TechBuy provides comments, internal and external notes, and attachments for additional information and communication. The comments, internal notes and attachments are only available within TechBuy and are not sent to the supplier. External notes and attachments allow you to send information to the vendor. This document will review internal and external notes and attachments at the header and line levels.
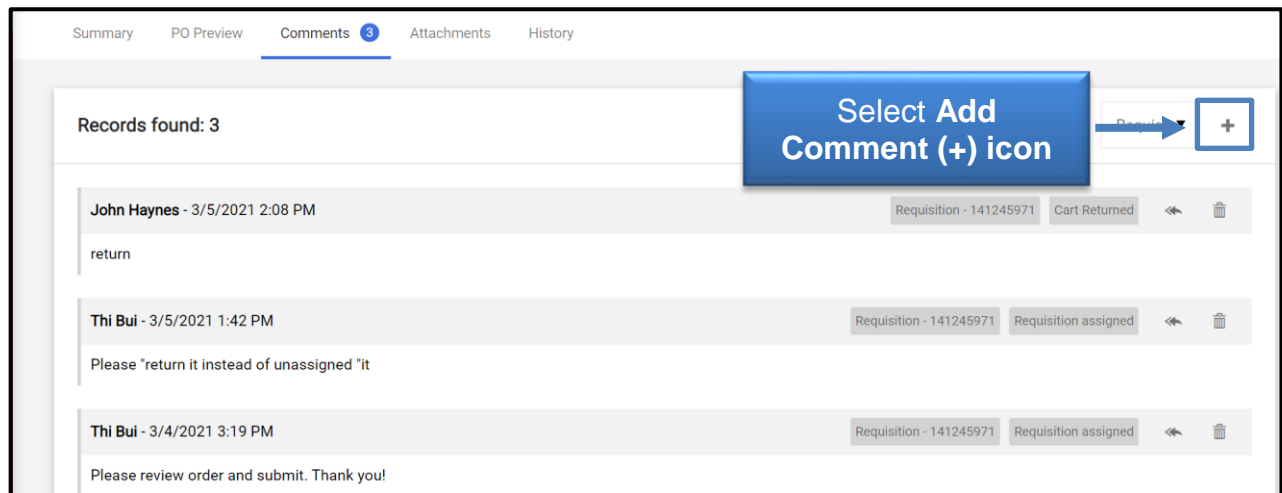

Comments

You can add comments to a cart or requisition at any point during the Review or Approval process. The comments will stay in the order history and can be accessed at any time.
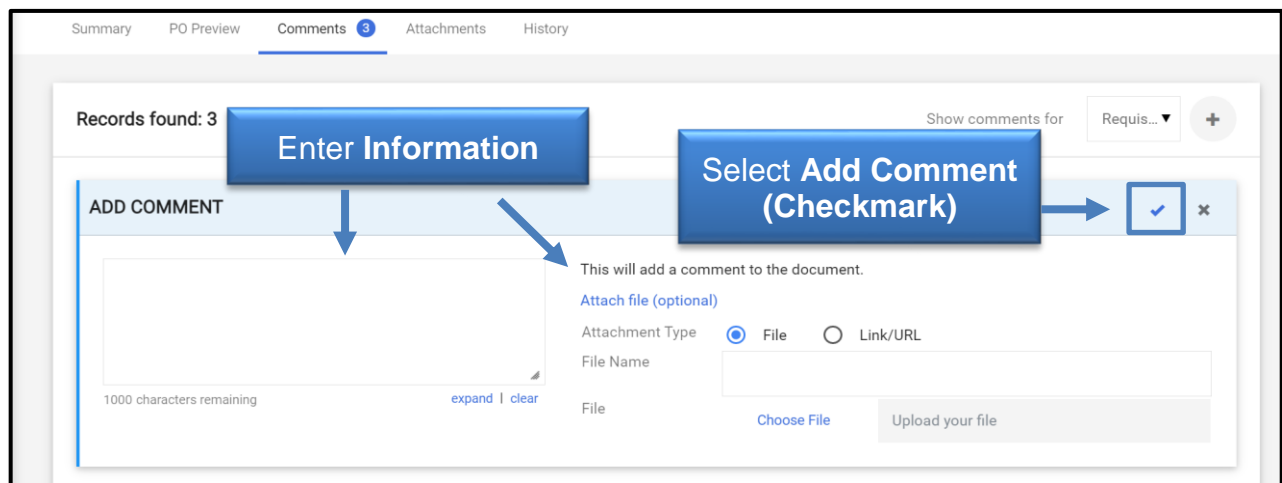
To add a comment to a cart, select **Comments**.

