



Version	9.0
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Entering Comments

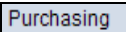
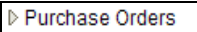

Concept

There are many places in MaineStreet Purchasing where you may wish to enter a comment, e.g., a message for the record, a message to send to the vendor, a message for your voucher-entry staff etc. The comment can be a standardized comment that you can select or it may be an ad hoc comment specific to the line item, purchase order etc.

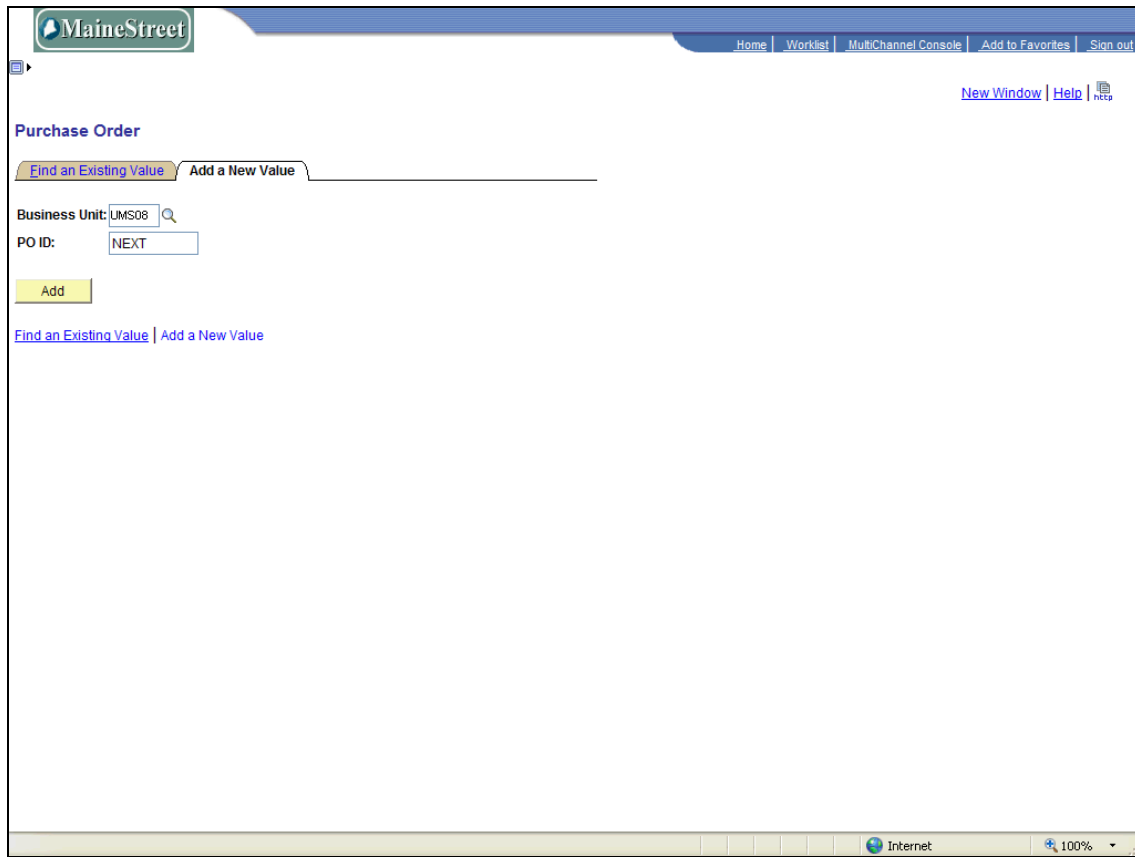
This Business Process document will include both the standard comments and ad hoc comments. We will use a PO Header comment as the example but the same processes apply anywhere else you have the opportunity to enter a comment (requisition header, requisition line receipt, etc.)

Navigation



Step	Action
1.	Begin by navigating to the Purchase Order page. From the Financials menu, click on the Purchasing link. 
2.	Click the Purchase Orders link. 
3.	Click the Add/Update POs link. 

