



College Financial System User Procedure

Title:


Enter Standard and One-Time Notes (Using Purchase Orders)

Description:

Standard notes can be used on numerous Purchase Orders and may not be changed. One-Time notes can be used once and may be changed. These notes can be entered at the header or line level of the Purchase Order. If you have created (and approved) a Purchase Order, and a Standard or One-Time note needs to be added to or removed from it, then you will use this procedure.

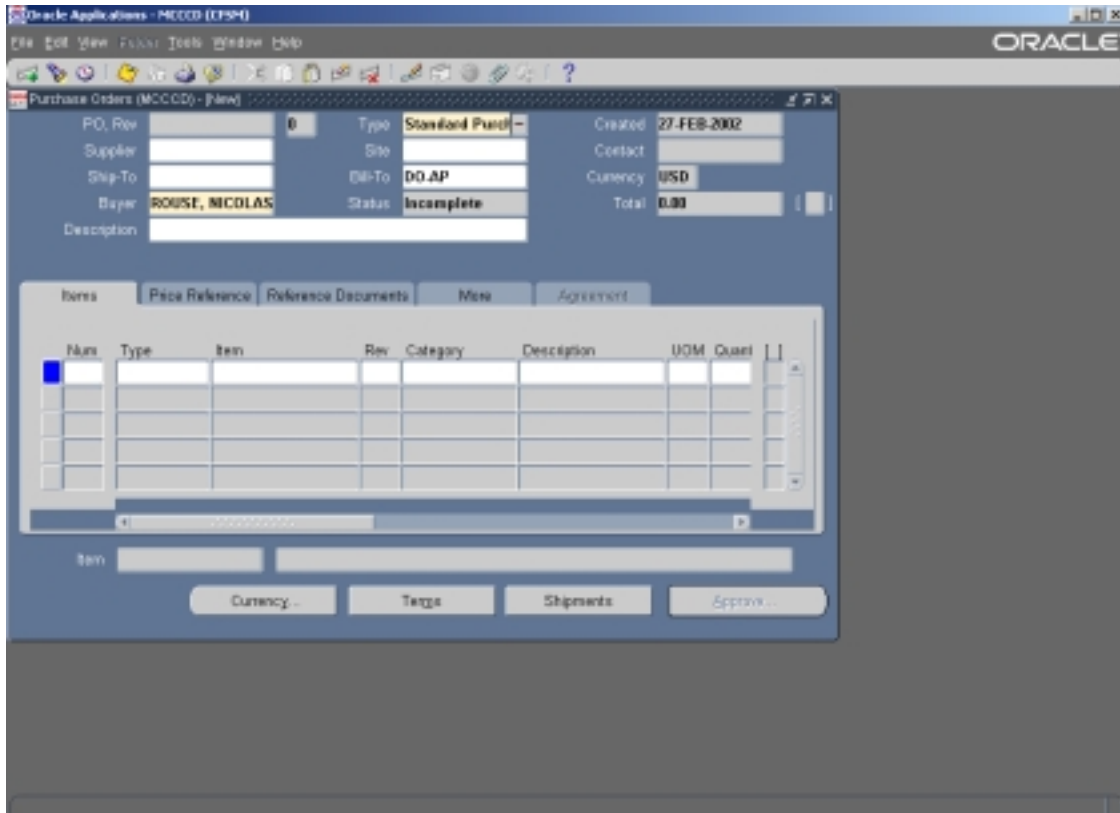
College Financial System (CFS) Prerequisites:

- *A Purchase Order that you have created that has already been Approved and Reserved.*
- *System Navigation skills are required.*

<i>Menu Path</i>
Purchase Orders ➤ Purchase Orders
 Note: You must be the person that created the Purchase Order.

Window Name:

Purchase Orders



1. First, you must press the **F11** key to perform a query on a Purchase Order that you will add to or remove from the Standard or One-Time note.

Window Name:

Purchase Orders

Notice that all of the fields turn light blue after you press F11. You are now in query mode.

Field Name

Description/Action


- 2. PO, Rev** Enter the Purchase Order number that you will be adding to or removing the note from.
- 3.** To execute the query, hold down the **CTRL** button on your keyboard, and then press the **F11** key.

