



# Business Process Document

## PS FIN Purchasing: Entering Receipt Comments and Activities

<b>Department</b>	
<b>Responsibility/Role</b>	
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### Entering Receipt Comments and Activities

Trigger:

Required Field(s)	Comments

Output - Results	Comments

### Additional Information

### Procedure

The Receipt Header Comments page enables you to enter comments that pertain to the entire receipt. You can access this page by clicking the Add Comments link on the Receiving page.

The Activities page enables you to enter information that pertains to a receipt activity. You can access this page by clicking the Activities link on the Receiving page.

In this topic, you have created a receipt for some items. You need to enter additional information for this receipt.



Step	Action
1.	Click the <b>Purchasing</b> link. <b>Purchasing</b>



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The screenshot displays the FIU Purchasing system interface. On the left is a navigation menu with categories like Requisitions, Request for Quotes, Procurement Contracts, etc. The main area shows a 'Purchasing' folder with sub-sections: Requisitions, Request for Quotes, Procurement Contracts, Purchase Orders, Receipts, Return To Vendor, Supplier Schedules, and Analyze Procurement. Each sub-section includes a description and a list of actions such as 'Add/Update', 'Approve', 'Dispatch', and 'Process'.

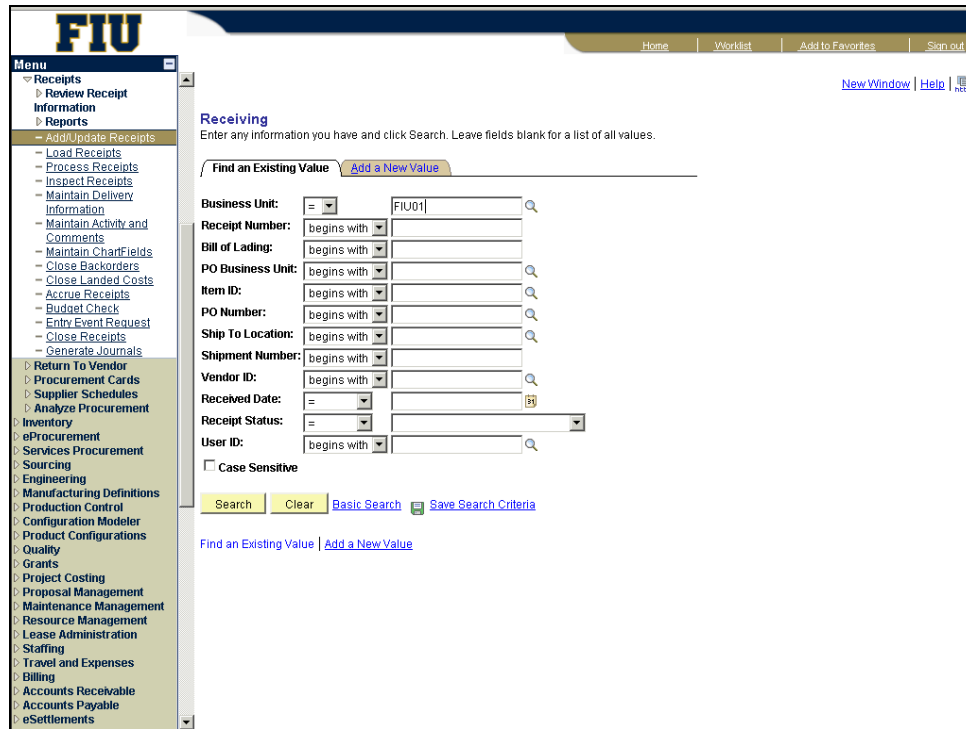
Step	Action
2.	Click the <b>Receipts</b> link. <a href="#">Receipts</a>

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Step	Action
3.	Click the <b>Add/Update Receipts</b> link. <a href="#">Add/Update Receipts</a>
4.	Click the <b>Find an Existing Value</b> link. <a href="#">Find an Existing Value</a>



**FIU** Home | Worklist | Add to Favorites | Sign out

**Menu**

- Receiving
  - Review Receipt
  - Information
  - Reports
    - Add/Update Receipts
      - Load Receipts
      - Process Receipts
      - Inspect Receipts
      - Maintain Delivery Information
      - Maintain Activity and Comments
      - Maintain CharFields
      - Close Backorders
      - Close Landed Costs
      - Accrue Receipts
      - Budget Check
      - Entry Event Request
      - Close Receipts
      - Generate Journals
    - Return To Vendor
    - Procurement Cards
    - Supplier Schedules
    - Analyze Procurement
    - Inventory
    - eProcurement
    - Services Procurement
    - Sourcing
    - Engineering
    - Manufacturing Definitions
    - Production Control
    - Configuration Modeler
    - Product Configurations
    - Quality
    - Grants
    - Project Costing
    - Proposal Management
    - Maintenance Management
    - Resource Management
    - Lease Administration
    - Staffing
    - Travel and Expenses
    - Billing
    - Accounts Receivable
    - Accounts Payable
    - eSettlements

