

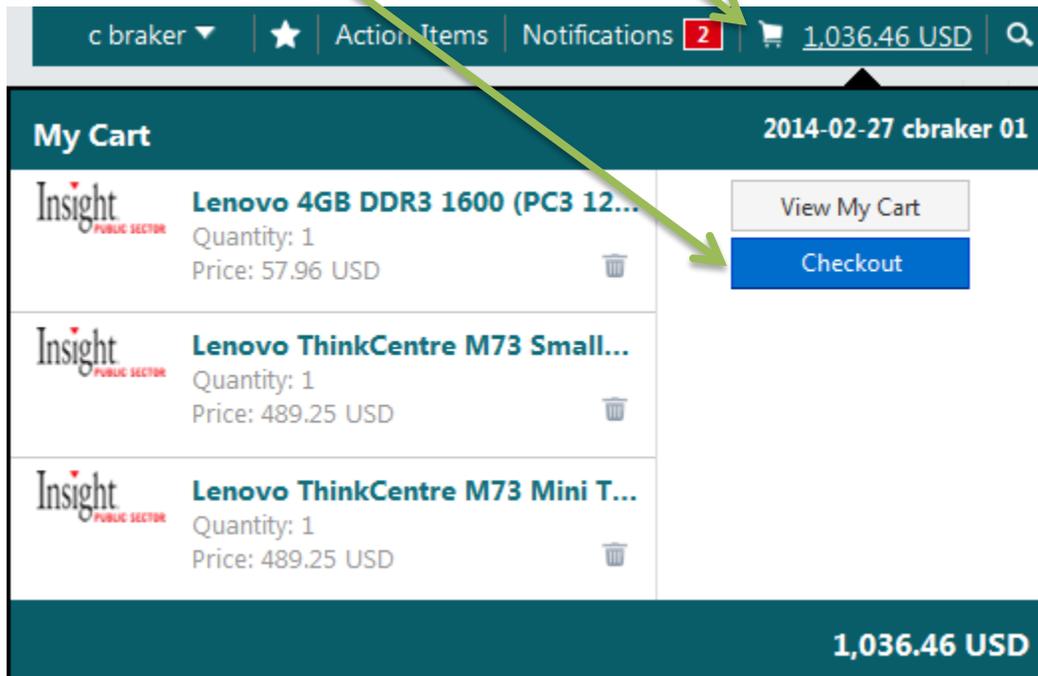
Adding Attachments, Notes, and Comments

**Including by Line Item*

In this lesson, you will learn how to add attachments, notes, and comments in WISBuy.

1. At times, it may be necessary to include additional information to support your purchase. In this demonstration, you have put all the items that are needed in the cart and are ready to proceed to checkout. Click the **shopping cart icon** in the upper right corner of the page followed by **Checkout**.

2.