Window Name:

Purchase Orders

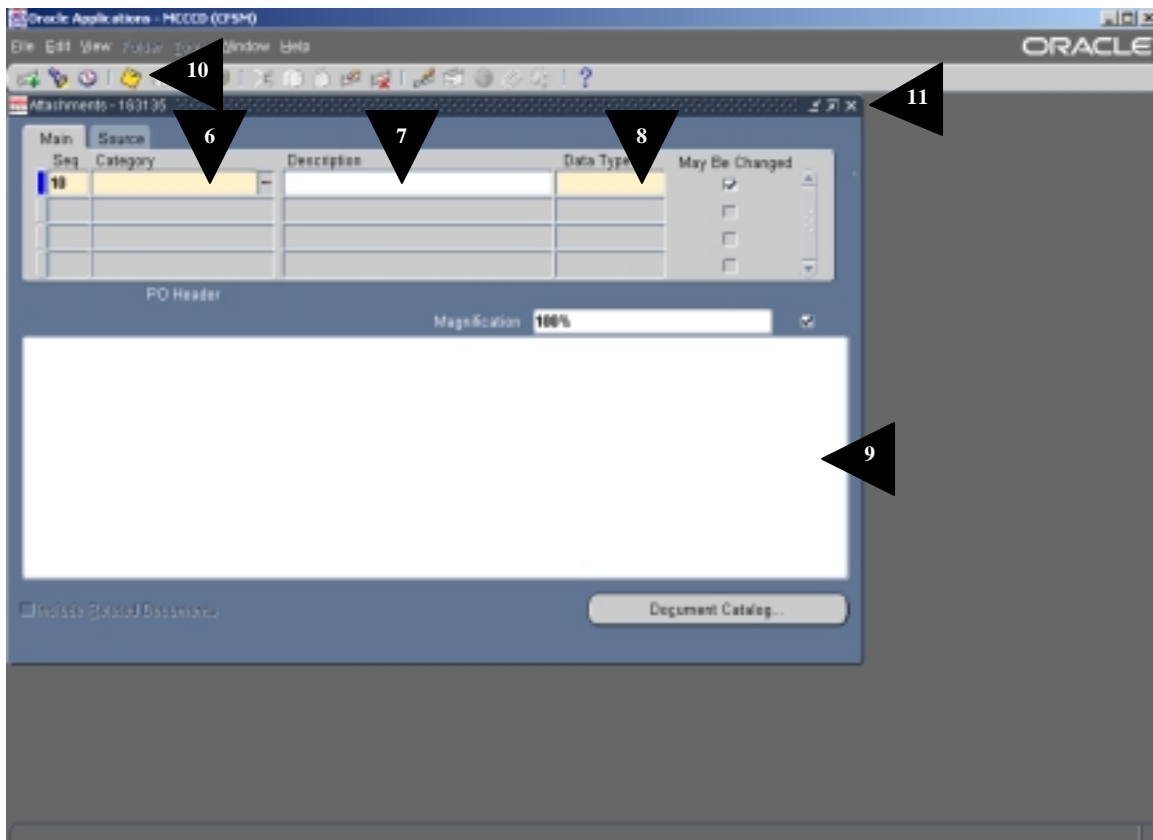
Num	Type	Item	Rev	Category	Description	UOM	Quant
1	Svc-Dollars		961.00	(Contract for Profess		US D	1200

Once you have executed the query on the Purchase Order you want to add to or remove the Standard or One-Time note from, the Purchase Order will appear.

4. Click within a field in the header of the Purchase Order to add to or remove a note from the header, or click within a field in the Purchase Order line to add to or remove a note from a specific Purchase Order line.
5. Once you have clicked in a field on the header or line, click on the Attachments  button.

Window Name:


Attachments



The “Attachments” window will appear after you click the “Attachments” button on the Purchase Orders window. The following steps will show you how to enter a One-Time Note on the Purchase Order header.


Field Name	Description/Action
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6. Category	Select the category from the list of values.
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 **Note:** Below the “Category” field in white letters, you will notice the text “PO Header or PO Line” which lets you know that you are entering the note for the header or line.

