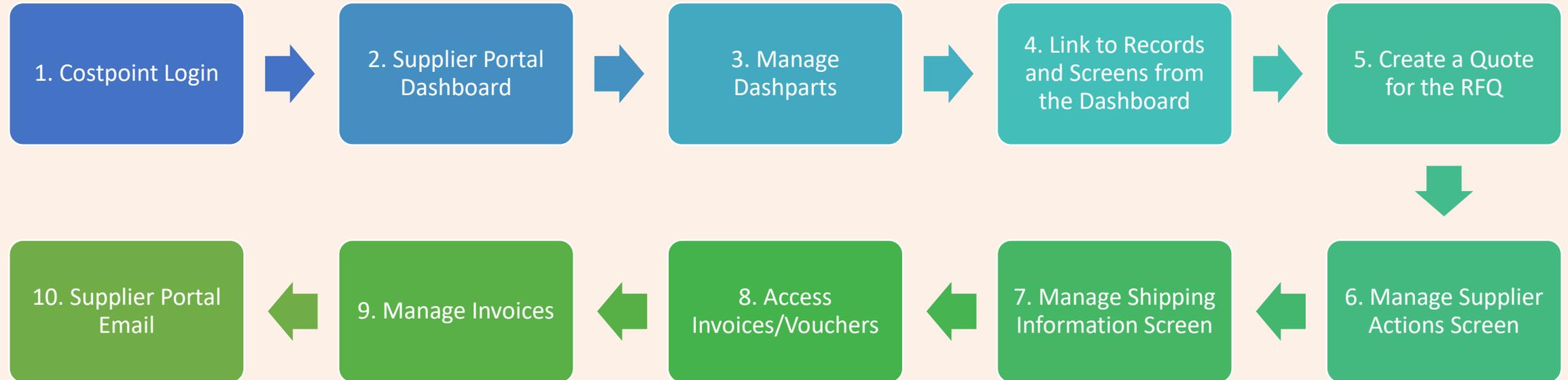


## Supplier Portal Overview Quick Steps

Welcome to the Supplier Portal Overview. This quick step discusses the Supplier Portal, a new feature within Costpoint that allows suppliers to quickly access purchase orders issued by buyers, submit shipping notifications, generate invoices, and approve invoices. The Supplier Portal helps companies streamline communications between their purchasing and accounts payable departments as well as their suppliers, vendors, and subcontractors.



### Navigation:

- Use the **PAGE DOWN** key to proceed to the next slide.
- Use the **PAGE UP** key to return to a prior slide.

Costpoint [Add Desktop Shortcut](#)

USERNAME

PASSWORD   
Enter a valid password

SYSTEM  ?

Remember me [Reset](#)

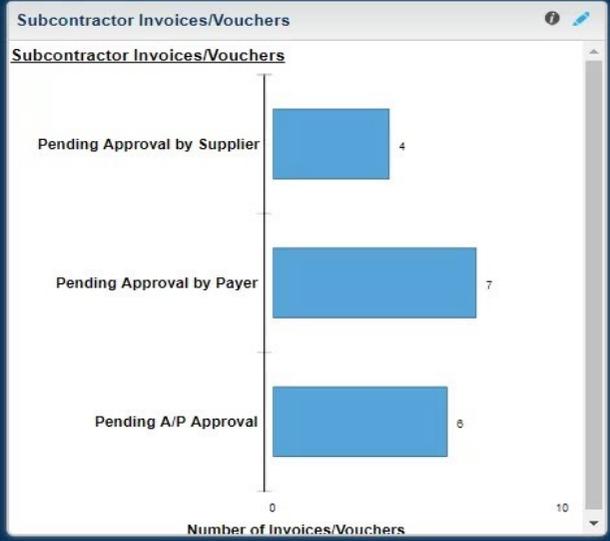
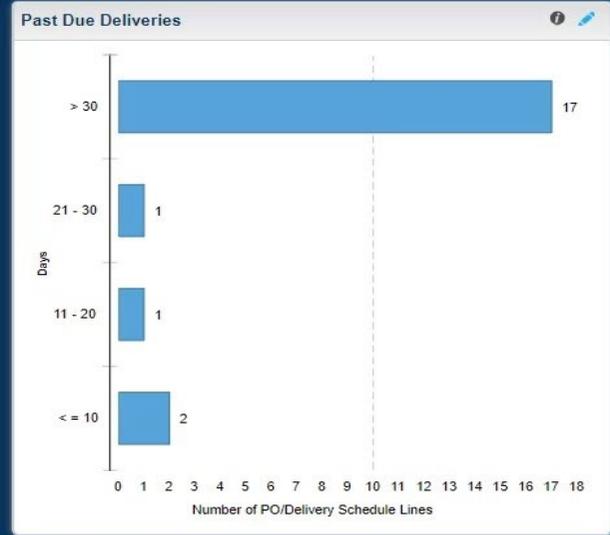
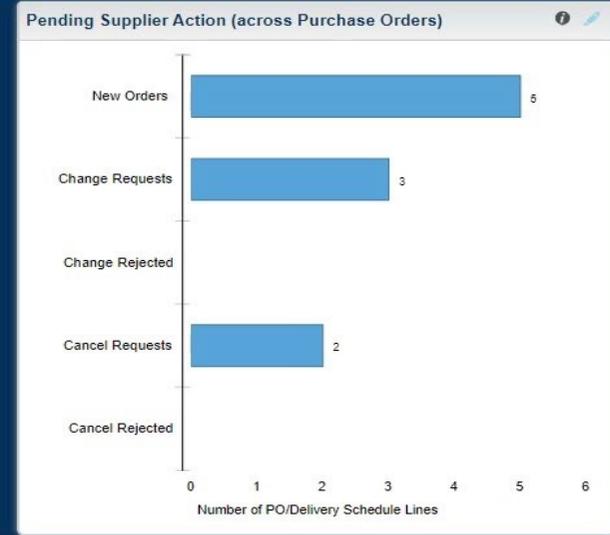
**LOG IN**

[+ SHOW ADDITIONAL CRITERIA](#)

Suppliers are setup as users in Costpoint and can access the Supplier Portal by logging in to Costpoint with the provided username and password. The supplier will have access to the following screens: Supplier Portal Dashboard, Manage Supplier Actions, Manage Shipping Information, and Manage Invoices.

\*All data updates in real time except when noted.

Manage Dashparts



### Purchase Order Invoices/Vouchers dashpart parameters

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rtse	PO Type
123456	04/01/2020	6,250.00	USD	PO-0000...	0	Subcontr...
6333	04/02/2020	2,500.00	USD	PO-0000...	0	Subcontr...
2556	04/03/2020	2,500.00	USD	PO-0000...	0	Subcontr...
123566	04/07/2020	2,500.00	USD	PO-0000...	0	Subcontr...
SP-0413-3	04/13/2020	15,163.20	USD	SP-0413-3	0	Subcontr...
INV-052020	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
885566	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
999666	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
788999	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
5633322	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
556666	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
8887755	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
55566333	07/22/2020	75.00	USD	PO-0000...	0	Purchase ...
74566323	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...

