Last Modified on 09/28/2026 3:21 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:



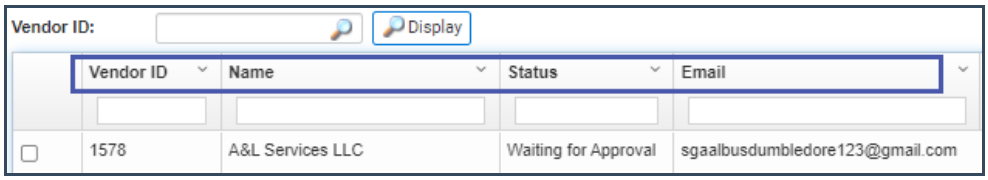
- **View Detail:** When a vendor is highlighted, and this button is checked, it will open a new tab indicating the info has changed.
- **Accept Changes:** Used to approve the changes made by the vendor in the portal. Once this is hit, it will be written to the vendor tables in the database, and an email 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's email on file.
- **Current Vendor Information:** Look directly at 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.

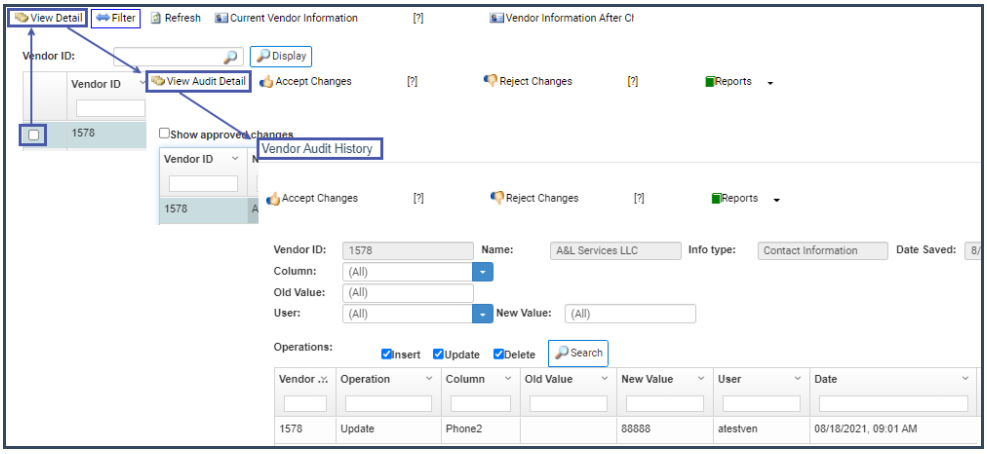
- Vendor ID
- Name
- Status (Waiting for Approval, Approved, Disapproved)
- Email



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.

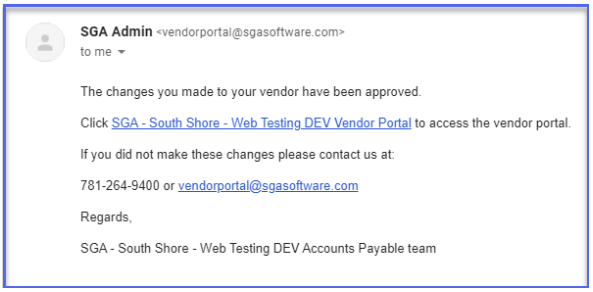
If you choose **View Audit Detail,** you will be able to see the operation of what was added, updated, or deleted, as well as the old value and the new value.

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



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.



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.


SGA - South Shore - Web Testing DEV Vendor Portal changes disapproved

SGA Admin <vendorportal@sgasoftware.com>
to me

The changes you made to your vendor have been disapproved please review the reason below and resave.

Reason:

Name Already Exists

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

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.

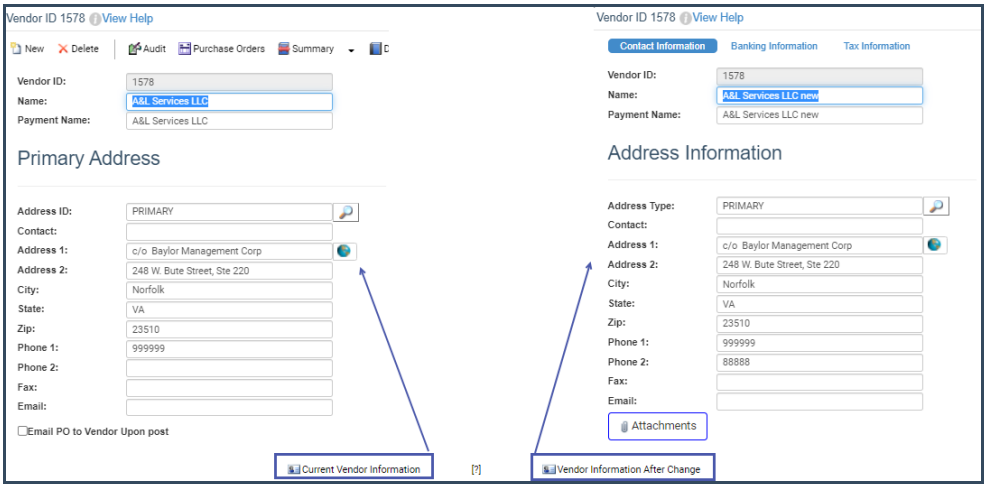
NOTE: *For more information, see Vendor Portal: Communication*

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).


Vendor ID 1578 View Help
New
Delete
Audit
Purchase Orders
Summary
Vendor ID:
1578
Name:
A&L Services LLC
Payment Name:
A&L Services LLC
Primary Address
Address ID:
PRIMARY
Contact:
Address 1:
c/o Baylor Management Corp
Address 2:
248 W. Bute Street, Ste 220
City:
Norfolk
State:
VA
Zip:
23510
Phone 1:
999999
Phone 2:
Fax:
Email:
Email PO to Vendor Upon post
Current Vendor Information
[?]
Vendor ID 1578 View Help
Contact Information
Banking Information
Tax Information
Vendor ID:
1578
Name:
A&L Services LLC new
Payment Name:
A&L Services LLC new
Address Information
Address Type:
PRIMARY
Contact:
Address 1:
c/o Baylor Management Corp
Address 2:
248 W. Bute Street, Ste 220
City:
Norfolk
State:
VA
Zip:
23510
Phone 1:
999999
Phone 2:
88888
Fax:
Email:
Attachments
Vendor Information After Change