QAD Supplier Portal: Alerts and Collaboration

Course Overview

- Introduces the alerts and collaboration features in the Supplier Portal Web UI
- Describes features for users and administrators
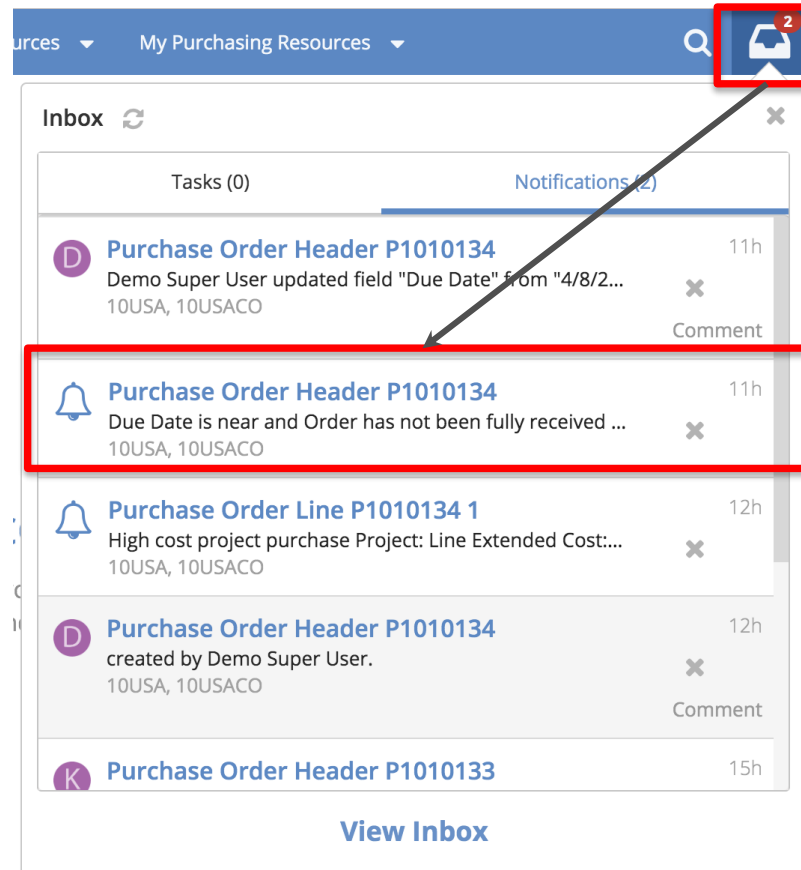
QAD Supplier Portal

Alerts

Alerts in Supplier Portal Web UI

- Alerts provide users with notifications of changes to field values when conditions are met
- Users can define alerts for enabled Supplier Portal views
- Many options for conditions and notification delivery
- Users can configure how they receive alerts:
  - Inbox
  - Email

Alert Notification Delivery

- Alert notifications sent to user's Inbox and/or email

Defining Alerts

- Bell icon displayed on views enabled for alerts
- Example: Purchase Orders

Click the bell icon to open the pop-up window for setting alerts

Configure Alerts — Alert Name and Conditions

Configure Alerts — Send Alerts About Changes to Fields

Select to get notifications about any changes to field values.

Select fields for which you want to get notifications.