7. Description	Enter a short description for the One-Time note.
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8. Data Type	Select the data type from the list of values.
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 **Note:** If this is a note that contains less than 2,000 characters, select “Short Text” from the list of values. If it is longer, select “Long Text.”

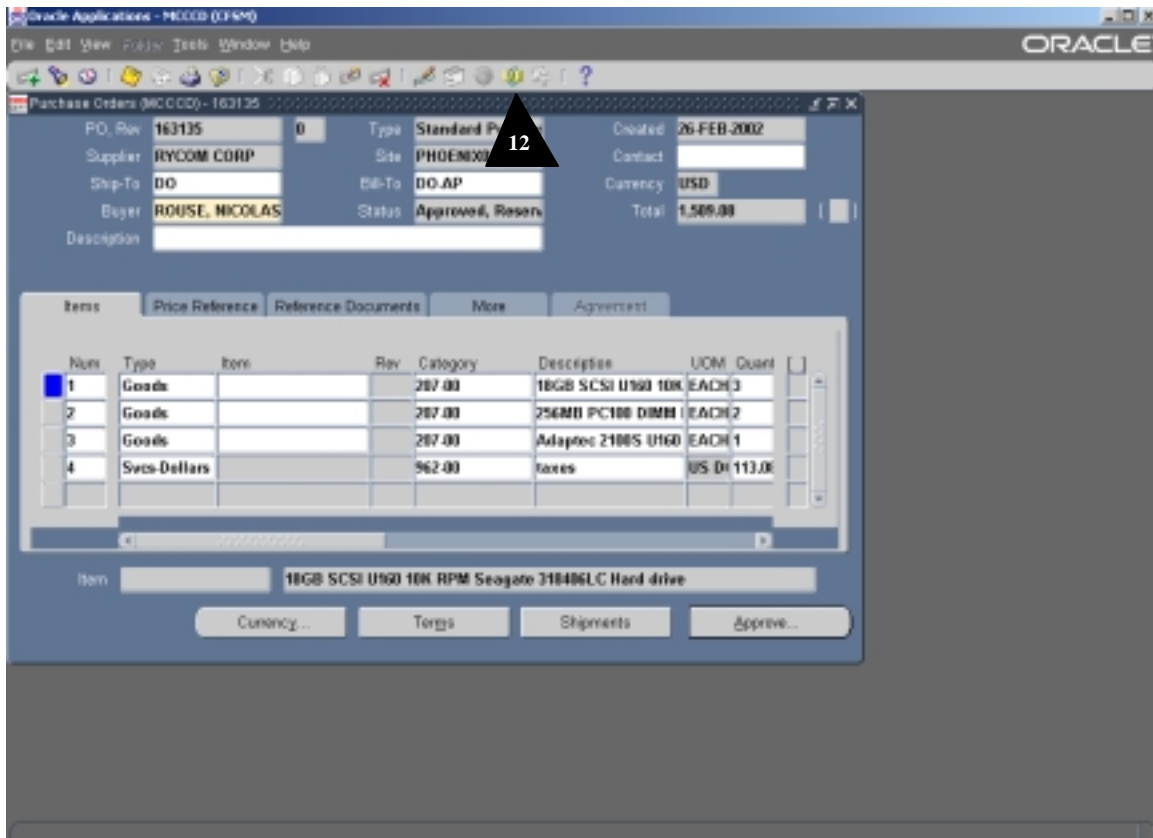
9. Enter the contents of the One-Time note here.

 **Note:** As a general rule, you may want to insert a blank line or two above and below the contents of the “One-Time” note.

