

Vendor Portal Options

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Settings > Accounts Payable > Vendor Portal Options

Users to notify when vendor portal user waiting approval: Specified users will receive email notifications each time vendors update their information through Vendor Portal.

Vendor Portal Email: The “From” email address which is used for automated emails sent to vendors. It is also the email used when Vendors initiate correspondence. It is initially set by SGA.

Allow vendor portal payment change: When checked the preferred payment method field in the Vendor Portal Banking Information screen is eligible for change by the Vendor.

Allow vendor portal payment change from Paper Check to EFT only: When checked the preferred payment method field in the Vendor Portal Banking Information screen is eligible for change by the Vendor but will only allow change from Paper Check to EFT. If the preferred payment method is set as EFT it may not be changed to Paper Check.

Require W9 attachment before allowing save: When checked the system will require the Vendor user to attach a file in the W9 attachment field on the Tax Information tab before allowing them to save any other information changes.

Require Bank attachment before allowing save: When checked the system will require the Vendor user to attach a file in the attachment field on the Banking Information tab before allowing them to save any other information changes.

Use upload invoices: When checked the system will allow invoices to be uploaded through the Vendor Portal.

Include welcome email header: Allows for specified wording to be listed for the Subject line of Vendor Portal welcome emails sent to Vendors.

Email Header Image: Any image file selected will be included in the Vendor Portal welcome email signature line.

Attachments: Any files selected will be attached to the Vendor Portal Welcome email.

Portal welcome email body: The wording of all Vendor Portal welcome emails. Initially set by SGA this text may be changed to whatever wording is preferred.

“Insert Variable” feature allows for inclusion of the following dynamic information:

%CompanyName%: The listed SGA organization name in system options.

%CompanyAddress%: The listed SGA organization address in system options.

%CompanyPhone%: The listed SGA organization phone number in system options.

%UserFullName%: The Vendor's full name as listed in the Vendor record Vendor Portal tab.
