

Guidelines for Entering Text on Banner Reqs

There are three (3) places on a Req that allow for text entry:

Comments field in the Requestor/Delivery Information section of the Req is to be used by the **Requestor to give instructions to Purchasing** about the Req. The following are examples of standard phrases (no more than 30 characters) that may be entered into the **Comments** field:

- Blanket Order
- Bid # 02-XXX-XX
- Confirming (SEND PO)
- Confirming (HOLD PO)
- Maintenance Agreement
- Independent Contractor Agreement
- Do Not Send PO
- Fax PO to Vendor (then make sure to enter vendor contact and fax # in document text)
- Phone-In – RUSH ORDER
- Enclosure
- Hold Check for Dept Pickup
- Check to Accompany Order

DIRECTIONS to enter COMMENTS: Tab to the ‘Comments’ field on the Requestor/Delivery page of the Req and enter applicable phrase. Note that the Comments field does **NOT** print on the purchase order. If you need to include instructions to the vendor – that will be entered in Document Text or Item Text.

Document Text is generally used for special instructions to the vendor, or other information concerning the entire order. For example, this may include instructions such as: “Please fax to: Bill Quimby at 603-862-1212”; or “Call Gail Stone at 603-535-2260 48 hours prior to delivery”. This may also include information such as the contract period, (Contract Period: August 1, 2001 – July 31, 2002); payment terms, (Quarterly payments of \$12,000 due on the first day of each quarter); service requirements, (Response Time: 2 hours M-F 8-5, 4 hours nights and weekends). All **instructions to the vendor should be printed** by checking the print box.

Document Text may also be used to note the **business purpose** of the order, which need **not be printed** on the Req or to include specific instructions to Purchasing or Accounts Payable about the entire order.

DIRECTIONS to enter DOCUMENT TEXT: You may be anywhere in the Req document as long as you have passed the ‘Ship-To’ code field. Click on Options on the menu bar and then click on Document Text. After it brings up the text screen, perform a Next Block and it will bring you to the lines where you can enter your text. The lines do not wrap, and only allow for 50 characters, so to add additional lines press the down arrow key. You can also choose to print, or not print, each individual line by clicking on, or off, the box under the ‘Print’ column. Save your changes by clicking on File on the menu bar and then click on Save. Then click on the Exit button (the red door on the upper right of your screen) to get back into your Req. To view or change your text you will do exactly as to put in new text.

Item Text is used to communicate **specific information or instructions to the vendor for a specific item**. This may include a catalog, item or page #; labor rate schedules; shipping charges; etc.

DIRECTIONS to enter ITEM TEXT: Directions are exactly the same as for Document Text **except** you **must have the particular item description highlighted** (must be in the description field for the item) for which you would like to add text.