Send alerts about changes to fields

Configure Alerts — Send Alerts When Conditions Are Met

Configure Alerts — Immediate Notification

Select for Immediate Notification

Configure Alerts — Delayed Notification

Select for Delayed Notification

Configure Alerts — Relative Notification

Configure Alerts — Repeat Notifications

User Notification Preferences

Profile settings include options for alert notification preferences
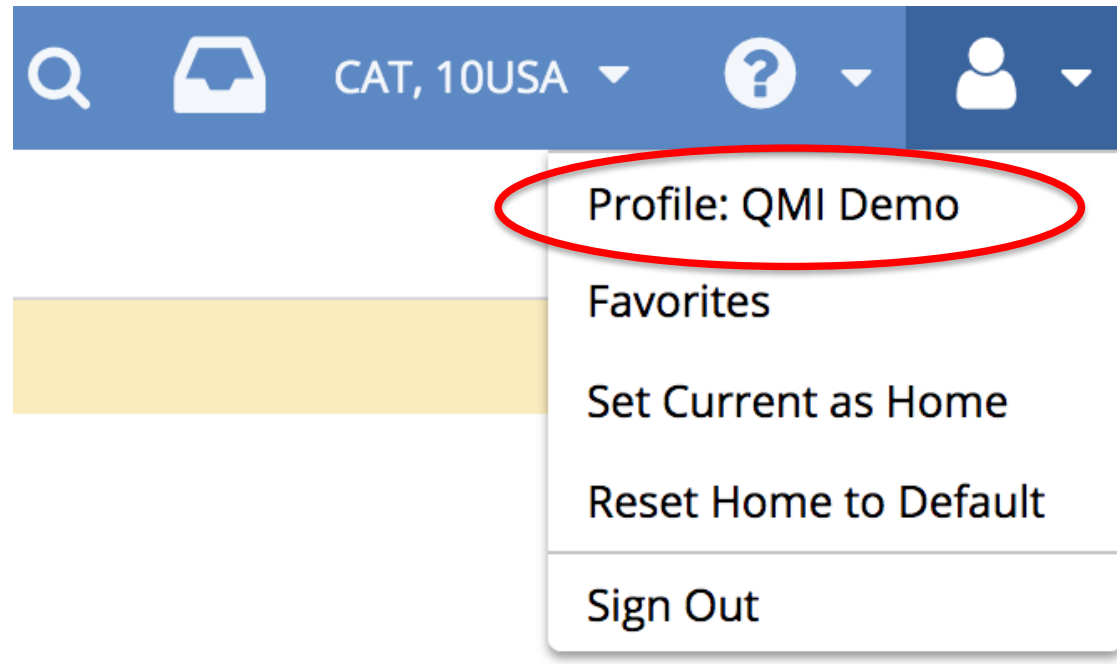
User Notification Preferences — Category Settings

User selects whether to receive alert notifications

Select for alert delivery to Inbox and/or Email

User Notification Preferences — Event Settings

Contact Information   Languages   Notifications ▾ | ⚙

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∨ Event Settings

✎ Edit   ✐ Details   More ▾

Category Name	Event Name	QAD Inbox	Email
Activity	Activity Feed Comment	All	None
Activity	Activity Feed Tagged	All	None
Alerts	Alert Message	All	None
Alerts	Field Tracking	All	None

Select for delivery to Inbox and/or email

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QAD Supplier Portal

Collaboration

Collaboration Features Overview

QAD SP collaboration features are:
- User Notes/Comments
- Alerts
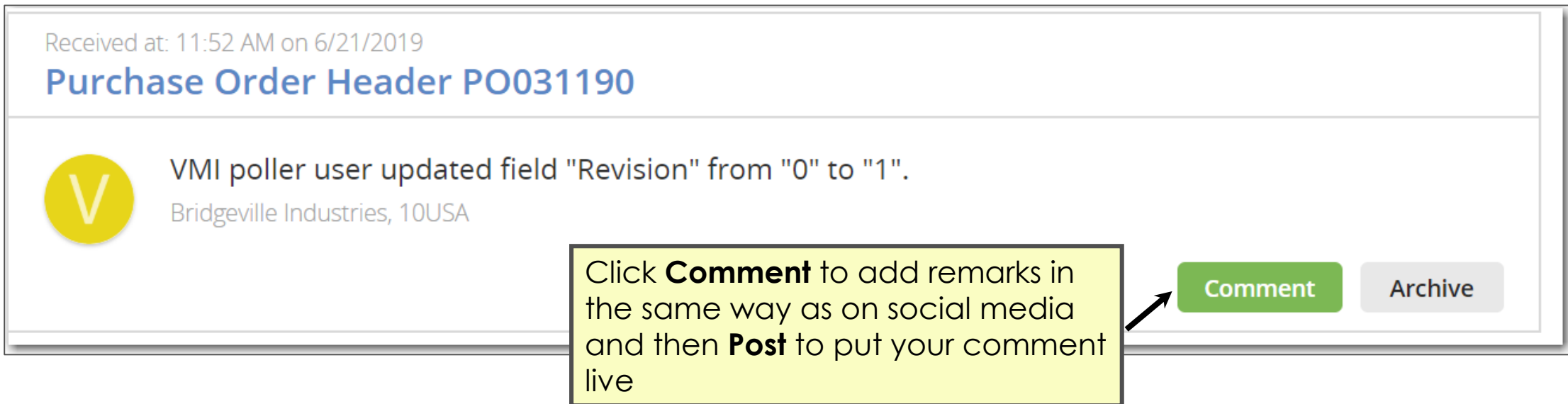
- This section concentrates on how these collaboration features are delivered using the **Activity panel**, **Inbox**, and **email**