Procedure



Step	Action
4.	On the Purchase Order - Add a New Value page, click on the Find an Existing Value tab. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;"> Find an Existing Value </div>

Process Document

Financials 9.0: Entering Comments



MaineStreet Home Worklist MultiChannel Console Add to Favorites Sign out

New Window Help

Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Business Unit: = UMS08

PO Number: begins with

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Name 1: begins with

Buyer: begins with

PO Type: =

Purchase Order Reference: begins with

Department: begins with

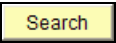
Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value [Add a New Value](#)

javascript:submitAction_win0(document.win0,'UM_PO_SRCH_BUSINESS_UNIT\$prompt');

Internet 100%

Step	Action
5.	On the <i>Find an Existing Value</i> page, enter a PO number in the <i>PO Number</i> field.
6.	Click the Search button. 

Maintain Purchase Order

Purchase Order

Unit: UMS08 Department charging is System Office Copiers PO Status: Dispatched
 PO ID: 8000001052 Budget Status: Valid
 Change Order: 3
 Copy From: [dropdown] Hold From Further Processing

Header

*PO Date: 07/14/2008 Vendor Search
 Vendor: IMAGISTICS-004 Vendor Details
 *Vendor ID: 0000093132 OCE IMAGISTICS INTERNATIONAL INC
 *Buyer: 0099999 Employee Name
 PO Reference: [text box]

Backorder Status: None Create BackOrder
 Receipt Status: Not Recvd
 *Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 59,200.00
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 59,200.00 USD

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Add Comments](#) [Requisitions](#)

Select Lines To Display

Purchasing Kit Catalog Item Search Line: [text] To: [text] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		RENTAL FEE FOR COLOR COPIERS	16000.0000	EA	MISC	1.00000	16,000.00	Active
2		COLOR CLICKS ON COLOR COPIERS. .06/CLICK	9000.0000	EA	MISC	1.00000	9,000.00	Active
3		B/W CLICKS ON COLOR COPIERS. .009/CLICK	4200.0000	EA	MISC	1.00000	4,200.00	Active
4		B/W CLICKS ON B/W COPIERS. .015/CLICK	9391.3300	EA	MISC	1.00000	9,391.33	Active

Step	Action
7.	<p>Use the Purchase Order page to enter or change PO information.</p> <p>Click the Add Comments link to enter comments for a transaction. You can enter a unique comment or select from predefined standard comments.</p> <p>Note: If the link says Edit Comments, comments were previously added.</p> <p>Click the Add Comments link.</p> <p>Add Comments</p>

