



Quick

Reference

Guide

Adding Notes and Attachments



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

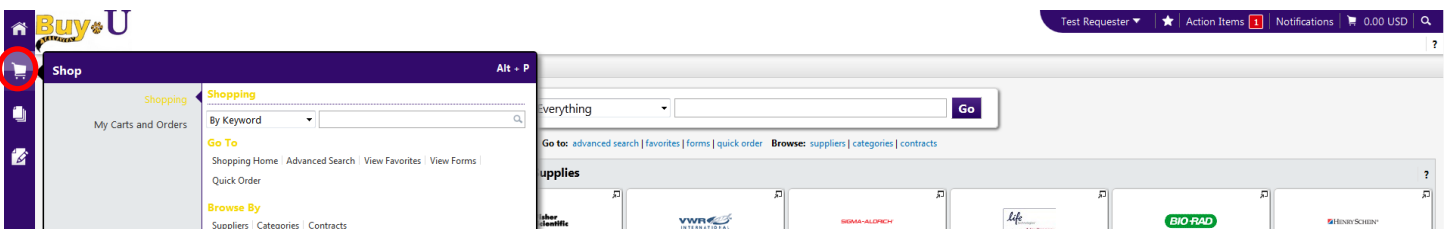
- **Internal Notes and Attachments** are visible to the shopper, requester, and all approvers of the requisition.

Attachments:

- Can be added to a requisition during the shopping and approval process
- Cannot be added to a requisition via the method described in this document once the requisition has completed workflow approval; the Comments feature must be utilized instead
- Remain with the requisition and purchase order indefinitely

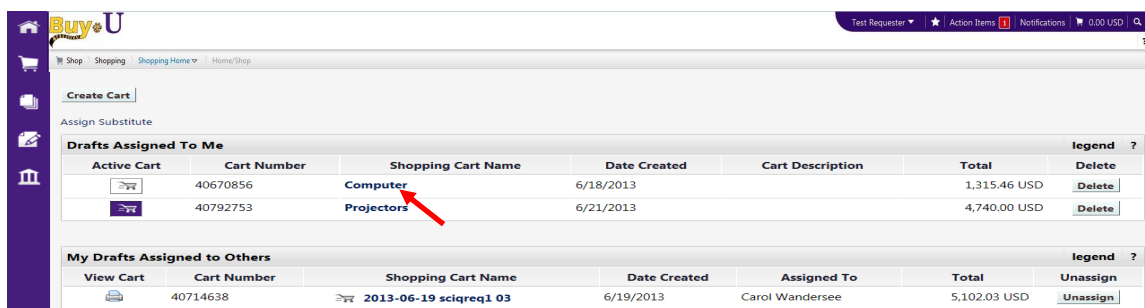
Procedure

1. Access your listing of carts by selecting the **shopping carts** icon from the navigation bar on the left side of the screen within **BUY-U**.



*Requesters can navigate to assigned carts from the homepage. Go to **Action Items** → **Carts Assigned to me**.

2. Click the cart name to make it your active cart.



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

The screenshot shows the Buy@U Shopping Cart interface. At the top right, it displays '1 Item(s) for a total of 1,315.46 USD'. Below this, there are two buttons: 'Proceed to Checkout' (highlighted with a red box) and 'Assign Cart'. The cart contains one item: 'OptiPlex 9010 MT:OptiPlex 9010 Minitower w/ Standard PSU' with a unit price of 1,315.46 USD and a quantity of 1, totaling 1,315.46 USD. The item details include Part Number 225-2583, Manufacturer Info 225-2583 - (Dell), and Commodity Code 180 - IT Hardware.

4. Navigate to **Notes and Attachments**.

The screenshot shows the Buy@U Requisition page. The 'Notes and Attachments' tab is highlighted with a red circle. The page displays various tabs including Summary, Shipping, Billing, Accounting Codes, Supplier Info, and Shipping & Handling Charges. The 'Notes and Attachments' section is currently empty, showing 'no note'.

5. To add an **Internal Note**: Click the appropriate **edit** button, enter your notes, and click the **Save** button.

The screenshot shows the 'Notes and Attachments' page. The 'edit' button is highlighted with a red circle. The page displays 'Internal Note' with 'no note' and 'Internal Attachments' with 'Add Attachments' button. There are also 'PO Clauses' and 'no clause' displayed.

6. To add **Internal attachments**: Click the appropriate **add attachment...** link, browse to the file that you want to attach, and click the **Save** button.

The screenshot shows the 'Notes and Attachments' page. The 'Add Attachments' button is highlighted with a red circle. The page displays 'Internal Note' with 'no note' and 'Internal Attachments' with 'Add Attachments' button. There are also 'PO Clauses' and 'no clause' displayed.

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