10. Click the save  button to save the note.

11. Click “X” to close the window and return to the “Purchase Orders” window.

Window Name:
Purchase Orders

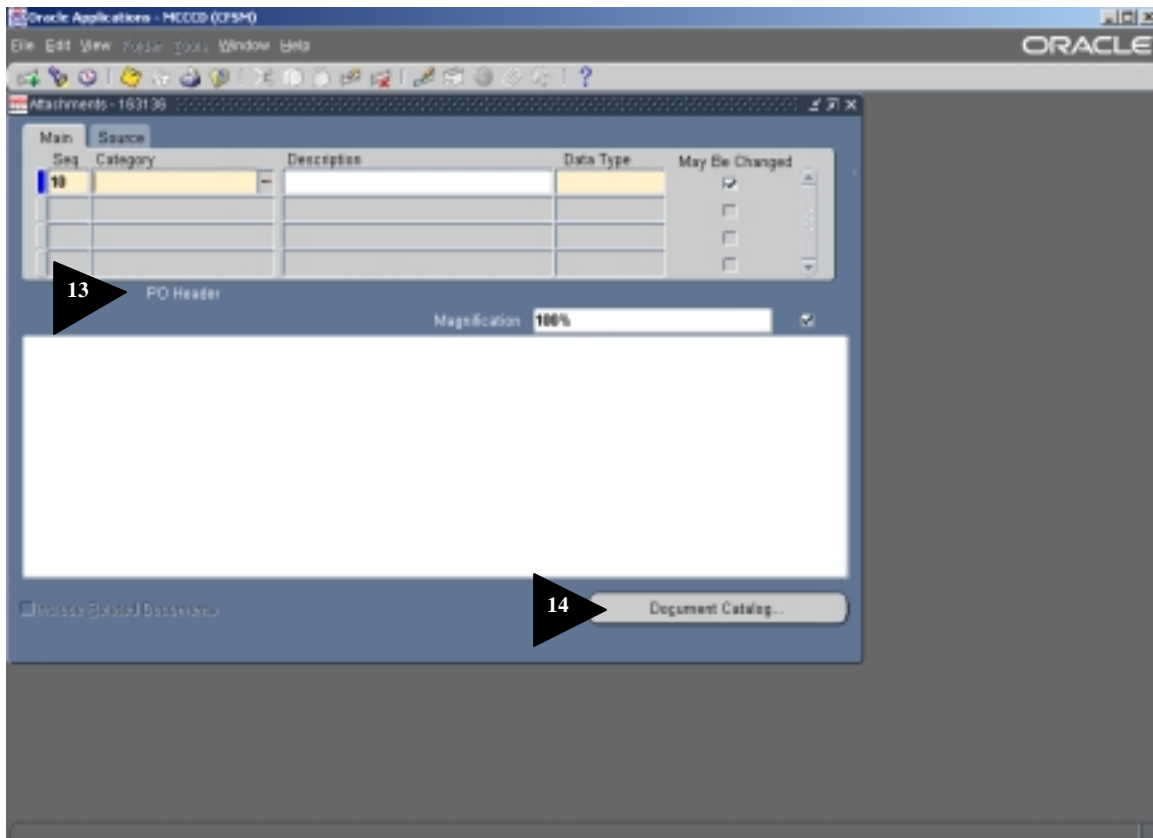


Now you are back to the “Purchase Orders” window. Notice that the “Attachments” button that was a paper clip, is now a paper clip with a yellow note attached to it. Now that you have learned how to enter a “One-Time” note on your existing Purchase Order, you will now need to learn how to attach a “Standard” note to it.

12. Click on the “Attachments” button to get back into your notes.

Window Name:

