



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

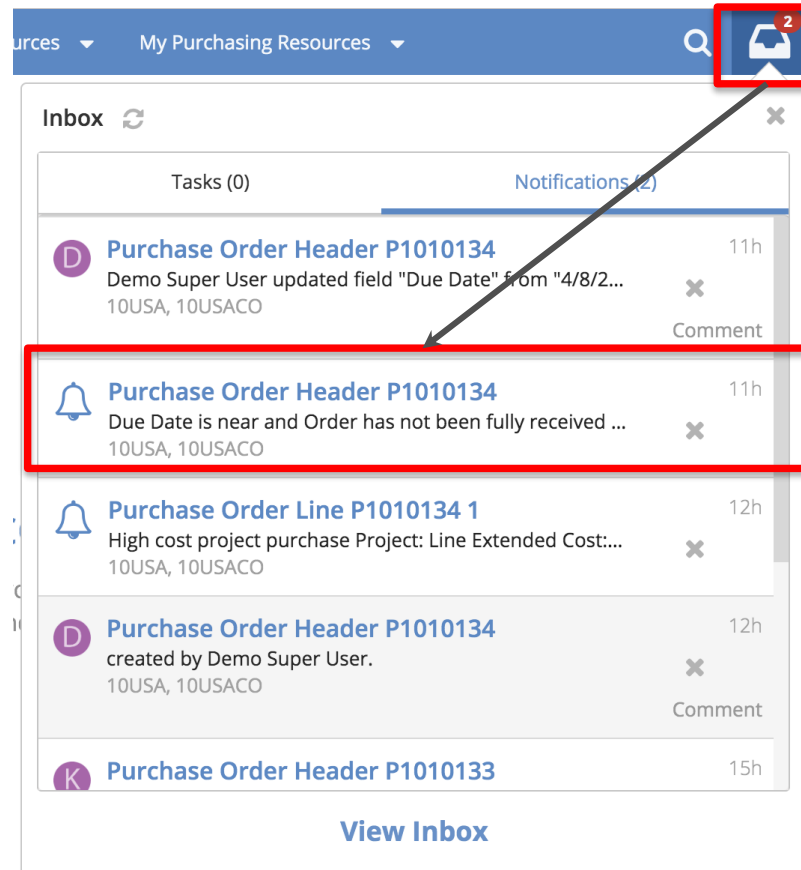


Alerts in Supplier Portal Web UI

- 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

The screenshot shows the QAD Supplier Portal interface. At the top, there is a blue navigation bar with the QAD logo, 'Favorites', a search icon, a printer icon, and the text '10USA, 10USACO'. Below this is a white header for 'Purchase Orders' with options for 'Quick Order View', '+ New', 'Delete', 'Actions', and 'More'. The main content is a table with columns for Order ID, Supplier, Amount, and Status. A red circle highlights a bell icon in the top right corner of the table, with an arrow pointing to a callout box.

Order	Supplier	Open Order Total	Status
PO061705	10S1005 Absolute Electronics Company	325.00 U...	Open

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

Configure Alerts — Alert Name and Conditions

The screenshot shows the 'Alerts' configuration page in the QAD Supplier Portal. The page title is 'Purchase Orders > Alerts'. The main heading is 'Alerts' with a '+ New' button. The current alert is named 'Order Revision Alert' and is associated with the 'Purchase Order Header' business component. The 'Alert Label' field is empty. The 'Conditions' section contains one condition: 'orderRevision' is not null. The interface includes a 'Main' tab, a 'Field Changes' tab, and a 'Conditions' table. The 'Alert' field is circled in red, and the 'is not null' operator is highlighted. A 'Save' button is visible at the bottom right.

Enter a name for the alert

Alert Order Revision Alert

Configure conditions for the alert

Field	Operator	Value1	Value2
orderRevision	is not null		

Configure Alerts — Send Alerts About Changes to Fields

Purchase Orders > Alerts

Alerts + New

Alert

Select to get notifications about any changes to field values.

