Last Modified on 03/10/2025 3:46 pm EDT

Vendor Portal Review

Daily > Vendor Portal Review

The new **Vendor Portal Review** menu item is used by staff to view and approve/disapprove changes made by the vendor in the portal. These changes are saved on a temporary table in the database and will not be written to the vendor tables till approved by A/P staff.

Menu Options:

📚 View Detail	C Refresh	🗲 Current Vendor Information 🕝	🔚 Vendor Information After Change 💿	🐞 Accept Changes 📀	📭 Reject Changes 📀	🕤 Log	🔀 Send Email
Vendor ID:	Q		•				
Q Display Ad	vanced Filters						

- **View Detail:** When a vendor is highlighted, and this button is checked, it will open a new tab indicating the info has changed.
- Accept Changes: Used to Approve the changes made by the vendor in the portal. Once this is hit, it will be written to the vendor tables in the database, and an email will be sent to the vendor stating their changes have been approved.
- **Reject Changes:** Used to Disapprove the changes made by the vendor in the portal. Once this is hit, you will be prompted to add feedback to an email that will be sent to the vendor, letting them know why it has not been approved.
- Send Email: You can send an email directly to the vendor email on file.
- **Current Vendor Information:** Look directly to the information for the vendor selected that is located under *Records > Vendors > Edit*
- Vendor Information After Change: Only the information that the vendor can see in the vendor portal is shown. (Contact, Banking, and Tax information)
- Log: This records the user, date, and time that a change was approved/disapproved, as well as an email sent to the vendor.
- **Refresh:** This will refresh the main screen, adding anything new that may have occurred during that time.
- Advanced Filters: Filter the displayed Vendor changes to (All), Waiting for Approval, Approved, or Disapproved.

To set notifications with who should be notified when a change is waiting on review, see Vendor Portal: Email Notification for Vendor Review

Home Screen of Vendor Portal Review

This page displays the following information.

- Vendor ID
- Name
- Status (Waiting for Approval, Approved, Disapproved)
- Email

/endor	ID:			🔎 🔎 Display				
	Vendor	D `	Name	~	Status	Ý	Email	Ň
	1578		A&L Services	LLC	Waiting for A	pproval	sgaalbusdumbledore123@gmail.c	om

To review the vendor's changes, you will choose the vendor and click **View Detail**. This will show you who made the change and the time it was changed.

If you choose **View Audit Detail,** you will be able to see the operation of what was added, updated, or deleted, as well as the old value and the new value.

You can approve/disapprove from any of the three screens.

View Detail 👄 Filter 🔄 Refresh 🔊 Current	Vendor Informa	ation [?]	S Ve	ndor Information Aft	er Cł		
	Display	ges [?]	📢 Reje	ct Changes	[?]	Reports 👻	
1578 Show approved to Vendor ID V	anges Vendor Audit I	History					
1578 A	👍 Accept Char	nges [?]	🃢 Rej	ject Changes	[?]	Reports 👻	
	Vendor ID:	1578	Name:	A&L Services	s LLC Info	type: Contact li	nformation Date Saved: 8/
	Column:	(All)	-				
	Old Value:	(All)					
	User:	(All)	- New	Value: (All)			
	Operations:	⊡ insert	Update ZDel	ete 🔑 Search			
	Vendor .::	Operation ~	Column ~	Old Value 🗸	New Value 🗸 🗸	User ~	Date ~
	1578	Update	Phone2		88888	atestven	08/18/2021, 09:01 AM

Accepting Vendor Changes

- To be able to approve vendors, the user must have at least allowed permission for Accounts Payable Vendors and Approve Vendors.
- When the A/P staff approves a change, an email will be sent automatically to the vendor, letting them know the change was approved, like the one shown below.

SGA Admin «vendorportal⊚sgasoftware.com» to me →
The changes you made to your vendor have been approved.
Click SGA - South Shore - Web Testing DEV Vendor Portal to access the vendor portal.
If you did not make these changes please contact us at:
781-264-9400 or vendorportal@sgasoftware.com
Regards,
SGA - South Shore - Web Testing DEV Accounts Payable team

Rejecting Vendor Changes

- To be able to disapprove vendors, the user must have at least allowed permission for *Accounts Payable - Vendors and Approve Vendors.*
- When the A/P Staff has disapproved a change, they will need to enter the reason why in the pop-up window, and an email will be sent automatically to the Vendor, letting them know the change was disapproved and why, like the one shown below.



Send Email

• Staff can communicate with the Vendor directly via the **Send Email** button. Attachments and images can also be added to the email sent to the vendor.

NOTE: For more information, see Vendor Portal: Communication

Current Vendor Information

• Look directly at the information for the vendor selected, which is located under *Records* > *Vendors* > *Edit*.

Vendor Information After Change

It only shows the information that the vendor can see in the vendor portal. (Contact, Banking, and Tax information).

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🚹 New 🛛 🗙 Delete	📫 Audit 🔡 Purchase Orders	📕 Summary 👻 📗 D			Contact Information	Banking Information	Tax Information	
Vendor ID:	1578				Vendor ID:	1578		
Name:	A&L Services LLC				Name:	A&L Services LLC new		
Payment Name:	A&L Services LLC				Payment Name:	A&L Services LLC new		
Primary A	ddress				Address Info	ormation		
Address ID:	PRIMARY				Address Type:	PRIMARY	<i>"</i>	$\mathbf{\rho}$
Contact:	- NIMANI	~			Contact:			_
Address 1:	c/o Baylor Management Corp	•			Address 1:	c/o Baylor Management C	orp	
Address 2:	248 W. Bute Street, Ste 220			1	Address 2:	248 W. Bute Street, Ste 220)	
City:	Norfolk				City:	Norfolk		
State:	VA				State:	VA		
Zip:	23510				Zip:	23510		
Phone 1:	999999				Phone 1:	999999		
Phone 2:					Phone 2:	88888		
Fax:					Fax:			
Email:					Email:			
Email PO to Vend	for Upon post				I Attachments			
		Current Vendor Information	[?]	Vendor In	formation After Change			