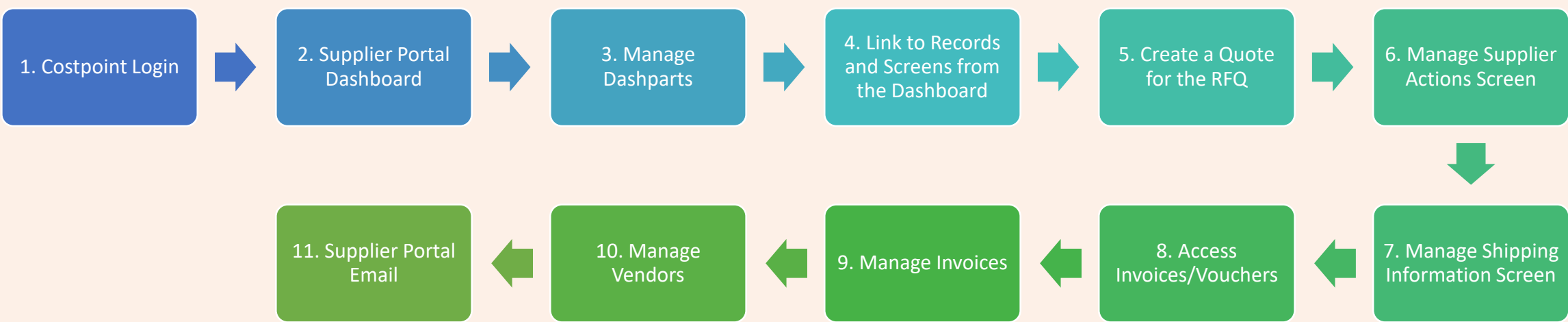


Supplier Portal Overview Quick Steps

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](#)

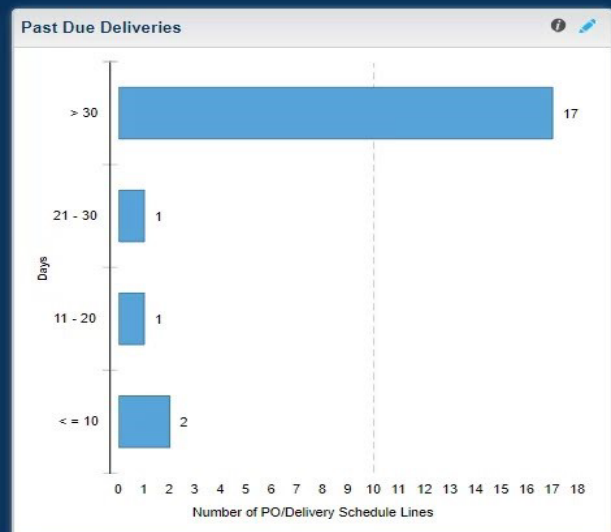
[LOG IN](#)

[+ 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, Manage Invoices, and Manage Vendors.

*All data updates in real time except when noted.

Manage Dashparts



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 ...
74566323	07/28/2020	2,500.00	USD	PO-0000...	0	Subcontr...

Pending Supplier Action (by Purchase Order)

PO	Rlse	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	Rlse	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.

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

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.



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



*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.

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.