### Pending Supplier Action (by Purchase Order)

PO	Rtse	PO Type	Buyer	PO Total Amt	Curr
PO-0000216	0	Purchase Order	Ashley, Floyd	7,932.00	USD
PO-0000238	0	Purchase Order	Ashley, Floyd	0.00	USD
PO-0000261	0	Purchase Order	Ashley, Floyd	1,000.00	USD
PO-0000263	0	Purchase Order	Ashley, Floyd	7,500.00	USD
PO-0000273	0	Purchase Order	Ashley, Floyd	500.00	USD
PO-0000274	0	Purchase Order	Ashley, Floyd	2,000.00	USD
PO-0000275	0	Purchase Order	Ashley, Floyd	1,904.00	USD
SP-052620	0	Purchase Order	Kansagra, Roopa	0.00	USD
SP-072420	0	Purchase Order	Kansagra, Roopa	0.00	USD
SP-0724202	0	Purchase Order	Kansagra, Roopa	0.00	USD

### Open Purchase Orders

PO	Rtse	Buyer	PO Total Amt	Curr
PO-0000216	0	Ashley, Floyd	7,932.00	USD
PO-0000238	0	Ashley, Floyd	0.00	USD
PO-0000261	0	Ashley, Floyd	1,000.00	USD
PO-0000263	0	Ashley, Floyd	7,500.00	USD
PO-0000273	0	Ashley, Floyd	500.00	USD
PO-0000274	0	Ashley, Floyd	2,000.00	USD
PO-0000275	0	Ashley, Floyd	1,904.00	USD
SP-0413-2	0	Kansagra, Roopa	56,750.00	USD
SP-0413-3	0	Kansagra, Roopa	1,053,000.00	USD
SP-041320	0	Kansagra, Roopa	59,750.00	USD
SP-052520	0	Kansagra, Roopa	0.00	USD
SP-052620	0	Kansagra, Roopa	0.00	USD
SP-072420	0	Kansagra, Roopa	0.00	USD
SP-0724202	0	Kansagra, Roopa	0.00	USD

Upon login, the Supplier is taken to the Supplier Portal Dashboard where they can see the purchase orders and invoices tied to their vendor ID. The Supplier Portal Dashboard allows suppliers to view Purchase Orders that require action, as well as upcoming or late deliveries, cancelled orders and invoice approval status.

Use the Manage Dashparts link in the upper right hand corner to configure the dashparts you wish to display. Click the Manage Dashparts link and a dialog box will open.

A Select the dashpart in the available column that you want to add and click the plus button to the right of the dashpart.

B You can click Add All to include all available dashparts.

**Manage Dashparts**

Search Available

Available (1)		Add All
Name	Add	
Upcoming Deliveries	+	

Selected (6)		Remove All
Name	Edit Order Remove	
Pending Supplier Action (across P...		
Past Due Deliveries		
Subcontractor Invoices/Vouchers		
Purchase Order Invoices/Vouchers...		
Pending Supplier Action (by Purch...		
Open Purchase Orders		

Save Close

**Purchase Order Invoices/Vouchers dashpart parameters**

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rtse	PO Type
123456	04/01/2020	6,250.00	USD	PO-0000...	0	Subcontr...
6333	04/02/2020	2,500.00	USD	PO-0000...	0	Subcontr...
2556	04/03/2020	2,500.00	USD	PO-0000...	0	Subcontr...
123566	04/07/2020	2,500.00	USD	PO-0000...	0	Subcontr...
SP-0413-3	04/13/2020	15,163.20	USD	SP-0413-3	0	Subcontr...
INV-052020	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
885566	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
999666	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
788999	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
563322	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
556666	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
8887755	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
55566333	07/22/2020	75.00	USD	PO-0000...	0	Purchase ...
74566333	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...

\*All data updates in real time except when noted.

Manage Dashparts

Upon save, the Supplier Portal dashboard will automatically update with your edits and these changes will be saved to your user ID for future sessions. If your dashparts do not display on a single view or page due to your computer screen resolution, use the left and right arrow icons on the toolbar to toggle between pages and view the dashparts.

**Manage Dashparts**

Search Available

Available (1)		Add All	Selected (6)		Remove All	
Name	Add		Name	Edit	Order	Remove
Upcoming Deliveries	+		Pending Supplier Action (across P...		↓	✗
			Past Due Deliveries		↑ ↓	✗
			Subcontractor Invoices/Vouchers		↑ ↓	✗
			Purchase Order Invoices/Vouchers...		↑ ↓	✗
			Pending Supplier Action (by Purch...		↑ ↓	✗
			Open Purchase Orders		↑	✗

Save Close

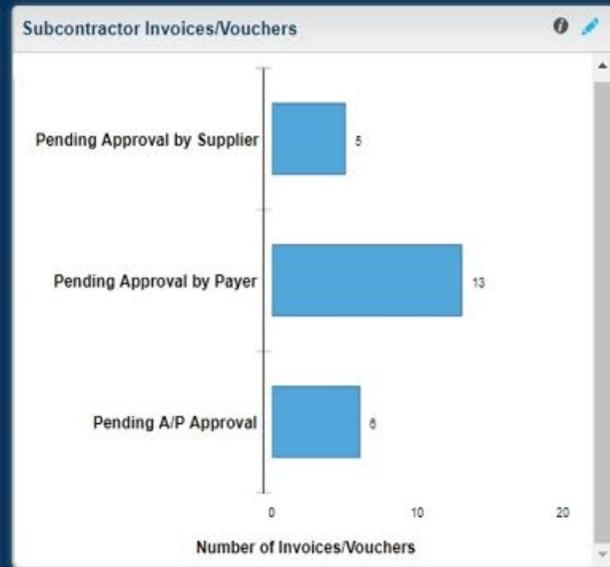
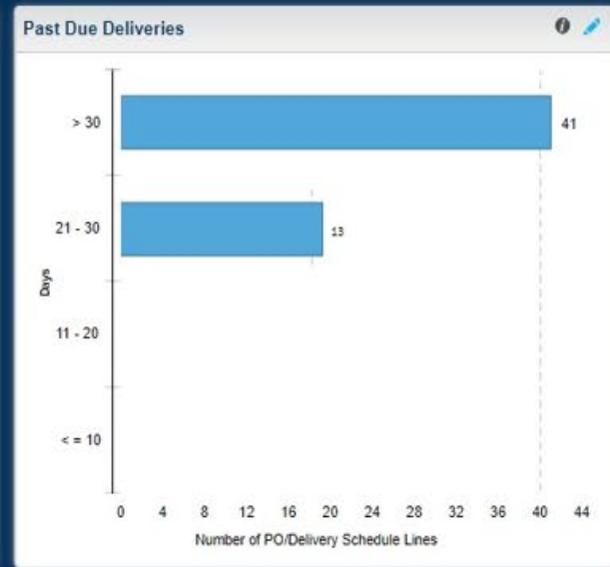
**Purchase Order Invoices/Vouchers dashpart parameters**

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rlse	PO Type
123456	04/01/2020	6,250.00	USD	PO-0000...	0	Subcontr...
6333	04/02/2020	2,500.00	USD	PO-0000...	0	Subcontr...
2556	04/03/2020	2,500.00	USD	PO-0000...	0	Subcontr...
123566	04/07/2020	2,500.00	USD	PO-0000...	0	Subcontr...
SP-0413-3	04/13/2020	15,163.20	USD	SP-0413-3	0	Subcontr...
INV-052020	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
885566	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
999666	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
788999	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
5633322	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
556666	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
8887755	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
55566333	07/22/2020	75.00	USD	PO-0000...	0	Purchase ...
74566333	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...

