Purchase Orders: Sending Notes to Contract Manager (Buyer)

1. Select the **Main Menu** tab in the Finance system.

2. Under Custom Document Search select **Purchase Orders**.

3. Enter the Purchase Order # or Requisition #.

4. Click the Search button.

5. Search result(s) appear at the bottom of the screen.

6. Click on the **Document/Notification Id number** to open the PO.
7. In the document window, scroll down to the **Notes and Attachments** tab.
   
   a. If the Notes and Attachments tab is not already open, select the **show** button.

   ![Notes and Attachments tab with show button](image)

8. In the **Note Text** box, enter detailed information for the contract manager.

   ![Note Text box](image)

9. Under the **Actions** column at the far left, click the **add** button.

   ![Actions column with add button](image)

10. The note is now added in the **Notes and Attachments** tab with date, time and author of the note.

   ![Notes and Attachments tab with note added](image)

11. Now you need to send the note to the contract manager’s Action List.

12. You can find out the contract manager for this PO under the **Document Overview** tab.

   ![Document Overview tab with contract manager information](image)

13. In the Notes and Attachments tab, under the **Notification Recipient** column, click on the magnify glass (lookup). Make sure you are working in the same row as your note.
14. Enter the contract manager’s first and last name.

15. Select the **Search** button.

16. Search result(s) will appear at the bottom of the screen.

17. Select the **return value** for the contract manager.

18. The contract manager’s name now appears in the **Notification Recipient** box next to your note.

19. Under the “Actions” column select the “send” button.

20. A confirmation message, “Note notification was successfully sent” will appear at the top of the document.
21. You have now completed your request to the contract manager and the document will appear in his/her Action List to “READ NOTES.”

22. Select the close button at bottom of page.

23. Return to the Main Menu.

Example

Below is an example of how the contract manager is informed via their Action List.