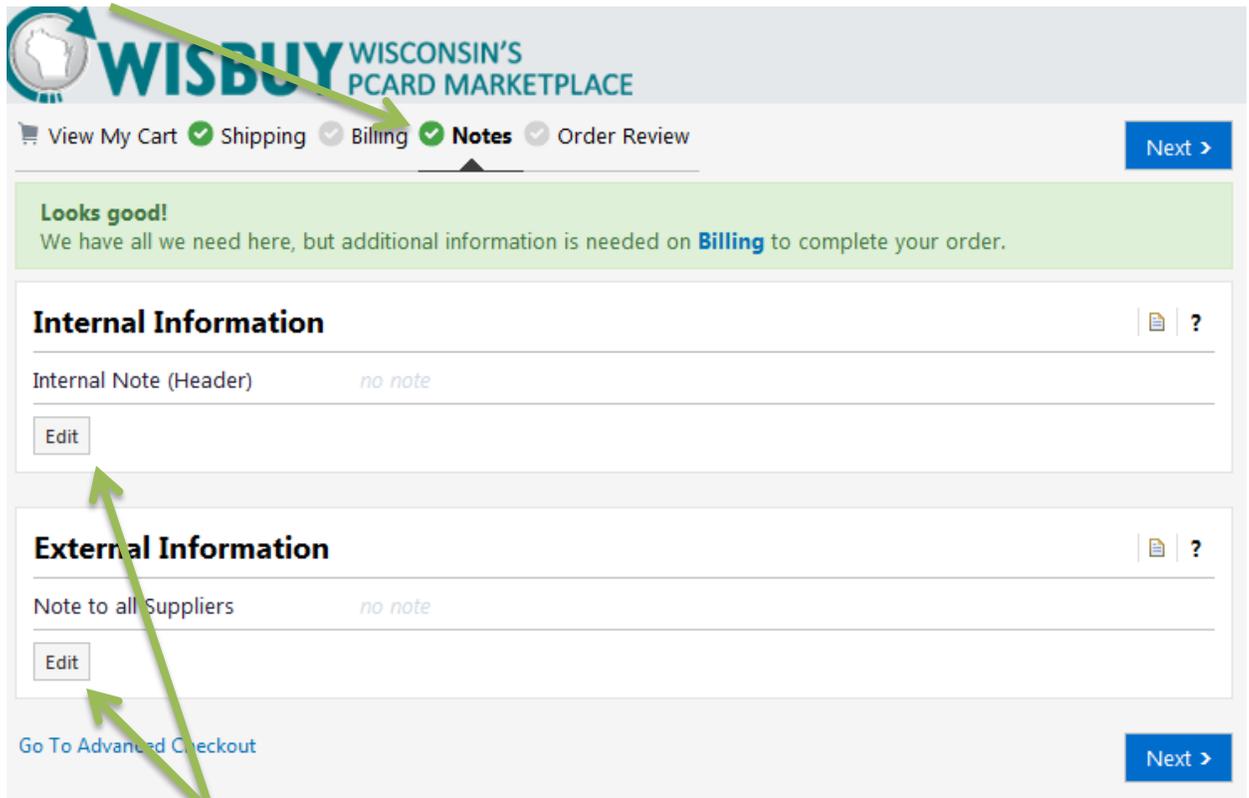


The screenshot shows the WISBUY shopping cart interface. At the top, there is a navigation bar with the user name 'c braker', a star icon, 'Action Items', 'Notifications' with a red '2' badge, a shopping cart icon with '1,036.46 USD', and a search icon. Below this is the 'My Cart' section, titled '2014-02-27 cbraker 01'. The cart contains three items, each with a trash icon:

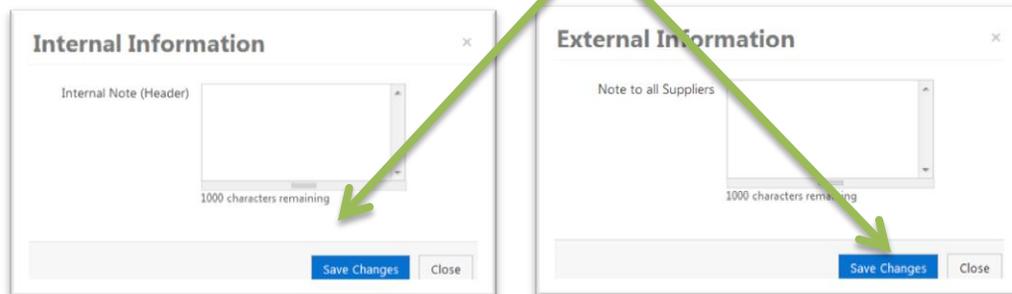
Item	Quantity	Price
Insight PUBLIC SECTOR Lenovo 4GB DDR3 1600 (PC3 12...	1	57.96 USD
Insight PUBLIC SECTOR Lenovo ThinkCentre M73 Small...	1	489.25 USD
Insight PUBLIC SECTOR Lenovo ThinkCentre M73 Mini T...	1	489.25 USD

At the bottom right of the cart, the total price is displayed as **1,036.46 USD**. There are two buttons: 'View My Cart' and 'Checkout'.