**C** To remove dashparts from the dashboard click the X button to the right of the dashpart that you want to remove in the Selected pane. You can click Remove All to remove all dashparts.

**D** You can also use the up and down arrows in the Selected pane to adjust the location of the Dashpart.

**E** The Edit Icon can be used to edit settings and parameters and can be accessed from the Dashboard or in the Manage Dashparts dialog box.



### Pending Supplier Action (by Purchase Order)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
<a href="#">0-ADEV...</a>	0	Subcontr...	Asaka, L...	0.00	USD	
<a href="#">0-ADEV...</a>	0	Purchas...	Asaka, L...	0.00	USD	
<a href="#">012621-1</a>	0	Purchas...	Asaka, L...	120.00	USD	
<a href="#">030521-1</a>	0	Purchas...	Asaka, L...	135.00	USD	
<a href="#">032019-1</a>	0	Purchas...	Asaka, L...	135.00	USD	
<a href="#">032521-1</a>	0	Purchas...	Asaka, L...	750.00	USD	Y
<a href="#">033021-1</a>	0	Purchas...	Asaka, L...	290.00	USD	Y
<a href="#">040721-1</a>	0	Purchas...	Asaka, L...	250.00	USD	Y
<a href="#">041221-2</a>	0	Purchas...	Asaka, L...	44.00	USD	Y
<a href="#">063020-1</a>	0	Subcontr...	Asaka, L...	5,250.00	USD	
<a href="#">063920-1</a>	0	Purchas...	Asaka, L...	150.00	USD	
<a href="#">000000...</a>	0	Purchas...	DOMIN...	13,445.80	USD	
<a href="#">0370153-1</a>	0	Subcontr...	Asaka, L...	20,372.40	USD	
<a href="#">0370153-2</a>	0	Purchas...	Asaka, L...	13,617.87	USD	
<a href="#">020-05-12</a>	0	Purchas...	Asaka, L...	100.00	USD	

### Open Purchase Orders

PO	Rise	Buyer	PO Total Amt	Curr	DPAS
<a href="#">0-ADEV0015</a>	0	Asaka, Leslie S C.P.A.	0.00	USD	
<a href="#">0-ADEV0017</a>	0	Asaka, Leslie S C.P.A.	0.00	USD	
<a href="#">0-ADEV0018</a>	0	Asaka, Leslie S C.P.A.	0.00	USD	
<a href="#">0-ADEV0031</a>	0	Asaka, Leslie S C.P.A.	8,143.02	USD	
<a href="#">01-AD00004</a>	0	Asaka, Leslie S C.P.A.	924.00	USD	
<a href="#">012621-1</a>	0	Asaka, Leslie S C.P.A.	120.00	USD	
<a href="#">030521-1</a>	0	Asaka, Leslie S C.P.A.	135.00	USD	
<a href="#">032019-1</a>	0	Asaka, Leslie S C.P.A.	135.00	USD	
<a href="#">032521-1</a>	0	Asaka, Leslie S C.P.A.	750.00	USD	Y
<a href="#">033021-1</a>	0	Asaka, Leslie S C.P.A.	290.00	USD	Y
<a href="#">040721-1</a>	0	Asaka, Leslie S C.P.A.	250.00	USD	Y
<a href="#">041221-2</a>	0	Asaka, Leslie S C.P.A.	44.00	USD	Y
<a href="#">063020-1</a>	0	Asaka, Leslie S C.P.A.	5,250.00	USD	
<a href="#">063920-1</a>	0	Asaka, Leslie S C.P.A.	150.00	USD	
<a href="#">1000000000</a>	0	DOMINGO, ANNABELLE B	13,445.80	USD	
			20,372.40	USD	
			13,617.87	USD	
			100.00	USD	
			50.00	USD	

### Purchase Order Invoices/Vouchers

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rise	PO Type
<a href="#">123456</a>	04/01/2020	6,250.00	USD	PO-0000...	0	Subcontr...
<a href="#">6333</a>	04/02/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">2556</a>	04/03/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">123566</a>	04/07/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">SP-0413-3</a>	04/13/2020	15,163.20	USD	SP-0413-3	0	Subcontr...
<a href="#">INV-052020</a>	05/26/2020	0.00	USD	SP-052520	0	Purchase...
<a href="#">885566</a>	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">999666</a>	06/24/2020	88.00	USD	PO-0000...	0	Purchase...
<a href="#">788999</a>	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase...
<a href="#">5633322</a>	06/26/2020	400.00	USD	PO-0000...	0	Purchase...
<a href="#">556666</a>	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
<a href="#">8887755</a>	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
<a href="#">55566333</a>	07/22/2020	75.00	USD	PO-0000...	0	Purchase...
<a href="#">74566323</a>	07/28/2020					
<a href="#">774422333</a>	09/18/2020					
<a href="#">776633232</a>	09/18/2020					

### Pending Supplier Action (by Request for Quotes)

RFQ	Buyer	Quote	Quote Reqd Date	Status
<a href="#">040821-1</a>	Asaka, Leslie S C.P.A.	Q040821-1		Partially Quoted
<a href="#">041521-2</a>	Asaka, Leslie S C.P.A.	Q041521-2		Partially Quoted
<a href="#">041521-6</a>	Asaka, Leslie S C.P.A.	Q041521-6		Partially Quoted
<a href="#">RFQ-T105</a>	Asaka, Leslie S C.P.A.			New
<a href="#">RFQ070921B</a>	Asaka, Leslie S C.P.A.	QT02		Partially Quoted
<a href="#">RFQ071121B</a>	Asaka, Leslie S C.P.A.	QT03		Partially Quoted
<a href="#">RFQ071321A</a>	Asaka, Leslie S C.P.A.	QT04		Partially Quoted
<a href="#">RFQ1000227</a>	Asaka, Leslie S C.P.A.	VQ 032421B	03/24/2021	Partially Quoted
<a href="#">RFQ1000244</a>	Asaka, Leslie S C.P.A.	VQ043021-0		Partially Quoted
<a href="#">RFQ1000253</a>	Asaka, Leslie S C.P.A.			New
<a href="#">RFQ1000255</a>	Asaka, Leslie S C.P.A.			New
<a href="#">RFQ1000260</a>	Asaka, Leslie S C.P.A.	VQT0709B		Partially Quoted
<a href="#">RFQ1000261</a>	Asaka, Leslie S C.P.A.	VQT0709C		Partially Quoted
				Quote not Submitted
				Quote not Submitted
				Partially Quoted

From the dashparts, suppliers can click the hyperlinks to access individual records in the corresponding screens, and take the necessary actions.