Process Document

Financials 9.0: Entering Comments



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

PO Header Comments

Unit: UMS08 PO ID: 8000001052 Vendor: IMAGISTICS-004 Change Order: 3

Retrieve Active Comments Only Retrieve

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All | First 1 of 3 | Last

[Copy Standard Comments](#) Comment Status: Active Inactivate +

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

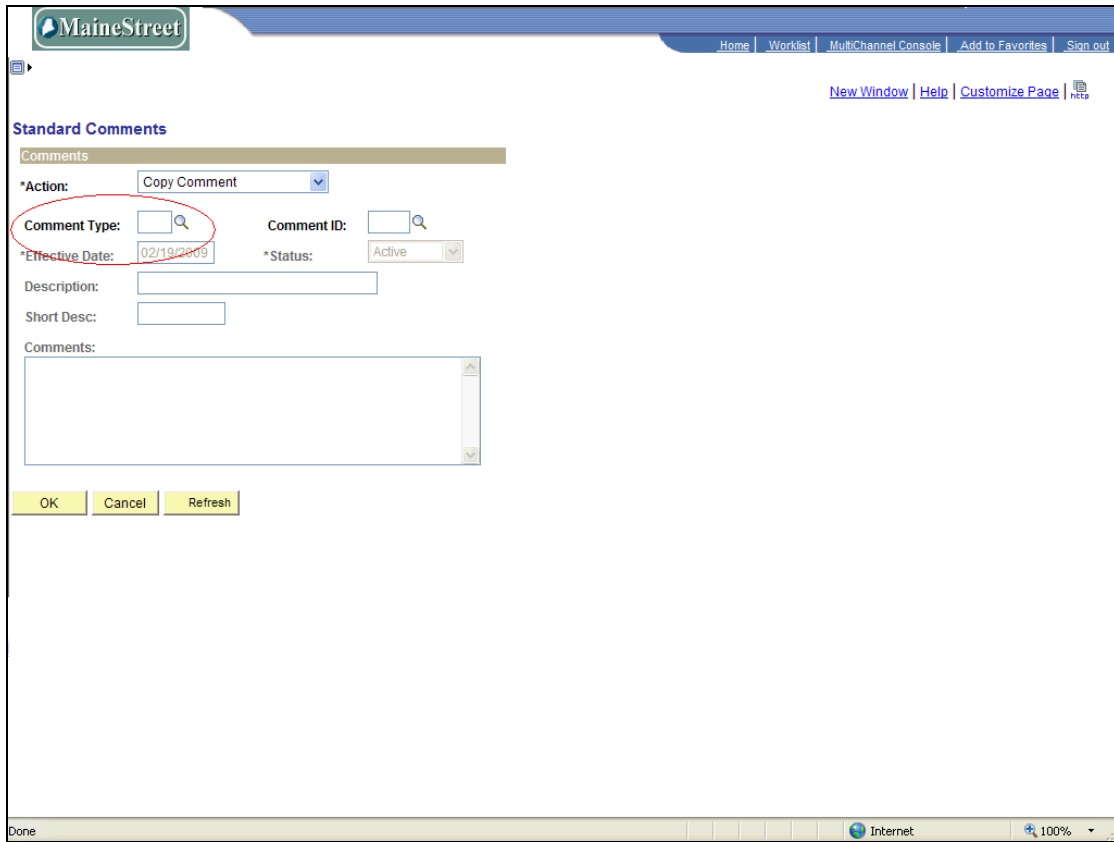
Attachment	Attach View Delete <input type="checkbox"/> Email
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[From -> REQ UMS08-8000000937](#)

OK Cancel Refresh

Internet 100%


Step	Action
8.	<p>Use the PO Header Comments page to enter comments.</p> <p>Click the Copy Standard Comments link to open the Standard Comments page.</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Copy Standard Comments</div>



The screenshot shows the 'Standard Comments' page in a web browser. The page title is 'Standard Comments'. Below the title is a 'Comments' section with the following fields and controls:

- *Action:** A dropdown menu set to 'Copy Comment'.
- Comment Type:** A text input field with a magnifying glass icon (lookup button) to its right. This field and its lookup button are circled in red in the original image.
- Comment ID:** A text input field with a magnifying glass icon to its right.
- *Effective Date:** A date input field containing '02/19/2009'.
- *Status:** A dropdown menu set to 'Active'.
- Description:** A text input field.
- Short Desc:** A text input field.
- Comments:** A large text area for entering the comment text.

At the bottom of the form are three buttons: 'OK', 'Cancel', and 'Refresh'. The browser's status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.

Step	Action
9.	<p>On the Standard Comments page, you need to specify the comment type code. Click on the Comment Type lookup button to see the Comment Types for your business unit.</p> <p>Click on the lookup button.</p> 

Process Document

Financials 9.0: Entering Comments



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Look Up Comment Type

SetID: UMS08

Standard Comment Type:

Description:

[Basic Lookup](#)

