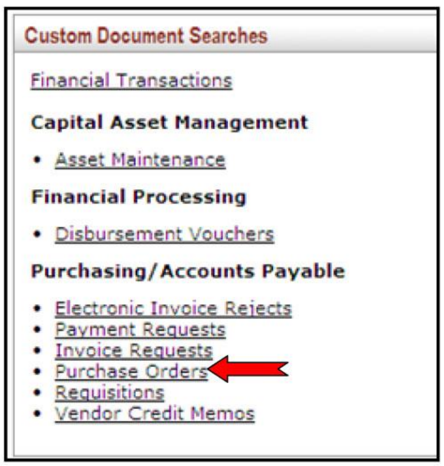
UNIVERSITY SERVICES

PURCHASING

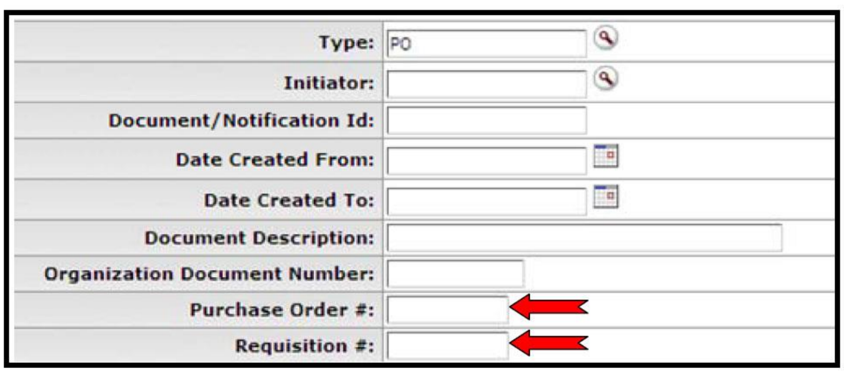
# Job Aid:
# Purchase Orders: Sending Notes to Contract Manager (Buyer)

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

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




**Step 3:** Enter the Purchase Order # or Requisition #.



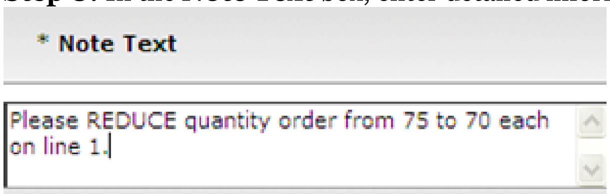

**Step 4:** Click the **Search** button.

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

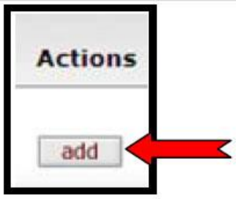
**Step 6:** Click on the **Document/Notification Id number** to open the PO.


**Step 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.

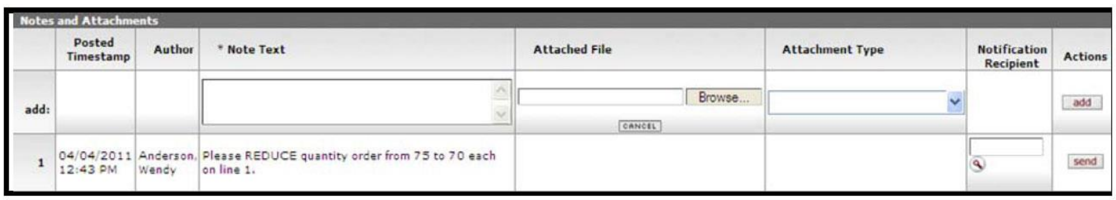

**Step 8:** In the **Note Text** box, enter detailed information for the contract manager.




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

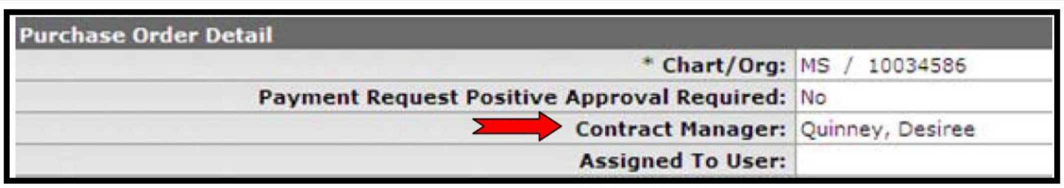



**Step 10:** The note is now added in the **Notes and Attachments** tab with date, time and author of the note.



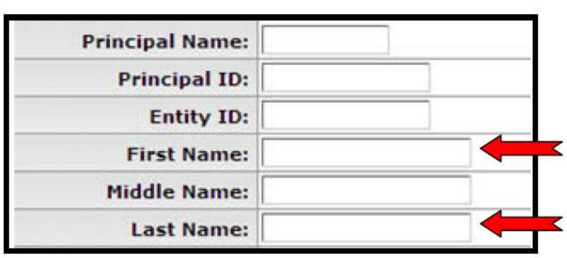

**Step 11:** Send the note to the contract manager's Action List.

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




**Step 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.

**Step 14:** Enter the contract manager's first and last name.



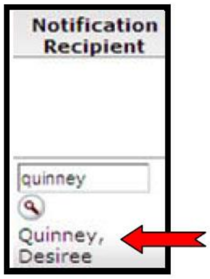

**Step 15:** Select the **Search** button.

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

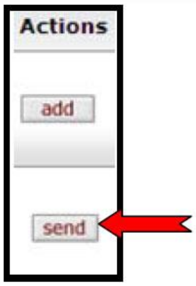
**Step 17:** Select the **return value** for the contract manager.

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




**Step 19:** Under the "Actions" column select the "send" button.




**Step 20:** The message "Note notification was successfully sent" will appear at the top of the document.

**Step 21:** You have now completed your request to the contract manager and the document will appear in his/her Action List to "READ NOTES."

**Step 22:** Select the **close** button at bottom of page.

**Step 23:** Return to the Main Menu.

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

Action List

One item retrieved.

| Id | Type | Title | Status | Action Requested | Initiator | Delegator | Date Created | Group Request | Log |
|---|---|---|---|---|---|---|---|---|---|
| 510023 | Purchase Order | Purchase Order - Payment Hold test - wma | FINAL | READ NOTES | KFS | | 02:32 PM 04/01/2011 | | |

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