

Set Up Supplier Portal Email Notification

1

Configure Purchasing
Settings

2

Enable Email Notification
Settings

3

Manage Buyer Email
Notification Setting

4

Purchase Order Email
Settings

5

Email from Buyer

6

Email from Supplier

FILE LINE OPTIONS PROCESS HELP

Company 1 (Test Env Name III - C71MQC011) Delttek Costpoint

Browse Applications > Materials > Purchasing > Purchasing Controls > Configure Purchasing Settings

PO Status

Initial Status

Open Pending

Allow Change to Open in Manage POs Allow pending lines in Open, Closed or System Closed POs

Set to Pending if Over Buyer's Limit Allow Changes to Quality Requirements on PO Lines with Received Quantities

PO Numbering Method

System Manual B

Other Settings

Buyer PAO Validation Code *

Requisition Requirements

Do Not Require Req No on PO Line

Defaults

- PO Defaults

Confirming PO

Ship ID

- Change Order Default

Save Existing Change Order to History File Restrict Release Items to Items on Blanket Do Not Exceed Blanket Gross Unit Cost on Rise Lines

Allow Change Save Default Restrict Release Line Totals to Blanket Line Totals Do Not Allow Rise Amts to Exceed Total Blanket Amt

Supplier Portal

Email Notification Allow Edit Standard Calendar Production Control Settings

- Purchasing Vendor Lead Time Calculation

Begin

Best viewed in IE or Adobe PDF Reader.

In this click-thru, you will set up the email alerts whenever there are action changes related to the supplier portal information.

Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step.

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Browse Applications > Materials > Purchasing > Purchasing Controls > Configure Purchasing Settings

PO Status

Initial Status

Open Pending

Allow Change to Open in Manage POs Allow pending lines in Open, Closed or System Closed POs

Set to Pending if Over Buyer's Limit Allow Changes to Quality Requirements on PO Lines with Received Quantities

Allow Change to Item Description on Voucher Lines

PO Numbering Method

System Manual Buyer Last System PO Number PO-E120787

Other Settings

Buyer PAO Validation Code * Include Unreleased Blanket Amounts on Commitments

Change Commitment Type to 'Amount' on adding line charge to 3-way match PO line

Requisition Requirements

Do Not Require Req No on PO Line Require Req No to be Non-Blank on PO Line Require Valid Req No on PO Line

Defaults

Supplier Portal

Email Notification Allow Edit Standard Calendar Production Control Settings

Sales/VAT Tax Defaults

All Items Taxable All Items Non-Taxable

Restrict Release Line Totals to Blanket Line Totals Do Not Exceed Blanket Gross Unit Cost on Rise Lines

Do Not Allow Rise Amt to Exceed Total Blanket Amt

Supplier Portal

Email Notification Allow Edit

Supplier Portal

Email Notification Allow Edit

A

On the Configure Purchasing Settings (POMSET) screen, locate the **Supplier Portal** group box. Under it are two check boxes: **Email Notification** and **Allow Edit**.

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4

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The screenshot shows the 'Configure Purchasing Settings' screen in SAP. The breadcrumb trail is: Browse Applications > Materials > Purchasing > Purchasing Controls > Configure Purchasing Settings. The screen is divided into several sections:

- PO Status:** Includes 'Initial Status' (radio buttons for Open and Pending), 'Allow Change to Open in Manage POs' (checked), 'Set to Pending if Over Buyer's Limit' (checked), 'Allow Change to Item Description on Voucher Lines' (checked), and 'Allow pending lines in Open, Closed or System Closed POs' (unchecked).
- PO Numbering Method:** Includes radio buttons for System, Manual, and Buyer, and a text field for 'Last System PO Number' with the value 'PO-E120787'.
- Other Settings:** Includes 'Buyer PAO Validation Code' (dropdown set to 'implicit'), 'Include Unreleased Blanket Amounts on Commitments' (unchecked), and 'Change Commitment Type to 'Amount' on adding line charge to 3-way match PO line' (unchecked).
- Sales/VAT Tax Defaults:** Includes 'Auto Calculate Sales/VAT Tax' (checked).
- Default Taxable Status:** Includes radio buttons for 'Use Item Type Default' (selected), 'All Items Taxable', and 'All Items Non-Taxable'.
- Supplier Portal:** Includes checkboxes for 'Email Notification' (checked) and 'Allow Edit' (checked).