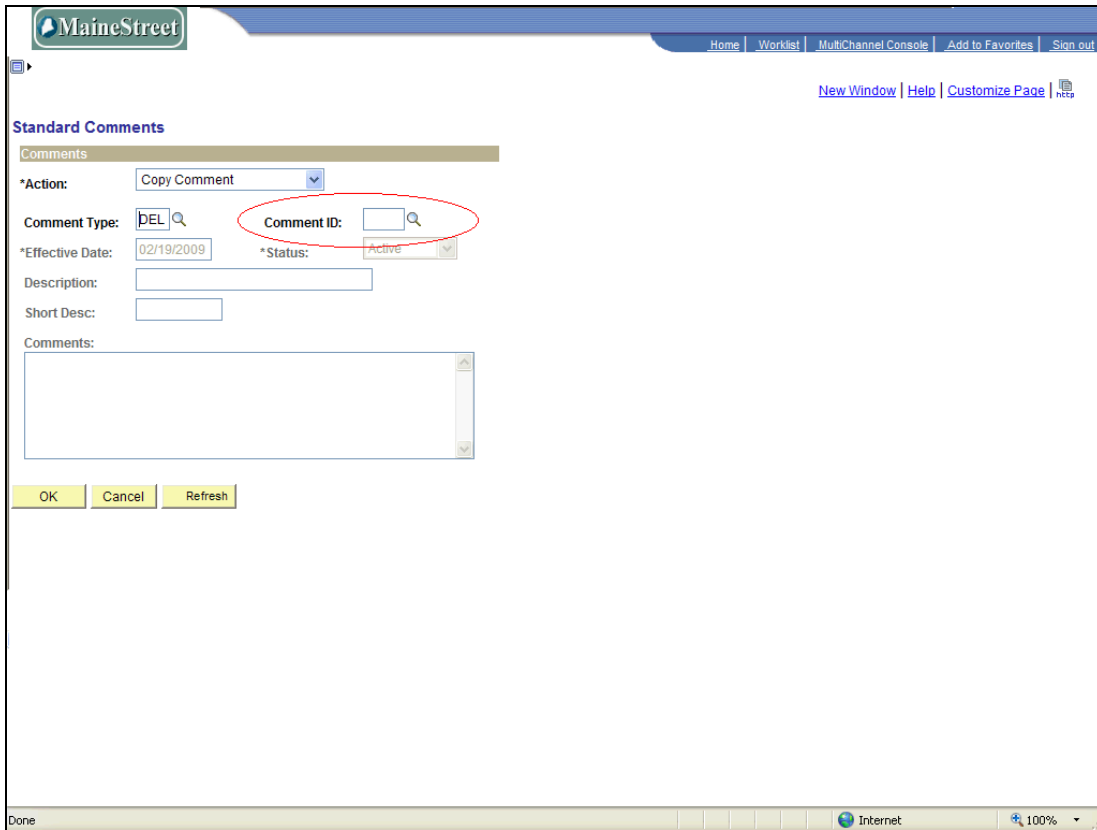
Search Results

View All 1-7 of 7

Standard Comment Type	Description
ACC	Vendor's Account Number
CON	CONSTRUCTION
DEL	Delivery Instructions
HZ	Hazardous Materials
INS	Insurance
MIS	Miscellaneous
TYP	Order Type

Internet 100%


Step	Action
10.	On the Look Up Comment Type page, click on the appropriate comment type to select it.



The screenshot shows the 'Standard Comments' form in the MaineStreet application. The form has a header with the MaineStreet logo and navigation links (Home, Worklist, MultiChannel Console, Add to Favorites, Sign out). Below the header, there are links for 'New Window', 'Help', and 'Customize Page'. The form itself is titled 'Standard Comments' and contains the following fields:

- *Action:** A dropdown menu set to 'Copy Comment'.
- Comment Type:** A dropdown menu set to 'DEL' with a search icon.
- *Effective Date:** A date field set to '02/19/2009'.
- *Status:** A dropdown menu set to 'Active'.
- Description:** A text input field.
- Short Desc:** A text input field.
- Comments:** A large text area for entering the comment text.
- Comment ID:** A text input field with a search icon, circled in red in the image.


At the bottom of the form, there are three buttons: 'OK', 'Cancel', and 'Refresh'. The browser's status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.