Manage Dashparts

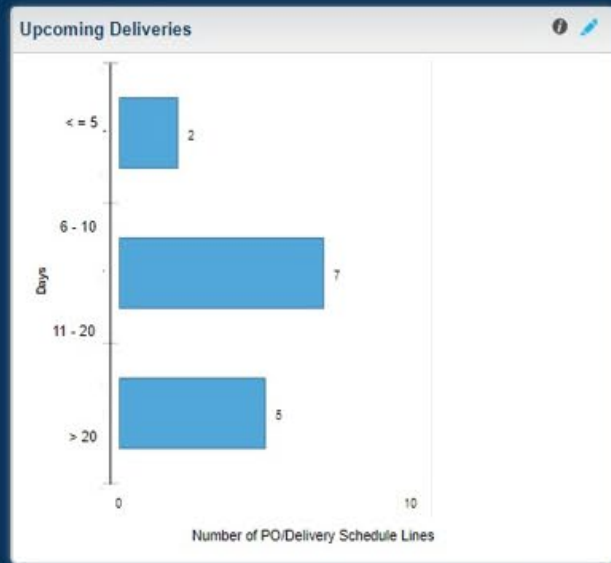
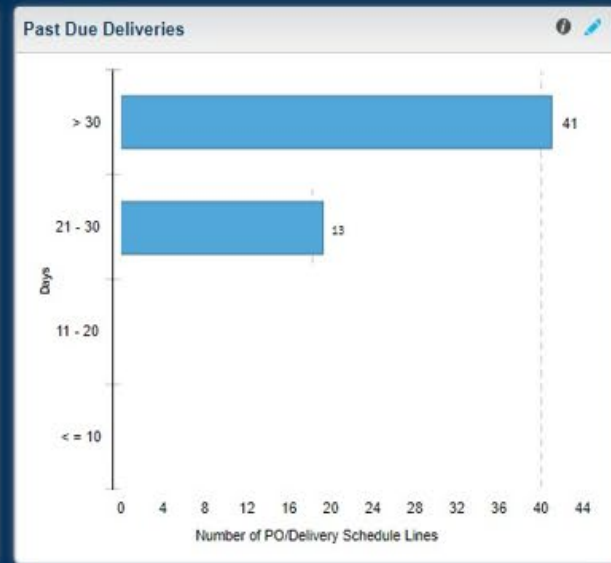
Search Available

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

Save Close

Purchase Order Invoices/Vouchers dashpart parameters

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rise	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 ...
385566	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	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
0-ADEV...	Q	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	Q	Purchas...	Asaka, L...	0.00	USD	
012621-1	Q	Purchas...	Asaka, L...	120.00	USD	
030521-1	Q	Purchas...	Asaka, L...	135.00	USD	
032019-1	Q	Purchas...	Asaka, L...	135.00	USD	
032521-1	Q	Purchas...	Asaka, L...	750.00	USD	Y
033021-1	Q	Purchas...	Asaka, L...	290.00	USD	Y
040721-1	Q	Purchas...	Asaka, L...	250.00	USD	Y
041221-2	Q	Purchas...	Asaka, L...	44.00	USD	Y
063020-1	Q	Subcontr...	Asaka, L...	5,250.00	USD	
063920-1	Q	Purchas...	Asaka, L...	150.00	USD	
00000000	Q	Purchas...	DOMIN...	13,445.80	USD	
0370153-1	Q	Subcontr...	Asaka, L...	20,372.40	USD	
0370153-2	Q	Purchas...	Asaka, L...	13,617.87	USD	
0020-05-12	Q	Purchas...	Asaka, L...	100.00	USD	

Open Purchase Orders

PO	Rise	Buyer	PO Total Amt	Curr	DPAS
0-ADEV00015	Q	Asaka, Leslie S C.P.A.	0.00	USD	
0-ADEV00017	Q	Asaka, Leslie S C.P.A.	0.00	USD	
0-ADEV00018	Q	Asaka, Leslie S C.P.A.	0.00	USD	
0-ADEV00031	Q	Asaka, Leslie S C.P.A.	8,143.02	USD	
01-AD00004	Q	Asaka, Leslie S C.P.A.	924.00	USD	
012621-1	Q	Asaka, Leslie S C.P.A.	120.00	USD	
030521-1	Q	Asaka, Leslie S C.P.A.	135.00	USD	
032019-1	Q	Asaka, Leslie S C.P.A.	135.00	USD	
032521-1	Q	Asaka, Leslie S C.P.A.	750.00	USD	Y
033021-1	Q	Asaka, Leslie S C.P.A.	290.00	USD	Y
040721-1	Q	Asaka, Leslie S C.P.A.	250.00	USD	Y
041221-2	Q	Asaka, Leslie S C.P.A.	44.00	USD	Y
063020-1	Q	Asaka, Leslie S C.P.A.	5,250.00	USD	
063920-1	Q	Asaka, Leslie S C.P.A.	150.00	USD	
1000000000	Q	DOMINGO, ANNABELLE B	13,445.80	USD	

Purchase Order Invoices/Vouchers

Invoice	Invoice Date	Invoice Amt	Currency	PO	Rise	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	Subcontr...
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					
774422333	09/18/2020					
776633232	09/18/2020					

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

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



Manage Quotes

Request for Quotes	RFQ-100266	RFQ Date	07/21/2021	RFQ Status	Open
Buyer	Asaka, Leslie G	Quote Req'd 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

Vendor Quotes

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

Form Query

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

Form Query ▼

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.

