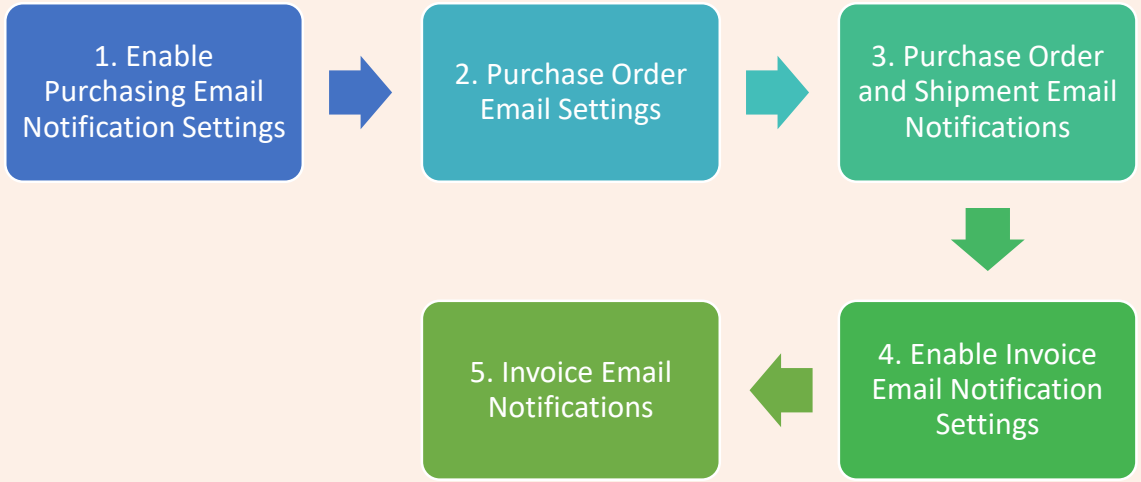
Supplier Portal Email Notification Setup Quick Steps