Annotations:

- A:** A callout box pointing to the 'Email Notification' checkbox in the Supplier Portal section. Text: "Select the **Email Notification** check box to enable sending of Supplier Portal email alerts to and from the buyer and supplier whenever there are action changes related to a PO."
- B:** A callout box pointing to the 'Allow Edit' checkbox in the Supplier Portal section. Text: "Select the **Allow Edit** check box to enable editing of the **Supplier Portal Email Notification** check box on the Manage Buyers (POMBUY) and Manage Purchase Orders (POMMAIN) screens."

Additional callout: A purple box on the right side of the screen contains the text: "Your selections on this screen flows to the Manage Buyers and Manage Purchase Orders screens."

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FILE LINE OPTIONS PROCESS HELP

Company 1 (Test Env Name III - C71MQC011) > Deltek Costpoint >

Browse Applications > Materials > Purchasing > Purchasing Codes > Manage Buyers

→ Identification New Copy Delete 1 of 1 New Table Query

Buyer ID* Employee*

-Details-

-Maximum Authorizations- -Buyer PO Auto-Numbering- -PO Entry Authorization-

PO Last PO Number Purchase Order Release Order Subcontractor Agreement

PO Line Blanket Order Subcontract Retainage PO Subcontractor Agreement Blanket

GFM/GFE Order Subcontractor Agreement Release

-Default Return Address-

Branch Location*

Address Code*

-Default Bill To Address-

Branch Location*

Address Code*

Supplier Portal

Email Notification

[Link Acct/Org](#) [Link Projects](#) [Link Vendors](#)

Your selection on the Configure Purchasing Settings screen flows to this screen and the check box will be editable based on the **Allow Edit** status.

Set Up Supplier Portal Email Notification



FILE LINE OPTIONS PROCESS HELP Company 1 (Test Env Name III - C71MQC011) Deltek Costpoint

Browse Applications > Materials > Purchasing > Purchase Orders > Manage Purchase Orders

Manage Purchase Orders

New Copy Delete

-Identification
 Purchase Order ID: 0303-1 Release: 0 Change Order: 0 Type: Purchase Order

Header **Other Information** Accounting Defaults Other Defaults Vendor Address Bill To & Return Address Blanket Info Security Req

Vendor Terms: NET 30
 FOB Point:
 CIS Code:
 Cost Saving Amt: 0.00
 Last Change Date:

-Contact
 Last Name:
 First Name:
 Phone:
 Fax:
 Email Address:

-Acknowledgment Info
 Required
 Date:
 Released to Vendor
 Released Date:
 GSA
 Supplier Portal Email Notification

Implement Action Changes Create Blanket PO Release

Header Text Header Documents PO Totals Exchange Rates Link SCI/SAP Security Codes

New Copy Delete Approval Form Query

Purchase Order Lines

PO Line	Line Type	Status	Item	Rev	Order Date	Original Due Date	Delivery Schedule Exists	Quantity	Inv Abbrev	Gross Unit Cost	Volume Discount	Net Unit Cost	Ext Cc
1	P	Open	PART-0302		03/03/2017	03/03/2017	<input checked="" type="checkbox"/>	20	51501	100.00	0.00%	100.00	2

Action History Line SOW Resources Serial/Lot Accounts Line Charges Line Text Line Documents Currency Line Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

Your selections on the Configure Purchasing Settings screen flows to this screen and the check box will be editable based on the **Allow Edit** status. When this check box is selected, email alerts are sent to and from the buyer and supplier whenever there are action changes related to a PO.

The default email address is the primary email address indicated for the vendor contact, and is editable here. You can also use the Import Vendors preprocessor to upload the vendor information, which includes the vendor email address.

