

Master Company Setup | Notes Tab

You use this tabbed page to work with Notes, a free-form tool to record information about the company. Its use will vary dependent on the type of data you choose to record here.

Note

The Notes feature is for information purposes only. It has no effect on the payroll process. Information entered as notes is available to Millennium’s reporting functions.

This feature offers two types of internal notes for this company:

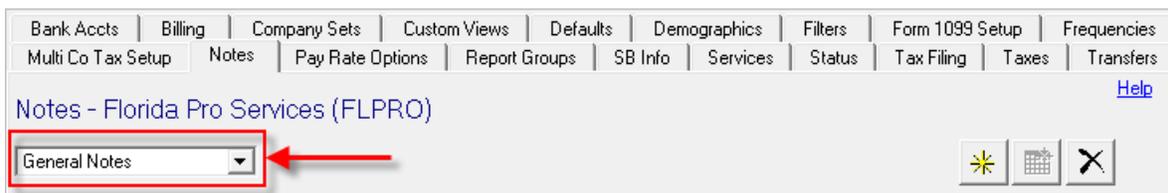
- General Notes
- Payroll Notes

You work with each one separately by selecting it from the options drop-down list in the page header. The default option for the page is **General Notes**.

For more information about payroll notes, see the *Payroll Notes* task sheet.

To work with company notes, select [\[company\] > Company Maintenance > Master Company Setup > Notes](#) tab. The system displays the Notes page and associated sub-pages. In the page header is the drop-down list of options, as shown in [Figure 1](#):

Figure 1: Options drop-down on the Notes page header



In the page header, you can select one of the following values from the drop-down list:

- **General Notes** — general information
This is the default value. The fields associated with this option are explained in [“General Notes option.”](#)
- **Payroll Notes** — payroll information
The fields associated with this option are explained in [“Payroll Notes option”](#) on [page 3](#).

The sections that follow explain the tabbed sub-pages of the Notes page, according to the option you select in the page header.

General Notes option

When you select the **General Notes** option, the system displays the General Notes information and the Notes sub-page, as shown in [Figure 2](#):

Figure 2: General Notes option and associated sub-page

Notes - Florida Pro Services (FLPRO)

General Notes

Category	Code	Entry Date	Description
Sales	NC	08/13/2012	Joe's Barber Shop
FLSDU	CHSPTACH	None	child support ACH

Notes

FLSDU - CHSPTACH - child support ACH

Category	Code	Check Date	Entry Date	Description
FLSDU	CHSPTACH	//	//	child support ACH

Memo

Florida SDU via ACH - set up unique agency for each FIPS code.
File approved 7/30/2010.
Agency Phone: 850-205-8248
melissa.strong@acs-inc.com

Most common applications are sales notes on new clients, recording information concerning critical events, or issues concerning the clients and logging of phone calls.

The *Category* and *Code* fields are not based on any data within Millennium. They are free-form text fields whose values are not checked, compared, or validated. This may impact reporting in cases where the same value is entered various ways (SALES, Sales, sales).

The field uses defined in this section are suggestions only.

The explanations of the fields are as follows:

Category Enter a general classification used by this company.

Code Enter a more specific ID that falls under the entry in the *Category* field.

Check Date Enter the check date to which this note pertains.

Entry Date Enter the date on which you initially created this note.

Description Enter a clear, concise explanation of this note.

Memo Enter the details of this note. As a best practice, ensure the text is not vague or open to interpretation so that it is helpful to whoever reads it.

Payroll Notes option

Select the **Payroll Notes** option. The system displays the Payroll Notes information and the Payroll Notes sub-page, shown in [Figure 3](#):

Figure 3: Payroll Notes option and associated sub-page

The screenshot shows a software interface with a menu bar at the top containing options like Bank Accts, Billing, Company Sets, Custom Views, Defaults, Demographics, Filters, Form 1099 Setup, Frequencies, Multi Co Tax Setup, Notes, Pay Rate Options, Report Groups, SB Info, Services, Status, Tax Filing, Taxes, and Transfers. Below the menu bar, the title bar reads "Notes - Florida Pro Services (FLPRO)" with a "Help" link. A dropdown menu is set to "Payroll Notes". Below this is a table with the following data:

Description	Start Date	End Date
Insurance Changes 2013	08/13/2012	12/31/2013

Below the table, there is a section titled "Payroll Notes" with a sub-header "Insurance Changes 2013". This section contains three input fields: "Description" with the value "Insurance Changes 2013", "Start Date" with the value "08/13/2012", and "End Date" with the value "12/31/2013". Below these fields is a text area labeled "Payroll Notes" containing the text: "Reminder: Insurance carrier and rates will change as of January 1, 2013."