3. You can add internal and external note here at the “**Express Checkout**” by clicking on the “**Notes**” Link after the checkmark.



Click on the **Edit** button to add an internal/external note. A box will appear for you to add an internal/external note. Click the “**Save Changes**” Button to add your note to your entire order.



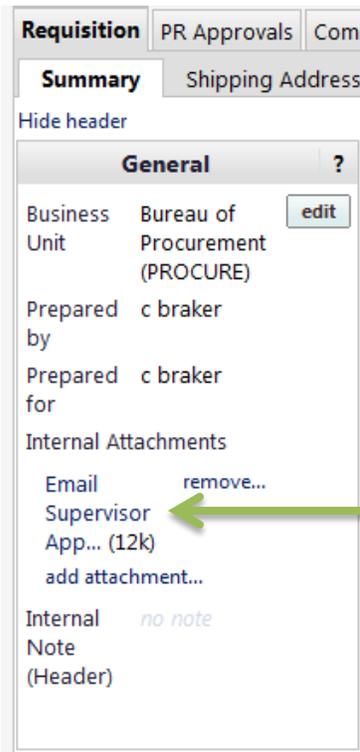
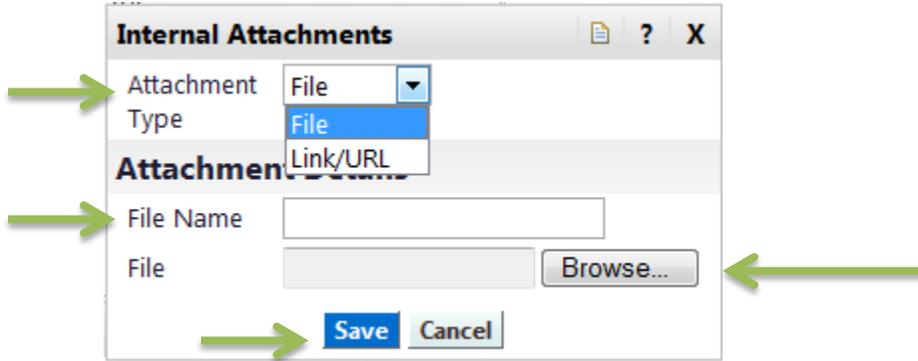
Follow the next steps to get a detailed view of your order, where you will be able to add attachments, comments, notes per line item, and also alter the shipping address per line item.

- Click on **Go to Advanced Checkout** in the bottom left corner of the screen.

- Let's first start by adding an attachment to our active cart. You can use this feature to include additional information such as a justification or document showing approval to purchase. For example, you can include an email from your supervisor stating that you have permission to purchase items that you don't typically purchase.

- To add an attachment, click on the **add attachment** link in the general box on your summary screen.

7. Select the file type you wish to upload, file name, and browse your computer to for the file. Click Save when finished adding all attachments.



You will see your attached document.
 You can continue to add another
 document or remove any unnecessary
 documents.

- Next, I'd like to add a note about the order. Internal notes only will be seen by staff within WISBuy, not by the suppliers, and also will show up as comments. In the Internal Notes section of the general box, click **edit**. Add the note and then click **Save**.

The screenshot shows two parts of the WISBUY interface. On the left, a 'General' tab is selected, and an 'edit' button is highlighted in the 'Internal Note (Header)' section. On the right, a modal window titled 'General' is open, showing the 'Internal Note (Header)' field with the text 'See Attachment'. Below the field are 'Save' and 'Cancel' buttons. Green arrows indicate the flow from the 'edit' button to the modal and from the 'Save' button back to the main interface.

