

October 17, 2025

Set Up Note Types and Standard Notes

Agencies can create standard notes for use in the Billing module of SWIFT. The **Standard Notes** feature can streamline bill creation by providing a catalog of standardized wording for use on invoices. Standard notes can save time, reduce errors, and provide consistent information internally or for your customer. You can select a standard note for either the header of the bill or at the line level.

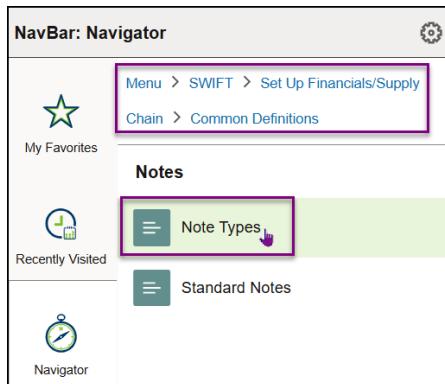
Users must have the AR-Billing Set-up role to create standard notes.

Step 1: Set Up Note Type

Before creating standard notes, there must be an available **Note Type**. **Note Type** is a required field when creating standard notes. If your agency has at least one note type, you may skip this step and move to [Step 2](#).

1. Navigate to the **Note Type** page using instructions below.

Navigation Options	Navigation Path
NavBar Navigator	NavBar icon, Navigator, SWIFT, Set Up Financials/Supply Chain, Common Definitions, Notes, Note Type.



2. The **Find an Existing Value** page displays for Note Types. Select the **Add a New Value** button.

Note Types	
Welcome to the Administrative Portal, Trainer User TRN3. Sign Out	
Print N	
Find an Existing Value <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> ⊕ Add a New Value </div>	
✓ Search Criteria	

3. Enter a **SetID**. This is usually the same as your business unit.
4. Enter a name for your new **Note Type**.
5. Select the **Add** button.

Add a New Value

*SetID 

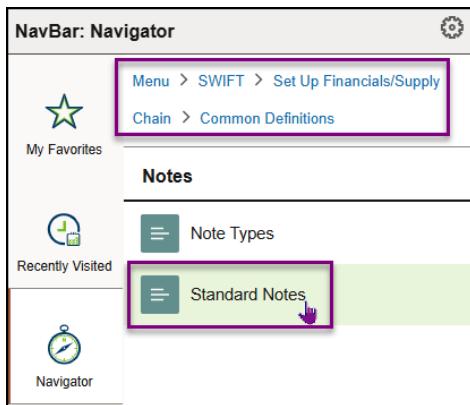
*Note Type

Add 

Step 2: Set Up Standard Notes

1. Navigate to the **Standard Notes** page using instructions below.

Navigation Options	Navigation Path
NavBar Navigator	NavBar icon, Navigator, SWIFT, Set Up Financials/Supply Chain, Common Definitions, Notes, Standard Notes.



2. The Find an Existing Value page displays for Standard Notes. Select the **Add a New Value** button.

Standard Notes

Welcome to the Administrative Portal, Trainer User TRN3. [Sign Out](#)

Find an Existing Value

Search Criteria: Enter any information you have and click Search. Leave fields blank for a list of all values.

Add a New Value 

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3. Enter a **SetID**. This is usually the same as your business unit.
4. Enter a name for your new **Standard Note Code**.
5. Select the **Add** button.

Add a New Value

*SetID	G1001	<input type="button" value="Q"/>
*Standard Note Code	PntrInv	
<input style="border: 2px solid #000; padding: 5px; width: 100px; height: 30px; border-radius: 5px; background-color: #f0f0f0; color: #000; font-weight: bold; font-size: 10px; text-align: center; margin: 10px 0;" type="button" value="Add"/>		

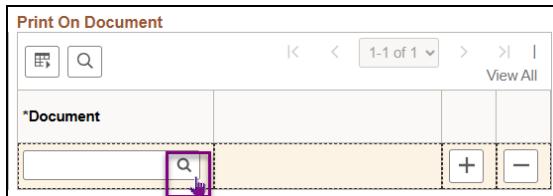
6. Complete the **Standard Note Description** section as described below.