Alerts for Updates and Comments

- Alerts for both updates and comments can be delivered to your Inbox (by default), email (requires additional setup), or both
  - The setup for email is covered in later slides

- To view all notification messages, go to the Inbox

- To see a long message in its entirety, open the Extended Inbox

- **Note**: Any notifications sent to your QAD SP Inbox are also visible in the QAD Mobile Action Center app

Comment on an Alert for an Update

- When viewing update alerts messages in your Inbox, you can:
  - Enter comments by clicking on the **Comment** link
  - Archive the alert message by clicking on the **Archive** button

Received at: 11:52 AM on 6/21/2019

Purchase Order Header PO031190

V

VMI poller user updated field "Revision" from "0" to "1".

Bridgeville Industries, 10USA

Click **Comment** to add remarks in the same way as on social media and then **Post** to put your comment live

Comment   Archive

QAD

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Reply to a User Comment

You can reply to another user's comment using the:
- Inbox
- Extended Inbox
- Activity Panel

The following slides show these options in detail

Reply to a User Comment — Inbox
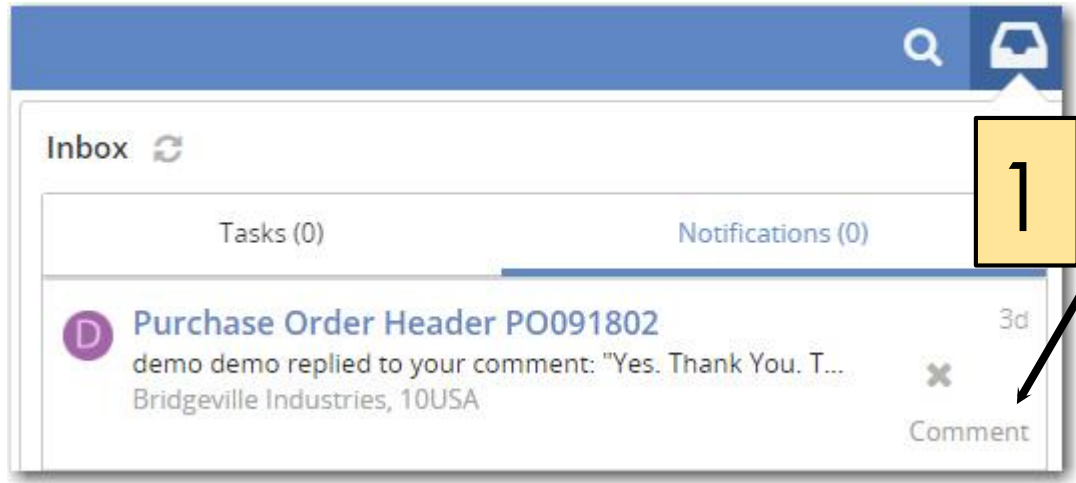
Click **Comment** to open the comment box
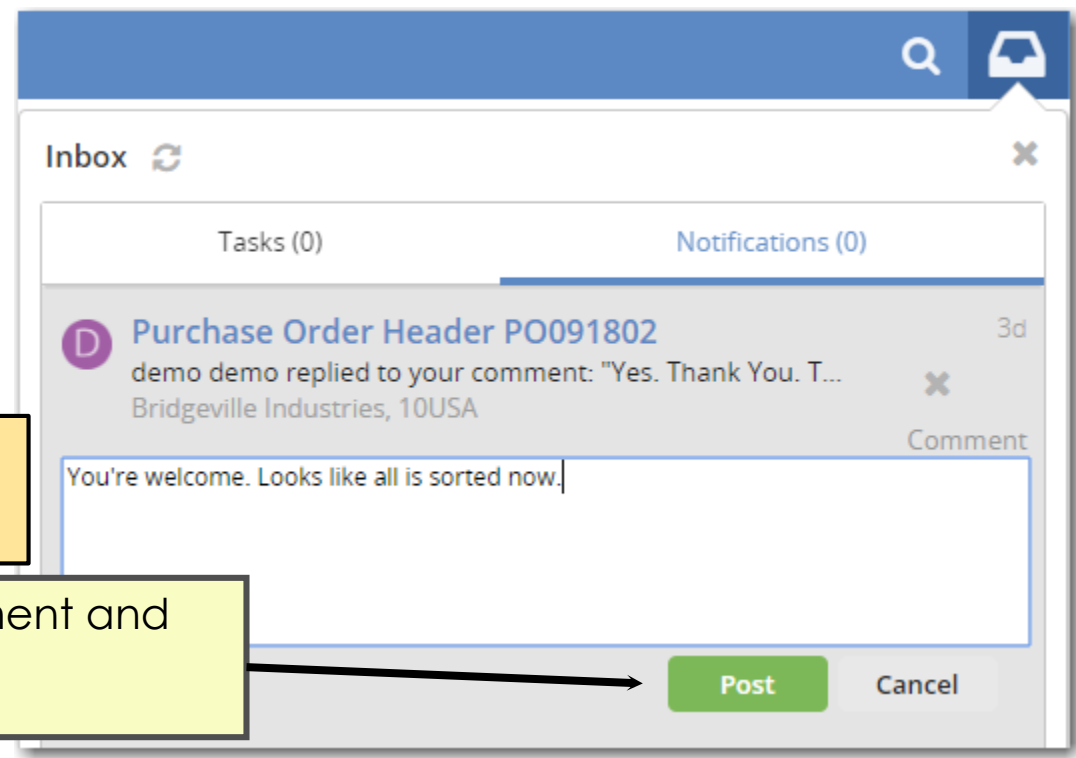
Type your comment and click **Post**

