

Step-by-Step Guide

Adding Notes and Attachments



In This Guide

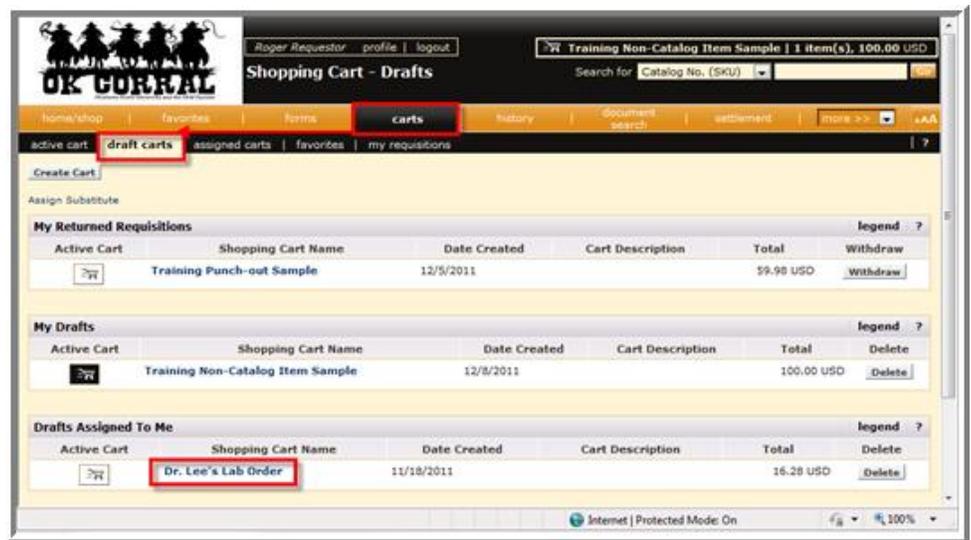
- ✓ Adding internal notes and attachments

This guide demonstrates how to add header level notes and attachments to your shopping cart.

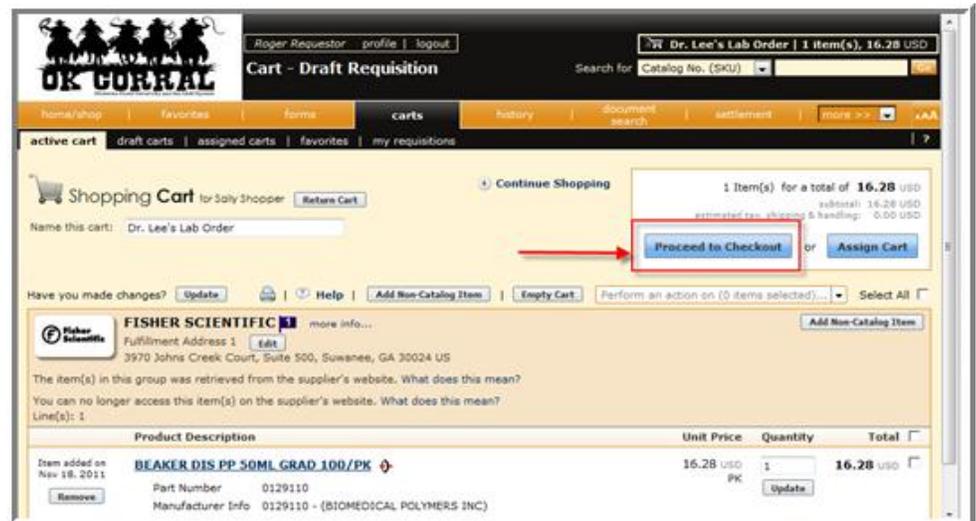
Internal Notes and Attachments are visible to the shopper, requester and all approvers of the requisition.

Procedure

1. Access your shopping cart by clicking **carts** ⇒ **draft carts** . Locate the shopping cart you want to process.
2. Click the shopping cart name to select your active cart.



3. Click the **Proceed to Checkout** button.



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4. Click the **Requisition Summary** tab.
5. Scroll down to the **Internal Notes and Attachments** section.
 - a. To add an **Internal Note**: Click the **edit** button, enter your notes, and click the **Save** button.
 - b. To add Internal **attachments**: Click the **add attachment...** link, select the **Attachment Type** and click **Browse** to search for the attachment. Click the **Save** button.

The screenshot shows the 'Requisition Summary' page with the following sections:

- General**: Cart Name (Dr. Lee's Lab Order), Description (no value), Requestor (Roger Requestor), Priority (Normal), Shopper (Sally Shopper), Contract # (no value), Campus Code (PS Panhandle State).
- Shipping**: Ship To (Attn: Sally Shopper, Room ROOM DEFAULT, Dept AAD0320 - FINANCIAL INFORMATION MANAGEMENT, Adair Cnty Ext Office, 220 W Division St Crthse Basement, Stilwell, OK 74960, United States), Delivery Options (Req Delivery no value).
- Billing**: Bill To (Connors State College, Accounts Payable, 918-463-6329, Rt 1 Box 1000, Warner, OK 74469, United States), Billing Options (Accounting Date no value).
- Accounting Codes**: Account String (AA111000 OSU/A&M RGNTS FEE (AA-1-11000)), Commodity (Bldgs Constructn/Renov/Rental Construction, Renovations, Renewals and Replacement, Space Rental, Land Purchase), Sub Code (4400 PURCH FIXT EQUIP), Fiscal Year (12 2012).
- Internal Notes and Attachments**: Internal Note (edit), Internal Attachments (add attachment...), AIM Part # (no value), AIM Bin # (no value).
- PO Clauses**: PO Clauses (no clause).

- ▲ You can add line level notes and attachments in the **Supplier/Line Item Details** section.
- ▲ You can also view attachments by clicking on the **Attachments** tab.

You have successfully added a note or an attachment to your shopping cart.