Any previous comments will populate. Select the **Add Comment (+)** icon.
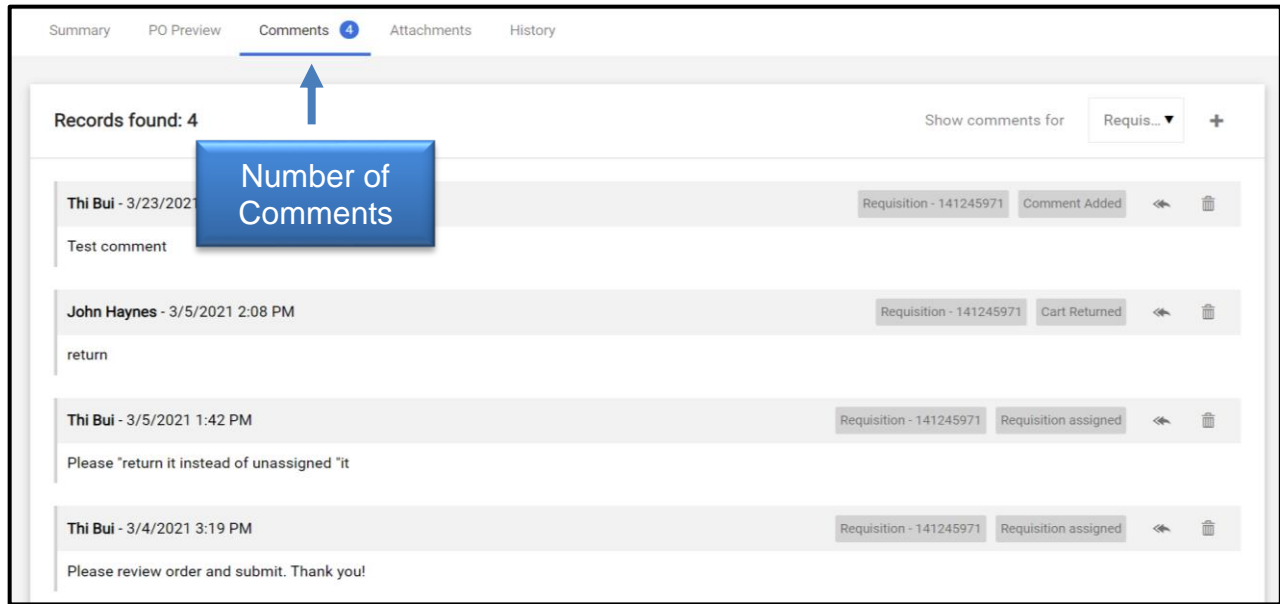

The Add Comment box will appear. Enter the **information** you want to add to the cart in the comment box and / or attach a file. Once you have entered the data, select **Add Comment (Checkmark)**.