Step	Action
11.	<p>Next, you need to enter a standard comment using its <i>Comment ID</i>. There are different comments available depending on the selected Std Type.</p> <p>Click on the <i>Comment ID</i> lookup button.</p> 

Process Document

Financials 9.0: Entering Comments




Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | 

Look Up Comment ID

SetID: UMS08
 Standard Comment Type: DEL
 Standard Comment ID:
 Description:

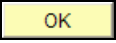
[Basic Lookup](#)

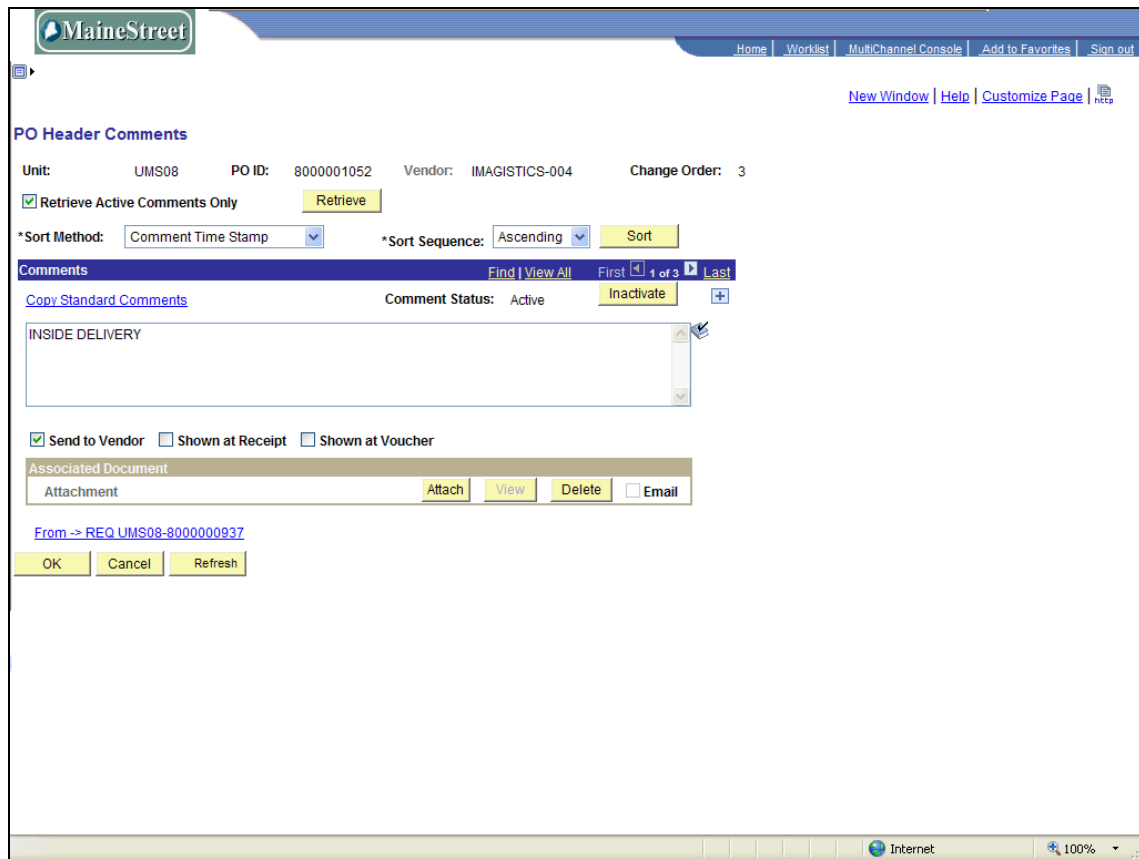
Search Results

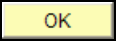

View All First 1 of 1

Standard Comment ID	Description
INSI	INSIDE DELIVERY

Internet 100%

Step	Action
12.	On the Look Up Comment ID page, click on the appropriate Comment ID to select it.
13.	Click the OK button. 



Step	Action
14.	<p>The PO Header Comments page reappears with the comment text displayed.</p> <p>Select the Send to Vendor check box if you want comments to appear on purchase orders dispatched to vendors. If the comments are for internal use only, clear the check box.</p> <p>For this example, leave the Send to Vendor box checked.</p>
15.	<p>Select the Shown at Receipt check box if you want comments to appear when the receipt is created.</p> <p>Select the Shown at Voucher check box if you want comments to appear when the vouchers are created.</p>
16.	<p>When finished, click the OK button.</p> 
17.	<p>Click the Save button.</p> 

