

## QUICK REFERENCE GUIDE

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.

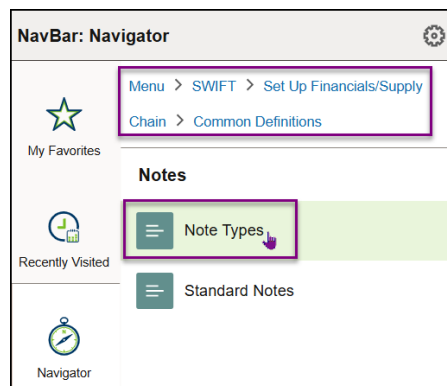
Users must have the AR-Billing Set-up role to create standard notes.

#### Step 1: Set Up Note Type

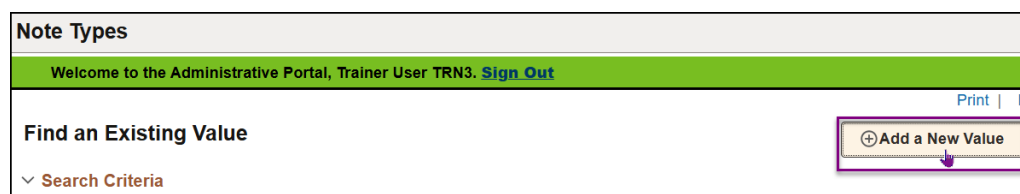
Before creating standard notes, there must be an available **Note Type**. **Note Type** is a required field when creating standard notes. If your agency has at least one note type, you may skip this step and move to [Step 2](#).

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

Navigation Options	Navigation Path
<b>NavBar Navigator</b>	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.



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
<b>NavBar Navigator</b>	NavBar icon, Navigator, SWIFT, Set Up Financials/Supply Chain, Common Definitions, Notes, Standard Notes.

Menu > SWIFT > Set Up Financials/Supply Chain > Common Definitions

Notes

Note Types

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

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

\*Standard Note Code PntrlInv

Add

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

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

SetID G1001

Standard Note Code PNTRINV

### Standard Note Description

Q

| < > |

1 of 1

> > | View All

\*Effective Date 07/01/2025

\*Status Active

+ -

\*Description Partner monthly invoicing

\*Note Type CUSTNOTE

CUSTOMER NOTE

Text Monthly MNIT expenses

233 characters remaining

☒ Show on Collections Workbench

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

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

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.

- 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.

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

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


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

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

**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.

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



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

Bill To:  
MN STATE COLLEGES/UNIVERSITIES  
E2601 MnSCU Minneapolis TC  
1501 Hennepin Avenue  
Minneapolis MN 55403

**AMOUNT DUE:** 250.00

For billing questions, please call

Original

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
<b>Subtotal:</b>						250.00
<b>Amount Due:</b>						<b>250.00</b>

Monthly MNIT expenses

Header note

Bill To:  
MN STATE COLLEGES/UNIVERSITIES  
E2601 MnSCU Minneapolis TC  
1501 Hennepin Avenue  
Minneapolis MN 55403

Customer No: E260100001  
Payment Terms: Due in 30  
Due Date: November 5, 2025

Address Change? If yes, Check box.  
Write correct address on back. → ☐

Please Remit To:  
MINNESOTA MANAGEMENT & BUDGET  
G100000000-001  
400 CENTENNIAL BUILDING  
658 CEDAR STREET  
ST. PAUL MN 55155

**Amount Due:** 250.00

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Amount Remitted

61001 E260100001ZZZZ 0 00000716159ZZZZZZZZ 2 0000025000