## 4. Link to Records and Screens from the Dashboard



Browse Applications &gt; Materials &gt; Supplier Portal &gt; Dashboards/Actions &gt; Manage Quotes

## Manage Quotes

1 of 1 Existing Table Query

Request for Quotes	RFQ-100266	RFQ Date	07/21/2021	RFQ Status	Open
Buyer	Asaka, Leslie G	Quote Reqd Date		Valid Through Date	
Header Notes					

The Request for Quote hyperlink accesses the Manage Quotes screen where the supplier can view requests for quotes and choose to generate a quote in response to the request. This will trigger an email to the buyer with the details, and if the quote is awarded, the buyer will create a purchase order. Both buyer and supplier will be able to communicate about an RFQ and quote via the Notes that will trigger an email notification to both parties.

[Generate Quote](#)

RFQ Lines

## Vendor Quotes

Copy Delete 1 of 1 Existing Table Query

Quote ID*	VQ0726	Quote Status	Open	Trans Currency	USD
Expiration Dt		Expiration Days	0	Quote Date*	07/25/2021
RFQ	RFQ-100266	Buyer	Asaka, Leslie G	Ship Via	
Terms*	NET 30	FOB			

Header Notes

Quote Lines

Browse Applications > Materials > Supplier Portal > Dashboards/Actions > Manage Supplier Actions

### Manage Supplier Actions

New Action	PO	Rise	Change Order	PO Status	PO Type	PO Line	Delivery Line	Line Status	Buyer	Item	Rev	Description	Order Qty	Order Amt	Due Date	Currency	Open Qty	Open Amt	Desired Date	U/M	
-None-	PO-0000216	0	0	Open	Purchase Order	2		Open	Ashley, Floyd	4101661	-	Titanium bolts - 3"	36	432.00	04/02/2020	USD	36	432.00	04/02/2020	BX	ashleyfloyd

Header Details Line Details

### Action History

Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

Once the buyer reviews the quotes and chooses a vendor, the Purchase Order is created and released which triggers an email notification to the supplier. The Supplier Dashboard is also updated with the record. The Purchase Order hyperlink from the email or dashboard accesses the Manage Supplier Actions screen. In this screen, action needed for the Purchase Order or line can be managed and the Supplier actions taken are attached to the vendor ID.


 Manage Supplier Actions 1 of 1 Existing **Table** Query

PO	PO-0000216	Release	0	Change Order	0	PO Status	Open	PO Type	Purchase Order
PO Line	2	Delivery Line				Line Status	Open	Buyer	Ashley, Floyd
Item	4101661	Rev	-	Description	Titanium bolts - 3"				
Order Qty	36	Order Amt	432.00	Due Date	04/02/2020	Currency	USD		
Open Qty	36	Open Amt	432.00	Desired Date	04/02/2020	U/M	BX		
Vendor Contact Email Address	ashleyfloyd@deltek.com								

## Last Action

Action Message	Pending Supplier Acknowledgment								
Proposed Order Qty		Proposed Order Amt		Proposed Due Date					

## New Action

Action Message	-None-								
Proposed Order Qty		Proposed Order Amt		Proposed Due Date					
Notes									

[Header Details](#) [Line Details](#)

## Action History

Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

Form and Table views are available for all screens in the Supplier Portal. Click Form or Table at the upper right-hand side of the section to toggle back and forth between views.



Browse Applications > Materials > Supplier Portal > Dashboards/Actions > Manage Supplier Actions

**Manage Supplier Actions** 1 of 1 Existing Table Query

PO: PO-0000216 Release: 0 Change Order: 0 PO Status: Open PO Type: Purchase Order  
 PO Line: 2 Delivery Line: Line Status: Open Buyer: Ashley, Floyd  
 Item: 4101661 Rev: - Description: Titanium bolts - 3"  
 Order Qty: 36 Order Amt: 432.00 Due Date: 04/02/2020 Currency: USD  
 Open Qty: 36 Open Amt: 432.00 Desired Date: 04/02/2020 U/M: BX  
 Vendor Contact Email Address: ashleyfloyd@deltek.com

**Last Action**

Action Message: Pending Supplier Acknowledgment  
 Proposed Order Qty: Proposed Order Amt: Proposed Due Date:

**New Action**

Action Message: **-None-**  
 Proposed Order Qty: **-None-**  
 Notes: Accepted by Supplier, Cancel Request by Supplier, Change Request by Supplier, Rejected by Supplier

**Action History**

Modified Date/Time	Modified By	PO Change Order	Action	Order C
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	

From the Manage Supplier Actions screen, use the **New Action** group box to select an action for the Purchase order line, then select save. The following actions are available in the drop-down list:

- **Accepted by Supplier** - Select this option to notate supplier's acceptance of the initial Purchase Order line, a change request made by the buyer, or to accept a cancel request made by the buyer.
- **Rejected by Supplier** - Select this option to indicate supplier's rejection of the Purchase Order line a change request made by the buyer, or to reject a cancel request made by the buyer.
- **Change Request by Supplier** - Select this option to propose a change to the Purchase Order line, order quantity, or due date.
- **Cancel Request by Supplier** - Select this option to propose a cancellation of the Purchase Order line.

Manage Supplier Actions																				Form	Query
New Action	PO	Rise	Change Order	PO Status	PO Type	PO Line	Delivery Line	Line Status	Buyer	Item	Rev	Description	Order Qty	Order Amt	Due Date	Currency	Open Qty	Open Amt	Desired Date	U/M	
-None-	PO-0000216	0	0	Open	Purchase Order	2		Open	Ashley, Floyd	4101661	-	Titanium bolts - 3"	36	432.00	04/02/2020	USD	36	432.00	04/02/2020	BX	ashleyfloyd
<ul style="list-style-type: none"> <li>-None-</li> <li>Accepted by Supplier</li> <li>Cancel Request by Supplier</li> <li>Change Request by Supplier</li> <li>Rejected by Supplier</li> </ul>																					
Manage Supplier Actions																				Form	Query
Created By	PO Change Order	Action			Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes				
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment			36	432.00	04/02/2020													

You can also update the PO Lines actions in Table view via the New Action drop down.

Manage Supplier Actions																			Form	Query	[-]	[X]
New Action	Order	PO Status	PO Type	PO Line	Delivery Line	Line Status	Buyer	Item	Rev	Description	Order Qty	Order Amt	Due Date	Currency	Open Qty	Open Amt	Desired Date	U/M	Vendor Contact Email Address			
-None-	0	Open	Purchase Order	2		Open	Ashley, Floyd	4101661	-	Titanium bolts - 3"	36	432.00	04/02/2020	USD	36	432.00	04/02/2020	BX	ashleyfloyd@deltek.com	Pending		
-None-	0	Open	Purchase Order	1	2	Open	Ashley, Floyd	4101351-1	-	Fuselage	150	0.00	06/22/2020	USD		0.00	06/22/2020	EA	ashleyfloyd@deltek.com	Pending		
-None-	0	Open	Purchase Order	1	2	Open	Ashley, Floyd	4101351-1	-	Fuselage	2	200.00	07/22/2020	USD		500.00	07/22/2020	EA	ashleyfloyd@deltek.com	Pending		
-None-	0	Open	Purchase Order	1	2	Open	Ashley, Floyd	4101351-1	-	Fuselage	1	100.00	08/05/2020	USD		500.00	08/05/2020	EA	ashleyfloyd@deltek.com	Pending		
-None-	0	Open	Purchase Order	1	2	Open	Ashley, Floyd	4101351-1	-	Fuselage	2	500.00	08/11/2020	USD	2	500.00	08/11/2020	EA	ashleyfloyd@deltek.com	Pending		
-None-	0	Open	Purchase Order	1	2	Open	Ashley, Floyd	4101577-1	-	Transponder Cover	4	0.00	06/05/2020	USD	4	0.00	06/05/2020	EA	roopakansagra@deltek.com	Pending		

Load New Action = Accepted by Supplier  
Show/Hide Screen Controls

You can also automatically update selected rows to "Accepted by Supplier" by using the Load New Action menu. Hover over the header until it changes to a four-sided arrow cursor. Right-click on the header to open the menu option and select Load New Action = Accepted by Supplier.

