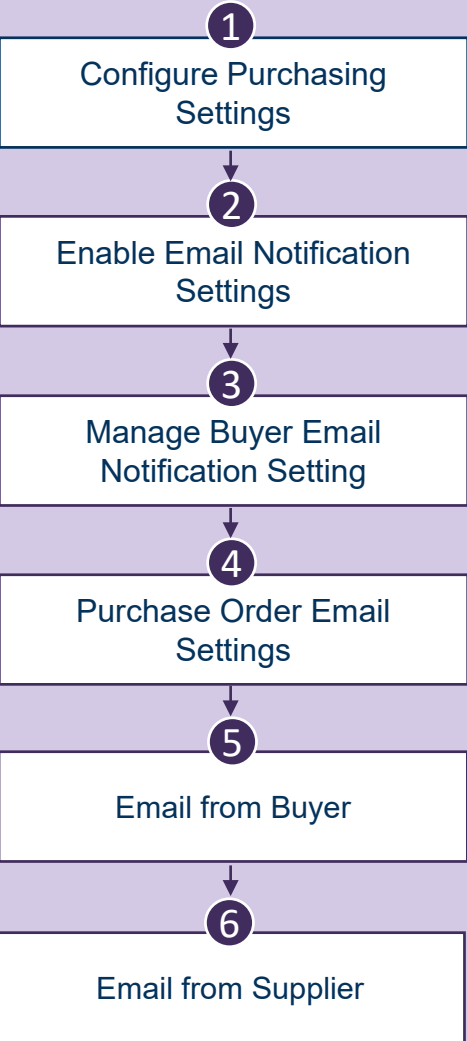


Set Up Supplier Portal Email Notification



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 ☐ Blanket

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 ☐ Allow Change Save Default

Blanket PO Restriction Defaults

☒ Restrict Release Items to Items on Blanket ☒ Do Not Exceed Blanket Gross Unit Cost on Rise Lines

☒ Restrict Release Line Totals to Blanket Line Totals ☒ Do Not Allow Rise Amts to Exceed Total Blanket Amt

Supplier Portal

☒ Email Notification ☒ Allow Edit

Purchasing Vendor Lead Time Calculation

☒ Standard Calendar ☐ Production Control Settings

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.

Begin

Best viewed in IE or Adobe PDF Reader.

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) Deltak 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

☒ 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

Sales/VAT Tax Defaults

☐ All Items Taxable ☐ All Items Non-Taxable

☐ Allow Change Save Default ☒ Restrict Release Line Totals to Blanket Line Totals ☒ Do Not Exceed Blanket Gross Unit Cost on Rise Lines

☒ Do Not Allow Rise Amts to Exceed Total Blanket Amt

Supplier Portal

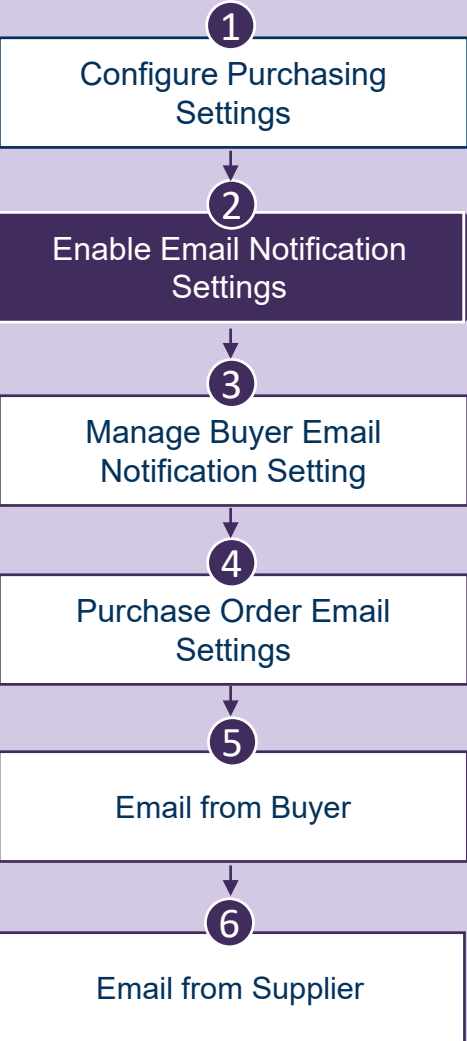
☒ Email Notification ☒ Allow Edit ☒ Standard Calendar ☐ Production Control Settings

