

## What is the System Note? When is it updated?

The System Note is a popup that displays messages relating to the processing of a transaction. Some examples of these messages include:

- Validation messages from a system administrator. These messages can display in the Checkout view prior to submitting a transaction for approval or releasing a transaction.
- Successful release to the supplier if the transaction is released electronically (via email or XML)
- Reference to a related transaction, if the transaction was initiated as the result of a published Sourcing award
- If Blanket Order is enabled, a message will display if the transaction exceeds the amount remaining for the associated blanket order
- Successful transmission to a third party GL/ERP system
- Record number or other identifier from a third party GL/ERP system
- Failed transmission to a third party GL/ERP system

These messages can occur when a transaction is validated, submitted for approval, released to the supplier, received, or invoiced.

## Where is the update coming from?

In some cases, the message displayed is informational and is the result of the completion of a process. Most of these messages are generated by ESM Solutions.

If a transaction has failed validation, the message can be customized by a system administrator.

If a transaction has failed transmission to a GL/ERP system, the messaging is generated by the GL/ERP system. Any questions about the content of the message should be generated to a system administrator and/or the GL/ERP provider.

## What do I need to do?

No action is required for informational messages.

If the transaction has failed a validation step or exceeds the remaining amount available for a blanket order, the transaction will need to be modified. For example, if the validation rule indicates the Credit Card payment form can't be used for a particular supplier, the payment form should be changed to PO. The transaction can be re-submitted after editing. Questions regarding how to edit the transaction or why the validation error is occurring should be directed to a system administrator.

If the transaction has failed to transmit to the GL/ERP, there may be a connection issue or an issue with the transaction data. If there is a data issue, the transaction may need to be edited before it can be re-submitted. Questions regarding the content of these messages should be directed to the GL/ERP provider or system administrator.

## Examples

System Note: Transaction has been released to the supplier. No action required.

System Note

10/23/2020 09:46 ET

Successfully released to supplier.

Close

Transaction Summary

Transaction #:	165686
Create Date:	10/23/2020
Supplier:	Funk Whse Supplies
Requester:	Jackie Funk
Selection:	Submitted
Status:	Submitted to Supplier
System Note:	History
Total Line Items:	2
Subtotal:	4,317.99
Total Value (USD):	4,317.99

System Note: Transaction has failed validation. The message displayed has been customized by an administrator. The transaction needs to be modified before it can be submitted.

Transaction is invalid. Please check System Note for more details.

System Note

01/29/2021 10:49 ET

Transaction Validation: Justification for Purchases Exceeding \$5000

Validation Message:

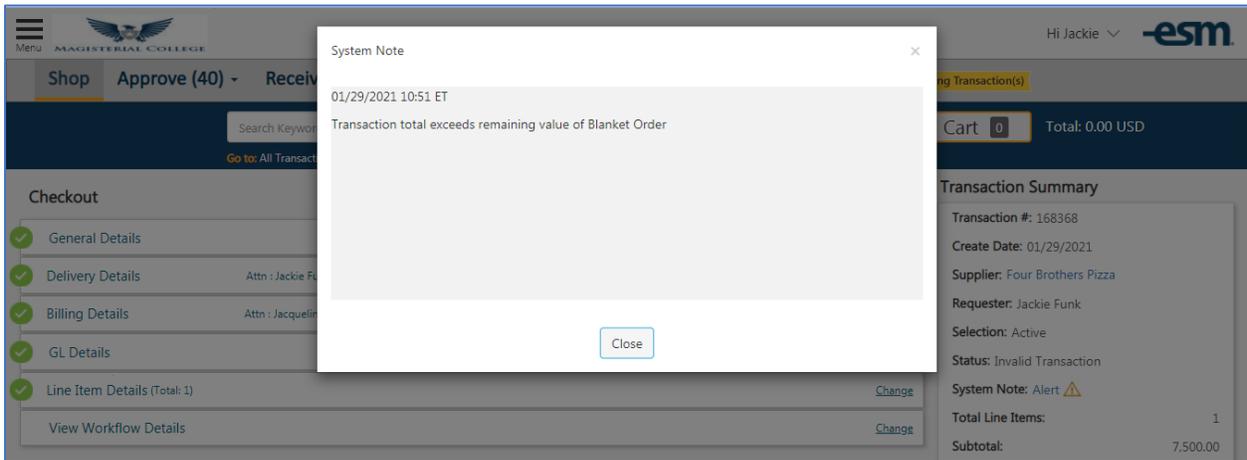
If your transaction total exceeds \$5,000, an internal note must be added to include the transaction's justification. Please contact the Purchasing department manager if you have any questions.