FILELINEOPTIONSPROCESSHELP

Home

Star

2

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

1 of 1 Existing

Table

Query

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

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
<input checked="" type="checkbox"/>	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.

6. Manage Supplier Actions Screen



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

Manage Supplier Actions

Form Query

New Action	Line Status	Buyer	Item	Rev	Order Qty
-None-	Open	Asaka, Leslie S C.P.A.	PART 011315	0/2	100
-None-	Open	Asaka, Leslie S C.P.A.	PART 011315	0/2	100
-None-	Closed	Asaka, Leslie S C.P.A.	PART 032999-3	0/2	180
-None-	System Closed	Asaka, Leslie S C.P.A.	PART 032999-3	0/2	50
-None-	System Closed	Asaka, Leslie S C.P.A.	PART 032999-3	0/2	50
-None-	Closed	Asaka, Leslie S C.P.A.	SERVICES	0/2	0
-None-	Open	Asaka, Leslie S C.P.A.	SERVICES	0/2	0
-None-	Open	Asaka, Leslie S C.P.A.	JR0831	A 04/24/2019	25
-None-	Open	Asaka, Leslie S C.P.A.	JR0831		25
-None-	Open	Asaka, Leslie S C.P.A.	JR0831		25
-None-	Open	Asaka, Leslie S C.P.A.	JR0831		25
-None-	Open	Asaka, Leslie S C.P.A.	PART 0		100

To open the pop-up menu, select the desired column, centering the mouse pointer over the column heading until it changes to a four-sided arrow cursor. Right-click on the column heading to open the pop-up menu and select the desired function.

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

Find
Lock Columns
Resize Column
Move Column
Sort Ascending
Sort Descending
Arrange Table Columns
Show/Hide Screen Controls

When in table view the following options are available: Find, Lock Columns, Resize Columns, Move Columns, Sort Ascending, Sort Descending, and Arrange Table Columns.

Action History

Action	Pending Supplier Acknowledgment				
Proposed Order Qty		Order Qty	100	Modified Date/Time	04/23/2019 06:11:57 PM
Proposed Amt		Order Amt	1,200.00	Modified By	CPSUPERUSER
Proposed Due Date		Due Date	04/23/2019	PO Change Order	0
Notes					

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
<input checked="" type="checkbox"/>	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.

Form Query

Change Request by Supplier Form Query

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



Manage Supplier Actions

Form Query ▾

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	4101351-1	-	Fuselage	4	0.00	06/05/2020	USD	4	0.00	06/05/2020	EA	roopakansagra@deltek.com	Pending

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.

[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
06/23/2020 08:18:28 AM	AFLOYD	0	Pending Supplier Acknowledgment	2	200.00	07/22/2020										

Header Details Line Details

Form Query ▼

Form Query ▼

6. Manage Supplier Actions Screen

FILELINEOPTIONSPROCESSHELP

Home

Star

2

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

Profile

Power

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
<input checked="" type="checkbox"/>	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.



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: Notes:

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

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										

Manage Supplier Actions > Line Details

Form Query

PO Line	Type	Item	Rev	Description	Misc Type	PO U/M	Mfg Part	Mfg Rev	Vendor Part	Vendor 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

