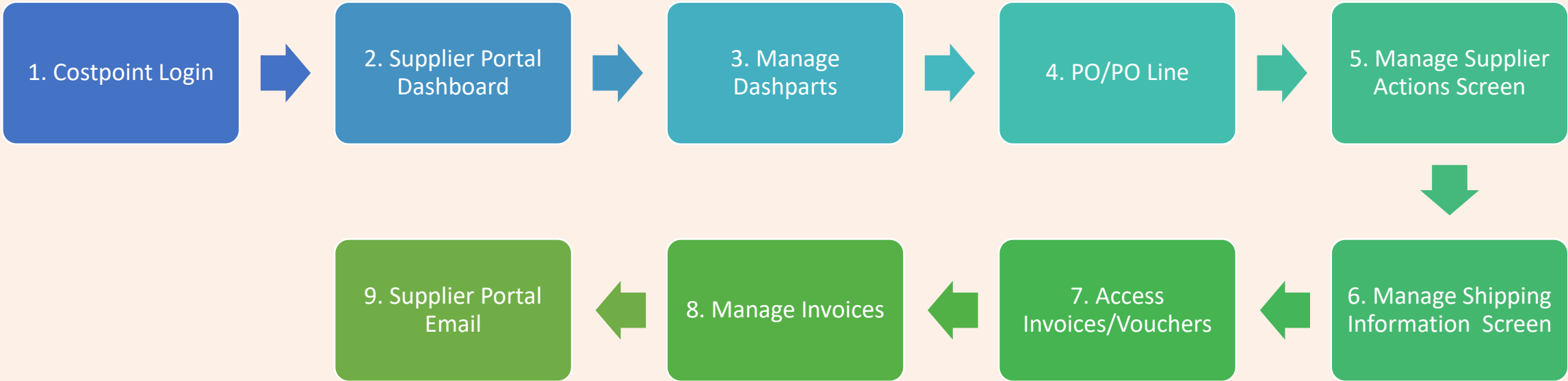# Supplier Portal Overview Quick Steps

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.

1. Costpoint Login → 2. Supplier Portal Dashboard → 3. Manage Dashparts → 4. PO/PO Line → 5. Manage Supplier Actions Screen ↓

9. Supplier Portal Email ← 8. Manage Invoices ← 7. Access Invoices/Vouchers ← 6. Manage Shipping Information Screen

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.

Deltek.

Costpoint® [Add Desktop Shortcut]

USERNAME

PASSWORD
Enter a valid password

SYSTEM
?

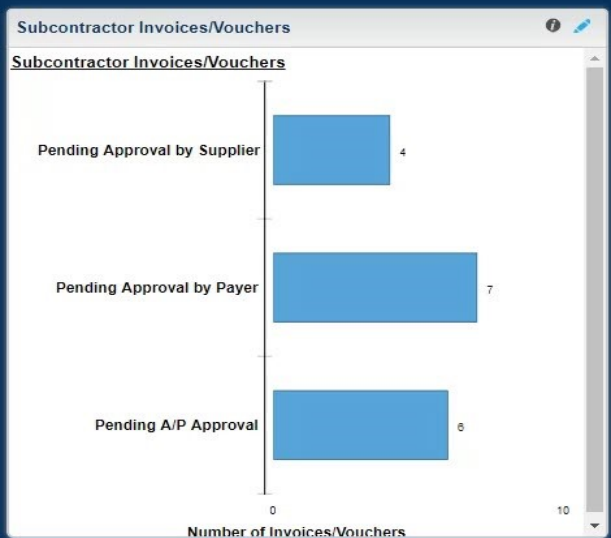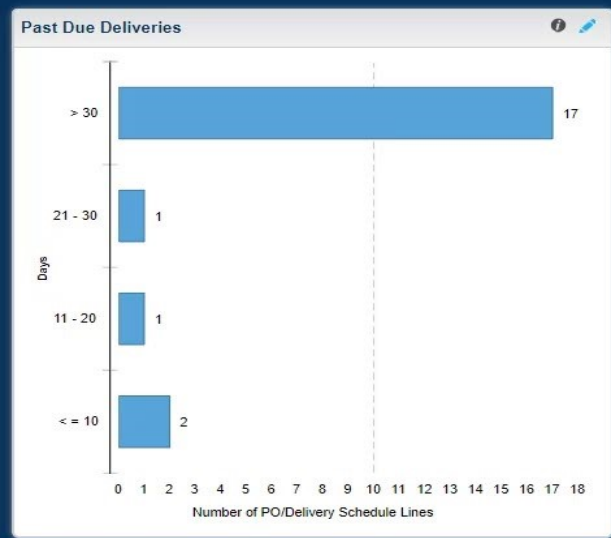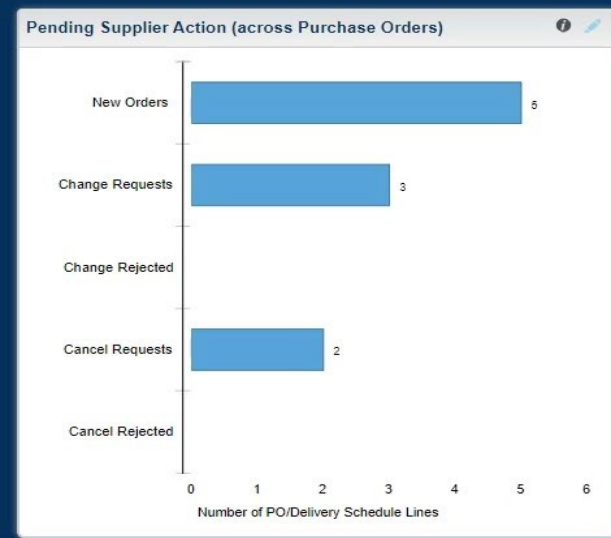☐ Remember me   Reset