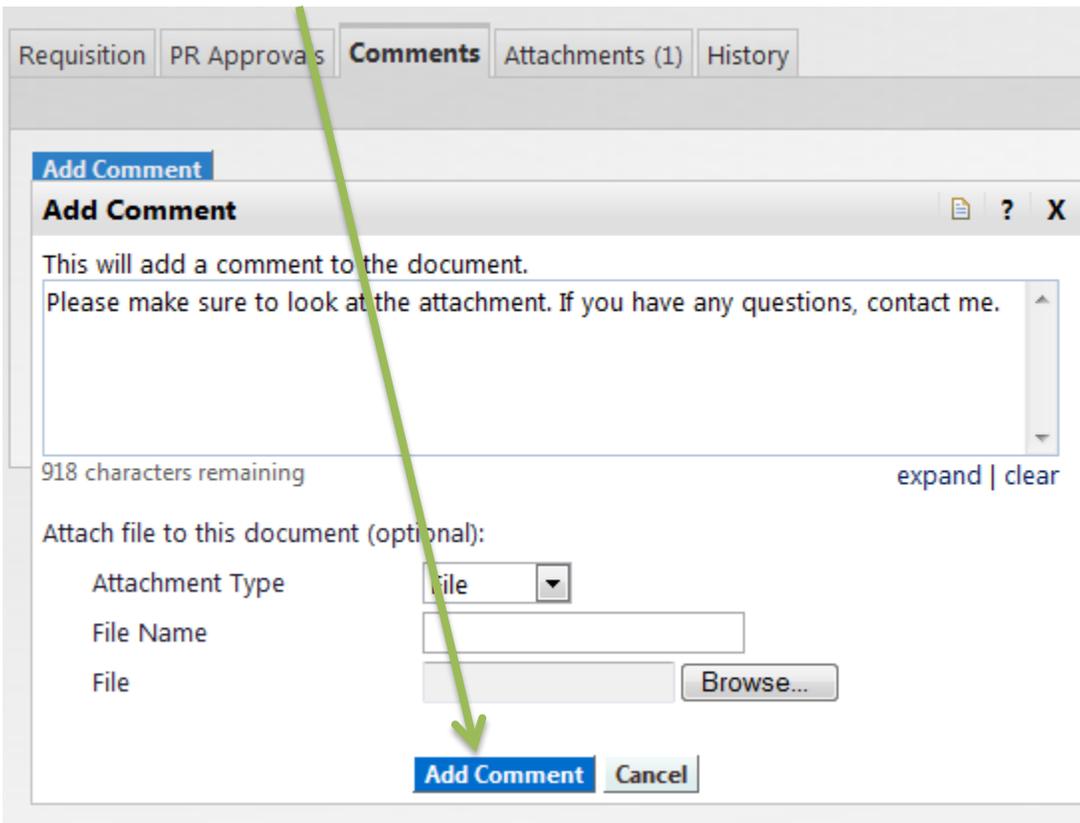
- You can add comments to any requisitions or WISBuy orders. Comments are typically used as a communication tool between users and other State of Wisconsin personnel. For example, a purchaser without a pcard may assign a cart to a purchaser with a pcard to complete the order, and comments can be used to explain the purchase. You can use the Add Comment function to get the necessary information, which will then be included as part of the requisition history. Click on the **Comments** tab.

The screenshot shows the WISBUY interface with the 'Comments' tab selected in the requisition header. The main content area is divided into four columns: 'General', 'Shipping Address', 'Billing Address', and 'Payment Information'. Each column has an 'edit' button. The 'Comments' tab is highlighted with a green dashed box and an arrow pointing to it.

10. Notice that if comments have already been made against this document, you will see them listed here. Click on the **Add Comment** button.



