

Job Aids

Sending Notes to Contract Manager in KFS Purchase Orders

Overview: This job aid demonstrates how to initiate notes to the contract managers on purchase order eDocs in Kuali Financial System.

- 1. Log in to <u>ebs.msu.edu</u> and click the Financial System tab.
- 2. Follow the Search for a Purchase Order tutorial to find and open the purchase order eDoc in KFS.
- 3. In the eDoc window, scroll down to the Notes and Attachments tab.
- 4. Add a new note to this tab.
 - a. In the Note Text box, enter detailed information for the contract manager.
 - b. Under the Actions column at the far left, click the **add** button.

Notes ar	nd Attachmen	ats (4)	• hide	This hide					
Notes a	nd Attachmer	nts							
	Posted Timestamp	Author	* Note Text	Attached File		Attachment Type	Notification Recipient	Actions	
add:		\Rightarrow		<u>^</u>	Browse			add	

- 5. Send the note to the Contract Manager.
 - a. In the **Notification Recipient** column (same row as the note), click the magnifying glass to look up the contract manager.
 - b. Enter the contract manager's first and last name.
 - c. Click the search button.
 - d. Select return value for the contract manager.
 - e. With the name in the **Notification Recipient** box, click the **send** button.
 - f. The message "Note notification was successfully sent" will appear at the top of the document.

Notes and Attachments												
	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Action					
add:				Browse	~		add					
_				CANCEL								
1	04/04/2011 12:43 PM	Anderson. Wendy	Please REDUCE quantity order from 75 to 70 each on line 1.			9	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.			9	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)			9	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.			9	send					

6. Close the eDoc and return to the Main Menu.

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