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, and Manage Invoices.

1. Costpoint Login

*All data updates in real time except when noted.   Manage Dashparts ✕

Pending Supplier Action (across Purchase Orders)

Bar chart — Number of PO/Delivery Schedule Lines:
- New Orders: 5
- Change Requests: 3
- Change Rejected:
- Cancel Requests: 2
- Cancel Rejected:

Past Due Deliveries

Bar chart — Days vs Number of PO/Delivery Schedule Lines:
- > 30: 17
- 21 - 30: 1
- 11 - 20: 1
- < = 10: 2

Subcontractor Invoices/Vouchers

Subcontractor Invoices/Vouchers

Bar chart — Number of Invoices/Vouchers:
- Pending Approval by Supplier: 4
- Pending Approval by Payer: 7
- Pending A/P Approval: 6

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 ...
885566	06/24/2020	2,500.00	USD	PO-0000...	0	Purchase ...
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
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	RIse	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.

2. Supplier Portal Dashboard

Manage Dashparts

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 diaglog 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	✎	⬆	✕

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.

Save   Close

Subcontractor Invoices/Vouchers   ⓘ ✎
Subcontractor Invoices/Vouchers

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	Purchase ...
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...

Change Rejected

Cancel Requests   2

Cancel Rejected

0   1   2
Number of PO/Delivery Sch

Days   11 - 20

Pending Supplier Action (by Purchase Or...

PO	Rlse	PO Type	Buyer	
PO-0000216	0	Purchase Order	Ashley, Flo...	
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

PO-0000238		
PO-0000261		
PO-0000263		
PO-0000273		
PO-0000274		
PO-0000275		
SP-0413-2		
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

3. Manage Dashparts > Steps A and B

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

*All data updates in real time except when noted.   Manage Dashparts   ✕

Pending Supplier Action (across Purchase Orders)   ⓘ ✎

Past Due Deliveries   ⓘ ✎

Subcontractor Invoices/Vouchers   ⓘ ✎

Subcontractor Invoices/Vouchers

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	Purchase...
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...

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.

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	✎	⬆	✕

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.