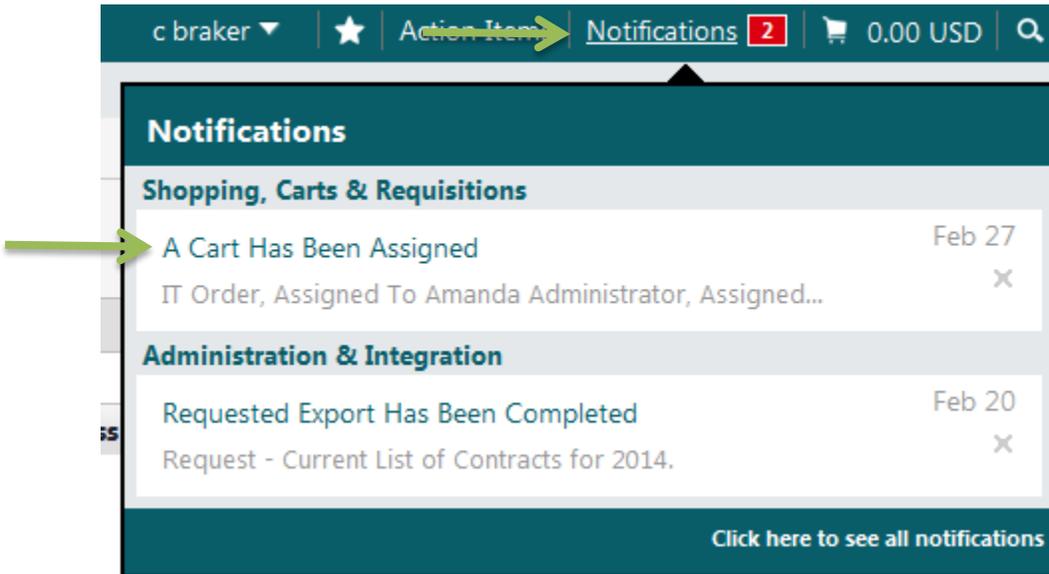
11. Enter the comment text. You also can attach files in the comments area. When you have finished, click **Add Comment**.



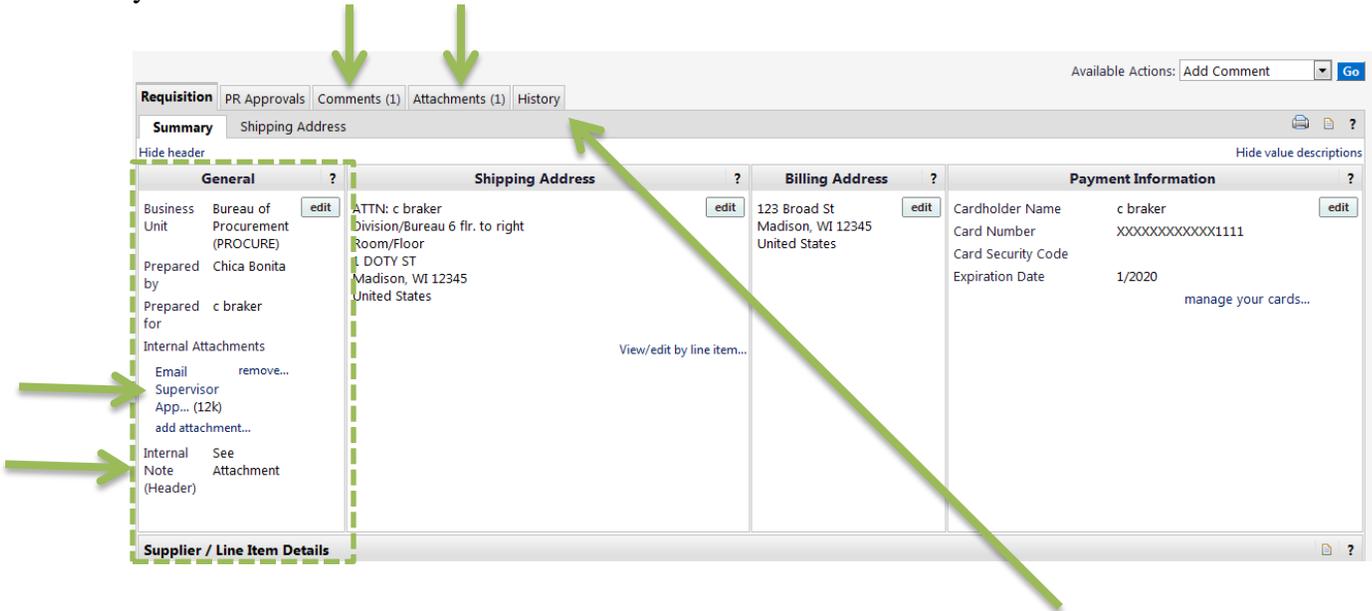
12. The system sends the selected user an e-mail with a link that directs them to the draft shopping cart where they can view the carts items.