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

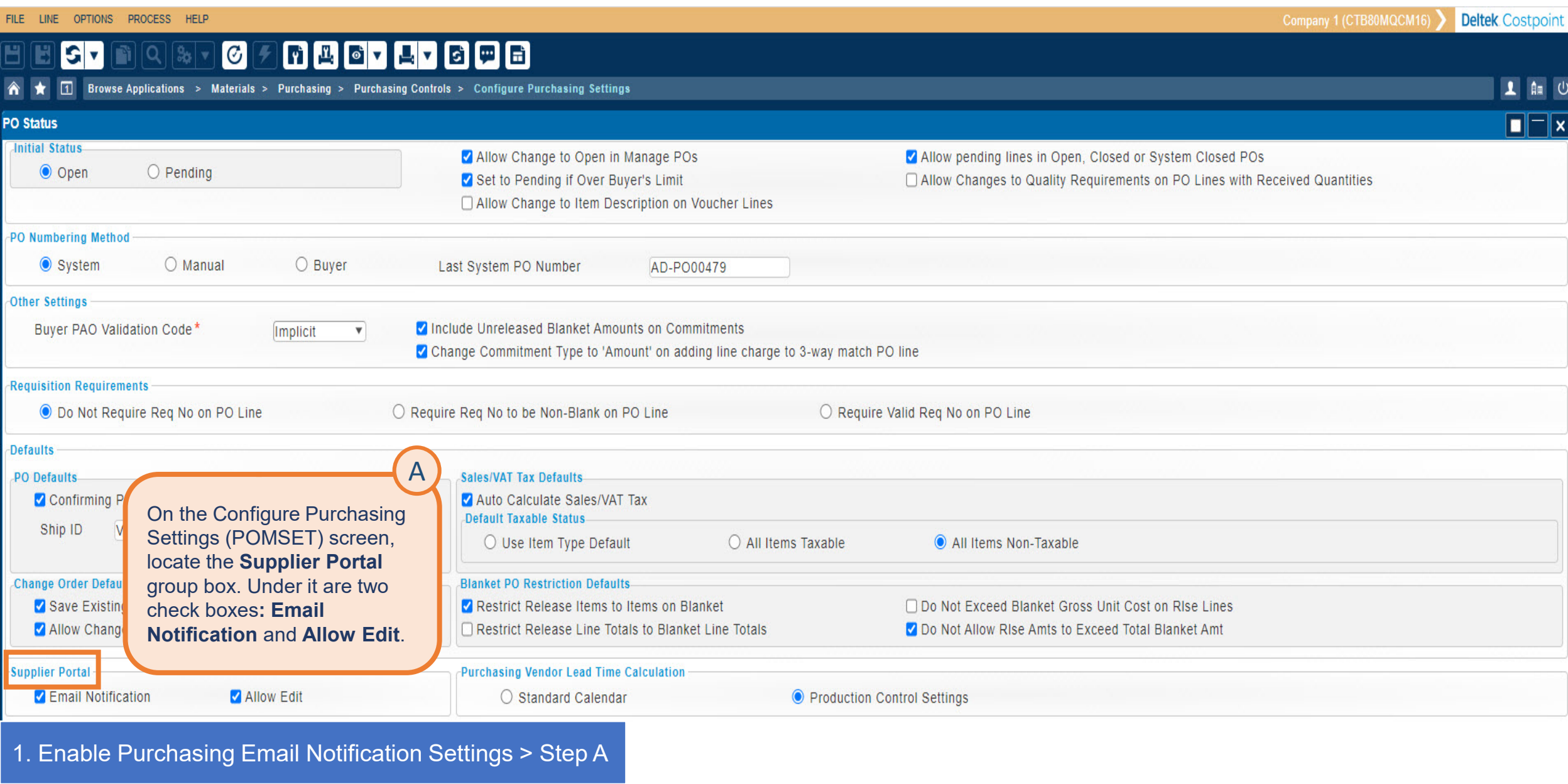


Navigation:

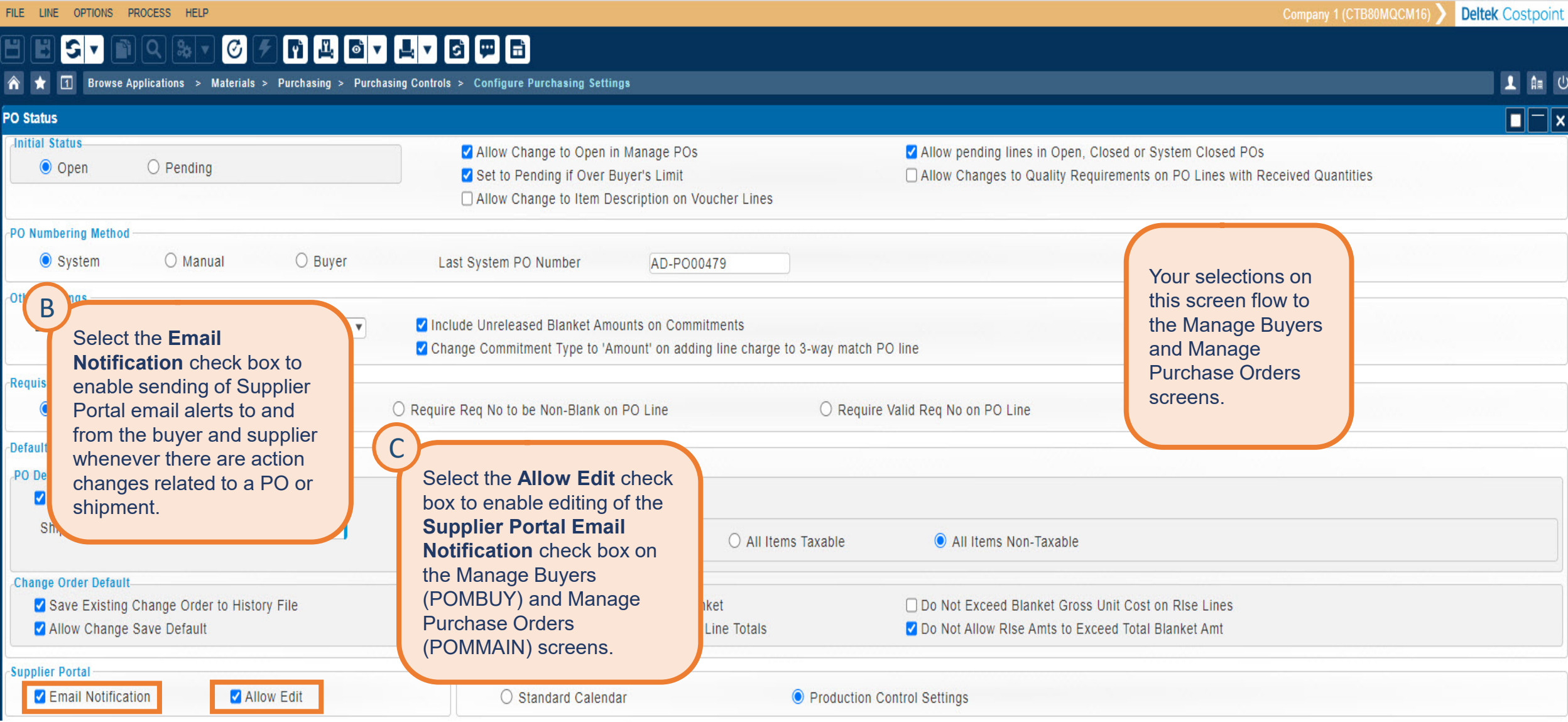
- Use the **PAGE DOWN** key to proceed to the next slide.
- Use the **PAGE UP** key to return to a prior slide.