Purchasing Vendor Lead Time Calculation

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**.

Set Up Supplier Portal Email Notification



FILE LINE OPTIONS PROCESS HELP

Company 1 (Test Env Name III - C71MQC011) Deltak 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

☒ 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* Implicit ☐ Include Unreleased Blanket Amounts on Commitments

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

☐ Require Req No to be Non-Blank on PO Line ☐ Require Valid Req No on PO Line

Sales/VAT Tax Defaults

☒ Auto Calculate Sales/VAT Tax

Default Taxable Status

☒ Use Item Type Default ☐ All Items Taxable ☐ All Items Non-Taxable

☐ Do Not Exceed Blanket Gross Unit Cost on Rise Lines

☐ Do Not Allow Rise Amts to Exceed Total Blanket Amt

Supplier Portal

☒ Email Notification ☒ Allow Edit

Control Settings

A 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 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.

Your selections on this screen flows to the Manage Buyers and Manage Purchase Orders screens.

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 Codes > Manage Buyers

Identification

Buyer ID * Employee *

Details

- Maximum Authorizations
PO PO Line

- Buyer PO Auto-Numbering
Last PO Number

- PO Entry Authorization
☒ Purchase Order
☐ Blanket Order
☐ GFM/GFE Order
☐ Release Order
☐ Subcontract Retainage PO
☐ Subcontractor Agreement
☐ Subcontractor Agreement Blanket
☐ Subcontractor Agreement Release

- Default Return Address
Branch Location * Address Code *

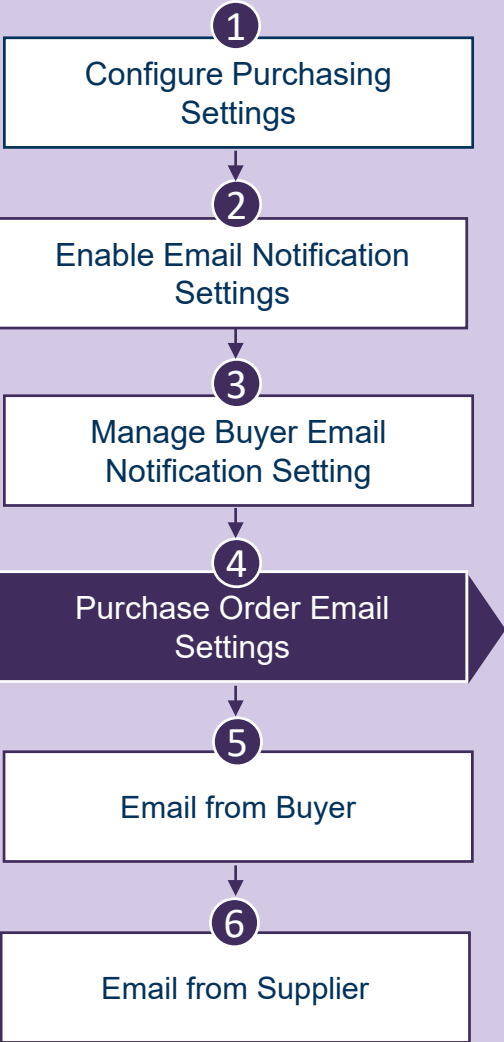
- Default Bill To Address
Branch Location * Address Code *

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) Delttek 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 Requirements

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:

Vendor Sales Order:

☐ 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
1	P	Open	PART-0302	

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

Order Date: 03/03/2017 Original Due Date: 03/03/2017 Delivery Schedule Exists: ☒ Quantity: 20 Inv Abbrev: 51501 Gross Unit Cost: 100.00 Volume Discount: 0.00% Net Unit Cost: 100.00 Ext Cc: 2

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.