Attachments

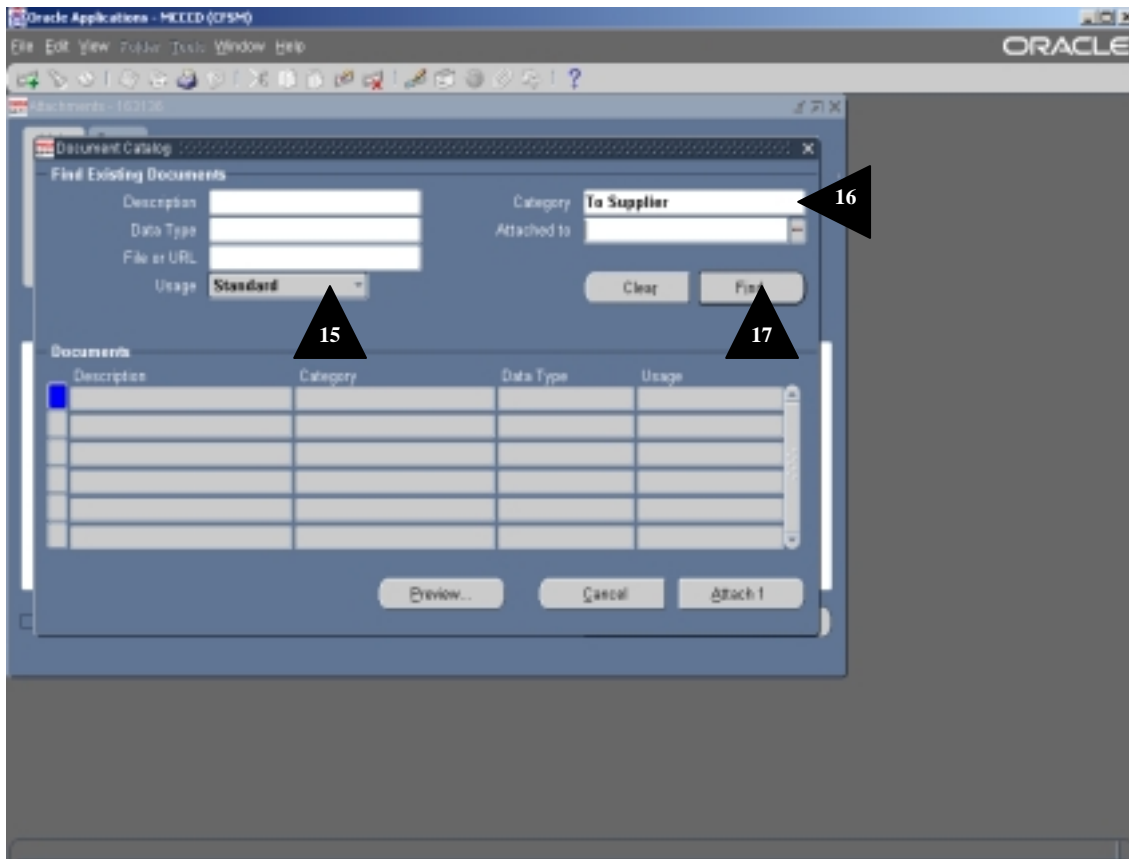


The process in which to add a “Standard Note” requires more steps than entering a “One-Time” note. These “Standard” notes may not be edited like “One-Time” notes can.