Save   Close
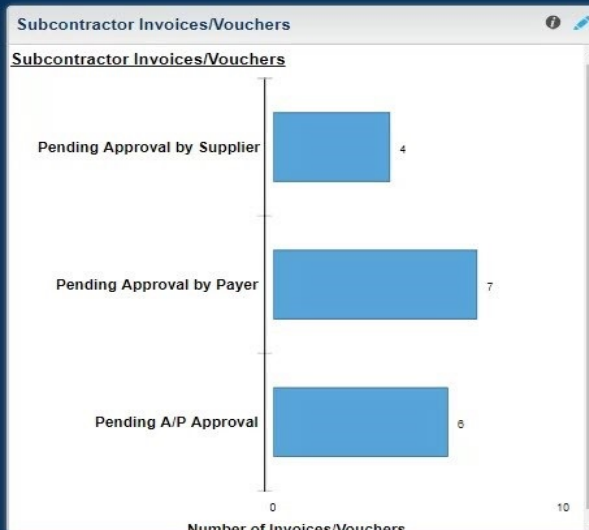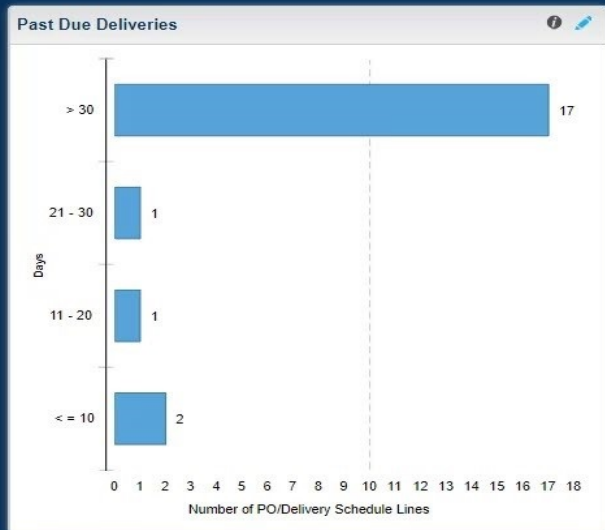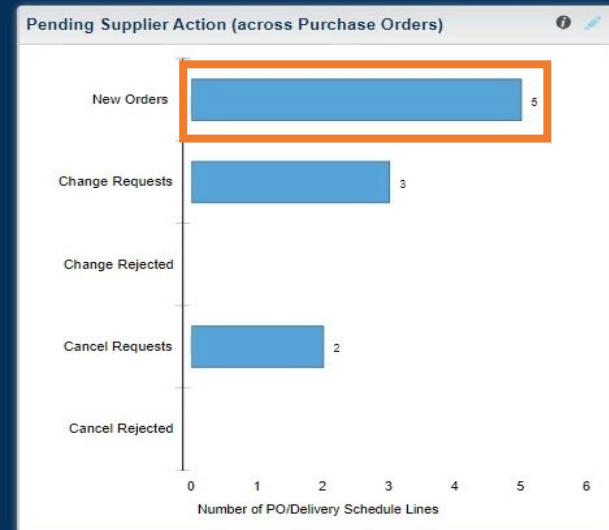
Pending Supplie

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		
PO-0000273	0	Purchase Order	Ashley, Floyd		
PO-0000274	0	Purchase Order	Ashley, Floyd		
PO-0000275	0	Purchase Order	Ashley, Floyd		
SP-052620	0	Purchase Order	Kansagra, Roopa		
SP-072420	0	Purchase Order	Kansagra, Roopa		
SP-0724202	0	Purchase Order	Kansagra, Roopa		

Open Purchase

PO
PO-0000216
PO-0000238
PO-0000261

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 pain to adjust the location of the Dashpart.

3. Manage Dashparts > Steps C, D, and E

*All data updates in real time except when noted.   Manage Dashparts ☒

Pending Supplier Action (across Purchase Orders) ⓘ ✎

Past Due Deliveries ⓘ ✎

Subcontractor Invoices/Vouchers ⓘ ✎

Subcontractor Invoices/Vouchers

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	Purchase ...
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

From the dashparts, suppliers can click the Purchase Order hyperlink to access individual Purchase Orders, Purchase Order lines or delivery schedule lines to take the necessary actions.

4. PO/PO Line

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

Manage Supplier Actions   Form   Query ▾

	New Action	PO	Rlse	Change 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	
✔	-None- ▾	PO-0000216	0	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	ashleyflo

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
✔	06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

The Purchase Order hyperlink 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.

5. Manage Supplier Actions Screen

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		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
	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.

5. 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-	▼	AD	Open	Asaka, Leslie S C.P.A.	PART 011315		04/2		100
	-None-	▼	AD	Open	Asaka, Leslie S C.P.A.	PART 011315		04/2		100
	-None-	▼	AD	Purchase Order	1	3 Closed	Asaka, Leslie S C.P.A.	PART 032999-3	04/2	180
	-None-	▼	AD	Purchase Order	2	4 System Closed	Asaka, Leslie S C.P.A.	PART 032999-3	04/2	50
	-None-	▼	AD	Purchase Order	2	5 System Closed	Asaka, Leslie S C.P.A.	PART 032999-3	04/2	50
	-None-	▼	AD	Purchase Order	4	6 Closed	Asaka, Leslie S C.P.A.	SERVICES	04/2	0
	-None-	▼	AD	Purchase Order	5	7 Open	Asaka, Leslie S C.P.A.	SERVICES	04/2	
	-None-	▼	AD	Purchase Order	1	8 Open	Asaka, Leslie S C.P.A.	JR0831	A	04/24/2019	25
	-None-	▼	AD-	Purchase Order	1	9 Open	Asaka, Leslie S C.P.A.	JR0831		25
	-None-	▼	AD-PO00236	0	0 Open	Purchase Order	1	10 Open	Asaka, Leslie S C.P.A.	JR0831	25
	-None-	▼	AD-PO00236	0	0 Open	Purchase Order	1	11 Open	Asaka, Leslie S C.P.A.	JR0831	25
	-None-	▼	AD-PO00236	0	0 Open	Purchase Order	2	12 Open	Asaka, Leslie S C.P.A.	PART 0	100