Deltek

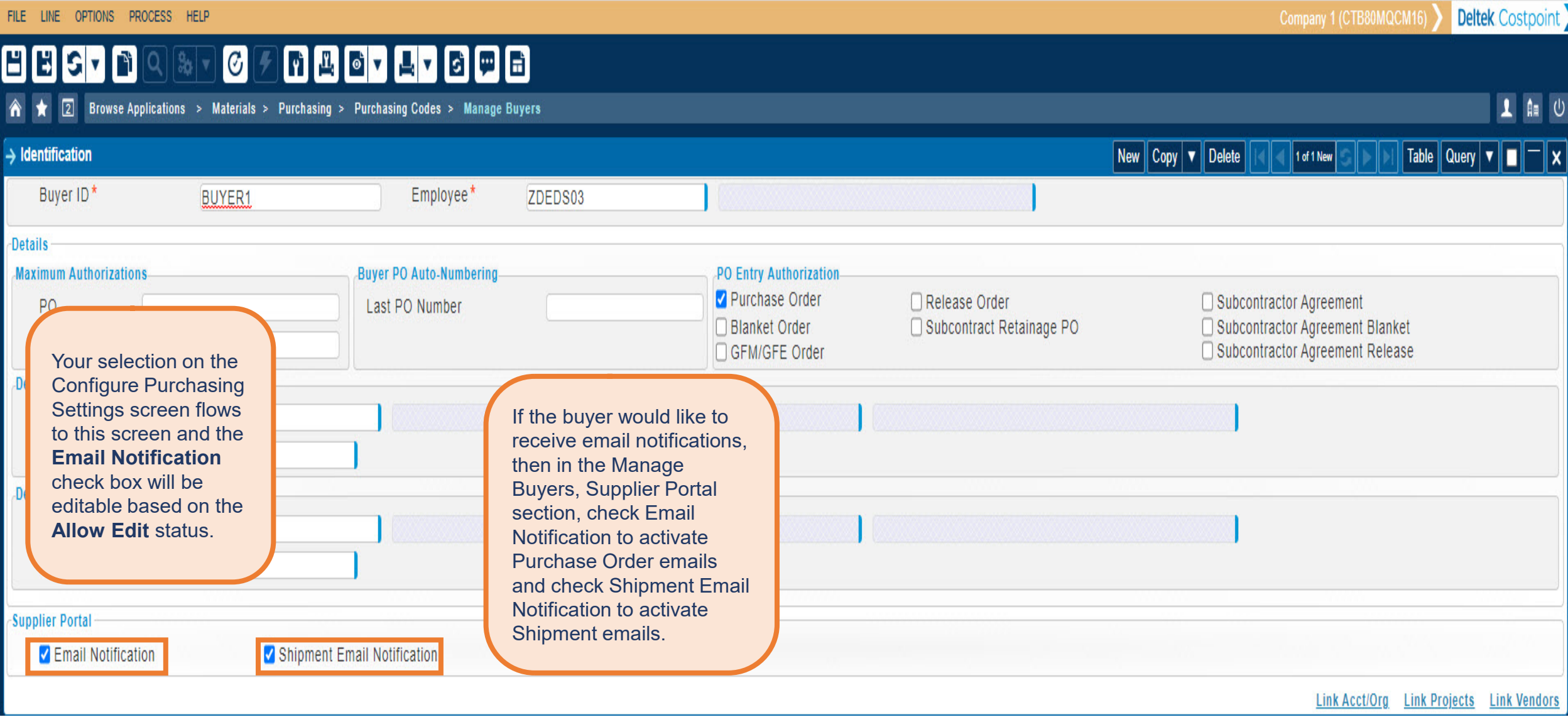
Best viewed in IE or Adobe PDF Reader.