**Receiving** [New Window](#) | [Help](#) | [Print](#)

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: = FIU01

Receipt Number: begins with

Bill of Lading: begins with

PO Business Unit: begins with

Item ID: begins with

PO Number: begins with

Ship To Location: begins with

Shipment Number: begins with

Vendor ID: begins with

Received Date: =

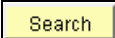

Receipt Status: =

User ID: begins with

Case Sensitive

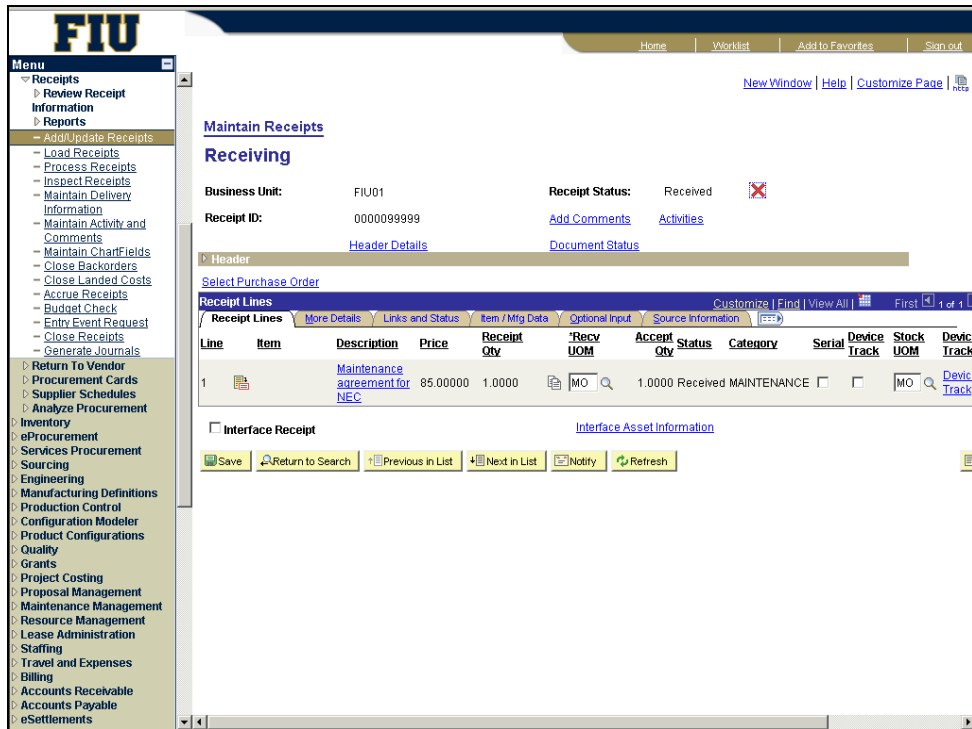
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)



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

Step	Action
5.	Enter the desired information into the <b>Receipt Number:</b> field. Enter " <b>0000</b> " to search for the desired receipts.
6.	Click the <b>Search</b> button. 
7.	Click the <b>000099999</b> link to select the desired receipt. 

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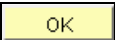



Step	Action
8.	Click the <b>Add Comments</b> link to enter comments for a transaction. You can enter a unique comment or select from predefined standard comments. <a href="#">Add Comments</a>
9.	Use the <b>Sort Method</b> : drop-down list to select the method that you want to use to sort the comments retrieval.  <b>-Comment Time Stamp</b> : Select to sort the comments by the time stamp assigned by the system when they were created.  <b>-Vendor Flag</b> : Select to sort by comments flagged to be sent to the vendor. 
10.	Click the <b>Sort Sequence</b> : drop-down list to sort by <b>Ascending</b> or <b>Descending</b> dates. 
11.	Click the <b>Copy Standard Comments</b> link to copy standard comments to the purchase order header comments. <a href="#">Copy Standard Comments</a>



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Step	Action
12.	Click the <b>Action</b> drop-down table to select the action that you want to perform on the standard comments. For the purpose of this topic we will select ' <b>Copy Comment</b> '. 
13.	Click the <b>Search</b> graphic to select a comment type. This will allow you to chose from a list of Standard Comment types specified by FIU.
14.	Click the <b>BBC</b> link. 
15.	Click the <b>Search</b> graphic to select a comment that is associated with the Comment Type, which in this topic is ' <b>BBC</b> '. 
16.	Click the <b>BBC</b> link to select the 'Biscayne Bay Campus Address' comment. 
17.	Click the <b>OK</b> button.  Notice how the comments field is now populated with shipping information for the BBC campus. 
18.	Click the <b>OK</b> button. 
19.	Click the <b>Activities</b> link.  Use the <b>Activities</b> page to enter and track activities associated with a particular transaction. Keep the activity comments organized by logging the due date and by selecting the <b>Done</b> check box. 

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**FIU** Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

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  - Product Configurations
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  - Grants
  - Project Costing
  - Proposal Management
  - Maintenance Management
  - Resource Management
  - Lease Administration
  - Staffing
  - Travel and Expenses
  - Billing
  - Accounts Receivable
  - Accounts Payable
  - eSettlements

**Maintain Receipts**

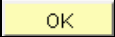
**Activities**

Business Unit: FIU01    Receipt ID: 0000099999    Receipt Status: Received

Activities Find | View All First 1 of 1 Last

Done	*Due Date	Comments
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh



Step	Action
20.	Enter the desired information into the <b>*Due Date</b> field. Enter <b>"04/30/2009"</b> .
21.	Enter the desired information into the <b>Comments</b> field. Enter <b>"Confirm quality of items received"</b> .
22.	Click the <b>OK</b> button. 



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Step	Action
23.	Click the <b>Save</b> button. 
24.	Click the <b>Home</b> link. 
25.	Congratulations. You have successfully entered Receipt Comments and Activities. <b>End of Procedure.</b>