13. Verify that you are in the “PO Header” or “PO Line.”

14. Click on the **DOCUMENT CATALOG** button.

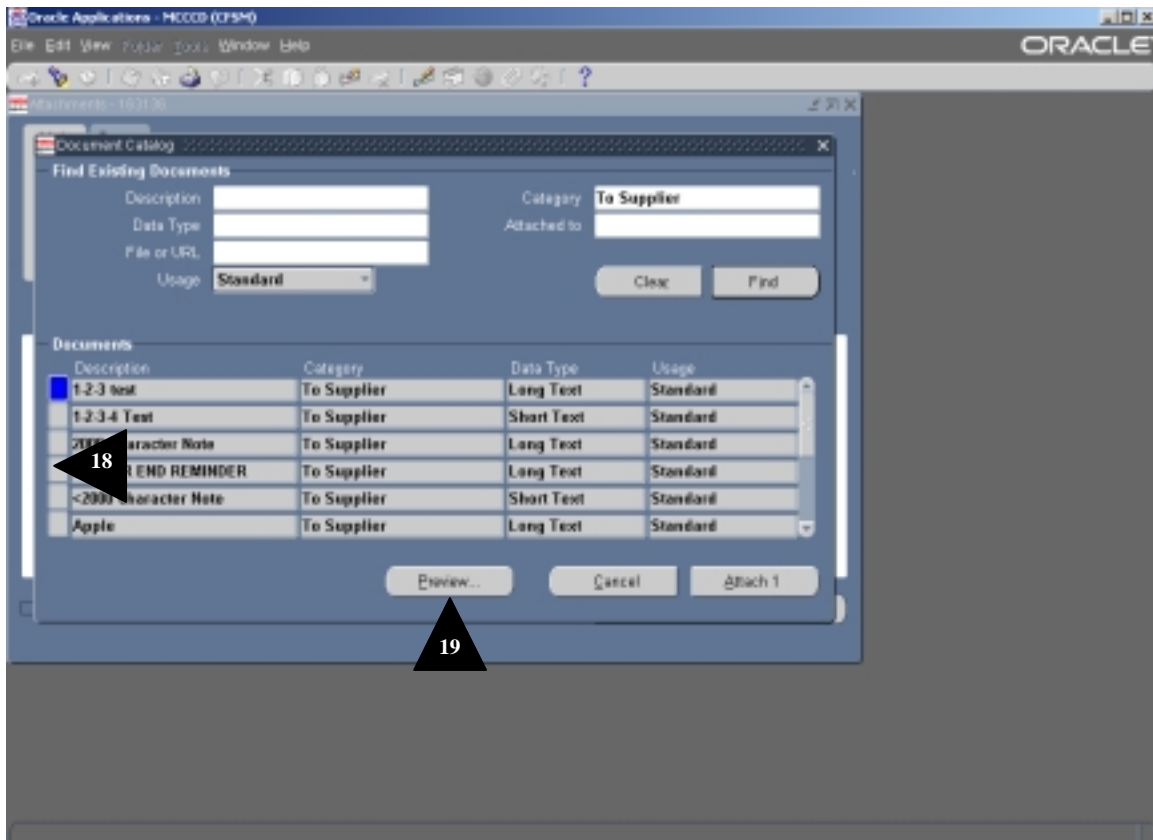
Window Name:
Document Catalog



In order to enter Standard notes on a Purchase Order header or line, you must go into the document catalog. Below are the steps to take to attach a Standard note to the Purchase Order header or line.


- | Field Name | Description/Action |
|--|--|
| 15. Usage | Select the usage from the drop-down menu. |
|  Note: For Standard notes, select “Standard.” | |
| 16. Category | Select the category from the list of values. |
|  Note: For Standard notes to suppliers, select “To Suppliers.” | |
| 17. Click FIND | to display all Standard notes to suppliers. |

Window Name:
Document Catalog



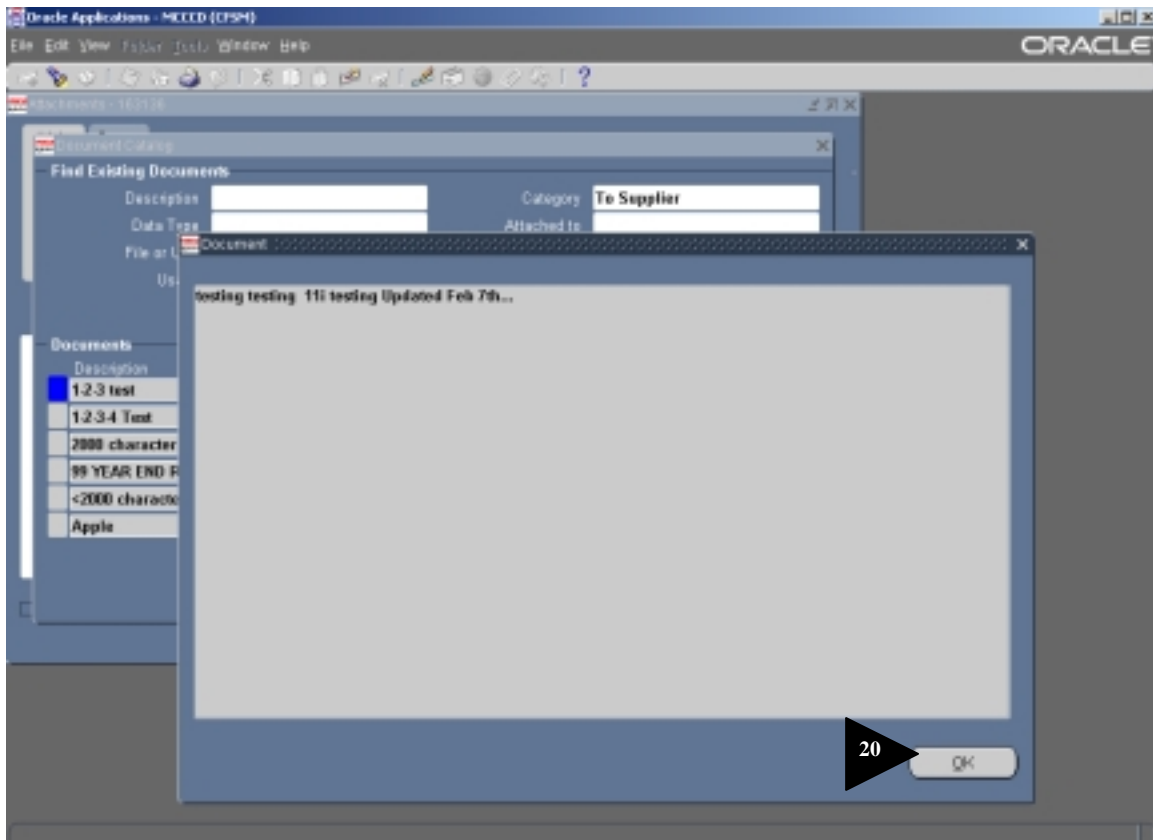
The Standard notes will appear in the “Documents” zone in the document catalog window. There are two ways in which you may preview the notes prior to attaching them to the Purchase Order header or line.