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

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.

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

Details

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			

5. Manage Supplier Actions Screen

Manage Supplier Actions

1 of 1 Existing   Table   Query

PO	PO-0000216
PO Line	2
Item	4101661
Order Qty	36
Open Qty	36
Vendor Contact Email Address	ashleyfloyd@deltek.com

Release: 0   Change Order: 0   PO Status: Open   PO Type: Purchase Order
Delivery Line: Line Status: Open   Buyer: Ashley, Floyd
Rev: -   Description: Titanium bolts - 3"
Order Amt: 432.00   Due Date: 04/02/2020   Currency: USD
Open Amt: 432.00   Desired Date: 04/02/2020   U/M: BX

Last Action

Action Message	Pending Supplier Acknowledgment
Proposed Order Qty	

Proposed Order Amt   Proposed Due Date

New Action

Action Message	-None-
Proposed Order Qty	
Notes	

Dropdown options:
-None-
Accepted by Supplier
Cancel Request by Supplier
Change Request by Supplier
Rejected by Supplier

Header Details   Line Details

Action History

Form   Query

Modified Date/Time	Modified By	PO Change Order	Action	Order Q...	Number	Number of Containers	Notes
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.

5. Manage Supplier Actions Screen

Manage Supplier Actions   Form | Query ▼

New Action		PO	RIse	Change 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	
-None-	▼	PO-0000216	0	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	ashleyflo
-None-																						
Accepted by Supplier																						
Cancel Request by Supplier																						
Change Request by Supplier																						
Rejected by Supplier																						

Header Details   Line Details

Ac   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
	06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

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

5. Manage Supplier Actions Screen

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-	▼ PO-0000250	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-	▼ PO-0000273	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-	▼ PO-0000273	0							01351-1	-	Fuselage	1	100.00	08/05/2020	USD		500.00	08/05/2020	EA	ashleyfloyd@deltek.com	Pending
	-None-	▼ PO-0000300	0							01351-1	-	Fuselage	2	500.00	08/11/2020	USD	2	500.00	08/11/2020	EA	ashleyfloyd@deltek.com	Pending
	-None-	▼ SP-052620	0							577-1	-	Transponder Cover	4	0.00	06/05/2020	USD	4	0.00	06/05/2020	EA	roopakansagra@deltek.com	Pending

Load New Action = Accepted by Supplier

Show/Hide Screen Controls

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										

5. Manage Supplier Actions Screen

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   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
	06/04/2020 11:49:41 AM	AFLOYD	0	Pending Supplier Acknowledgment	36	432.00	04/02/2020										

In Form view suppliers can utilize the New Action box to enter additional information such as proposed order quantity, proposed due date, notes, and the conditional proposed order amount, which is editable only if the Purchase Order line order quantity is zero.

5. Manage Supplier Actions Screen

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

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
	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.

5. Manage Supplier Actions Screen

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 A

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

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
06/04/2020 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	Vend 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	Rlse	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

5. Manage Supplier Actions Screen

Manage Shipping Information

| New | Copy ▼ | Delete | |◄ ◄ | 2 of 9 Existing | ► ►| | Table | Query ▼ | ■ |

Identification

Shipment Number*	555888	Purchase Order*	PO-0000274	Release*	0	☑ Submit
Carrier	UPS	Tracking Number	122556633235			
Ship Date*	06/23/2020	Number of Containers	1			Autoload

Shipping Information Lines

| New | Copy ▼ | Delete | Form | Query ▼ | — |

☑	PO Line*	Delivery Line	Item	Rev	Misc Type	Description	Due Date	Shipped Qty*	PO U/M	Tracking Number	Notes
	1		4101351-1	-		Fuselage	07/07/2020	1	EA		

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.

