MEMBER BUSINESS SOLUTIONS

Comments

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Purpose of this document

This document illustrates the new enhancements that have been made in Ceres 2009 in regards to the Comment functionality.

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Purpose

The original Comment functionality in Ceres 2009 has been enhanced to include;

- Standard Comment Categories – to standardize record keeping for reporting/ searching
- Comment Codes – A user defined field that can be used to define, track, and group like Comments.
- Comment Length – The length of the Comment field was expanded from 80 characters to 250 characters.
- User Id and Date – Two new fields were added to Comments to track the user who created the comment and the date the comment was created. Both of these fields are automatically updated when a user creates a comment.

The enhanced comment functionality applies to Agencies, Donors, Vendors, Contacts, and Items.

Ceres object release 4.00.00 is required for the functionality documented in this procedure.

Workflow

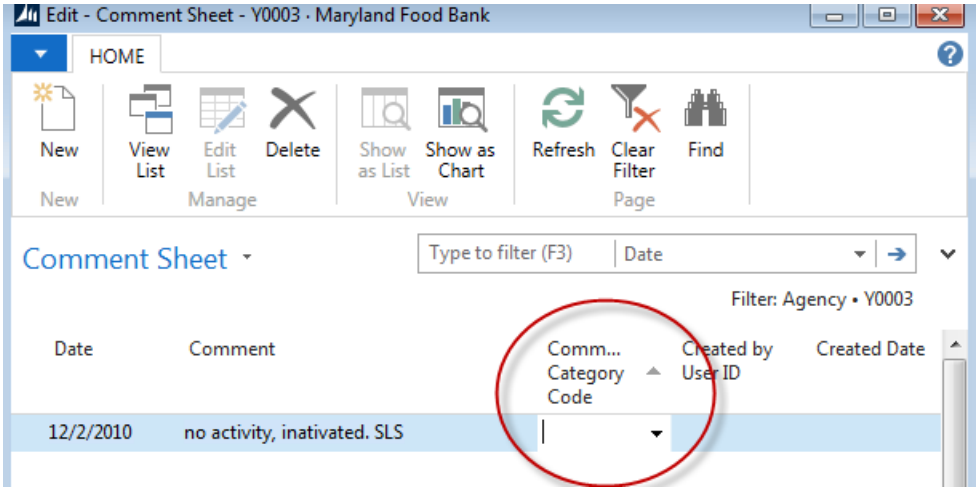
The first step is to setup standard Comment Categories that can be linked to comments. This way when users view comments they will be sorted by Comment Categories.

Comment Categories are defined by type: Agency, Donor/Vendor, Contact, or Item. This allows for transaction or process specific Codes to be defined.

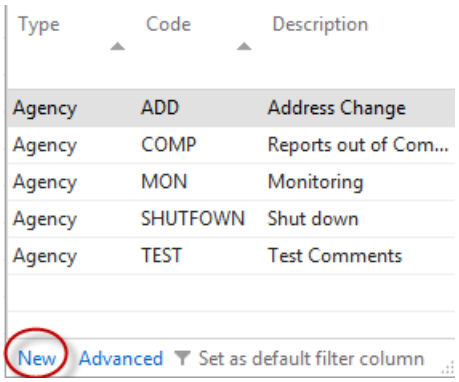
Once the Comment Categories are defined they can be linked to new or existing comments.

Setting up Comment Categories

1. The Comment Categories can be accessed from the Agency, Donor, Vendor, Contact, or Item Card by selecting Navigate → Comments. From the Comments Lists, drill down on the Comment Category Code field.