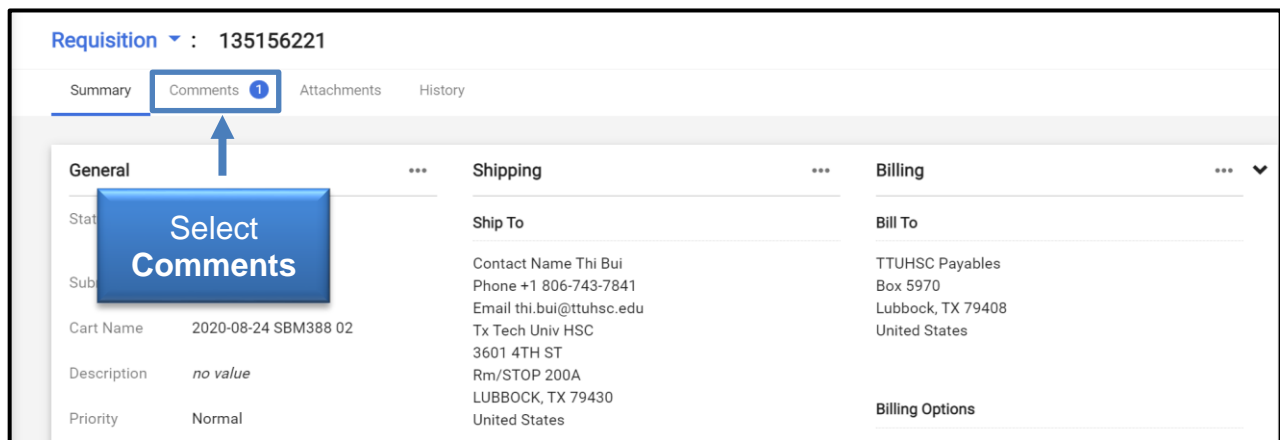Notice the number of comments (4) has been added in the Comments heading.

Reviewing the comments on an order is a common way to track the status. You can select to view all comments, or you can select to view the comments for a requisition, purchase order, invoice or receipt. The comments will default to the document that you are currently reviewing.
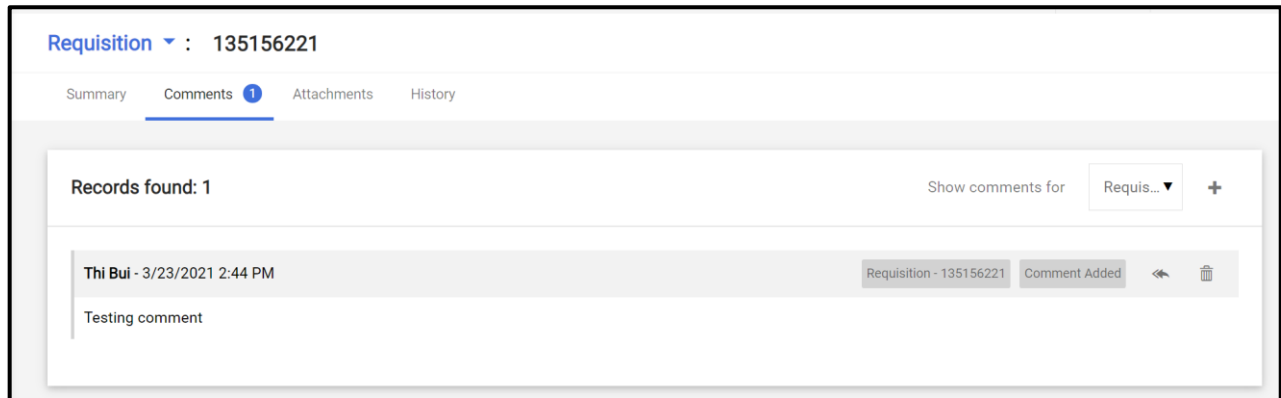
From a requisition, you can see the comments for the purchase order, invoice, and receipts that pertain to that requisition. From an invoice, you can see all the comments for the requisition, purchase order and receipts that correspond to that invoice. From the receipt, you can see all comments for that receipt and its associated requisition, purchase order and invoice.

To view the comments from a requisition, select **Comments**.

The Comments page will appear.

