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PURCHASING USER MANUAL

CREATING PURCHASE ORDER NOTES

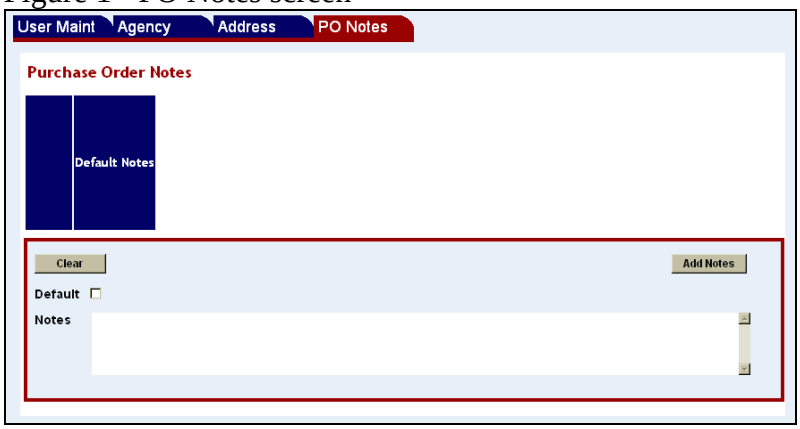
INTRODUCTION

An administrator can create notes or messages that purchasers can select from and append to a purchase order. The administrator can set which notes will be default notes so that they will automatically print on every purchase order without the purchaser having to select them.

TO CREATE PURCHASE ORDER NOTES

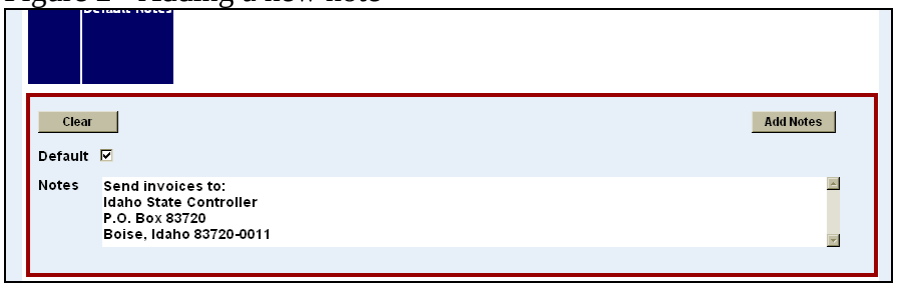
1. On the Administration screen, click the **PO Notes** tab.

Figure 1 - PO Notes screen



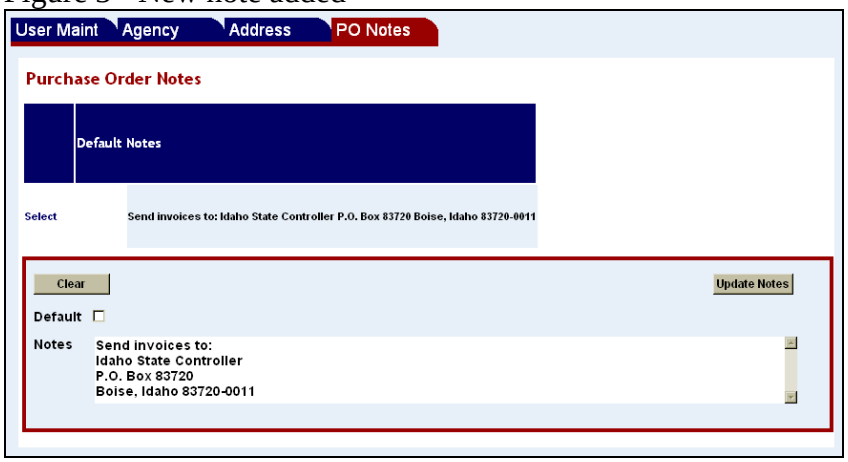
2. In the **Notes** field, type the message you want to appear on a purchase order (up tp 2000 characters). Do not use special characters or symbols, including **&**, **'**, **"**, <, and \. Press ENTER to add separate lines, e.g., as in an address.

Figure 2 - Adding a new note



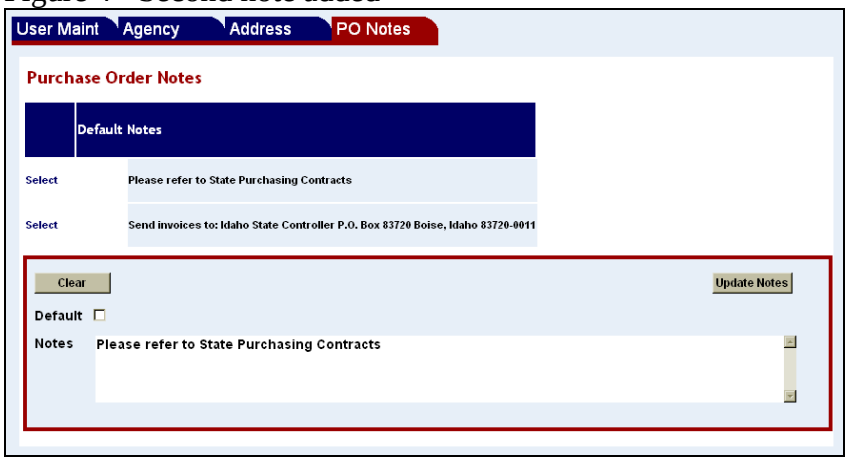
3. Check the **Default** check box if you want the note to print automatically on every purchase order. (You may check more than one, but this can cause printing problems on the purchase order. See below.)
4. Click **Add Notes**.