Reply to a User Comment — Extended Inbox
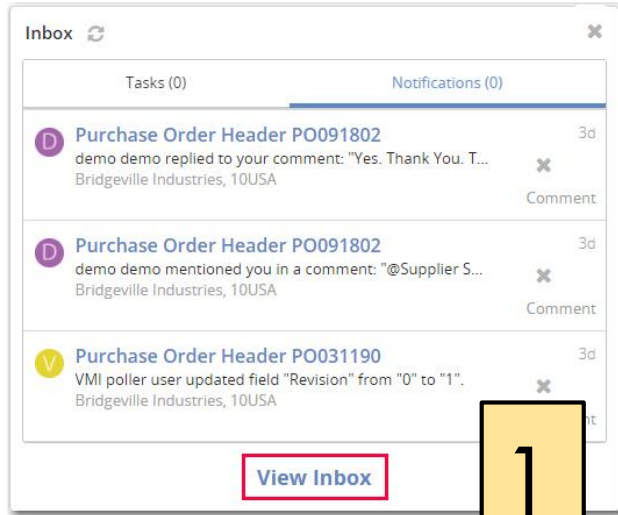
1 Click **View Inbox** to open the Extended Inbox

2 In the Extended Inbox, click **Comment** to open the comment box

3 In the comment box, click **Post** to post your comment
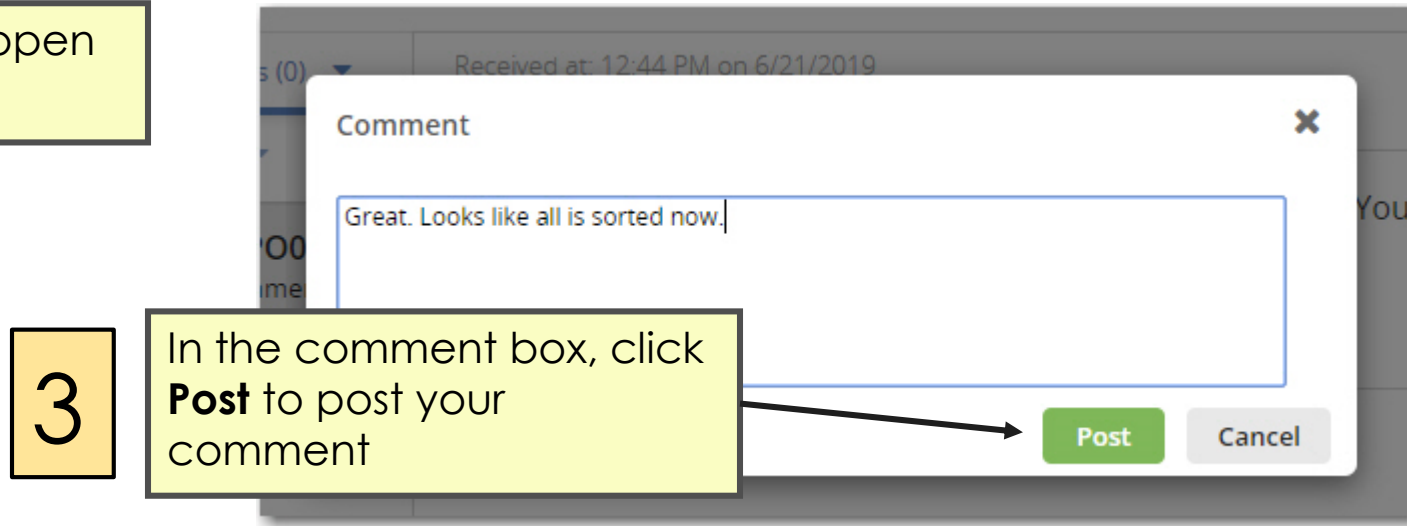
Reply to a User Comment — Activity Panel

1
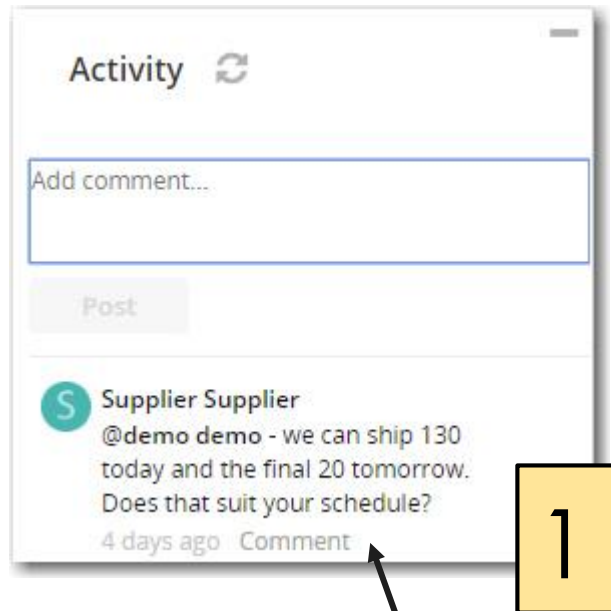
Click **Comment** under the message to reply directly to the message