Close

Manage Supplier Actions > Header Details

Form Query

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

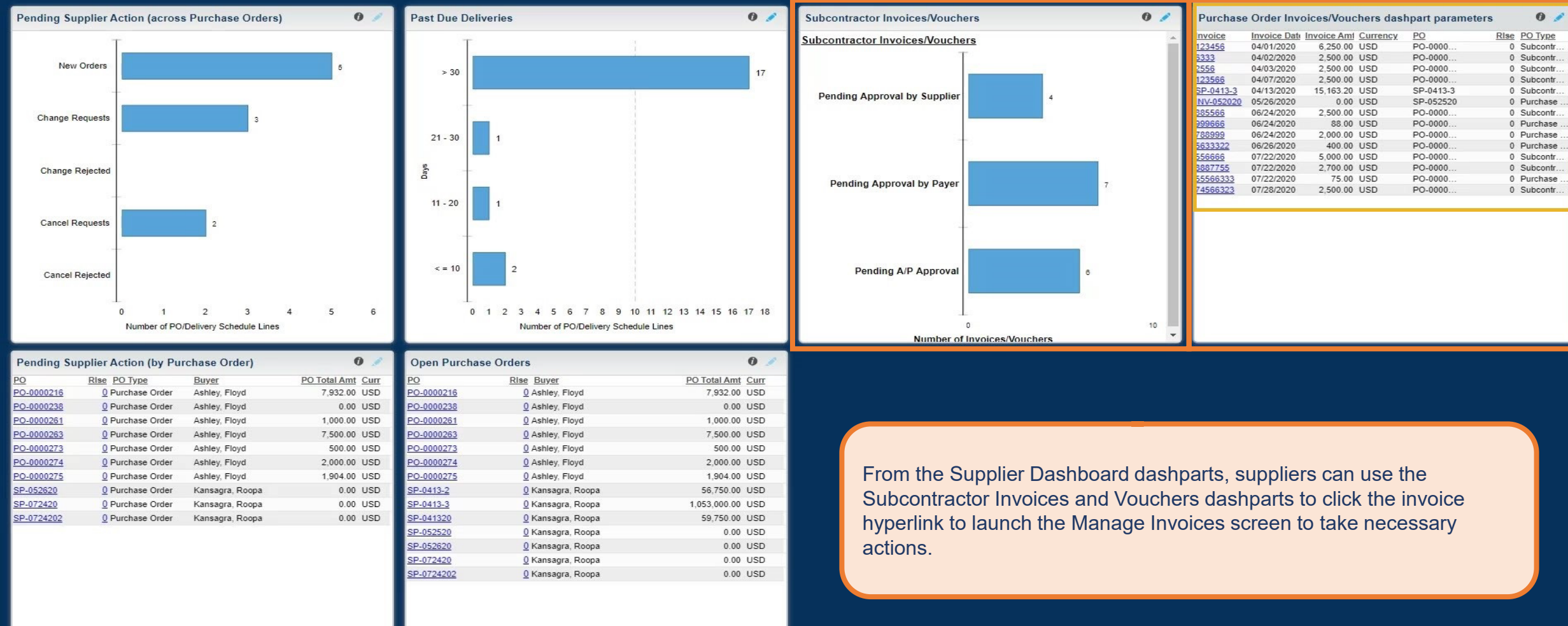
Close

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.

7. Manage Shipping Information Screen



*All data updates in real time except when noted.

[Manage Dashparts](#)

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 New Copy Delete 1 of 1 Existing Table Query

Identification

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

PO

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

Invoice

Number: INV-052020 Date*: 05/26/2020 Amount: 0.00

Trans Currency: USD Terms: NET 30 Shipment Number: Autoload

Invoice Approvals Details

Payer Approval

☐ Approved

Approver:

Date/Time:

Notes:

Supplier Approval

☒ Approved

Approver: SUPPLIERRRK

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

Notes:

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

Invoice Lines New Copy Delete Form Query

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	

[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.

FILE LINE OPTIONS PROCESS HELP

Applied Technologies Inc (PSMDEMOEA) Deltek Costpoint

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

Manage Invoices

New Copy Delete 1 of 1 Existing Table Query

Identification

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

Trans Currency: USD

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

Terms: NET 30

Invoice Number: INV-052020 Date: 05/26/2020 Amount: 0.00

Shipment Number: Autoload

Invoice Approvals

Details

Payer Approval

☐ Approved

Approver:

Date/Time:

Notes:

Supplier Approval

☒ Approved

Approver: SUPPLIERRK

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

Notes:

Invoice Lines

New Copy Delete Form Query

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	

Manage Invoices > Vendor Labor

New Copy Delete Form Query

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 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.

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

1 of 1 Existing Table Query

100%

On the Manage Vendors (SPMVEND) screen, the supplier has access to view vendor record information and request changes via the Notes in the Action Information tab. These notes will send an email notification to the vendor administrator responsible for the vendor record.