13. The selected user simply clicks on the notification link in the top right corner to open the cart details to view any attachments and comments added to the cart.



14. After you open the cart, look in the **General** box for any attachments or notes, and also look at the **Comments** tab, prior to proceeding with review of the WISBuy Order. Here you can add additional attachments and comments if needed.



15. Note: All of the comments and attachments become part of the document **history**.

16. To add an internal note per line item, scroll down on your “**Advanced Checkout**” screen to view all products in your cart. On the right-hand side you’ll see an “**edit**” button. Click on the edit button to the item you would like to add a note to:

Supplier / Line Item Details

Hide line details For selected line items: Add To Favorites Go

Fastenal [more info...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)
 Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/27/2014 8:39:39 AM
 Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
400 Watt Metal Halide Replacement Bulb more info...	0716888	EA	53.97	4 EA	215.88 USD	<input type="button" value="edit"/>
Manufacturer Name: PROBUILT PROFESSIONAL LIGHTING LLC	Commodity Code: 28550	Lamps: Fluorescent, Incandescent, Mercury Vapor, Quartz, and Sodium Vapor		Internal Note (Line): no note		
Manufacturer Part Number: 111903						
Supplier Part Auxiliary ID: 111903						
more info...						
Supplier subtotal					215.88USD	

Graybar Electric Company [more info...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor more info...	88200882	EA	10.86	1 EA	10.86 USD	<input type="button" value="edit"/>
Manufacturer Name: Panduit Electrical	Commodity Code: 28075	Ties and Anchors, Cable and Wiring		Internal Note (Line): no note		
Manufacturer Part Number: PX-2						
UNSPSC: 39-12-17-03						
more info...						
Supplier subtotal					10.86USD	

17. A box will appear for you to add a note. When completed click on the “**save**” button.

Edit Line

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
400 Watt Metal Halide Replacement Bulb more info...	0716888	EA	53.97	4 EA	215.88 USD	<input type="button" value="edit"/>
Manufacturer Name: PROBUILT PROFESSIONAL LIGHTING LLC	Commodity Code: 28550	Lamps: Fluorescent, Incandescent, Mercury Vapor, Quartz, and Sodium Vapor		Internal Note (Line):		<input type="text"/>
Manufacturer Part Number: 111903						<input type="button" value="expand"/> <input type="button" value="clear"/>
Supplier Part Auxiliary ID: 111903						
more info...						
Save <input type="button" value="Cancel"/>						

18. You will see your **internal note** for the specific item added to that specific line item.

Supplier / Line Item Details

Hide line details For selected line items: Add To Favorites Go

Fastenal [more info...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)
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 Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
400 Watt Metal Halide Replacement Bulb more info...	0716888	EA	53.97	4 EA	215.88 USD	<input type="button" value="edit"/>
Manufacturer Name: PROBUILT PROFESSIONAL LIGHTING LLC	Commodity Code: 28550	Lamps: Fluorescent, Incandescent, Mercury Vapor, Quartz, and Sodium Vapor		Internal Note (Line): When delivered, make sure that Celia receives 2 bulbs. copy to other lines		
Manufacturer Part Number: 111903						
Supplier Part Auxiliary ID: 111903						
more info...						
Supplier subtotal					215.88USD	

Graybar Electric Company [more info...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor more info...	88200882	EA	10.86	1 EA	10.86 USD	<input type="button" value="edit"/>
Manufacturer Name: Panduit Electrical	Commodity Code: 28075	Ties and Anchors, Cable and Wiring		Internal Note (Line): no note		
Manufacturer Part Number: PX-2						
UNSPSC: 39-12-17-03						
more info...						
Supplier subtotal					10.86USD	

19. To alter a line items address, scroll up to view your “**Requisition.**” In the “**Shipping Address**” box located in the middle of the page, click on “**view/edit by line item...**”