18. Click on the field to the left of the “Description” field, and the “Document” window will automatically open (this previews the note).
19. Click within any of the fields on the note you want to preview, then click the **PREVIEW...** button.

 **Note:** If you know what the note says, and you want to attach the note to the header or line, you may click in any field on the line of the note you would like, then click the “ATTACH 1” button.

Window Name:

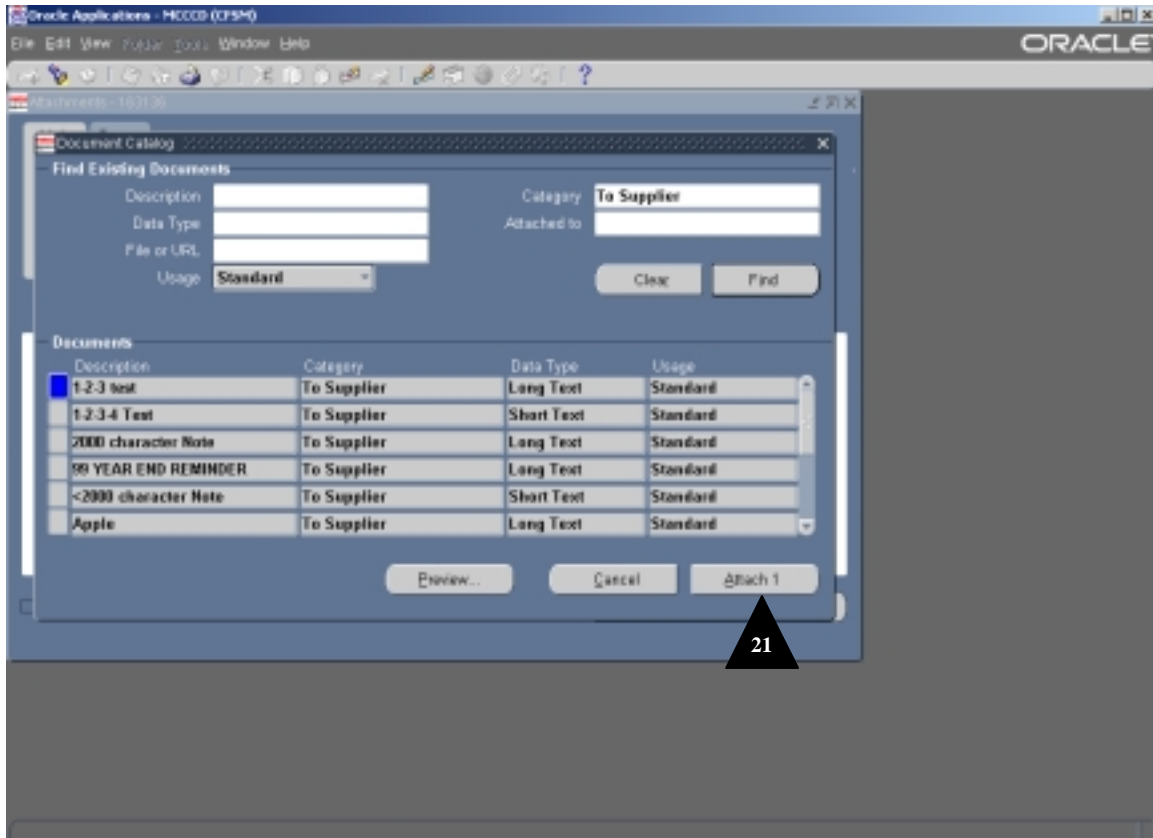
Document



A “Document” window will appear once you have selected the Standard note that you wanted to preview.