2
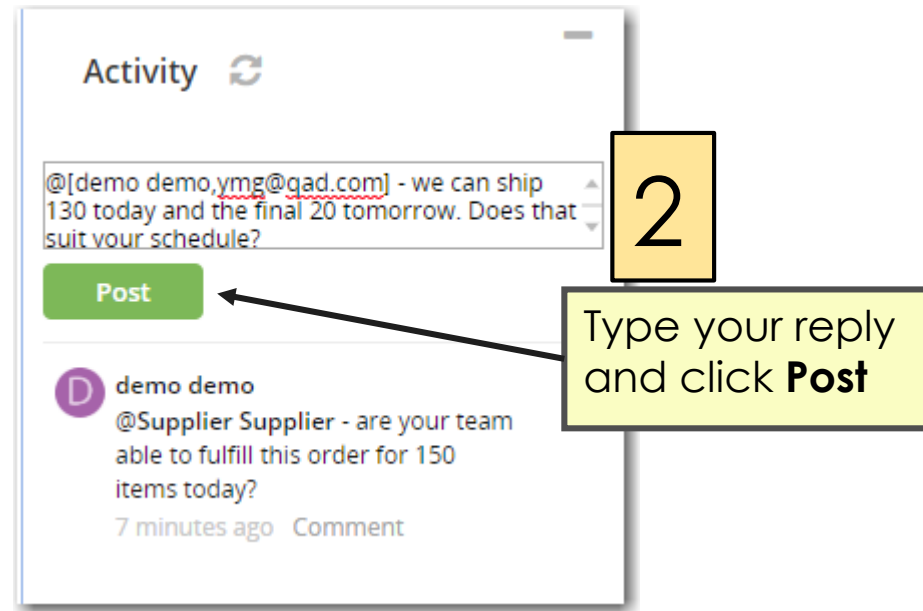
Type your reply and click **Post**

Tag Other Users in Comments

- Type @ ("at" symbol) to bring up a list of users to tag

Tag in the Activity Panel

Tag in the Inbox

@ symbol displays a list of users to tag

