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 ebs.msu.edu 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.
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.
6. Close the eDoc and return to the Main Menu.

If you have any questions, please contact Procurement at (517) 355-0357.

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