Field Name	Field Description
Effective Date	Enter a date into the Effective Date field. It automatically defaults to the current date. Note: Make sure that the date is prior to the date that will be on your invoice.
Status	Allow the default of "Active."
Description	Enter a Description.
Note Type	Select the Magnifying Glass and choose a Note Type. If none exists, refer to Step 1 in this guide to create a Note Type before proceeding.
Text	Enter wording for your standard note.
Checkbox	Leave the "Show on Collections Workbench" checked.

SetID	G1001	Standard Note Code	PNTRINV
Standard Note Description <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input type="button" value="Q"/> <input type="button" value="K"/> < <input type="button" value="1 of 1"/> > <input type="button" value="View All"/> </div> <div style="flex: 1; text-align: right;"> <input style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px; margin-right: 5px;" type="button" value="+"/> <input style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px;" type="button" value="-"/> </div> </div>			
*Effective Date	07/01/2025 <input type="button" value="Q"/>	*Status	Active <input type="button" value="▼"/>
*Description	Partner monthly invoicing		
*Note Type	CUSTNOTE <input type="button" value="Q"/>	CUSTOMER NOTE	
Text	Monthly MNIT expenses <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; font-size: 0.8em;"> 233 characters remaining <input checked="" type="checkbox"/> Show on Collections Workbench </div>		

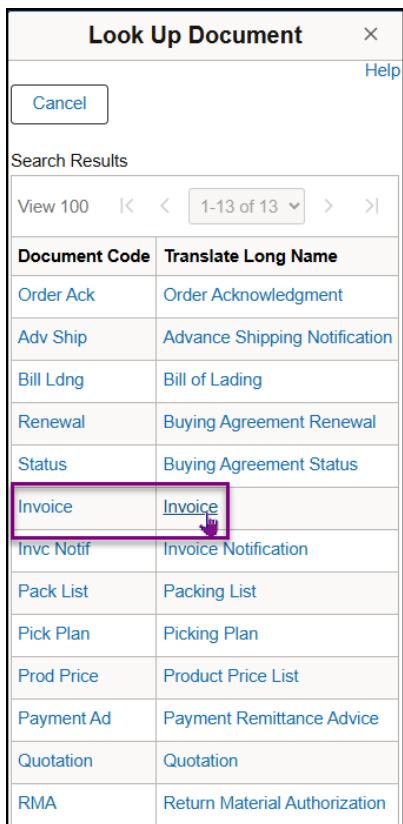
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7. Select the **Magnifying Glass** icon under Document in the **Print On Document** section.



The screenshot shows the 'Print On Document' search interface. At the top, there are search and filter icons. Below is a table with a single row labeled '*Document'. In the 'Document' column, there is a text input field with a magnifying glass icon. A cursor is hovering over this magnifying glass icon.

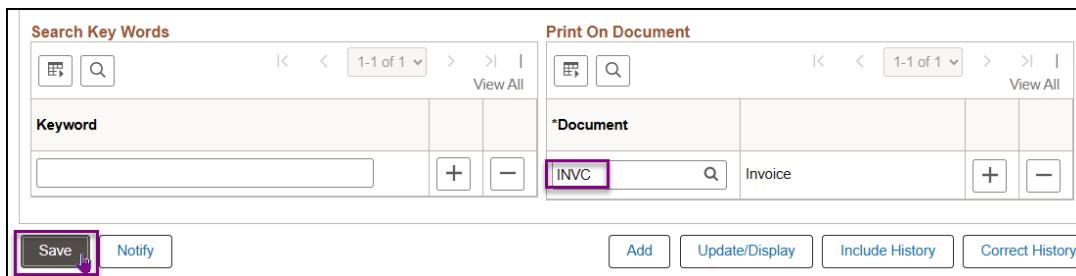
8. Select one of the **Invoice** links. You must select this document type to have the standard note available when creating bills.



The screenshot shows the 'Look Up Document' search results. The table has two columns: 'Document Code' and 'Translate Long Name'. The 'Invoice' row is highlighted with a purple box and a cursor is hovering over the 'Invoice' link in the 'Translate Long Name' column.