20. Click the **OK** button to get back to the Document Catalog.

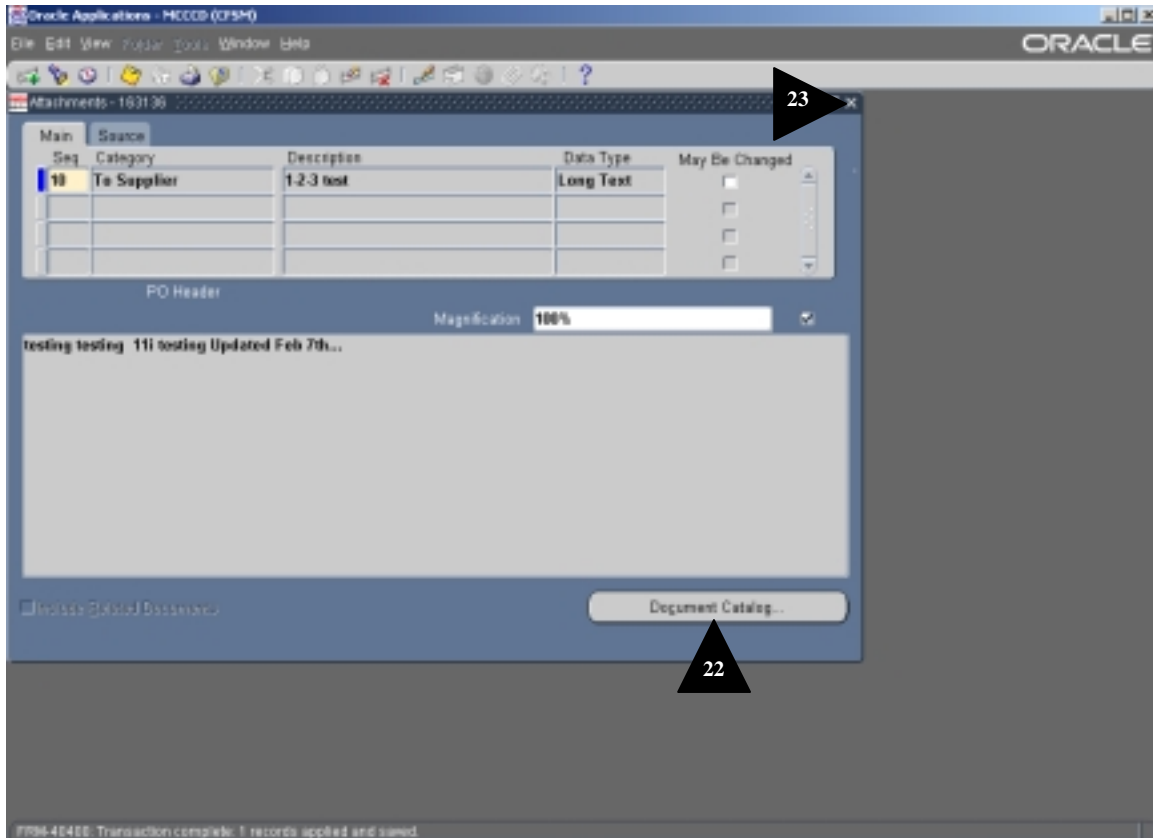
Window Name:
Document Catalog



21. Once you have previewed the Standard note and are ready to attach it to the Purchase Order header or line, make sure the field to the left of “Description” is highlighted (blue), then click the **ATTACH 1** button.

Window Name:

Attachments



You will be returned to the “Attachments” window, and the Standard note will automatically be saved to the Purchase Order header or line.

22. If you wish to enter more Standard notes to the Purchase Order header or line, click on the **DOCUMENT CATALOG** button and repeat steps 15-21.
23. If you are finished entering Standard notes to the Purchase Order header or line, click on the “X” in the upper right corner of the “Attachments” window to get back to the “AutoCreate to Purchase Orders” window.



End of procedure