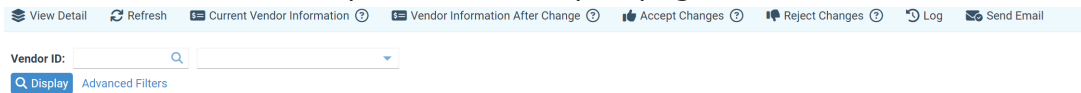


Vendor Portal Review

Last Modified on 05/11/2023 10:49 am EDT

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 approve by A/P staff.

Breakdown of tool bar options across top of page:



- **View Detail:** When a vendor is highlighted, and this button is checked it will open a new tab indicating the info changed.
- **Refresh:** This will refresh the main screen adding anything new that may have come in during that time.
- **Current Vendor Information:** Looks directly to the information for the vendor selected that is located under Records > Vendors > Edit
- **Vendor Information After Change:** Shows only the information that the vendor can see in the vendor portal. (Contact, Banking and Tax information)
- **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.
- **Log:** This records the user, date, and time that a change was approved/disapproved as well as an email sent to the vendor.
- **Send Email:** You can send an email directly to the vendor email on file.
- **Advanced Filters:** Filter the displayed Vendor changes to "(All)", "Waiting for Approval", "Approved", or "Disapproved"

To setup 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

Vendor ID:

Vendor ID	Name	Status	Email	
<input type="checkbox"/>	1578	A&L Services LLC	Waiting for Approval	sgaalbusdumbledore123@gmail.com

To review the changes that were made by the vendor 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, the old value and the new value.

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

Vendor ID:

Show approved changes

Vendor ID:

Vendor ID: 1578 Name: A&L Services LLC Info type: Contact Information Date Saved: 8/18/2021 9:01 AM

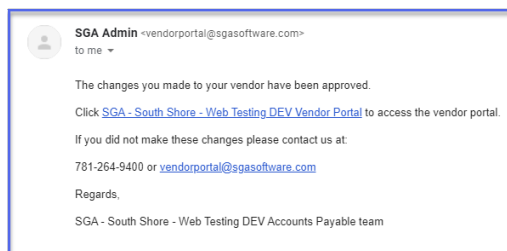
Column: (All) Old Value: (All) User: (All) New Value: (All)

Operations: Insert Update Delete

Vendor ID	Operation	Column	Old Value	New Value	User	Date
1578	Update	Phone2		88888	ateshven	08/18/2021, 09:01 AM

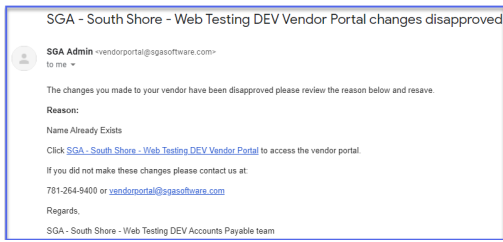
Accepting Vendor Changes

- To be able to approve vendors, the user must have at least allowed for permission Accounts Payable - Vendors and Approve Vendors.
- When a change has been approved by the A/P Staff and 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 for permission Accounts Payable - Vendors and Approve Vendors.
- When a change has been disapproved by the A/P Staff they will need to enter the reason why in the pop up window and 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 to the Vendor directly via the 'Send Email' button. Attachments and Images can also be added to the email to be sent to the Vendor.

NOTE: For more Information see Vendor Portal: [Communication](#)

Current Vendor Information

- Looks directly to the information for the vendor selected that is located under **Records > Vendors > Edit.**

Vendor Information After Change

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

The image shows two side-by-side screenshots of a vendor information page for Vendor ID 1578. The left screenshot, labeled 'Current Vendor Information', shows the 'Primary Address' section with fields for 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, and Email. The right screenshot, labeled 'Vendor Information After Change', shows the 'Address Information' section with the same fields, but with an '@ Attachments' button below the Email field. Blue arrows point from the 'Current Vendor Information' label to the left screenshot and from the 'Vendor Information After Change' label to the right screenshot.