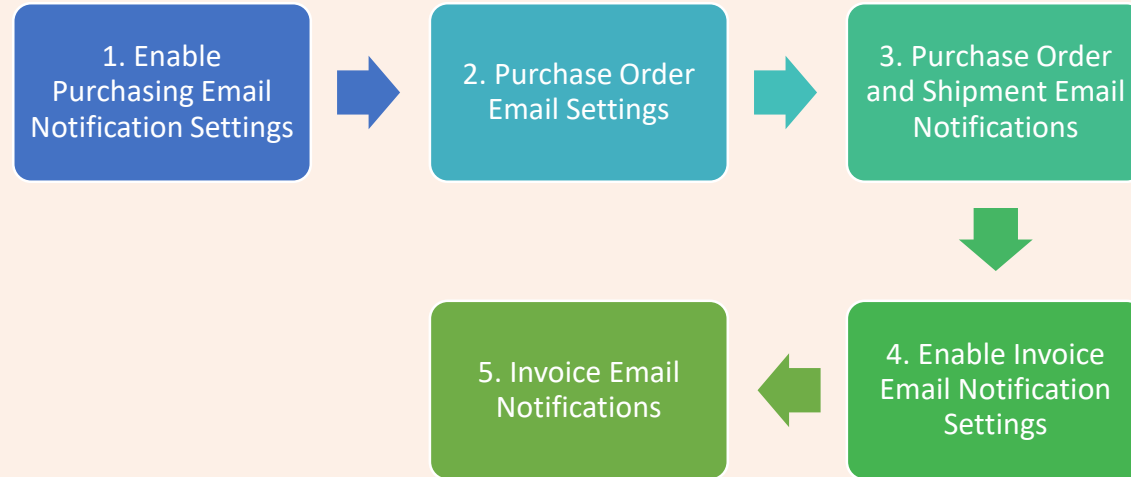# Supplier Portal Email Notification Setup Quick Steps

The high-level steps required to set up Supplier Portal email notification

1. Enable Purchasing Email Notification Settings

2. Purchase Order Email Settings

3. Purchase Order and Shipment Email Notifications

4. Enable Invoice Email Notification Settings

5. Invoice Email Notifications

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

Deltek

Best viewed in IE or Adobe PDF Reader.

PO Status

Initial Status
- ● Open
- ○ Pending

☑ Allow Change to Open in Manage POs
☑ Set to Pending if Over Buyer's Limit
☐ Allow Change to Item Description on Voucher Lines

☑ Allow pending lines in Open, Closed or System Closed POs
☐ Allow Changes to Quality Requirements on PO Lines with Received Quantities

PO Numbering Method
- ● System
- ○ Manual
- ○ Buyer

Last System PO Number   [AD-PO00479]

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

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

PO Defaults
☑ Confirming P...

Ship ID   [V...]

Sales/VAT Tax Defaults
☑ Auto Calculate Sales/VAT Tax

Default Taxable Status
- ○ Use Item Type Default
- ○ All Items Taxable
- ● All Items Non-Taxable

> **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**.

Change Order Defau...
☑ Save Existing...
☑ Allow Chang...

Blanket PO Restriction Defaults
☑ Restrict Release Items to Items on Blanket
☐ Restrict Release Line Totals to Blanket Line Totals

☐ Do Not Exceed Blanket Gross Unit Cost on Rlse Lines
☑ Do Not Allow Rlse Amts to Exceed Total Blanket Amt

Supplier Portal
☑ Email Notification   ☑ Allow Edit

Purchasing Vendor Lead Time Calculation
- ○ Standard Calendar
- ● Production Control Settings

1. Enable Purchasing Email Notification Settings > Step A

PO Status

Initial Status

- ● Open   ○ Pending

☑ Allow Change to Open in Manage POs
☑ Set to Pending if Over Buyer's Limit
☐ Allow Change to Item Description on Voucher Lines

☑ Allow pending lines in Open, Closed or System Closed POs
☐ Allow Changes to Quality Requirements on PO Lines with Received Quantities

PO Numbering Method

- ● System   ○ Manual   ○ Buyer   Last System PO Number   AD-PO00479

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

Other ~~Settings~~

▼

☑ Include Unreleased Blanket Amounts on Commitments
☑ Change Commitment Type to 'Amount' on adding line charge to 3-way match PO line

B

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 or shipment.