Close

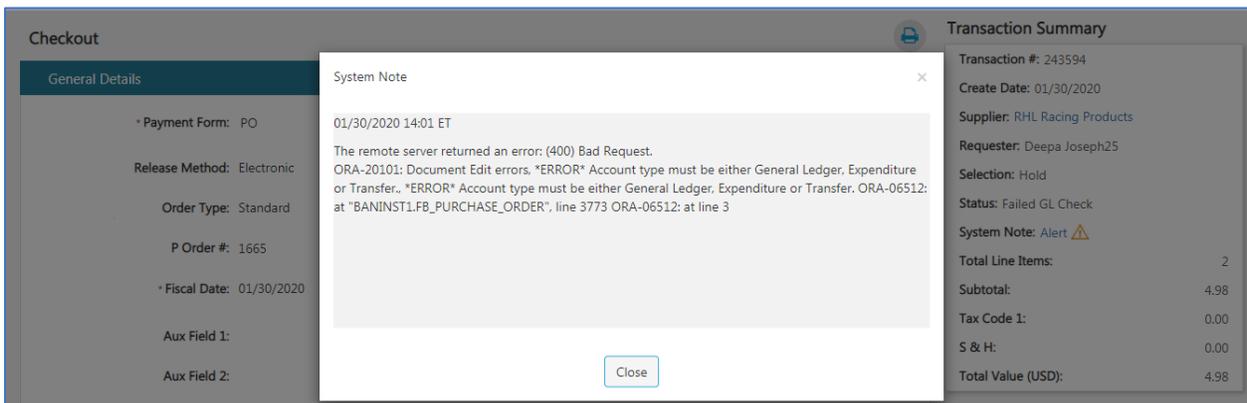
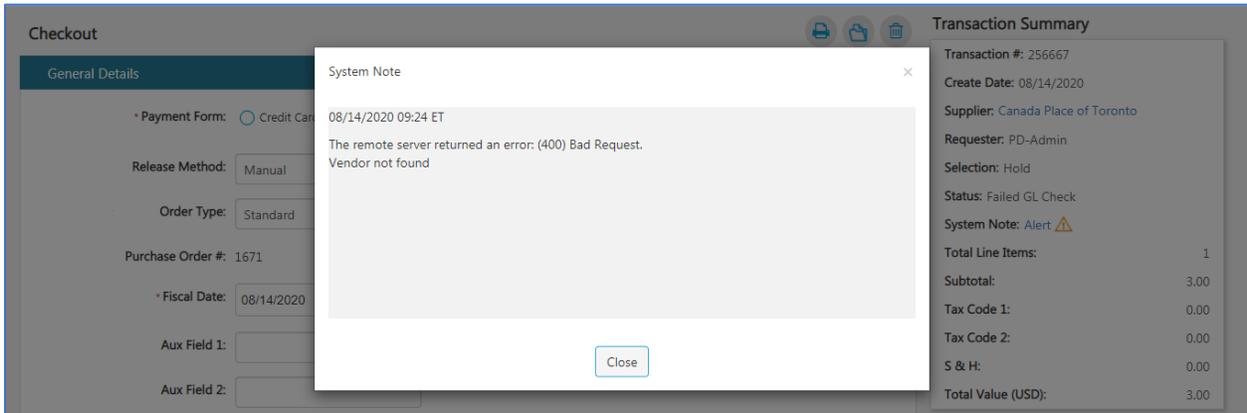
Transaction Summary