Action History																Form	Query	[-]
Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes		
06/23/2020 08:18:28 AM	AFLOYD	0	Pending Supplier Acknowledgment	2	200.00	07/22/2020												

Browse Applications > Materials > Supplier Portal > Dashboards/Actions > Manage Supplier Actions

### Manage Supplier Actions

1 of 1 Existing Table Query

PO: PO-0000216 Release: 0 Change Order: 0 PO Status: Open PO Type: Purchase Order  
 PO Line: 2 Delivery Line: Line Status: Open Buyer: Ashley, Floyd  
 Item: 4101661 Rev: - Description: Titanium bolts - 3"  
 Order Qty: 36 Order Amt: 432.00 Due Date: 04/02/2020 Currency: USD  
 Open Qty: 36 Open Amt: 432.00 Desired Date: 04/02/2020 U/M: BX  
 Vendor Contact Email Address: ashleyfloyd@deltek.com

**Last Action**

Action Message: Pending Supplier Acknowledgment  
 Proposed Order Qty: Proposed Order Amt: Proposed Due Date:

**New Action**

Action Message: -None-  
 Proposed Order Qty: Proposed Order Amt: Proposed Due Date:  
 Notes:

Header Details Line Details

**Action History**

	Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes
✓	06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

In Form view suppliers can utilize the New Action box to enter additional information such as proposed order quantity, proposed due date, notes, and the conditional proposed order amount, which is editable only if the Purchase Order line order quantity is zero.

## 6. Manage Supplier Actions Screen



## Manage Supplier Actions

1 of 1 Existing Table Query

PO PO-0000216 Release 0 Change Order 0 PO Status Open PO Type Purchase Order  
 PO Line 2 Delivery Line Line Status Open Buyer Ashley, Floyd  
 Item 4101661 Rev - Description Titanium bolts - 3"  
 Order Qty 36 Order Amt 432.00 Due Date 04/02/2020 Currency USD  
 Open Qty 36 Open Amt 432.00 Desired Date 04/02/2020 U/M BX  
 Vendor Contact Email Address ashleyfloyd@deltek.com

## Last Action

Action Message Pending Supplier Acknowledgment  
 Proposed Order Qty Proposed Order Amt Proposed Due Date

## New Action

Action Message -None-  
 Proposed Order Qty Proposed Order Amt Proposed Due Date  
 Notes

Header Details Line Details

## Action History

Form Query

Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

You can view the history of any change, along with communication notes, in the Action History group box. Costpoint displays all actions associated with the particular Purchase Order line, or delivery schedule line, regardless of the change order number.

Manage Supplier Actions

PO: PO-0000216 Release: 0 Change Order: 0 PO Status: Open PO Type: Purchase Order  
 PO Line: 2 Delivery Line: Line Status: Open Buyer: Ashley, Floyd  
 Item: 4101661 Rev: - Description: Titanium bolts - 3"  
 Order Qty: 36 Order Amt: 432.00 Due Date: 04/02/2020 Currency: USD  
 Open Qty: 36 Open Amt: 432.00 Desired Date: 04/02/2020 U/M: BX  
 Vendor Contact Email Address: ashleyfloyd@deltek.com

**Last Action**  
 Action Message: Pending Supplier Acknowledgment  
 Proposed Order Qty: Proposed Order Amt: Proposed Due Date:

**New Action**  
 Action Message: -None-  
 Proposed Order Qty: Proposed Order Amt:  
 Notes:

In Manage Supplier Actions, suppliers can also see the header and line details of the Purchase Order, which are read-only.

**Action History**

Modified Date/Time	Modified By	PO Change Order	Action	Order Qty	Order Amt	Due Date	Proposed Order Qty	Proposed Order Amt	Proposed Due Date	Shipped Qty	Shipment Number	Ship Date	Carrier	Tracking Number	Number of Containers	Notes
06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

**Manage Supplier Actions > Line Details**

PO Line	Type	Item	Rev	Description	Misc Type	PO U/M	Mfg Part	Mfg Rev	Vendor Part	Vend Rev	Due Date	Ordered Quantity	Orig Due Date	Desired Date	Received Quantity	Accepted Quantity	Open	Rejected Quantity	Ordered Amt	Received Amt	Accepted Amt	Open	Rejected Amt	Delivery Schedule Exists	Resource Exists	Gross Unit Cost	Net Unit Cost	Ext Amt	Line Charges
2	P	4101661	-	Titanium bolts - 3"		BX					04/02/2020	36	04/02/2020	04/02/2020	0	0	36	0	432.00	0.00	0.00	432.00	0.00			12.00	12.00	432.00	0.00

Line Charges Line Text Line Notes Line Documents Line SOW Resources Serial/Lot Link SCI/SAP Security Codes

**Manage Supplier Actions > Header Details**

PO	Rise	Change Order	Buyer	Subcontract	Buyer Name	Order Date	Trans Currency	Trans PO Total Amt	Change Date	Blanket Amt	Unreleased Amt	Terms	FOB	Header Notes
PO-0000216	0	0	BUYERAF		Ashley, Floyd	04/02/2020	USD	7,932.00		0.00	0.00	NET 30		