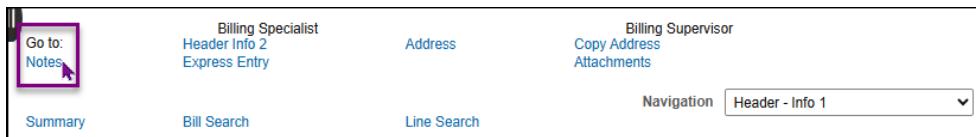
Document Code	Translate Long Name
Order Ack	Order Acknowledgment
Adv Ship	Advance Shipping Notification
Bill Ldng	Bill of Lading
Renewal	Buying Agreement Renewal
Status	Buying Agreement Status
Invoice	Invoice
Invc Notif	Invoice Notification
Pack List	Packing List
Pick Plan	Picking Plan
Prod Price	Product Price List
Payment Ad	Payment Remittance Advice
Quotation	Quotation
RMA	Return Material Authorization

9. You should see "INVC" in the Document column. Select the **Save** button.



The screenshot shows the 'Search Key Words' and 'Print On Document' interfaces side-by-side. In the 'Print On Document' section, the 'Document' field contains 'INVC'. The 'Save' button at the bottom left of the 'Search Key Words' interface is highlighted with a purple box.

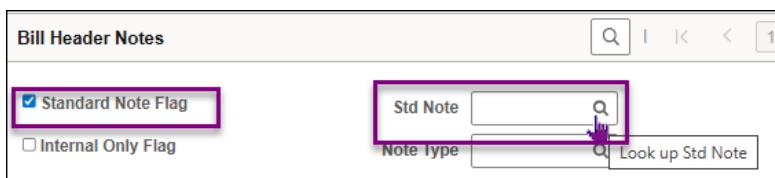
10. You can now navigate to the Billing module to add the standard note to a bill as needed. For instructions on creating bills, refer to the [Enter a Bill with Standard Bill Entry](#) Quick Reference Guide. From either the **Header – Info 1** or **Line – Info 1** pages, select the **Notes** link in the **Go to:** section.



The screenshot shows the 'Header - Info 1' page. At the top left, there is a 'Go to:' dropdown menu with 'Notes' selected. Other options in the menu include 'Header Info 2', 'Express Entry', 'Address', 'Copy Address', 'Attachments', 'Navigation' (set to 'Header - Info 1'), 'Summary', 'Bill Search', and 'Line Search'.

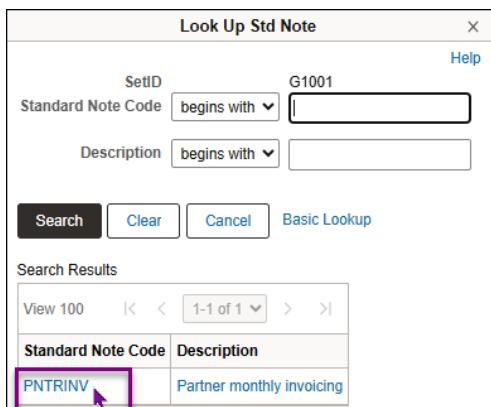
Note: Choose header notes or line notes, depending on where you want the standard note to display on an invoice.

11. The **Header – Note** or the **Line – Note** page displays. Select the checkbox next to the **Standard Note Flag** field.
 12. Select the **Magnifying Glass** icon in the **Std Note** field.



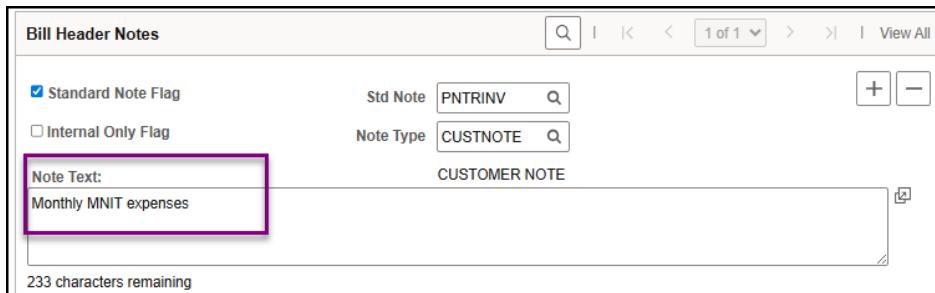
The screenshot shows the 'Bill Header Notes' page. On the left, there is a checkbox for 'Standard Note Flag' (which is checked) and an unchecked checkbox for 'Internal Only Flag'. On the right, there is a search field for 'Std Note' with a magnifying glass icon, a 'Note type' dropdown, and a 'Look up Std Note' button.