Requisition PR Processing Comments Attachments History

Summary Shipping Address

Hide value descriptions

General	Shipping Address	Payment Information
Business Unit: Bureau of Procurement (PROCURE) <input type="button" value="edit"/> Prepared by: c braker Prepared for: c braker Internal Attachments: add attachment... Internal Note (Header): no note Note to all Suppliers: no note	ATTN: c braker Division/Bureau 6 flr. to right Room/Floor 1 DOTY ST Madison, WI 12345 United States	Cardholder Name: Celia 2 <input type="button" value="edit"/> Card Number: XXXXXXXXXXXXXXX1111 Card Security Code: Expiration Date: 1/2017 manage your cards...

[View/edit by line item...](#)

Supplier / Line Item Details

20. You will be prompted to a new screen where you have the option to “**edit**” the shipping address of each item in your cart. This is a nice feature for when you are ordering for another location/office. Click on the “**edit**” button on the item you would like shipped to an alternative address.

Requisition PR Processing Comments Attachments History

Summary Shipping Address

Hide value descriptions

These values apply to all lines unless specified by line item

Shipping address: ATTN: c braker, Division/Bureau 6 flr. to right, Room/Floor, 1 DOTY ST, Madison, WI 12345, United States

For selected line items:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Fastenal more info... 400 Watt Metal Halide Replacement Bulb <input type="button" value="more info..."/>	0716888	EA	53.97	4 EA	215.88 USD
Shipping Address (same as header) <input type="button" value="edit"/>					Supplier subtotal 215.88USD
Graybar Electric Company more info... Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor <input type="button" value="more info..."/>	88200882	EA	10.86	1 EA	10.86 USD
Shipping Address (same as header) <input type="button" value="edit"/>					Supplier subtotal 10.86USD
MSC Industrial Supply Company MRO more info... Combination Wrenches: Tool Type: Combination Wrench NonRatcheting; Number of Points: 12; System of Measurement: Metric; Size: 1700 mm; Overall Length Inch: 83/4; Finish/Coating: Satin <input type="button" value="more info..."/>	00153718	EA	11.12	1 EA	11.12 USD

21. You will be prompted to edit the current address (i.e. alter the attention line/change the floor number) or choose another address.

Edit current shipping address...

Fields in **bold** are required for checkout.

ATTN:

Division/Bureau

Room/Floor

Address Line 1

City

State

Zip Code

Country

Save this address for future use

Always make sure to click on the "Save Changes" Button after you made changes.

Or choose from your addresses...

★ **Default**

c braker

6 fir. to right

[Room/Floor]