Header SOW Header Text Header Documents

6. Manage Supplier Actions Screen

Manage Shipping Information
 
 New Copy Delete 2 of 9 Existing Table Query

**Identification**

Shipment Number\* 555888 Purchase Order\* PO-0000274 Release\*  Submit

Carrier UPS Tracking Number 122556633235

Ship Date\* 06/23/2020 Number of Containers 1 Autoload

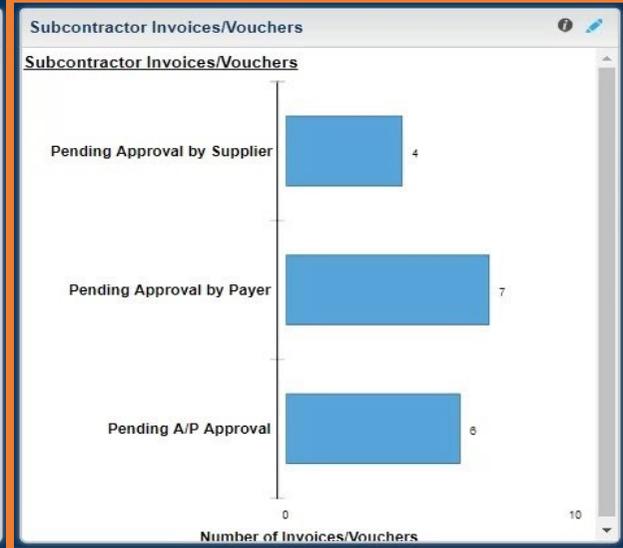
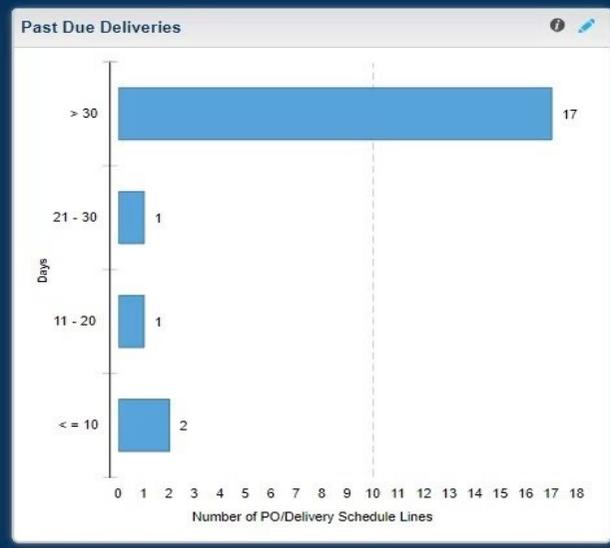
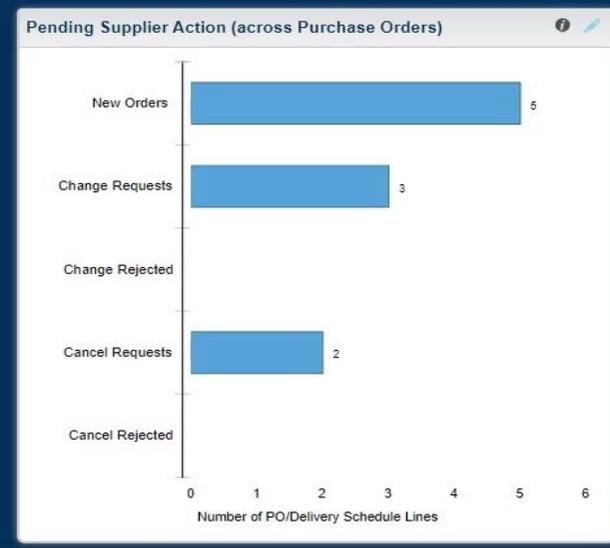
**Shipping Information Lines**
New Copy Delete Form Query

PO Line*	Delivery Line	Item	Rev	Misc Type	Description	Due Date	Shipped Qty*	PO U/M	Tracking Number	Notes
1		4101351-1	-		Fuselage	07/07/2020	1	EA		

Suppliers can use the Manage Shipping Information screen to enter information regarding shipped quantities against Purchase Orders. Selecting the **Submit** check box will trigger an email to the buyer upon save. This email contains all the pertinent shipping information which is also saved in the Action History.

\*All data updates in real time except when noted.

Manage Dashparts



### Purchase Order Invoices/Vouchers dashpart parameters

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rtse	PO Type
<a href="#">123456</a>	04/01/2020	6,250.00	USD	PO-0000...	0	Subcontr...
<a href="#">5333</a>	04/02/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">2556</a>	04/03/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">123566</a>	04/07/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">SP-0413-3</a>	04/13/2020	15,163.20	USD	SP-0413-3	0	Subcontr...
<a href="#">INV-052020</a>	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
<a href="#">385566</a>	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
<a href="#">399666</a>	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
<a href="#">788999</a>	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
<a href="#">5633322</a>	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
<a href="#">556666</a>	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
<a href="#">3887755</a>	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
<a href="#">55566333</a>	07/22/2020	75.00	USD	PO-0000...	0	Purchase ...
<a href="#">74566323</a>	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...

### Pending Supplier Action (by Purchase Order)

PO	Rtse	PO Type	Buyer	PO Total Amt	Curr
<a href="#">PO-0000216</a>	0	Purchase Order	Ashley, Floyd	7,932.00	USD
<a href="#">PO-0000238</a>	0	Purchase Order	Ashley, Floyd	0.00	USD
<a href="#">PO-0000261</a>	0	Purchase Order	Ashley, Floyd	1,000.00	USD
<a href="#">PO-0000263</a>	0	Purchase Order	Ashley, Floyd	7,500.00	USD
<a href="#">PO-0000273</a>	0	Purchase Order	Ashley, Floyd	500.00	USD
<a href="#">PO-0000274</a>	0	Purchase Order	Ashley, Floyd	2,000.00	USD
<a href="#">PO-0000275</a>	0	Purchase Order	Ashley, Floyd	1,904.00	USD
<a href="#">SP-052620</a>	0	Purchase Order	Kansagra, Roopa	0.00	USD
<a href="#">SP-072420</a>	0	Purchase Order	Kansagra, Roopa	0.00	USD
<a href="#">SP-0724202</a>	0	Purchase Order	Kansagra, Roopa	0.00	USD

### Open Purchase Orders

PO	Rtse	Buyer	PO Total Amt	Curr
<a href="#">PO-0000216</a>	0	Ashley, Floyd	7,932.00	USD
<a href="#">PO-0000238</a>	0	Ashley, Floyd	0.00	USD
<a href="#">PO-0000261</a>	0	Ashley, Floyd	1,000.00	USD
<a href="#">PO-0000263</a>	0	Ashley, Floyd	7,500.00	USD
<a href="#">PO-0000273</a>	0	Ashley, Floyd	500.00	USD
<a href="#">PO-0000274</a>	0	Ashley, Floyd	2,000.00	USD
<a href="#">PO-0000275</a>	0	Ashley, Floyd	1,904.00	USD
<a href="#">SP-0413-2</a>	0	Kansagra, Roopa	56,750.00	USD
<a href="#">SP-0413-3</a>	0	Kansagra, Roopa	1,053,000.00	USD
<a href="#">SP-041320</a>	0	Kansagra, Roopa	59,750.00	USD
<a href="#">SP-052520</a>	0	Kansagra, Roopa	0.00	USD
<a href="#">SP-052620</a>	0	Kansagra, Roopa	0.00	USD
<a href="#">SP-072420</a>	0	Kansagra, Roopa	0.00	USD
<a href="#">SP-0724202</a>	0	Kansagra, Roopa	0.00	USD

From the Supplier Dashboard dashparts, suppliers can use the Subcontractor Invoices and Vouchers dashparts to click the invoice hyperlink to launch the Manage Invoices screen to take necessary actions.