1. Enable Purchasing Email Notification Settings > Step A



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



1. Enable Purchasing Email Notification Settings

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.

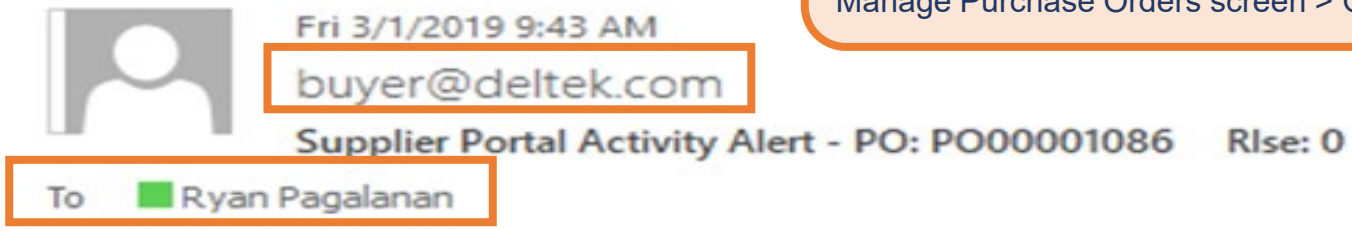
The default email address is the primary email address indicated for the vendor contact, and is editable here. You can also use the Import Vendors preprocessor to upload the vendor information, which includes the vendor email address.

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.

