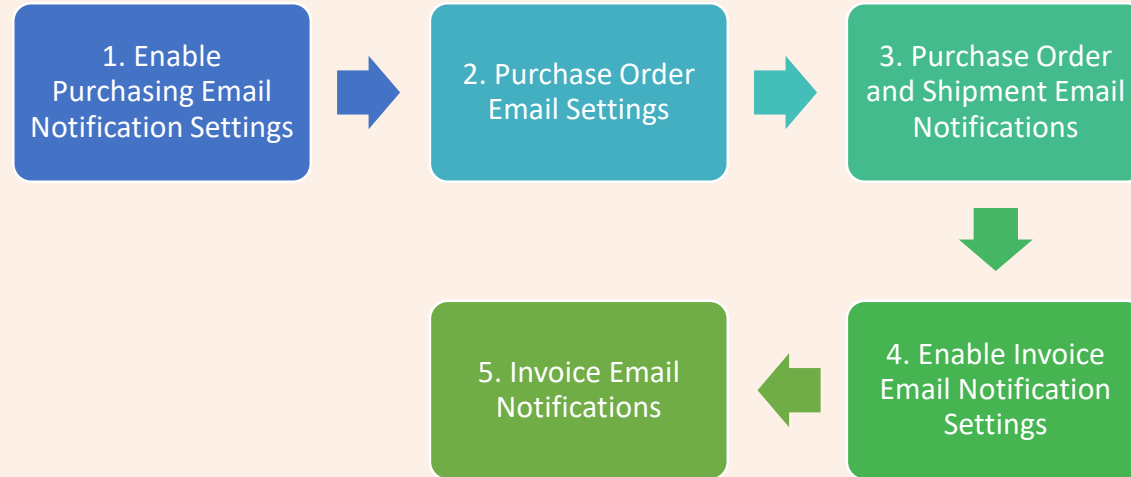


# Supplier Portal Email Notification Setup Quick Steps

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.





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

☒ 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

#### Change Order Defaults

☒ Save Existing

☒ Allow Change

#### Supplier Portal

☒ Email Notification

☒ Allow Edit

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**.

#### Sales/VAT Tax Defaults

☒ Auto Calculate Sales/VAT Tax

##### Default Taxable Status

☐ Use Item Type Default

☐ All Items Taxable

☒ All Items Non-Taxable

#### 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 Amt to Exceed Total Blanket Amt

#### Purchasing Vendor Lead Time Calculation

☐ Standard Calendar

☒ Production Control Settings





Browse Applications &gt; Materials &gt; Purchasing &gt; Purchasing Controls &gt; Configure Purchasing Settings

## PO Status

## Initial Status

☒ Open ☐ Pending☒ Allow Change to Open in Manage POs☒ Allow pending lines in Open, Closed or System Closed POs☒ Set to Pending if Over Buyer's Limit☐ Allow Changes to Quality Requirements on PO Lines with Received Quantities☐ Allow Change to Item Description on Voucher Lines

## PO Numbering Method

☒ System ☐ Manual ☐ Buyer

Last System PO Number

AD-PO00479

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.

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.

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

## Requisition

## Default

## PO Description

## Shipment

☒ Include Unreleased Blanket Amounts on Commitments☒ Change Commitment Type to 'Amount' on adding line charge to 3-way match PO line☐ Require Req No to be Non-Blank on PO Line☐ Require Valid Req No on PO Line

## Change Order Default

☒ Save Existing Change Order to History File☒ Allow Change Save Default☐ All Items Taxable☒ All Items Non-Taxable

## Supplier Portal

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

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





Browse Applications &gt; Materials &gt; Purchasing &gt; Purchasing Codes &gt; Manage Buyers

## → Identification

New Copy ▼ Delete 1 of 1 New Table Query ▼

Buyer ID \*

BUYER1

Employee \*

ZEDS03

## Details

## Maximum Authorizations

PO

## Buyer PO Auto-Numbering

Last PO Number

## PO Entry Authorization

☒ 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 &gt; Materials &gt; Purchasing &gt; Purchase Orders &gt; Manage Purchase Orders

## Manage Purchase Orders

New Copy Delete

## Identification

Purchase Order ID

Release

0

Change Order

0

Type\*

Purchase Order

Trans Current

Header Other Information Accounting Defaults Other Defaults Vendor Address Bill To &amp; 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

Implement Action Changes

Create Blanket PO Release

## Purchase Order Lines

PO Line*	Line Type	Status*	Resource Exists	Item
1				

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.

[Header SOW](#) [Header Notes](#) [Header Text](#) [Header Documents](#) [PO Totals](#) [Exchange Rates](#) [Link SCI/SAP Security Codes](#)

New Copy Delete Form Query

Part Security

Misc Type

U/M

Due Date

Desired Date

Order Date\*

Original Due Date

Delivery Schedule Exists

[Lot](#) [Accounts](#) [Line Charges](#) [Line Text](#) [Line Documents](#) [Currency Line](#) [Proj Sub Parts](#) [Link SCI/SAP Security Codes](#) [Delivery Schedule](#)

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.



### PO Emails from Buyer to Supplier



Fri 3/1/2019 9:43 AM

buyer@deltek.com

Supplier Portal Activity Alert - PO: PO00001086 Rlse: 0

To Ryan Pagalanan

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 vendor has the **Supplier Portal Enabled** check box selected in Manage Vendors and the users have an email address setup in Manage Users. The buyer should 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



Fri 3/1/2019 9:26 AM

supplier@deltek.com

Supplier Portal Activity Alert - PO: PO00001086 Rlse: 0

To Ryan Pagalanan

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.





Browse Applications > Accounting > Accounts Payable > Accounts Payable Controls > Configure Purchase Order Voucher Settings

### 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**

☒ Parts (Non-Inventory) ☒ Charge Code Change

**Default**

Receipt Quantity Autoload\* Received Exchange Rate Source\* Purchase Order

**Discount**

PO 0.00% Quantity 0.00% ☒ Include Sales/VAT Tax

**Supplier Portal**

☒ Invoice Email Notification Email maureenhorner@deltek.com

**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.

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

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



### Invoice Emails from Payer to Supplier

Wed 7/22/2020 3:06 PM  
Payer@deltek.com  
[External] Invoice Activity Alert - Invoice: 556666  
To Ashley Floyd

[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

### 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

[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 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.

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.

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.



☒ Open ☐ Pending

☒ Allow Change to Open in Manage POs

☒ Allow pending lines in Open, Closed or System Closed POs

☒ Set to Pending if Over Buyer's Limit☐ Allow Changes to Quality Requirements on PO Lines with Received Quantities

☐ Allow Change to Item Description on Voucher Lines

☒ System      ☐ Manual      ☐ Buyer

Last System PO Number

AD-PO00479

Buyer PAO Validation Code\*

Implicit ▼

☒ Do Not Require Req No on PO Line

## 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

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

### Blanket PO Restriction Defaults

☒ Restrict Release Items to Items on Blanket☐ Do Not Exceed Blanket Gross Unit Cost on Rlse Lines☐ Restrict Release Line Totals to Blanket Line Totals

☒ Do Not Allow Rlse Amts to Exceed Total Blanket Amt

☒ Email Notification☒ Allow Edit

### Purchasing Vendor Lead Time Calculation

☐ Standard Calendar

● Production Control Settings