Manage Invoices

Identification  
 Invoice Control No: 6354 Fiscal Year: 2020 Period: 5 Subperiod: 1 Trans Currency: USD  
 PO Number\*: SP-052520 Rise\*: 0 Change Order: 0 PO Type: Purchase Order Terms: NET 30  
 Invoice Number: INV-052020 Date\*: 05/26/2020 Amount: 0.00 Shipment Number: [Empty] Autoload

Invoice Approvals Details

Payer Approval  
 Approved  
 Approver: [Empty]  
 Date/Time: [Empty]  
 Notes: [Empty]

Supplier Approval  
 Approved  
 Approver: SUPPLIERRRK  
 Date/Time: 05/26/2020 08:33:00 AM  
 Notes: [Empty]

Timesheet Information Expense Information Timesheet Exclusions Expense Exclusions Invoice Approval History

Invoice Lines

Invoice Line	PO Line	Item	Item Rev	Misc Type	Description	Part Security	Line Type	Work Assignment	Charge Line	Charge Line Description	Work Assignment Description	Invoice Quantity	Invoice Unit Cost	Invoice Ext Amount*	Line Charge Cost Amount	Total Before Discount Amt	Discount Amount	Total After Discount Amount	Qty to Pay Not Vchrd	Amt to Pay Not Vchrd	Vend Tot H
1	1	398076-20	-		Chassis W/Power Supply	Unrestricted	P					2	0.00	0.00	0.00	0.00	0.00	0.00	-2	0.00	0

Receipts Vendor Labor Vendor Expense Reports

On the Manage Invoices screen suppliers can enter, manage, and approve the invoices associated with their vendor ID. Suppliers can use purchase order or shipment information to generate invoices for standard purchase orders or subcontractor agreement purchase orders. If Timesheet and expense data is entered for the purchase order, then this data is pulled from Time & Expense and displayed on this screen. If discrepancies in time and expense data exist, these changes must be made within T&E and the invoice must be regenerated with the updated data.

Manage Invoices

Identification

Invoice Control No: 6354 Fiscal Year: 2020 Period: 5 Subperiod: 1

Trans Currency: USD

PO

PO Number\*: SP-052520 Rlse\*: 0 Change Order: 0 PO Type: Purchase Order

Terms: NET 30

Invoice

Number: INV-052020 Date: 05/26/2020

Autoload

The Supplier Approval group box lets you enter notes for communication with the payer. This is also where you approve and submit invoices that have either been created by you or submitted to you by the payer. Notes or approval changes trigger an email to the payer with the information on your action. The Invoice Approval History subtask is also updated for tracking purposes.

Supplier Approval

Approved

Approver: SUPPLIERRK

Date/Time: 05/26/2020 08:33:00 AM

Notes:

[Timesheet Information](#) [Expense Information](#) [Timesheet Exclusions](#) [Expense Exclusions](#) [Invoice Approval History](#)

Invoice Lines

Invoice Line	PO Line	Item	Item Rev	Misc	Charge Line	Charge Line Description	Work Assignment Description	Invoice Quantity	Invoice Unit Cost	Invoice Ext Amount *	Line Charge Cost Amount	Total Before Discount Amt	Discount Amount	Total After Discount Amount	Qty to Pay Not Vchrd	Amt to Pay Not Vchrd	Vend Tot H
1	1	398076-20	-			Chassis W/Power Supply	Unrestricted	P	2	0.00	0.00	0.00	0.00	0.00	-2	0.00	

[Receipts](#) [Vendor Labor](#) [Vendor Expense Reports](#)

Manage Invoices > Vendor Labor

PO Number: SP-052520 PO Release No: 0

Sub Line	Timesheet Date	Vendor Empl	Vendor Empl Name	PLC	PLC Description	Hours	Amount	Sales Tax/VAT on Labor *	VAT Recovery Amount	Comments

[Vendor Labor Details](#)  
Close

The header level subtasks show Timesheet, Expense data, and exclusions associated with the Purchase Order being invoiced. Once invoice lines are auto-loaded, the line level subtasks show the Vendor Labor and Vendor Expense Reports associated with each line.



Wed 5/8/2019 3:11 PM

buyer@costpoint.com

Supplier Portal Activity Alert - PO: PO-02-0627 Rise: 0

to  Supplier

[PO: PO-02-0627 Rise: 0](#)

PO Line: 1

Item: 1000-2345 Rev: A Desc: ECO-R2 15BK Directional Gyro 28 volt Electric TSO  
Order Qty: 250.0 Order Amt: 3000.0 U/M: EA Currency: USD

Delivery Schedule Line: 1

Order Qty: 150.0 Due Date: 05/13/2019

Action: Pending Supplier Acknowledgment

Delivery Schedule Line: 2

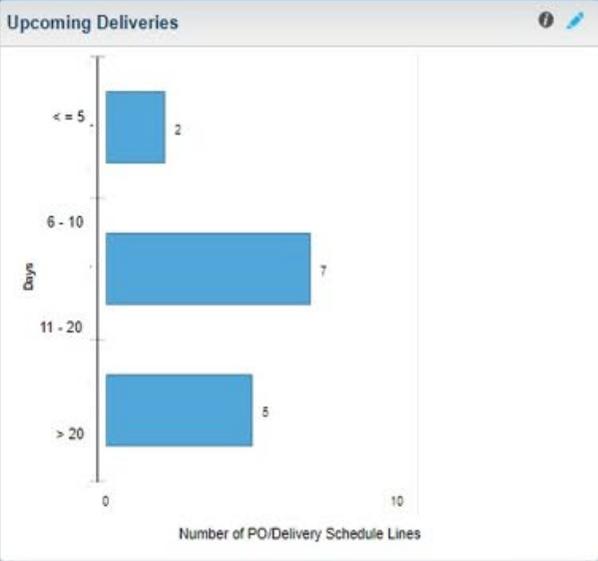
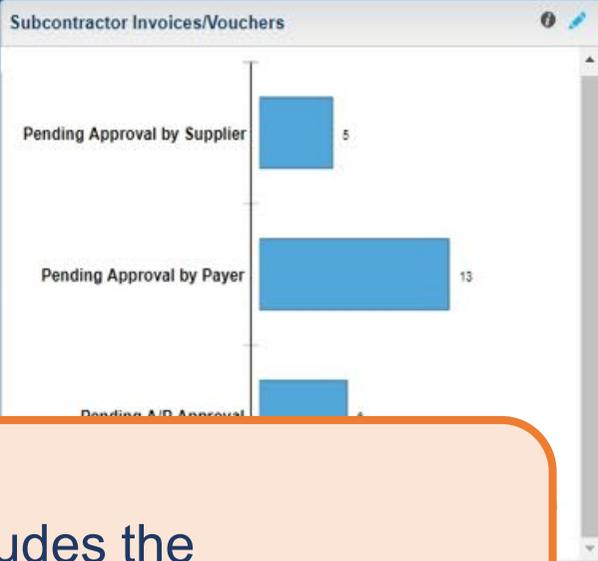
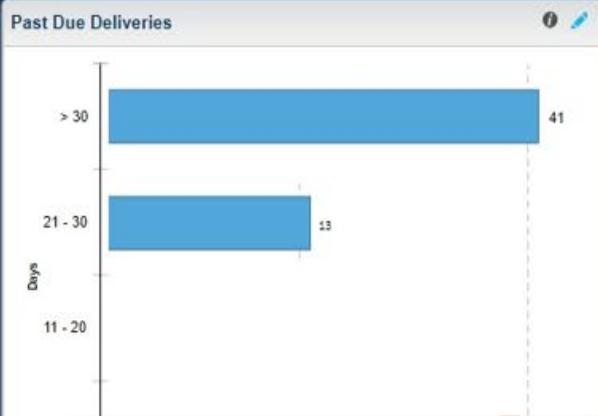
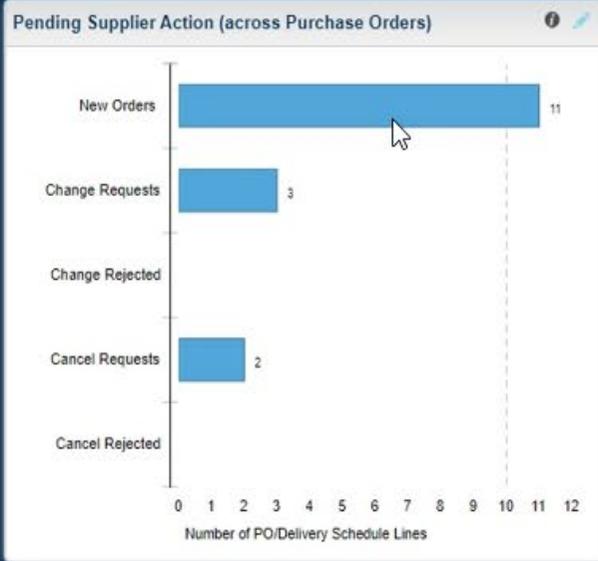
Order Qty: 100.0 Due Date: 05/24/2019