6. Manage Shipping Information Screen

*All data updates in real time except when noted.

Manage Dashparts

Pending Supplier Action (across Purchase Orders)

Number of PO/Delivery Schedule Lines

Past Due Deliveries

Number of PO/Delivery Schedule Lines

Subcontractor Invoices/Vouchers

Subcontractor Invoices/Vouchers

Number of Invoices/Vouchers

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...
NV-052020	05/26/2020	0.00	USD	SP-052520	0	Purchase ...
385566	06/24/2020	2,500.00	USD	PO-0000...	0	Purchase ...
399666	06/24/2020	88.00	USD	PO-0000...	0	Purchase ...
788999	06/24/2020	2,000.00	USD	PO-0000...	0	Purchase ...
6633322	06/26/2020	400.00	USD	PO-0000...	0	Purchase ...
556666	07/22/2020	5,000.00	USD	PO-0000...	0	Subcontr...
3887755	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
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	RIse	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

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.

7. Access Invoices/Vouchers

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

Manage Invoices   New | Copy ▼ | Delete | |◄ ◄ | 1 of 1 Existing | ↻ ► | ►| | Table | Query ▼ | ■ | _ | □ | X

Identification

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

Trans Currency   USD

PO

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

Terms   NET 30

Shipment Number

Invoice

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

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

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	0

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.

8. Manage Invoices

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

| PO Number* | SP-052520 | RIse* | 0 | Change Order | 0 | PO Type | Purchase Order | Terms | NET 30 |
| | | | | | | | | Shipment Number | |

Invoice

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

Invoice Approvals | Details

Payer Approval

☐ Approved

Approver

Date/Time

Notes

> 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.

Supplier Approval

☑ Approved

Approver	SUPPLIERRK
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	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

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 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.

8. Manage Invoices

Wed 5/8/2019 3:11 PM
buyer@costpoint.com
Supplier Portal Activity Alert - PO: PO-02-0627   Rlse: 0

To ■ Supplier

PO: PO-02-0627 Rlse: 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
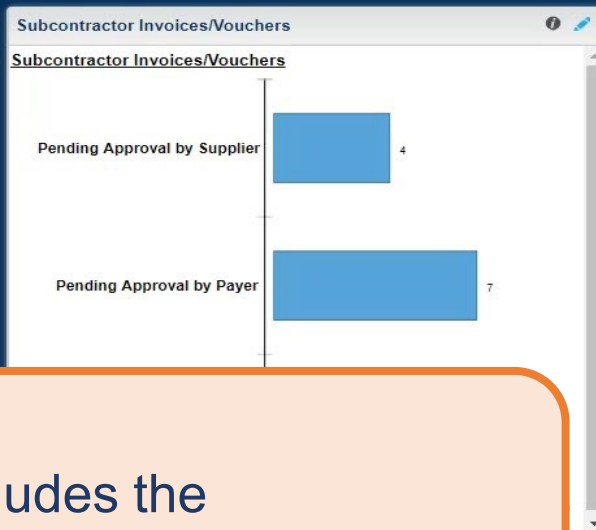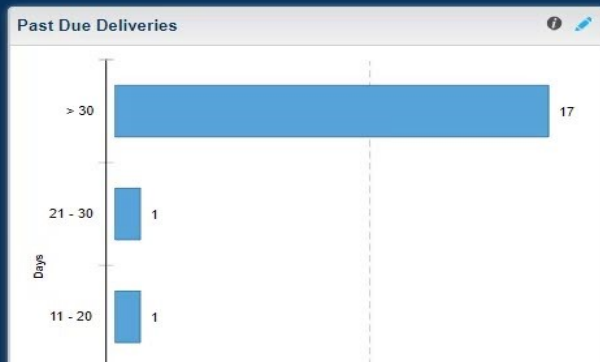
Delivery Schedule Line: 2

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 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 purchase order, shipment, or invoice.

9. Supplier Portal Email

*All data updates in real time except when noted.

Manage Dashparts

Pending Supplier Action (across Purchase Orders)

Number of PO/Delivery Schedule Lines

Past Due Deliveries

Days

Subcontractor Invoices/Vouchers

Subcontractor Invoices/Vouchers

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 ...
885566	06/24/2020	2,500.00	USD	PO-0000...	0	Purchase ...
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...

This concludes the
Supplier Portal Overview Quick Steps.

Pending Supplier Action (by Purchase Order)

PO	Rise	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

PO	Rise	Buyer	Amt	Curr
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