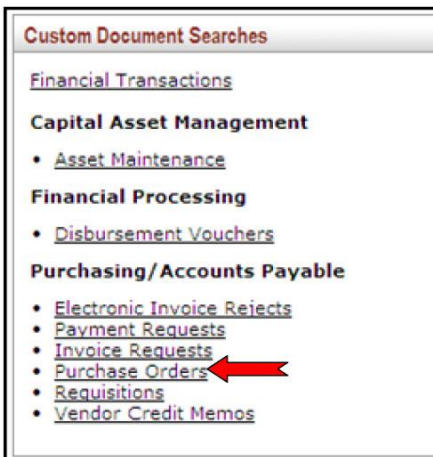


PURCHASING

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 #.

Type:	PO	
Initiator:		
Document/Notification Id:		
Date Created From:		
Date Created To:		
Document Description:		
Organization Document Number:		
Purchase Order #:		
Requisition #:		

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

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

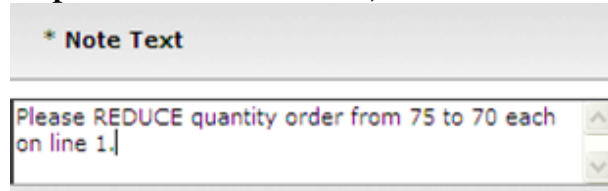
Step 6: Click on the **Document/Notification Id number** to open the PO.

Document/Notification Id	Document Description	Organization Document Number	Purchase Order #	Purchase Order Status Description	Contract Manager Name	Chart/Org	Vendor	University Fiscal Year	Type	Chart Code	Account Number
510023	Payment Hold test - wma		12397	Open	Quinney, Desiree	MS-10034586	INTEGRATED DNA TECHNOLOGIES INC	2011	Purchase Order	MS	RC0607

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.

Notes and Attachments							
	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:			<input type="text"/>	<input type="text"/> Browse... CANCEL	<input type="text"/>		<input type="button" value="add"/>
1	04/04/2011 12:43 PM	Anderson Wendy	Please REDUCE quantity order from 75 to 70 each on line 1.			<input type="text"/>	<input type="button" value="send"/>

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.

Purchase Order Detail	
* Chart/Org:	MS / 10034586
Payment Request Positive Approval Required:	No
Contract Manager:	Quinney, Desiree
Assigned To User:	

Step 13: In the Notes and Attachments tab, under the **Notification Recipient** column, click on the magnifying 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.

Principal Name:	<input type="text"/>
Principal ID:	<input type="text"/>
Entity ID:	<input type="text"/>
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>

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	quinnev	Quinnev, 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.

Notification Recipient

quinnev

Quinnev, Desiree

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

Actions

add

send

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		