To view the comments for a different document, use the **Show comments for** drop-down box and select the **document**. By selecting **Purchase Order** as the document type, you can view the comments of the purchase order that pertains to that requisition.
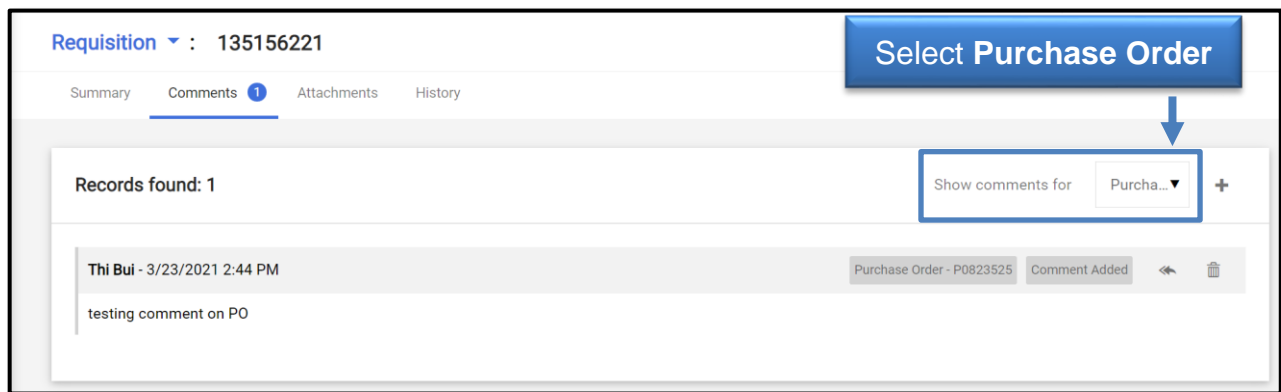
Internal Header Level Notes

Internal notes allow users to add detailed notes or information to the cart and are available to all roles as the requisition goes through the workflow process. These notes are **not** sent to the supplier.

Internal notes entered at the header level are intended to apply to all items in the cart. To add an internal note to the header, select **Edit** at the top right-hand corner of the Internal Notes and Attachments header section.

An additional window titled Edit Internal Notes and Attachments will open. Enter the **information** in the text box. If you need additional space, select **Expand**. When you have completed the note, select **Save Changes**.

Once you save the note, the additional window will close. You will notice the Internal Notes and Attachments header information will now be updated with the note.

Internal Line Item Level Notes

Internal line item notes are similar to internal header notes except that they contain information specifically relating to a particular item in the cart. To enter a line item note, select **Edit** to the right of the item in the cart.

This will open an additional window titled Edit Line. Enter the **information** in the Internal Note text box. When you have completed the note, select **Save**.

The Edit Line window will close and the line item note will now be populated in the cart.

The Copy to Other Lines feature allows you to add the same internal note to other items in the cart. Select **Copy to Other Lines** if you would like to include the line item internal note to other commodities.

The Copy To Other Lines: Internal Note window will open and provide a list of the remaining commodities on the order. Select **each item** for which you would like the line item note included and select **Copy**.

The line item note will now be included for each selected item.

Internal Header Attachments

When you add an internal attachment, it is **<u>not</u>** sent to the supplier. Internal attachments added at the header level apply to all items in the requisition.

To add a header level attachment, select **Add** located in the Internal Notes and Attachments section.

This will open an additional window titled Add Attachments. Click **Select Files**. Select the file from your computer.
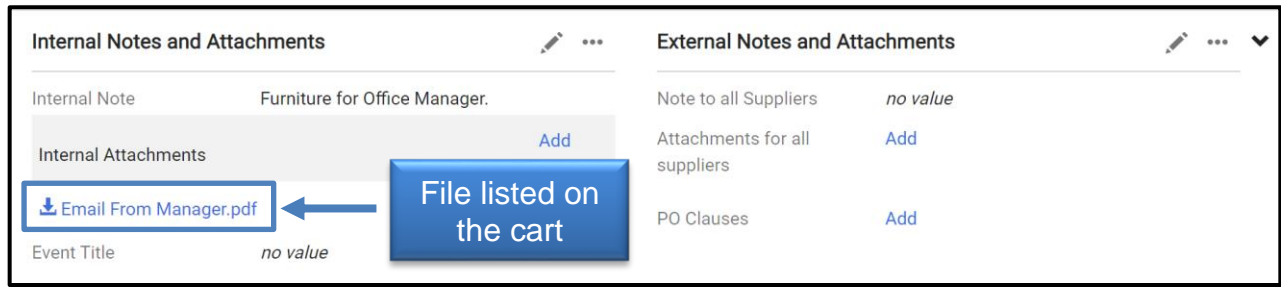

The document name will populate in the File field. Select **Save Changes**.

