Sending Notes and Attachments to a Supplier

As of February 1, 2010, Kuali Financial System users can now communicate with suppliers by sending notes and/or notes and attachments. This quick guide will provide the steps in order to send notes and attachments to suppliers. When using shop catalogs or a standard non-catalog requisition, the user will need to use the Notes and Attachments Tab in the Kuali requisition eDOC.

The user has the option of sending a note or a note and attachment. Kuali will always require a note when attaching a document. Note: Once a note or attachment is added, it cannot be removed. Please be cognizant of what types of information that you attach and send to the vendor.
User will complete the steps on the requisition to trigger the workflow for workflow approval. When the PO is created the note and/or note and attachment will appear on the body of the PO with any attachments to send via email or fax to the supplier.