1 DOTY ST

Madison, WI 12345

United States

Your current default address

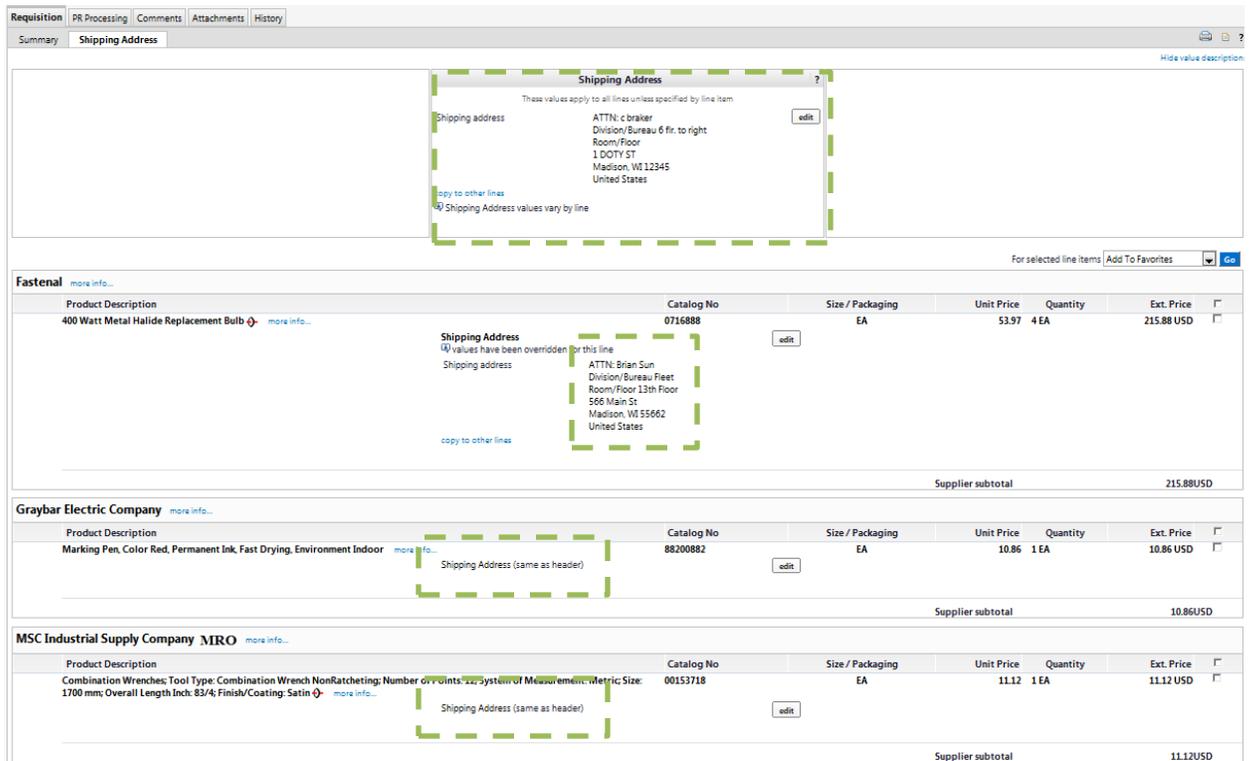
You will also have the option to "Use" a saved address or to select a different address. Click on the "Use" button if you want to use that particular address.

Or select a different address...

Fields in **bold** are required for checkout.

- | | | |
|--|--|--|
| <p><input type="button" value="Use"/> Ad and Fin LAX</p> <p>[ATTN:]
ST OF WI-DEPT ADMIN & FINANCE
[ROOM/FLOOR]
855 EAST AVE N
LA CROSSE, WI 54601
United States</p> | <p><input type="button" value="Use"/> Default</p> <p>[ATTN:]
[Division/Bureau]
[Room/Floor]
1 DOTY ST
Madison, WI 12345
United States</p> | <p><input type="button" value="Use"/> Main St</p> <p>[ATTN:]
[Division/Bureau]
[Room/Floor]
566 Main St
Madison, WI 55662
United States</p> |
|--|--|--|

22. After you select the appropriate address, you will be returned to your “**Advanced Checkout**” screen, where you will see that for the one line item, it is going to be shipped to an alternative address than the rest of your order.



The screenshot displays a requisition summary with the following details:

Supplier	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Fastenal	400 Watt Metal Halide Replacement Bulb	0716888	EA	53.97	4 EA	215.88 USD
Graybar Electric Company	Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor	88200882	EA	10.86	1 EA	10.86 USD
MSC Industrial Supply Company MRO	Combination Wrenches; Tool Type: Combination Wrench NonRatcheting; Number of Joints: 2; System of Measurement: Metric; Size: 1700 mm; Overall Length Inch: 83/4; Finish/Coating: Satin	00153718	EA	11.12	1 EA	11.12 USD

Each line item's shipping address is overridden as follows:

- Fastenal:** ATTN: e brailer, Division/Bureau 6 flr. to right, Room/Floor, 1 DODY ST, Madison, WI 53745, United States.
- Graybar Electric Company:** ATTN: Brian Sun, Division/Bureau Fleet, Room/Floor 13th Floor, 566 Main St, Madison, WI 53602, United States.
- MSC Industrial Supply Company:** Shipping Address (same as header).

This concludes the lesson on Adding Attachments, Notes, and Comments in WISBuy. For further assistance, please contact WisBuy@Wisconsin.gov or visit the website.