The file will now be listed under Internal Attachments at the header level.
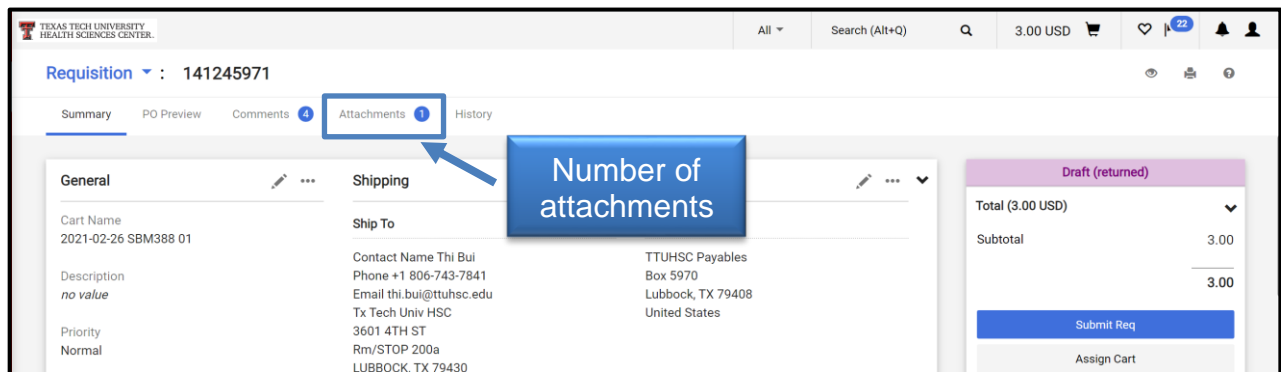

If you need to remove the attachment, select **Remove** from the Actions icon drop-down list to the right of the attachment. You can also attach additional documents by following the same steps.
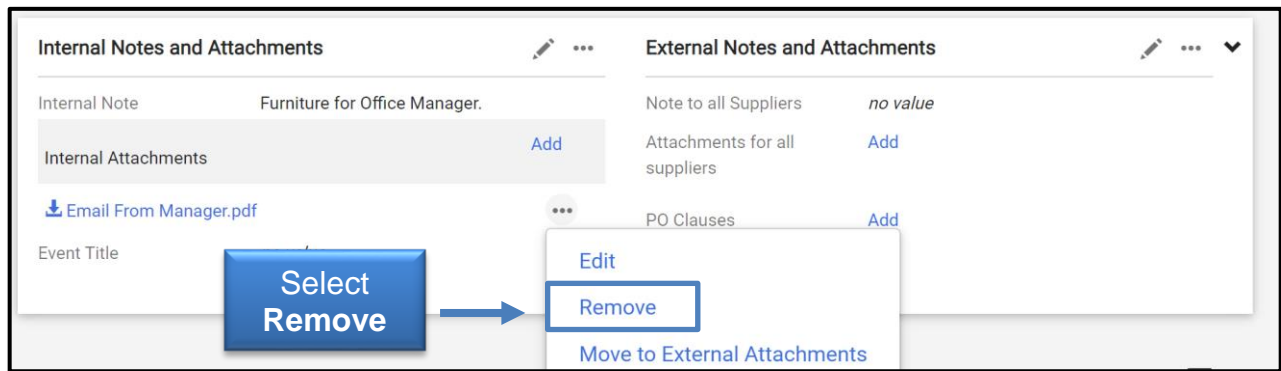
Notice the number of attachments (1) has been added in the Attachments heading.

Internal Line Level Attachments

Internal attachments added at the line item level are intended to apply only to the specific item. To add a line item level attachment, select **Add** located under Internal Attachments.

This will open an additional window titled Add attachments. Click **Select Files**. Select the file from your computer.

The file path will populate in the File field. Select **Save Changes**.

Add Attachments

Attachment Type   ● File   ○ Link

File(s) ★   SELECT FILES...   *Drop files to attach, or browse.*   Done ⊘

File attached → Floor Plan.pdf ✓ 🗑

Maximum upload file size: 24.41 MB

Select Save Changes → Save Changes   Close

The file will now be listed under Internal Attachments at the line item level.