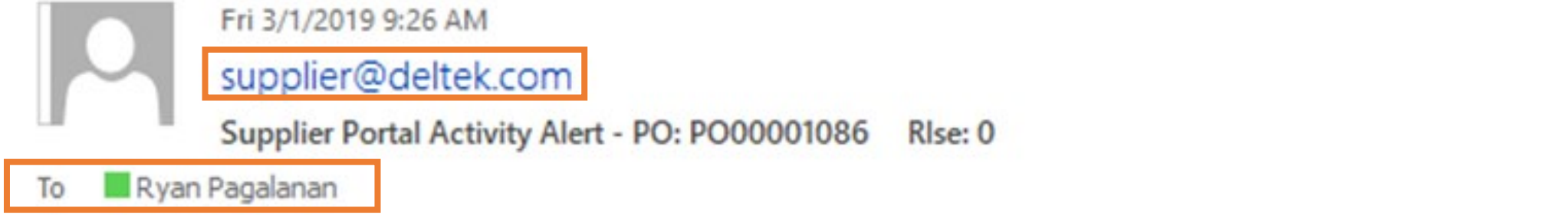


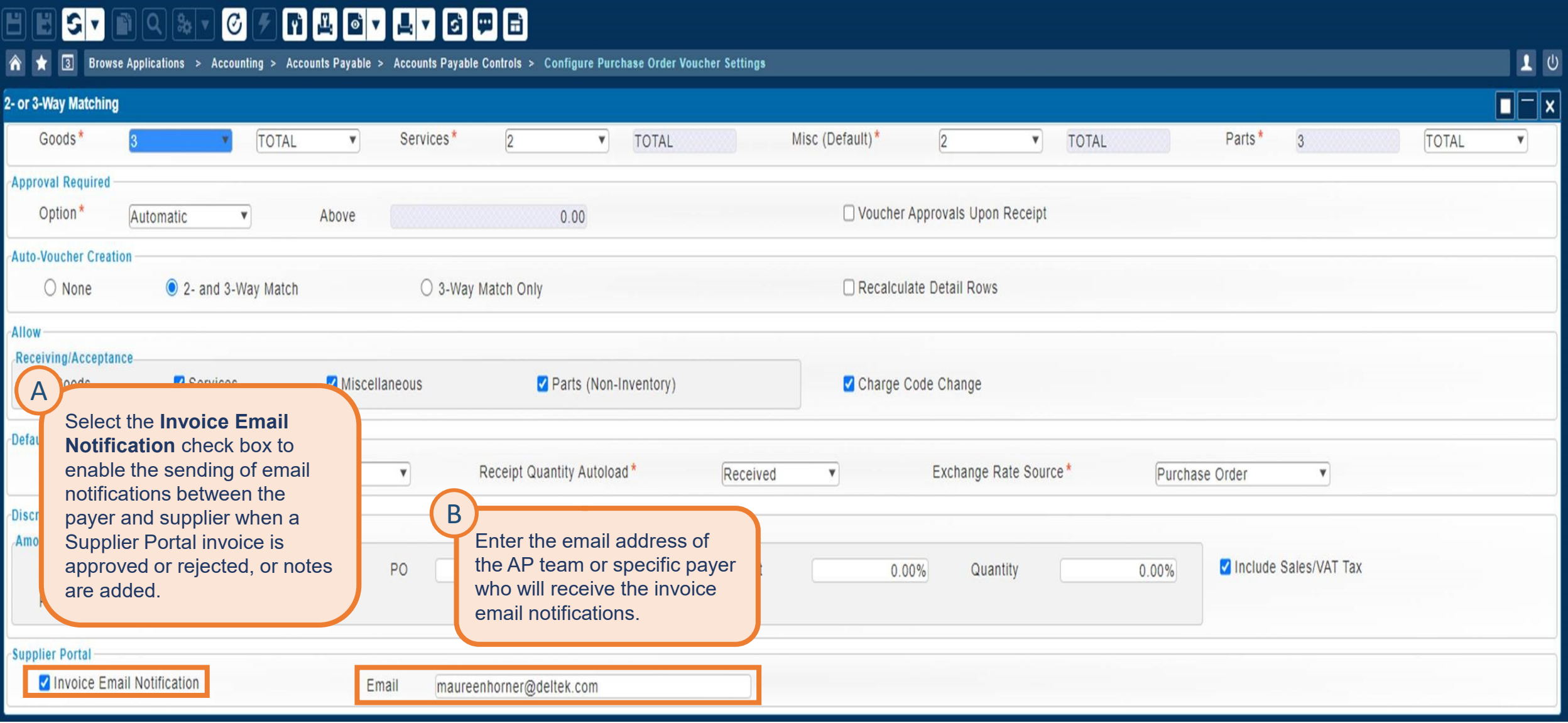
Ensure that the Supplier Portal users have an email address setup in Manage Users, and Buyer also have an email address setup in Manage Employee Information. Please refer to the Set Up Supplier Portal User Quick Steps for more information.

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.

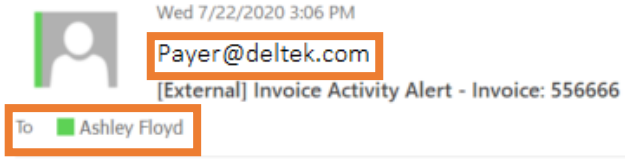
The **To** email address is the buyer email address saved on the Manage Employee Information screen that is linked to the buyer on the PO.





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

Invoice Emails from Payer to Supplier



Invoice Number: 556666

Invoice Control/Voucher Number: 6396

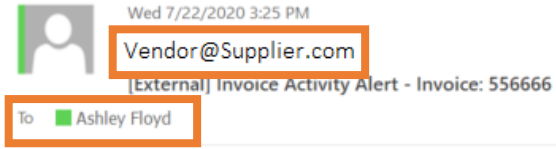
Invoice Amount: 5000.00 Currency: USD Terms: NET 30 Due Date: 08/21/2020
PO: PO-0000218 Rlse: 0 PO Type: Subcontractor Agreement

Action: Created by Payer

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 Emails from Supplier to Payer



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

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.

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.

FILE LINE OPTIONS PROCESS HELP
Company 1 (CTB80MQCM16)
Deltek Costpoint
Browse Applications > Materials > Purchasing > Purchasing Controls > Configure Purchasing Settings
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
Requisition Requirements
Do Not Require Req No on PO Line
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 RIse Lines
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
This concludes the
Set Up Supplier Portal Email Notification Quick Steps.