UNIVERSITY SERVICES

PURCHASING

Job Aid: POs: Responding to Contract Manager's Notes/Request for Changes

- The contract manager notifies an individual with detailed information using the **Notes and Attachments** tab.
- The **Note Text** is sent to an individual using the **Notification Recipient** column in the Notes and Attachments tab.

Step 1: The individual will receive the document in his/her Action List to **READ NOTES**.

Action List

One item retrieved.

Id	Type	Title	Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
510097	Purchase Order Amendment	Purchase Order Amendment - Payment Hold test - wma	FINAL	READ NOTES	Quinney, Desiree		02:54 PM 04/04/2011		

Step 2: Click on the Id number (link) to open the document.

Action List

One item retrieved.

Id	Type	Title	Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
510097	Purchase Order Amendment	Purchase Order Amendment - Payment Hold test - wma	FINAL	READ NOTES	Quinney, Desiree		02:54 PM 04/04/2011		

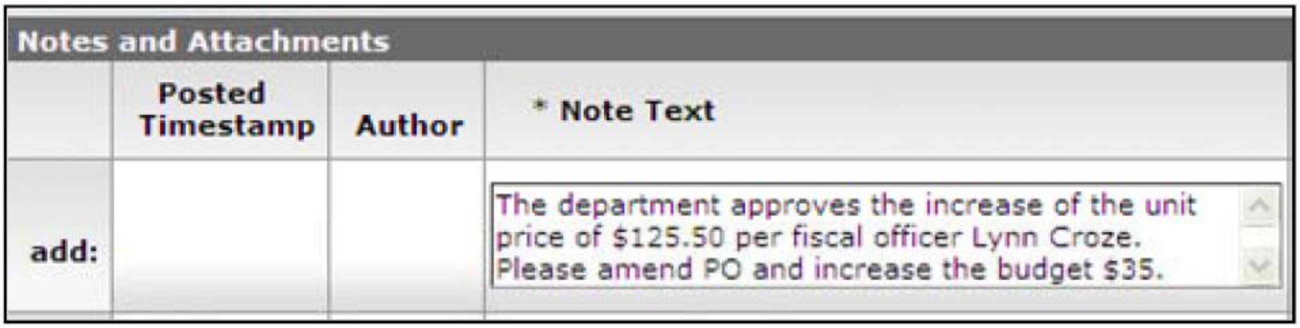
Step 3: In the document window, scroll down to the **Notes and Attachments** tab and read the **Note Text**.

Notes and Attachments

	Posted Timestamp	Author	* Note Text
add:			
1	04/04/2011 12:43 PM	Anderson, Wendy	Please REDUCE quantity order from 75 to 70 each on line 1.
2	04/04/2011 02:54 PM	Quinney, Desiree	Note entered while amending a Purchase Order : Reducing line item 1 from 75 to 70 each per department request. (Previous Document Id is 510023)
3	04/04/2011 02:54 PM	Quinney, Desiree	Accounts Payable received invoice for payment. The unit price is $125.50 NOT $125.00. Need department approval to increase budget $35 on this PO. Please respond as soon as possible.

Step 4: The individual should research the contract manager's note and respond back via the **Notes and Attachments** tab.

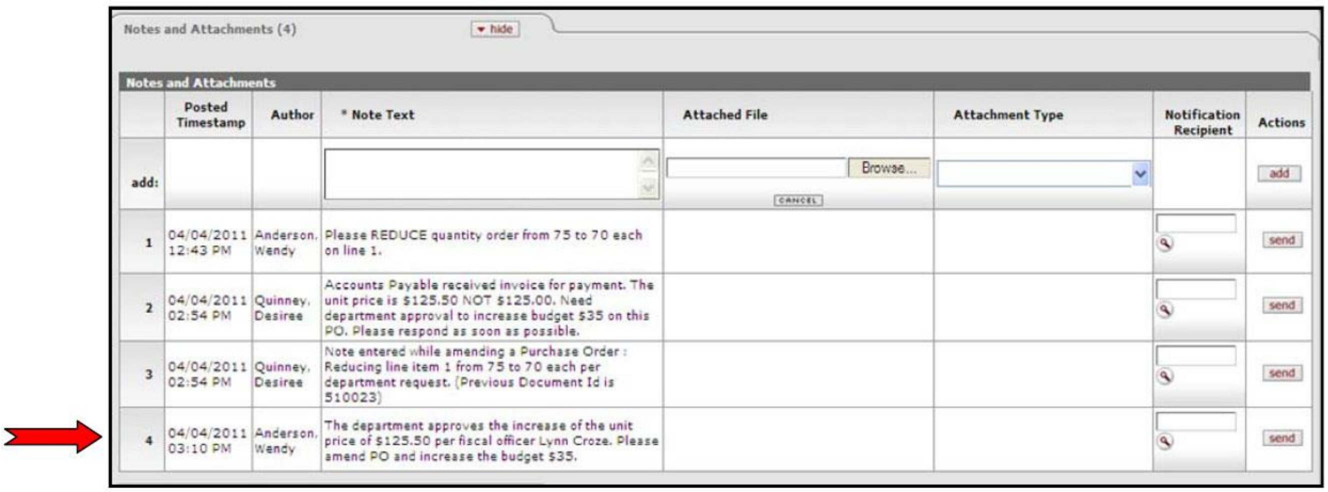
Step 5: In the **Note Text** box, enter detailed information for the contract manager.