Navajo Office Products LLC · 2 Items · 3.00 USD

▲ SUPPLIER DETAILS PO Purchase Order 1 : 1200 S Taylor St, Amarill... ▾

Contract	H-TXMAS-11-71050-7	PO Number	To Be Assigned

Item	Catalog No.	Unit Price	Quantity	Ext. Price
1 Chair for purchasing office	test	1.00	Qty: 1 1/EA	1.00

▲ ITEM DETAILS

Contract:	Commodity Code	Internal Note
H-TXMAS-11-71050-7	*no value*	Furniture for Office Manager - Room 120
		Copy to other lines

Part Number   Recurring Payment   Internal Attachments   Add
test

File listed under Internal Attachments → ⬇ Floor Plan.pdf   •••

Specifications/Long Text
Chair for purchasing office

External Note
no value

Attachments for supplier
Add

If you need to remove the attachment, select **Remove** from the Actions icon drop-down list to the right of the attachment. You can also attach additional documents by following the same steps.
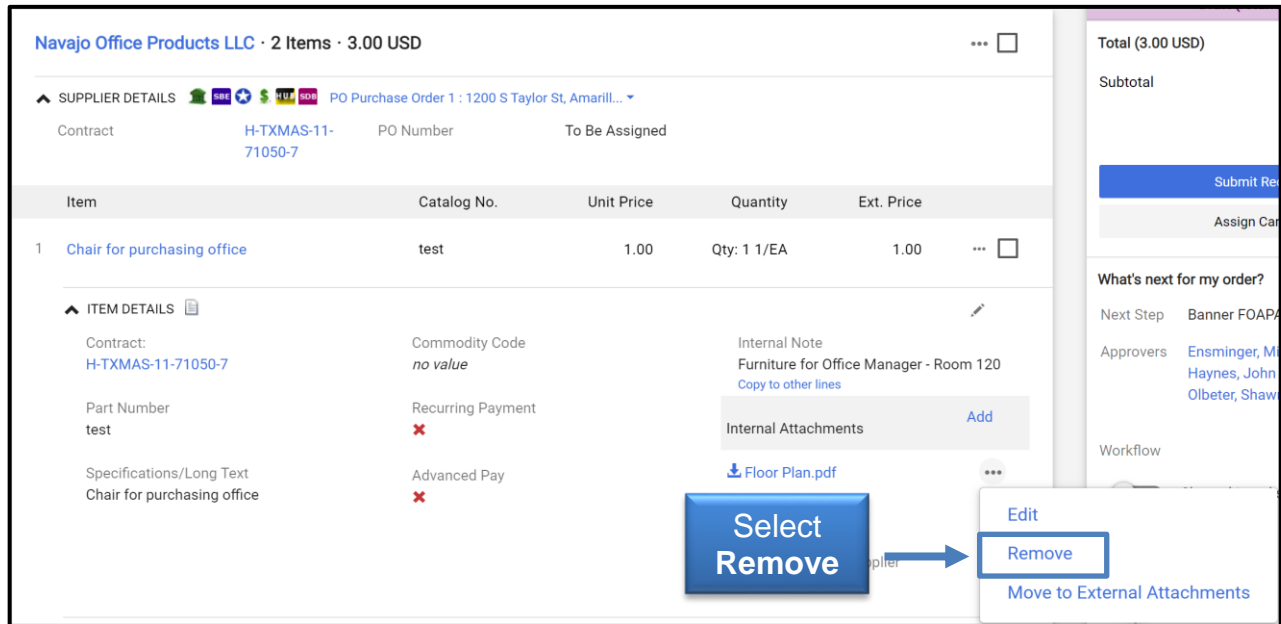
Notice the number of attachments (2) has been added in the Attachments heading.
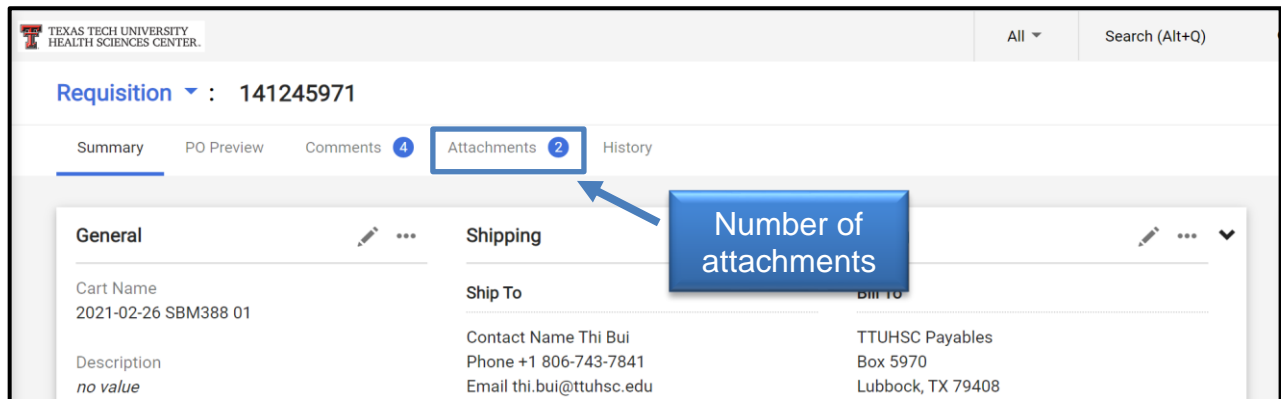
External Header Level Notes