13. The look up standard note window displays. Select **Standard Note Code** that you want to use.



The screenshot shows the 'Look Up Std Note' window. It has fields for 'SetID' (G1001), 'Standard Note Code' (set to 'begins with'), and 'Description'. Below these are 'Search', 'Clear', 'Cancel', and 'Basic Lookup' buttons. The 'Search Results' section shows a single result: 'Standard Note Code' is 'PNTRINV' and 'Description' is 'Partner monthly invoicing'.

14. The standard note wording now displays in the **Note Text:** open text box.



The screenshot shows the 'Bill Header Notes' page again. The 'Note Text:' field is highlighted with a purple box and contains the text 'Monthly MNIT expenses'. Other fields shown include 'Standard Note Flag' (checked), 'Std Note' (set to 'PNTRINV'), 'Note Type' (set to 'CUSTNOTE'), and a note description 'CUSTOMER NOTE'.

Note: For Standard Notes, the text cannot be edited. If you need to revise the note, deselect the **Standard Note Flag** checkbox before editing and then save.

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15. View the Pro Forma to be sure the note displays in the appropriate location.

G1001 001 MINNESOTA MANAGEMENT & BUDGET G100000000-001 400 CENTENNIAL BLDG ST. PAUL MN 55155		 PRO FORMA																													
<p>Customer No: E260100001 Payment Terms: Due in 30 Due Date: November 5, 2025 Invoice: 00000716159 Invoice Date: October 6, 2025 From Date: To Date: Purchase Order: Page: 1 of 1</p> <p>Bill To: MN STATE COLLEGES/UNIVERSITIES E2601 MnSCU Minneapolis TC 1501 Hennepin Avenue Minneapolis MN 55403</p> <p>AMOUNT DUE: 250.00</p> <p>For billing questions, please call</p> <p style="text-align: right;">Original</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Identifier</th> <th>Description</th> <th>Qty</th> <th>UOM</th> <th>Unit Amt</th> <th>Net Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ELD_INV Monthly MNIT expenses</td> <td>Enterprise Learning Dev</td> <td>1.00</td> <td>EA</td> <td>250.00</td> <td>250.00</td> </tr> <tr> <td colspan="6"></td> <td>Subtotal: 250.00</td> </tr> <tr> <td colspan="6"></td> <td>Amount Due: 250.00</td> </tr> </tbody> </table> <p>Monthly MNIT expenses</p> <p>Line note</p> <p>Header note</p> <p>Bill To: MN STATE COLLEGES/UNIVERSITIES E2601 MnSCU Minneapolis TC 1501 Hennepin Avenue Minneapolis MN 55403</p> <p>Customer No: E260100001 Payment Terms: Due in 30 Due Date: November 5, 2025</p> <p>Please Remit To: MINNESOTA MANAGEMENT & BUDGET G100000000-001 400 CENTENNIAL BUILDING 658 CEDAR STREET ST. PAUL MN 55155</p> <p>Address Change? If yes, Check box. <input type="checkbox"/> Write correct address on back.</p> <p>Amount Due: 250.00</p> <p>Amount Remitted</p> <p>61001 E260100001Zzzzz 0 00000716159Zzzzzzzzzz 2 0000025000</p>				Line	Identifier	Description	Qty	UOM	Unit Amt	Net Amount	1	ELD_INV Monthly MNIT expenses	Enterprise Learning Dev	1.00	EA	250.00	250.00							Subtotal: 250.00							Amount Due: 250.00
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