Process Document

Financials 9.0: Entering Comments



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Maintain Purchase Order

Purchase Order

Unit: UMS08 Department charging is System Office Copiers PO Status: Dispatched

PO ID: 8000001052 Budget Status: Valid

Change Order: 3

Copy From: Hold From Further Processing

Header

*PO Date: Vendor Search

Vendor: [Vendor Details](#)

*Vendor ID: OCE IMAGISTICS INTERNATIONAL INC Receipt Status: Not Recvd [Create BackOrder](#)

*Buyer: Employee Name *Dispatch Method:

PO Reference:

[Header Details](#) [PO Activities](#) [PO Defaults](#) [Document Status](#) [Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 59,200.00

Freight/Tax/Misc.: 0.00

Total Amount: 59,200.00 USD

Add Items From Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		RENTAL FEE FOR COLOR COPIERS	16000.0000	EA	MISC	1.00000	16,000.00	Active
2		COLOR CLICKS ON COLOR COPIERS. .06/CLICK	9000.0000	EA	MISC	1.00000	9,000.00	Active
3		B/W CLICKS ON COLOR COPIERS. .008/CLICK	4200.0000	EA	MISC	1.00000	4,200.00	Active
4		B/W CLICKS ON B/W COPIERS. .015/CLICK	9391.3300	EA	MISC	1.00000	9,391.33	Active

Internet 100%

Step	Action
18.	Now let's try an ad hoc comment. Click on the <i>Edit Comments</i> link. Edit Comments



Process Document Financials 9.0: Entering Comments

MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

PO Header Comments

Unit: UMS08 PO ID: 8000001052 Vendor: IMAGISTICS-004 Change Order: 3

Retrieve Active Comments Only

*Sort Method: *Sort Sequence:

Comments [Find](#) | [View All](#) [First](#) | [1 of 3](#) | [Last](#)

[Copy Standard Comments](#) Comment Status: Active

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
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[From -> REQ UMS08-8000000937](#)

Internet 100%

Step	Action
19.	This time write your specific comment in the large box in the middle of the PO Header Comments page. If it isn't already, select the <i>Send to Vendor</i> checkbox.

Process Document

Financials 9.0: Entering Comments



Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

PO Header Comments

Unit: UMS08 PO ID: 8000001052 Vendor: IMAGISTICS-004 Change Order: 3

Retrieve Active Comments Only

*Sort Method: *Sort Sequence:

Comments Find | View All First Last

[Copy Standard Comments](#) Comment Status: Active

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

 Email

[From -> REQ UMS08-8000000937](#)

Internet 100%

Step	Action
20.	Click the OK button.
	<input type="button" value="OK"/>



Process Document Financials 9.0: Entering Comments

Maintain Purchase Order
Purchase Order

Unit: UMS08 Department charging is System Office Copiers PO Status: Dispatched
 PO ID: 8000001052 Budget Status: Valid
 Change Order: 3
 Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 07/14/2008 Vendor Search Vendor: IMAGISTICS-004 Vendor Details
 *Vendor ID: 0000093132 OCE IMAGISTICS INTERNATIONAL INC Receipt Status: Not Recvd
 *Buyer: 0099999 Employee Name *Dispatch Method: Print Dispatch
 PO Reference: [Text] Amount Summary

Header Details PO Activities Merchandise: 59,200.00
 PO Defaults Document Status Freight/Tax/Misc.: 0.00 Calculate
 Edit Comments Requisitions Total Amount: 59,200.00 USD

Add Items From Select Lines To Display
 Purchasing Kit Catalog Item Search Line: [Text] To: [Text] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		RENTAL FEE FOR COLOR COPIERS	16000.0000	EA	MISC	1.00000	16,000.00	Active
2		COLOR CLICKS ON COLOR COPIERS. .06/CLICK	9000.0000	EA	MISC	1.00000	9,000.00	Active
3		B/W CLICKS ON COLOR COPIERS. .008/CLICK	4200.0000	EA	MISC	1.00000	4,200.00	Active
4		B/W CLICKS ON B/W COPIERS. .015/CLICK	9391.3300	EA	MISC	1.00000	9,391.33	Active

Step	Action
21.	End of Procedure.