Comment/Alert Notification by Email — User Maint Setup

Comment/Alert by Email — User Profile Setup

Category Settings

Edit   More ▾

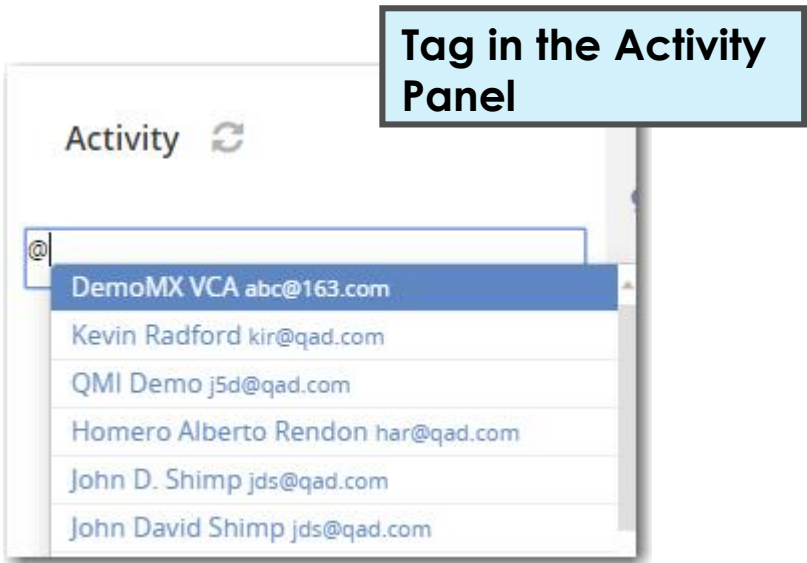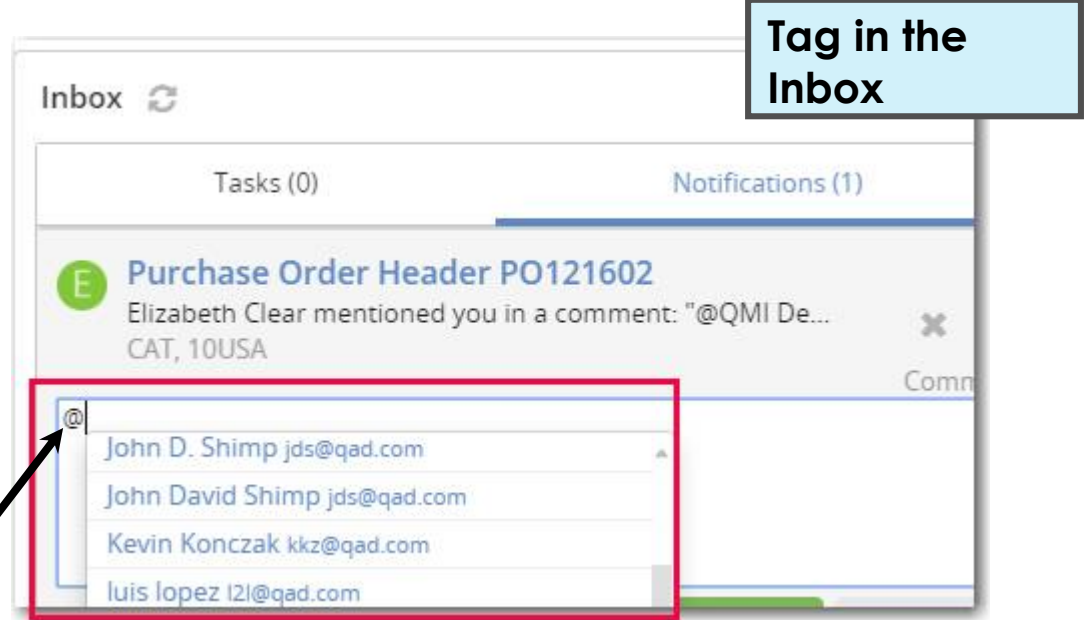| Category Name		QAD Inbox		Email
Activity		Yes		Yes
Alerts		Yes		Yes
Reports		Yes		No