Notes and Attachments			
	Posted Timestamp	Author	* Note Text
add:			The department approves the increase of the unit price of $125.50 per fiscal officer Lynn Croze. Please amend PO and increase the budget $35.

Step 6: Under the **Actions** column at the far left, click the **add** button.

Step 7: The note is now added in the **Notes and Attachments** tab with date, time and author of the note.



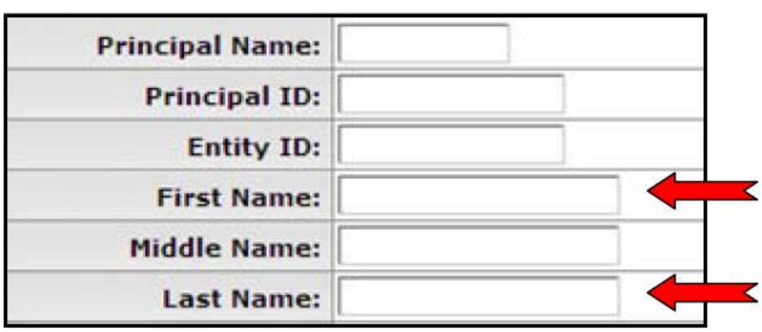
Notes and Attachments (4) hide

	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:				Browse... CANCEL			add
1	04/04/2011 12:43 PM	Anderson, Wendy	Please REDUCE quantity order from 75 to 70 each on line 1.				send
2	04/04/2011 02:54 PM	Quinney, Desiree	Accounts Payable received invoice for payment. The unit price is $125.50 NOT $125.00. Need department approval to increase budget $35 on this PO. Please respond as soon as possible.				send
3	04/04/2011 02:54 PM	Quinney, Desiree	Note entered while amending a Purchase Order : Reducing line item 1 from 75 to 70 each per department request. (Previous Document Id is 510023)				send
4	04/04/2011 03:10 PM	Anderson, Wendy	The department approves the increase of the unit price of $125.50 per fiscal officer Lynn Croze. Please amend PO and increase the budget $35.				send

Step 8: Send the note to the contract manager's Action List.

Step 9: Under the **Notification Recipient** column, in the same row as your new note, click on the magnify glass (lookup).

Step 10: Enter the contract manager's first and last name.



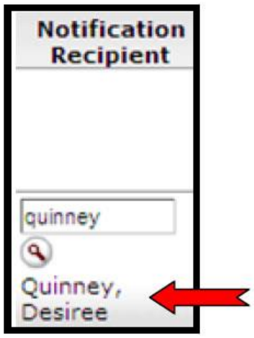
Step 11: Select the **Search** button.

Step 12. Search result(s) will appear at the bottom of the screen.

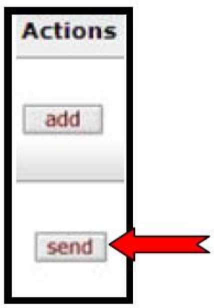
Step 13: Select the **return value** for the contract manager.

Return Value	Principal ID	Principal Name	Name	Entity ID	Campus Code	Primary Department Code	Employee ID
return value	10000000316	quinney	Quinney, Desiree	11adcc7b-9c6d-102a-aa45-59a83c375d2f	EL	MS-10074704	153900

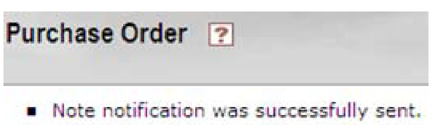
Step 14: The contract manager's name now appears in the **Notification Recipient** box next to your note.



Step 15: In the **Actions** column, on the same row as your note, click the **send** button.



Step 16: The message "Note notification was successfully sent" will appear at the top of the document.



Step 17: You have now responded to the contract manager and the document will appear in their Action List to READ NOTES.

Step 18: Select the **FYI** button at bottom of page. (Selecting the FYI button will remove the document from your Action List.)

Step 19: Return to the Main Menu.

MICHIGAN STATE UNIVERSITY

__UPDATED DESIGN 11/11/16__ Original doc: Purchase Orders: Responding to Contract Manager's Notes/Request for Changes.