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

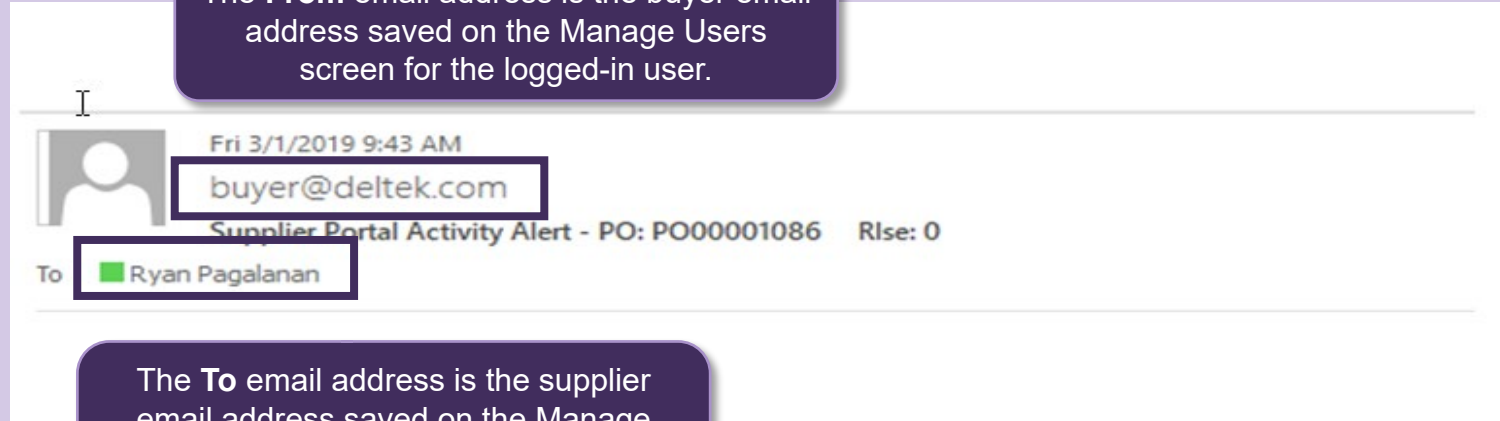
5

Email from Buyer

6

Email from Supplier

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.

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

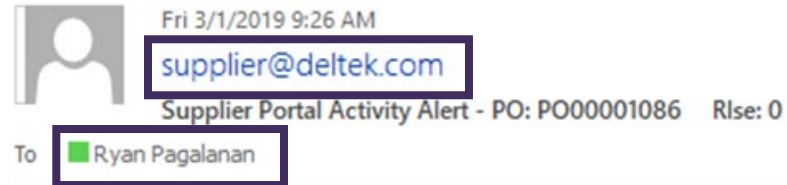
5

Email from Buyer

6

Email from Supplier

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



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.

Company 1 (Test Env Name III - C71MQCO11) > Deltek Costpoint >



Manage Purchase Orders

New Copy Delete Approval 23 of 4,453 Existing Table Query

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

-Identification-

Purchase Order ID: 0303-1 Release: 0 Change Order: 0 Type: Purchase Order Trans Currency: USD

Header Other Information Accounting Defaults

Vendor Terms: NET 30

FOB Point:

CIS Code:

Cost Saving Amt: 0.00

Last Change Date:

Email Address:

This concludes the Set Up Supplier Portal Email Notification click-thru.

Implement Action Changes Create Blanket PO Release

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

Purchase Order Lines

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	Ext C
1	P	Open	PART-0302		test	Unrestricted		EA	03/03/2017	03/03/2017	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