Requis~~~~

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

Default~~~~

PO De~~~~

☑

C

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.

Sh~~~~

○ All Items Taxable   ● All Items Non-Taxable

Change Order Default

☑ Save Existing Change Order to History File
☑ Allow Change Save Default

~~~~nket   ☐ Do Not Exceed Blanket Gross Unit Cost on Rlse Lines
~~~~Line Totals   ☑ Do Not Allow Rlse Amts to Exceed Total Blanket Amt

Supplier Portal

☑ Email Notification   ☑ Allow Edit

○ Standard Calendar   ● Production Control Settings

1. Enable Purchasing Email Notification Settings > Steps B and C

→ **Identification**   New | Copy ▼ | Delete | ◄◄ ◄ | 1 of 1 New | ↻ | ► ►► | Table | Query ▼ | ■ | — | X

Buyer ID *   BUYER1   Employee *   ZDEDS03

Details

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

PO   Last PO Number   ☑ Purchase Order   ☐ Release Order   ☐ Subcontractor Agreement
                                                                        ☐ Blanket Order   ☐ Subcontract Retainage PO   ☐ Subcontractor Agreement Blanket
                                                                        ☐ GFM/GFE Order   ☐ Subcontractor Agreement Release

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

If the buyer would like to
receive email notifications,
then in the Manage
Buyers, Supplier Portal
section, check Email
Notification to activate
Purchase Order emails
and check Shipment Email
Notification to activate
Shipment emails.

Supplier Portal

☑ Email Notification   ☑ Shipment Email Notification

Link Acct/Org   Link Projects   Link Vendors

1. Enable Purchasing Email Notification Settings

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

→ **Manage Purchase Orders**   New   Copy ▼ Delete   ✕

Identification

Purchase Order ID [   ]   Release [0]   Change Order [0]   Type * [Purchase Order   ▼]   Trans Curren

| Header | Other Information | Accounting Defaults | Other Defaults | Vendor Address | Bill To & Return Address | Blanket Info | Security Requirements | Subcontract Information |

Vendor Terms [   ]

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 [   ]

☐ Ret

☑ Cor

☐ PO

☐ GSA

☑ Supplier Portal Email Notification

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 or shipment.

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.

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   New   Copy ▼ Delete Form   Query ▼ —

✓	PO Line *	Line Type	Status *	Resource Exists	Item	Part Security	Misc Type	U/M	Due Date	Desired Date	Order Date *	Original Due Date	Delivery Schedule Exists

al/Lot   Accounts   Line Charges   Line Text   Line Documents   Currency Line   Proj Sub Parts   Link SCI/SAP Security Codes   Delivery Schedule

2. Purchase Order Email Settings

PO Emails from Buyer to 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.

Ensure that the Supplier Portal users have an email address setup in Manage Users, and Buyer also have an email address setup in Manage Employee Information. Please refer to the Set Up Supplier Portal User Quick Steps for more information.

Fri 3/1/2019 9:43 AM
buyer@deltek.com

Supplier Portal Activity Alert - PO: PO00001086   Rlse: 0

To   ■ Ryan Pagalanan

PO and Shipment Emails from Supplier to Buyer

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.

