*

5. Click on Add Attachment button

- Title – Delivery Instructions
- Category – To Supplier
- Type – Text (*Note: donot attach Files or URL’s to Purchase Orders. They will not go through the Fax Server to the supplier*)
  - Our office is moving the week of December 5. If delivered before that date, deliver to Salk-2189. After December 15, deliver to Salk 1100.

6. Click Apply, then click Save.
7. The Attachment is stored as a file. It can be updated and deleted.

8. Complete the rest of the PO with the following information

- Description – Dell Computer 4500 series, E-Quote 626101621
- Category – Computers.Personal Desktop Computers
- Qty – 2039
- Unit – US Dollars
- Price – 1
- Need-By -- Two weeks from today
8. Enter Charge Account information at the Line or Distribution level

9. Return to the Header region and Save.

10. To preview the notes as they will print on the order click View PDF from the Actions Drop-down menu, and click Go.
Entering One-Time Notes

- Notes to Supplier and Attachments entered at the Header level print in the Notes & Buyer Info. area
- Attachments can be entered at the Line level, and will print below the PO line