External notes allow users to send information with the purchase order to the supplier. You can add external notes at the header level, which apply to the entire cart or at the line item level. If you add external notes to the cart, verify that your cart only contains items from one vendor.

Because most punch-out vendors currently cannot receive this information electronically, we discourage users from entering or attaching any external notes to

punch-out vendors unless specifically told to do so by the vendor. Doing so could cause the order to be delayed or rejected in the vendor's system.

To add an external note to the header, select **Edit** at the top right-hand corner of the External Notes and Attachments header section.

An additional window titled Edit External Notes and Attachments will open. Enter the **information** in the text box. If you need additional space, select **Expand**. When you have completed the note, select **Save Changes**.

Once you save the note, the additional window will close. You will notice the External Notes and Attachments header information will now be updated with the note.

External Line Item Level Notes

External line item notes are similar to external header notes except that they contain information specifically related to a particular item in the requisition. To enter a line item note, select **Edit** to the right of the item in the cart.

This will open an additional window titled Edit Line. Enter the **information** in the External Note text box. When you have completed the note, select **Save**.

The Edit Line window will close and the line item note will now be populated in the requisition.

The Copy to Other Lines feature allows you to add the same external note to other items on the requisition. Select **Copy to Other Lines** if you would like to add the line item external note to other commodities.

The Copy To Other Lines: External Note window will open and provide a list of the remaining commodities for the order. Select **each item** that should include the note, and click **Copy**.

The line item note will now be included for each selected item.

External Header Attachments

External attachments allow users to send documents with the purchase order to the supplier. You can add external attachments at the header level, which apply to the entire cart, or at the line item level. If you add external attachments to the cart, verify that your cart only contains items from one vendor.

Because most punch-out vendors currently cannot receive this information electronically, we discourage users from adding any external attachments to punch-out

vendors unless specifically told to do so. Doing so could cause the order to be delayed or rejected in the vendor's system.

To add a header level attachment, select **Add** located in the External Notes and Attachments section.

This will open an additional window titled Add Attachments. Click **Select Files** to add a document.

Select the file from your computer. The file path will populate in the File field. Select **Save Changes**.

The file will now be listed under Attachments for All Suppliers at the header level.

If you need to remove the attachment, select **Remove** from the Actions icon drop-down list to the right of the attachment. You can also attach additional documents by following the same steps.

Notice the number of attachments (3) has been added in the Attachments heading.

External Line Level Attachments

External attachments added at the line item level are intended to apply only to the specific item. To add a line item level attachment, select **Add** located under Attachments for Supplier.

This will open an additional window titled Add Attachments. Click **Select Files**. Select the file from your computer.

The file path will populate in the File field. Select **Save Changes**.

The file will now be listed under Attachments for Supplier at the line item level.

If you need to remove the attachment, select **Remove** from the Actions icon drop-down list to the right of the attachment. You can also attach additional documents by following the same steps.

Notice the number of attachments (4) has been added in the Attachments heading.