Fri 3/1/2019 9:26 AM
supplier@deltek.com

Supplier Portal Activity Alert - PO: PO00001086   Rlse: 0

To   ■ Ryan Pagalanan

2- or 3-Way Matching

| Goods* | 3 ▼ | TOTAL ▼ | Services* | 2 ▼ | TOTAL | Misc (Default)* | 2 ▼ | TOTAL | Parts* | 3 | TOTAL ▼ |

Approval Required

Option* | Automatic ▼ | Above | 0.00 | ☐ Voucher Approvals Upon Receipt

Auto-Voucher Creation

○ None ● 2- and 3-Way Match ○ 3-Way Match Only ☐ Recalculate Detail Rows

Allow

Receiving/Acceptance

Goods | ☑ Services | ☑ Miscellaneous | ☑ Parts (Non-Inventory) | ☑ Charge Code Change

A

Select the **Invoice Email Notification** check box to enable the sending of email notifications between the payer and supplier when a Supplier Portal invoice is approved or rejected, or notes are added.

▼ | Receipt Quantity Autoload* | Received ▼ | Exchange Rate Source* | Purchase Order ▼

B

Enter the email address of the AP team or specific payer who will receive the invoice email notifications.

PO | | 0.00% | Quantity | 0.00% | ☑ Include Sales/VAT Tax

Supplier Portal

☑ Invoice Email Notification | Email | maureenhorner@deltek.com

4. Enable Invoice Email Notification Settings > Steps A and B

Wed 7/22/2020 3:06 PM

Payer@deltek.com

[External] Invoice Activity Alert - Invoice: 556666

To ☐ Ashley Floyd

The **From** email address is the payer 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.

Invoice Number: 556666

Invoice Control/Voucher Number: 6396

Invoice Amount: 5000.00   Currency: USD   Terms: NET 30   Due Date: 08/21/2020
PO: PO-0000218   Rlse: 0   PO Type: Subcontractor Agreement

        Action: Created by Payer

Ensure that the Supplier Portal users have an email address setup in Manage Users. Please refer to the Set Up Supplier Portal User Quick Steps for more information.

Invoice Emails from Supplier to Payer

Wed 7/22/2020 3:25 PM

Vendor@Supplier.com

[External] Invoice Activity Alert - Invoice: 556666

To ☐ Ashley Floyd

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 accounts payable email address saved on the Configure Purchase Order Voucher Settings screen in the Supplier Portal group box.

Invoice Number: 556666

Invoice Control/Voucher Number: 6396

Invoice Amount: 5000.00   Currency: USD   Terms: NET 30   Due Date: 08/21/2020
Vendor: SP001   Vendor Name: Supplier Company
PO: PO-0000218   Rlse: 0   PO Type: Subcontractor Agreement

        Action: Approved by Supplier

5. Invoice Email Notifications

PO Status

Initial Status

● Open   ○ Pending

☑ Allow Change to Open in Manage POs
☑ Set to Pending if Over Buyer's Limit
☐ Allow Change to Item Description on Voucher Lines

☑ Allow pending lines in Open, Closed or System Closed POs
☐ Allow Changes to Quality Requirements on PO Lines with Received Quantities

PO Numbering Method

● System   ○ Manual   ○ Buyer   Last System PO Number   AD-PO00479

Other Settings

Buyer PAO Validation Code*   Implicit ▼

This concludes the
Set Up Supplier Portal Email Notification Quick Steps.

Requisition Requirements

● Do Not Require Req No on PO Line   ○ R

Defaults

PO Defaults

☑ Confirming PO

Ship ID   VA-SHIP2

Sales/VAT Tax Defaults

☑ Auto Calculate Sales/VAT Tax

Default Taxable Status

○ Use Item Type Default   ○ All Items Taxable   ● All Items Non-Taxable

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
☐ Restrict Release Line Totals to Blanket Line Totals

☐ Do Not Exceed Blanket Gross Unit Cost on Rlse Lines
☑ Do Not Allow Rlse Amts to Exceed Total Blanket Amt

Supplier Portal

☑ Email Notification   ☑ Allow Edit

Purchasing Vendor Lead Time Calculation

○ Standard Calendar   ● Production Control Settings