2. To create a new Comment Category select New.



3. Choose the Type of Comment Category. The options are Agency, Donor/Vendor, Contact, or Item.

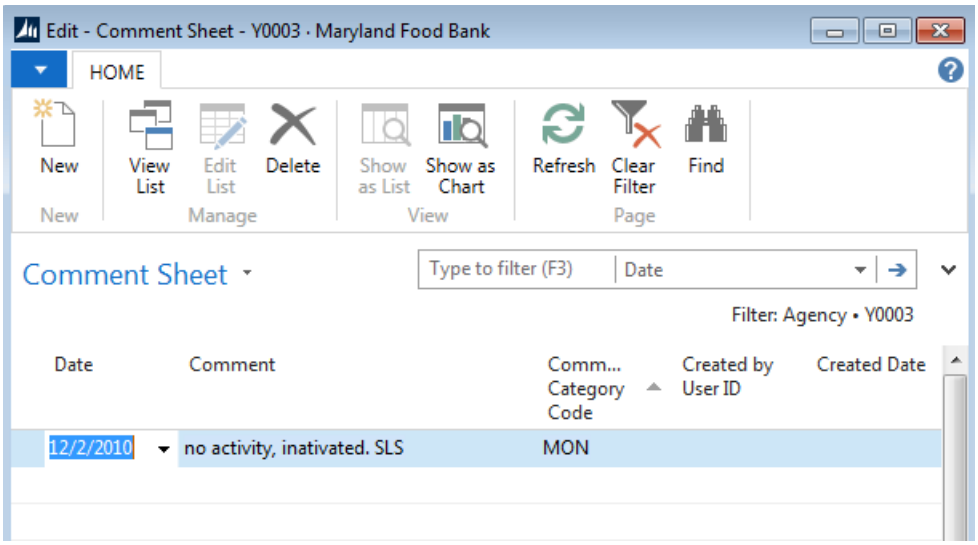
4. Enter a Code for the Comment Category.

5. Enter a Description.

6. Click OK.

Viewing and Editing Comments

1. Comments can be viewed from an Agency, Donor, Vendor, Contact, or Item Card by selecting Navigate → Comments.

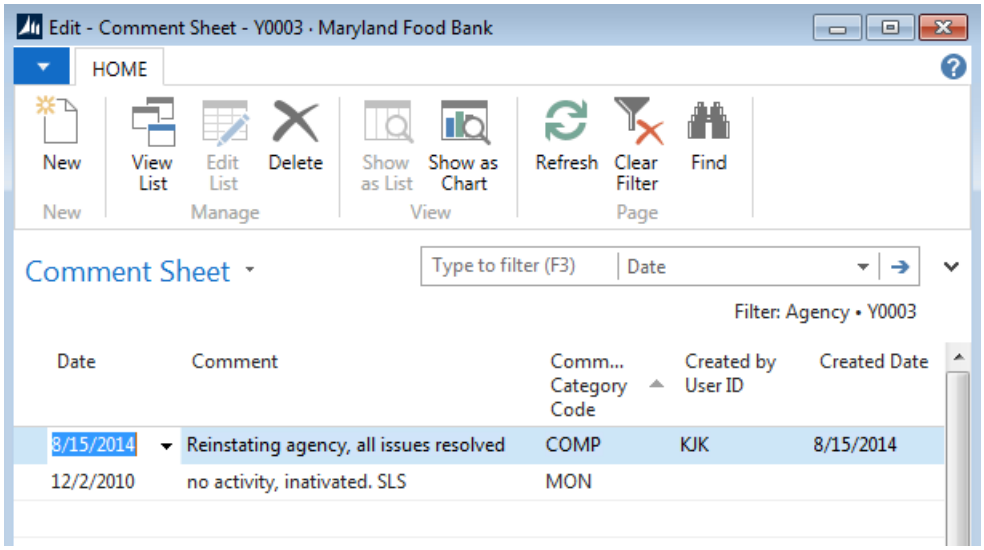


2. New comments can be added by clicking on Home → New.

3. In the Date field enter the date the interaction took place.

4. In the Comment field describe the interaction. Each line is 250 characters line long. Thus most comments can be entered on a single line vs. multiple lines.

5. Select a Comment Category Code. The Comment Categories List is filtered by the Type, so only Comment Categories of Type = Agency will display from an Agency Card, and Type = Item from an Item Card, etc. The comments are sorted by Comment Category, Line No. This way all like types of comments are together. If multiple comment lines are necessary, make sure you select a Comment Category Code on each comment line or the comments will not sort correctly.



6. The Created by User ID and Created Date fields are updated automatically by Ceres when a new comment has been entered.

7. An existing Comment can be edited by clicking on the line and then updating the various fields.

Related Topics:

1. Agency Overview
2. Donor Overview
3. Item Overview
4. Vendor Overview