Figure 3 - New note added



5. To add another note, click **Clear**.
6. In the **Notes** field, type the message you want to appear on a purchase order (2000 character limit).
7. Check the **Default** check box if you want the note to print automatically on every purchase order.
8. Click **Add Notes**.

Figure 4 - Second note added

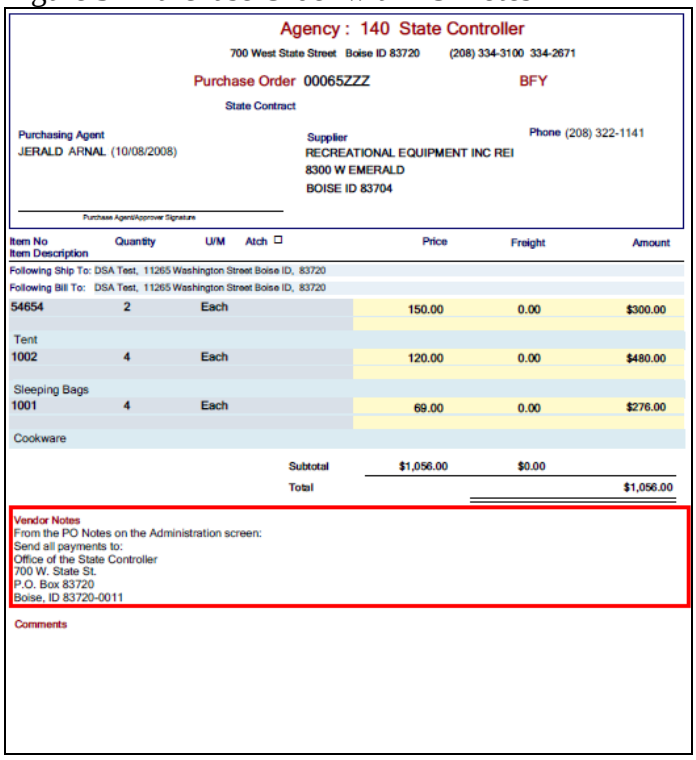


9. To edit a note, click **Select** next to the note.
10. Edit the **Notes** text and then click **Update Notes**.

SELECTING PO NOTES

If needed, Purchasers can select which Default notes they want to apply to a purchaser order. A purchaser would click the **Vendor Notes** icon on the **PO** screen and then click the **Default** tab on the **Vendor Notes** pop-up dialogue box. The Purchaser can then check or uncheck the default notes and click **Save**. Default notes will print in the **Vendor Notes** section of the purchase order.

Figure 5 - Purchase Order with PO Notes



Agency : 140 State Controller
700 West State Street Boise ID 83720 (208) 334-3100 334-2671

Purchase Order 00065ZZZ BFY
State Contract

Purchasing Agent
JERALD ARNAL (10/08/2008)

Supplier
RECREATIONAL EQUIPMENT INC REI
8300 W EMERALD
BOISE ID 83704

Phone (208) 322-1141

Purchase Agent/Approver Signature

Item No / Item Description	Quantity	U/M	Atch ☐	Price	Freight	Amount
Following Ship To: DSA Test, 11265 Washington Street Boise ID, 83720						
Following Bill To: DSA Test, 11265 Washington Street Boise ID, 83720						
54654	2	Each		150.00	0.00	$300.00
Tent						
1002	4	Each		120.00	0.00	$480.00
Sleeping Bags						
1001	4	Each		69.00	0.00	$276.00
Cookware						
			Subtotal	$1,056.00	$0.00	
			Total			$1,056.00

Vendor Notes
From the PO Notes on the Administration screen:
Send all payments to:
Office of the State Controller
700 W. State St.
P.O. Box 83720
Boise, ID 83720-0011

Comments

PRINTING PROBLEMS WITH PO NOTES

Selecting too many default notes may cause the notes to print past the bottom margin of the page. It is also possible that PO Notes that have many, many separate lines (e.g., an itemized list) may print past the bottom margin of the page.

If you have a long document to print along with a purchase order, create it in PDF and store it on a network drive. Purchasers can then add it as an attachment and will be able to select it when they print the purchase order. Click here for instructions on how to attach a document to a purchase order.