The explanations of the fields are as follows:

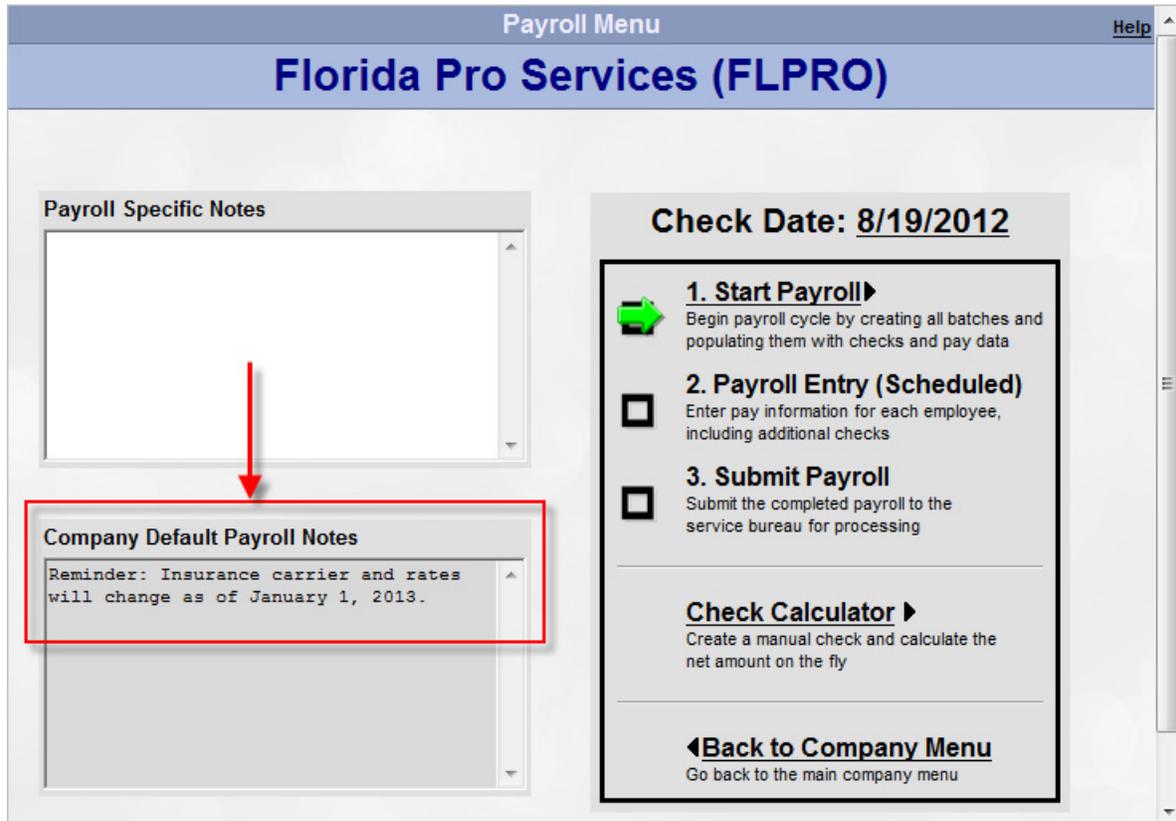
Description This field is automatically filled with the text you entered in the Enter new Payroll Notes Description dialog (see [Figure 6](#)). You can change the text, if desired.

Start Date, End Date The dates that dictate the first and last dates on which the text you enter in the *Payroll Notes* field (explained below) will appear on the Payroll Menu page.

Payroll Notes The text you enter in this field will appear on the main Payroll Menu page for *all* check dates that fall within the *Start Date* and *End Date* (explained above).

The payroll notes you define here are displayed in the **Payroll** page in the *Company Default Payroll Notes* text area, shown in [Figure 4](#):

Figure 4: Company Default Payroll Notes text area



For more information on how to use payroll notes, see the *Payroll Notes* task sheet.

Adding Notes

To add a new note, click the yellow star button in the page header:

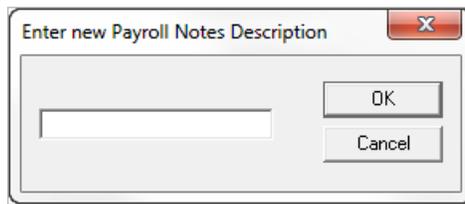
Figure 5: Yellow star button to add an item



What occurs next depends on the option you have selected. If you selected:

- **General Notes**, the system adds a new line item and places the cursor in the *Category* field.
- **Payroll Notes**, the system displays a pop-up window in which you define the label for the new payroll note:

Figure 6: Enter New Payroll Notes Description dialog



Enter a clear, concise explanation of this note. What you enter should not be the note itself, as that is the purpose of the *Payroll Notes* text field. Click the *OK* button when you are done.

Deleting Notes

To remove a note that is not referenced or used by anything in the system:

1. Highlight the note in the items list.
2. Click the black X button in the page header:

Figure 7: Black X button to delete an item



The system removes the note.