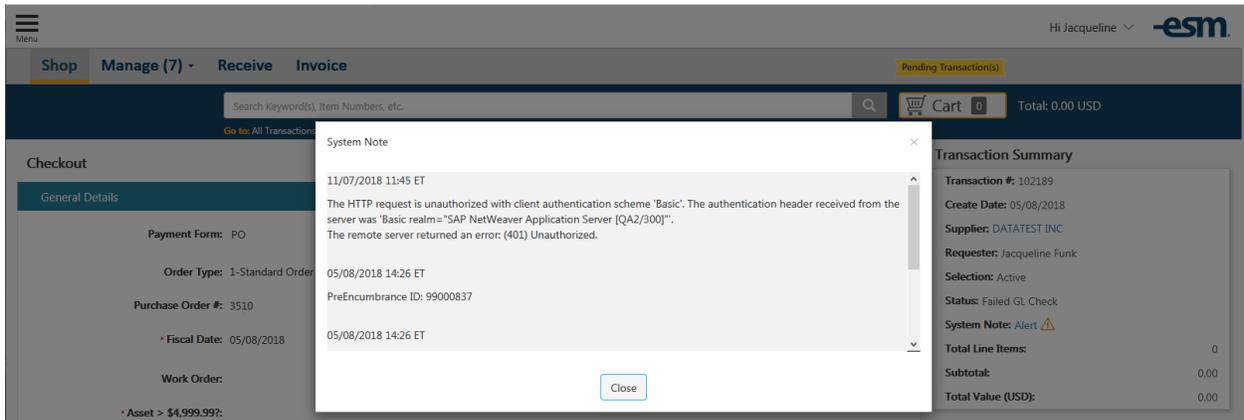
Transaction #:	168368
Create Date:	01/29/2021
Supplier:	Four Brothers Pizza
Requester:	Jackie Funk
Selection:	Active
Status:	Invalid Transaction
System Note:	Alert ⚠

System Note: Transaction exceeds remaining value of a blanket order. The transaction needs to be modified before it can be submitted. (This example only applies to customers with blanket order functionality enabled.)

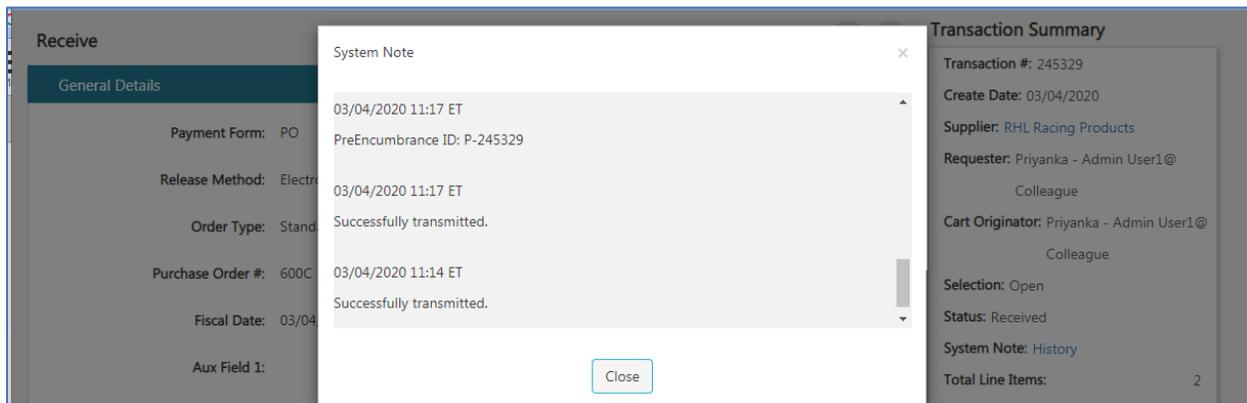


System Note: Messaging returned from a GL/ERP system indicating a bad request. In this scenario, we would recommend contacting a system administrator to determine how to proceed. Below are three examples.





System Note: Informational messaging that includes a reference value assigned by a GL/ERP system as well as success messages.



System Note: Informational message indicating the transaction was generated from Sourcing. (This example only applies to customers who utilize Transaction to Sourcing.)