Configure Category and Event settings for email in the User Profile

Event Settings

Edit   Details   More ▾

Category Name		Event Name		QAD Inbox		Email
Activity		Activity Feed Comment		All		All
Activity		Activity Feed Tagged		All		All
Alerts		Alert Message		All		All
Alerts		Field Tracking		All		All

Receiving Comments by Email

Important: Emails are for notification purposes only. You <u>cannot</u> reply by email

PurchaseOrderHeader PO091802 : demo demo replied to your comment ▶ Inbox ×

qad-sp_no-reply@qad.com
to me ▾

Yes. Thank You. That works for us.
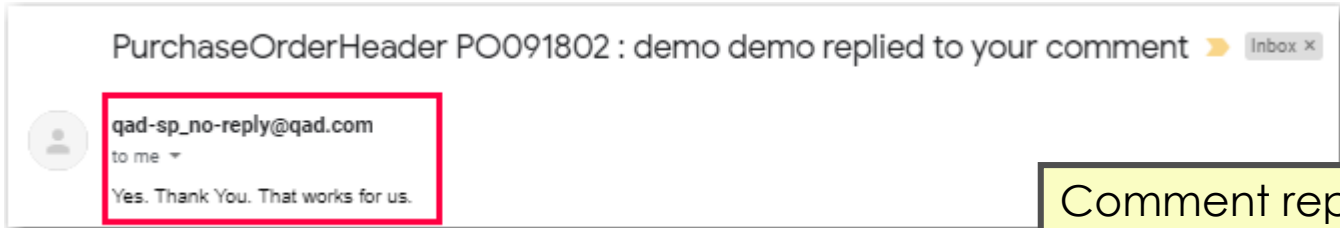
Comment reply delivered to email

PurchaseOrderHeader PO031190 : VMI poller user updated field Revision ▶ Inbox ×

qad-sp_no-reply@qad.com
to me ▾

PurchaseOrderHeader PO031190 :
VMI poller user updated Revision from 0 to 1
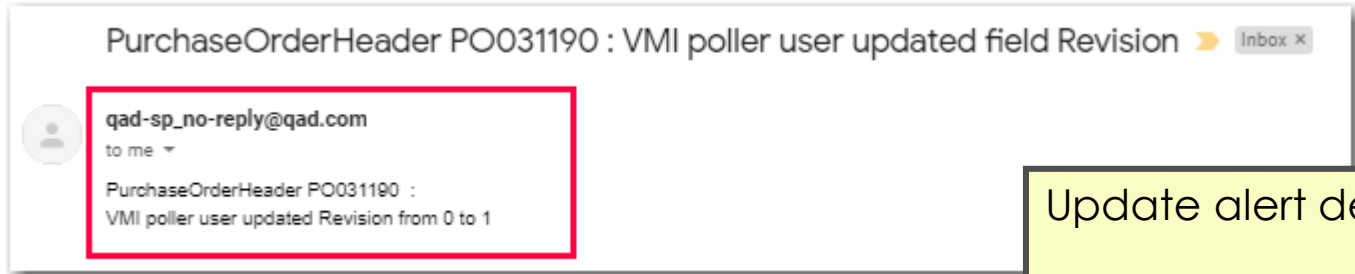
Update alert delivered to email

www.qad.com