



Sending Notes to Contract Manager

Overview: This job aid demonstrates how to initiate Notes to the Contract Managers on Purchase Order eDocs in Quali Financial System.

1. Log in to ebs.msu.edu and click the **Financial System** tab.
2. Follow the **How to Search for a Purchase Order** Job Aid to find and open your PO 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 and Attachments (4) hide							
Notes and Attachments							
	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:			<input type="text"/>	<input type="text" value="Browse..."/>		<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"/>
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.			<input type="text"/>	<input type="button" value="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 \$10023)			<input type="text"/>	<input type="button" value="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.			<input type="text"/>	<input type="button" value="send"/>



5. Send the note to the Contract Manager.
 - a. In the **Notification Recipient** column (same row as your note), click the magnifying glass to look up the Contract Manager.
 - b. Enter their first and last name.
 - c. Click the search button.
 - d. Select **return value** for the Contract Manager.
 - e. With their name now 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 (4) hide							
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	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:			<input type="text"/>	<input type="text"/> Browse... <input type="button" value="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"/>
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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)			<input type="text"/>	<input type="button" value="send"/>
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6. Close the eDoc and return to the Main Menu.