Notes I added a new contact and would also like to rec

Vendor Classification Currencies Bonds Insurance Lien Addresses VAT Info CIS Info Action History

New Copy ▼ Delete Form Query ▼

The supplier can edit or add records to the Addresses Contacts or Vendor Employees. This will also trigger an email notification to the vendor administrator that records were added or altered.

[Contacts](#) [EFT Info \(Non-US\)](#) [EFT Info \(US\)](#)

New Copy ▼ Delete Form

Close

Location

Header	Defaults	Notes	Action Information
--------	----------	-------	--------------------

Notes The address has been updated. Thank you!

The vendor administrator can send notes to the supplier via the Notes in the Action Information tab. These notes will send an email notification to the vendor contact indicated as the Supplier Portal administrator.

Vendor Employees	Vendor Classification	Currencies	Subcontractor Info	Credit Card Info	Addresses	Default Expense Accounts	VAT Info	CRS Info	User-Defined Info	Action History
------------------	-----------------------	------------	--------------------	------------------	-----------	--------------------------	----------	----------	-------------------	----------------

1 of 1 Existing Table Query

Action	Created by Supplier
1	2
3	4
5	6
7	8
9	10
11	12
13	14
15	16
17	18
19	20
21	22
23	24
25	26
27	28
29	30
31	32
33	34
35	36
37	38
39	40
41	42
43	44
45	46
47	48
49	50
51	52
53	54
55	56
57	58
59	60
61	62
63	64
65	66
67	68
69	70
71	72
73	74
75	76
77	78
79	80
81	82
83	84
85	86
87	88
89	90
91	92
93	94
95	96
97	98
99	100

SUPPLIERAF

The vendor administrator can see the changes and communication sent by the supplier in the Action History subtask.

Close

New Copy ▼ Delete Form Query ▼

<input checked="" type="checkbox"/>	Address Code *	Address Line 1	Address Line 2	Address Line 3	City	State/ Province	Postal Code	Country	Ship ID	Ship ID Description	Payment Address *	Order Address *	Phone Number	Fax Number	Other Number	Email Address	Congressional District Code	Sales/Use Tax Code	Sales/Use Tax Description	Password	Ship ID Active	US EFT Active	No
<input checked="" type="checkbox"/>	ADDR1	1277 West Elm St			Cleveland	OH	44199	USA			Default ▾	Default ▾									<input type="checkbox"/>	<input type="checkbox"/>	

[Contacts](#) [EFT Info \(Non-US\)](#) [EFT Info \(US\)](#)

Close



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

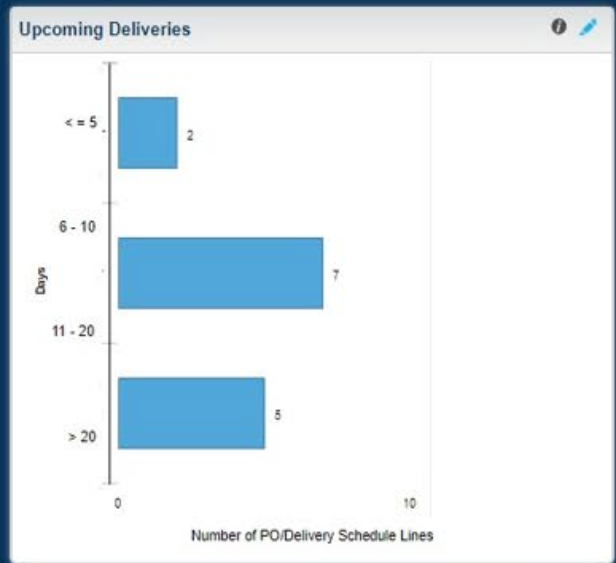
Delivery Schedule Line: 2

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

Action: Pending Supplier Acknowledgment

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 vendor record, 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 vendor record, 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	
10000000...	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	

Pending Supplier Action (by Purchase Order)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
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		

Subcontractor Invoices/Vouchers

SP	Rise	SP Type	Buyer	SP Total Amt	Curr	DPAS
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	Subcontr...
556866	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