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Vendor Portal Options

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.

Disable tax information tab: When this option is enabled, the tax information tab will be disabled in the vendor portal, preventing vendors from entering information on this tab.

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

Override Company Name for Payment Acknowledgement form: Allows you to enter a company name different from the one the form is pre-filled with for payment reporting purposes.
Allow Changes 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: 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: 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.

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

Notify vendor when Vendor Portal email changed: When this option is enabled, the system will send a notification to the vendor that their email has changed. This is a great security measure to prevent fraud.
Vendor Portal Email: This is the **From** email address used for automated emails sent to vendors and when Vendors initiate correspondence. SGA initially sets it.
Include welcome email header: This option allows specified wording to be listed in 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.

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

Insert Variable feature allows for the 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.