Action: Pending Supplier Acknowledgment

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The Supplier Portal sends an email notification to the buyer or payer to alert them of changes made by the supplier for new actions taken or notes added to the purchase order, shipment, or invoice. Any actions, changes or notes added by the buyer to the purchase order or added by the payer to the Invoice, will send an email alert to the supplier.

The supplier can click the purchase order or invoice hyperlink in the email, which launches the login page of Costpoint. Upon login, the user is automatically taken to the appropriate screen to manage the notes and complete necessary actions for the purchase order, shipment, or invoice.



This concludes the Supplier Portal Overview Quick Steps.

### Pending Supplier Action (by Purchase Order)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
0-ADEV...	0	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	0	Purchas...	Asaka, L...	0.00	USD	
012621-1	0	Purchas...	Asaka, L...	120.00	USD	
030521-1	0	Purchas...	Asaka, L...	135.00	USD	
032019-1	0	Purchas...	Asaka, L...	135.00	USD	
032521-1	0	Purchas...	Asaka, L...	750.00	USD	Y
033021-1	0	Purchas...	Asaka, L...	290.00	USD	Y
040721-1	0	Purchas...	Asaka, L...	250.00	USD	Y
041221-2	0	Purchas...	Asaka, L...	44.00	USD	Y
063020-1	0	Subcontr...	Asaka, L...	5,250.00	USD	
063920-1	0	Purchas...	Asaka, L...	150.00	USD	
1000000...	0	Purchas...	DOMIN...	13,445.80	USD	
1370153-1	0	Subcontr...	Asaka, L...	20,372.40	USD	
1370153-2	0	Purchas...	Asaka, L...	13,617.87	USD	
2020-05-12	0	Purchas...	Asaka, L...	100.00	USD	
2020-05-18	0	Purchas...	Asaka, L...	50.00	USD	
2444234...	0	Purchas...	Asaka, L...	50.00	USD	
2444234...	0	Purchas...	Asaka, L...	26.25	USD	
2444234...	0	Purchas...	Asaka, L...	150.00	USD	

01-AD00004	0	Asaka, Leslie S C.P.A.	924.00	USD
012621-1	0	Asaka, Leslie S C.P.A.	120.00	USD
030521-1	0	Asaka, Leslie S C.P.A.	135.00	USD
032019-1	0	Asaka, Leslie S C.P.A.	135.00	USD
032521-1	0	Asaka, Leslie S C.P.A.	750.00	USD Y
033021-1	0	Asaka, Leslie S C.P.A.	290.00	USD Y
040721-1	0	Asaka, Leslie S C.P.A.	250.00	USD Y
041221-2	0	Asaka, Leslie S C.P.A.	44.00	USD Y
063020-1	0	Asaka, Leslie S C.P.A.	5,250.00	USD
063920-1	0	Asaka, Leslie S C.P.A.	150.00	USD
1000000000	0	DOMINGO, ANNABELLE B	13,445.80	USD
1370153-1	0	Asaka, Leslie S C.P.A.	20,372.40	USD
1370153-2	0	Asaka, Leslie S C.P.A.	13,617.87	USD
2020-05-12	0	Asaka, Leslie S C.P.A.	100.00	USD
2020-05-18	0	Asaka, Leslie S C.P.A.	50.00	USD

SP-0413-2	04/13/2020	15,165.20	USD	SP-0413-3	0	Subcontr...
INV-052020	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
8855866	06/24/2020	2,500.00	USD	PO-0000...	0	Subcontr...
9996666	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
768999	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
5633322	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
556666	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
8887755	07/22/2020	2,700.00	USD	PO-0000...	0	Subcontr...
55566333	07/22/2020	75.00	USD	PO-0000...	0	Purchase ...
74566323	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...
774422333	09/18/2020	500.00	USD	PO-0000...	0	Purchase ...
776633232	09/18/2020	500.00	USD	PO-0000...	0	Purchase ...

### Pending Supplier Action (by Request for Quotes)

RFQ	Buyer	Quote	Quote Reqd Date	Status
040821-1	Asaka, Leslie S C.P.A.	Q040821-1		Partially Quoted
041521-2	Asaka, Leslie S C.P.A.	Q041521-2		Partially Quoted
041521-6	Asaka, Leslie S C.P.A.	Q041521-6		Partially Quoted
RFQ-T105	Asaka, Leslie S C.P.A.			New
RFQ070921B	Asaka, Leslie S C.P.A.	QT02		Partially Quoted
RFQ071121B	Asaka, Leslie S C.P.A.	QT03		Partially Quoted
RFQ071321A	Asaka, Leslie S C.P.A.	QT04		Partially Quoted
RFQ1000227	Asaka, Leslie S C.P.A.	VQ 032421B	03/24/2021	Partially Quoted
RFQ1000244	Asaka, Leslie S C.P.A.	VQ043021-0		Partially Quoted
RFQ1000253	Asaka, Leslie S C.P.A.			New
RFQ1000255	Asaka, Leslie S C.P.A.			New
RFQ1000260	Asaka, Leslie S C.P.A.	VQT0709B		Partially Quoted
RFQ1000261	Asaka, Leslie S C.P.A.	VQT0709C		Partially Quoted
RFQA-00062	MILLARD, ANNE M	051221-2		Quote not Submitted
RFQA-00062	MILLARD, ANNE M	051221-1		Quote not Submitted
WVC071421A	Asaka, Leslie S C.P.A.	QT071421A		Partially Quoted