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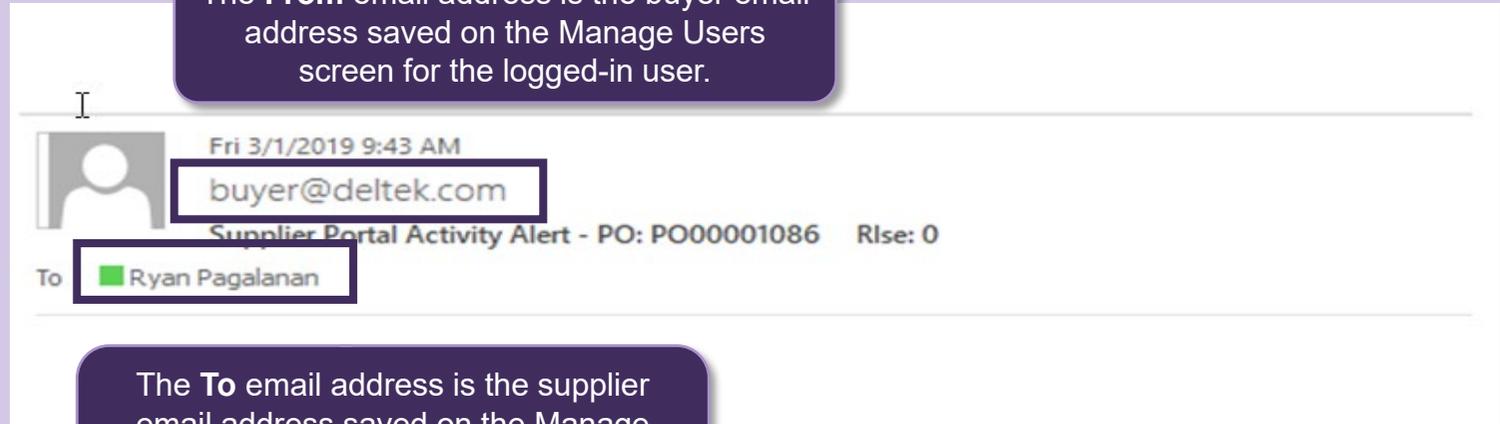
5

Email from Buyer

6

Email from Supplier

The **From** email address is the buyer email address saved on the Manage Users screen for the logged-in user.



The **To** email address is the supplier email address saved on the Manage Purchase Orders screen > Other Information.

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Email from Supplier

The **From** email address is the supplier email address saved on the Manage Users screen for the logged-in user.



Fri 3/1/2019 9:26 AM

supplier@deltek.com

Supplier Portal Activity Alert - PO: PO00001086 Rlse: 0

To

Ryan Pagalanan

The **To** email address is the buyer email address saved on the Manage Employee Information screen that is linked to the buyer on the PO.

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The screenshot shows the SAP 'Manage Purchase Orders' interface. At the top, there is a menu bar with 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. Below it is a toolbar with various icons. The breadcrumb navigation shows 'Browse Applications > Materials > Purchasing > Purchase Orders > Manage Purchase Orders'. The main area is titled 'Manage Purchase Orders' and includes a toolbar with 'New', 'Copy', 'Delete', 'Approval', and navigation arrows. The 'Identification' section contains fields for 'Purchase Order ID' (0303-1), 'Release' (0), 'Change Order' (0), 'Type*' (Purchase Order), and 'Trans Currency' (USD). Below this are tabs for 'Header', 'Other Information', and 'Accounting Defaults'. The 'Other Information' tab is active, showing fields for 'Vendor Terms' (NET 30), 'FOB Point', 'CIS Code', 'Cost Saving Amt' (0.00), and 'Last Change Date'. A callout box with a dark purple background and white text is overlaid on the screen, stating: 'This concludes the Set Up Supplier Portal Email Notification click-thru.' Below the callout, there are buttons for 'Implement Action Changes' and 'Create Blanket PO Release'. At the bottom, there are several links: 'Header SOW', 'Header Notes', 'Header Text', 'Header Documents', 'PO Totals', 'Exchange Rates', and 'Link SCI/SAP Security Codes'. The 'Purchase Order Lines' section is visible, showing a table with columns for PO Line, Line Type, Status, Item, Rev, Description, Part Security, Misc Type, U/M, Due Date, Desired Date, Order Date, Original Due Date, Delivery Schedule Exists, Quantity, Inv Abbrev, Gross Unit Cost, Volume Discount, Net Unit Cost, and Ext C. The table contains one row with PO Line 1, Line Type P, Status Open, Item PART-0302, Description test, Part Security Unrestricted, Misc Type EA, Due Date 03/03/2017, Desired Date 03/03/2017, Order Date 03/03/2017, Original Due Date 03/03/2017, Delivery Schedule Exists checked, Quantity 20, Inv Abbrev 51501, Gross Unit Cost 100.00, Volume Discount 0.00%, Net Unit Cost 100.00, and Ext C 2. At the bottom, there are more links: 'Action History', 'Line SOW', 'Resources', 'Serial/Lot', 'Accounts', 'Line Charges', 'Line Text', 'Line Documents', 'Currency Line', 'Proj Sub Parts', 'Link SCI/SAP Security Codes', and 'Delivery Schedule'.