Send alerts about changes to fields

Select fields for which you want to get notifications.

Field Changes

Select	Field Code	Field Label
<input checked="" type="checkbox"/>	orderRevision	Revision

Save Close

Configure Alerts — Send Alerts When Conditions Are Met

The screenshot shows the 'Alerts' configuration page for a 'Purchase Order Header' with the specific alert type 'Order Revision Alert'. The interface includes a breadcrumb trail 'Purchase Orders > Alerts', a '+ New' button, and a left sidebar with an 'Alert' dropdown. The main content area is divided into sections: 'Options', 'Message', and 'Notification Options'. The 'Options' section contains a dropdown menu set to 'Send alert when conditions are met', which is circled in red. The 'Message' section has a text input field containing 'Revision changed to \${orderRevision}' and an 'Include Field' button. The 'Notification Options' section includes a 'Delivery' dropdown set to 'Immediate (when conditions are first met)' and a 'Repeat' checkbox. At the bottom right, there are 'Save' and 'Close' buttons. A yellow callout box with a black border and an arrow pointing to the dropdown menu contains the text: 'Select to define message and notification delivery options when conditions are met'.

Configure Alerts — Immediate Notification

The screenshot shows the 'Alerts' configuration page in the QAD Supplier Portal. The breadcrumb trail is 'Purchase Orders > Alerts'. The main title is 'Alerts' with a '+ New' button. The alert is titled 'Order Revision Alert' and is associated with the 'Purchase Order Header' business component. The configuration is shown in the 'Message' tab, with 'Notification Options' also visible. A dropdown menu at the top indicates 'Send alert when conditions are met'. The 'Message' section contains a text field with the value 'Revision changed to \${orderRevision}' and an 'Include Field' button. The 'Notification Options' section has a 'Delivery' dropdown menu set to 'Immediate (when conditions are first met)', which is circled in red. A yellow callout box with the text 'Select for Immediate Notification' and an arrow points to this dropdown. At the bottom right, there are 'Save' and 'Close' buttons.

Configure Alerts — Delayed Notification

Purchase Orders > Alerts

Alerts | + New

Alert 1

Purchase Order Header
Business Component

Order Revision Alert
Alert

Main | Message | Notification Options | ⚙️

Send alert when conditions are met

Message

Revision changed to \${orderRevision}

Include Field

Notification Options

Delivery: Delayed (after conditions are still true)

Delay: 0 Days 1 Hours 0 Minutes

Repeat:

Save | Close

Select for Delayed Notification

Configure Alerts — Relative Notification

The screenshot shows the configuration interface for an alert in the QAD Supplier Portal. The main window is titled "Purchase Order Header" and "Order Revision Alert". The interface is divided into several sections:

- Alerts:** A sidebar on the left shows "Alert 1".
- Message:** A text field contains "Revision changed to \${orderRevision}". Below it is an "Include Field" button.
- Notification Options:** This section is highlighted with a red box. It contains:
 - Delivery:** A dropdown menu set to "Relative (before or after a variable date)". A yellow callout box with the text "Select for Relative Notification" and an arrow points to this dropdown.
 - Send:** A numeric input field set to "0".
 - Days:** A numeric input field set to "2".
 - Hours:** A numeric input field set to "0".
 - Minutes:** A dropdown menu set to "Before".
 - Due Date:** A dropdown menu.
 - Repeat:** An unchecked checkbox.

At the bottom right, there are "Save" and "Close" buttons.

Configure Alerts — Repeat Notifications

Purchase Orders > Alerts

Alerts | + New

Alert ▲1

Purchase Order Header
Business Component

Order Revision Alert
Alert

Main | Message | Notification Options | ⚙️

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Send alert when conditions are met ▼

Message

Revision changed to \${orderRevision}

Include Field

Notification Options

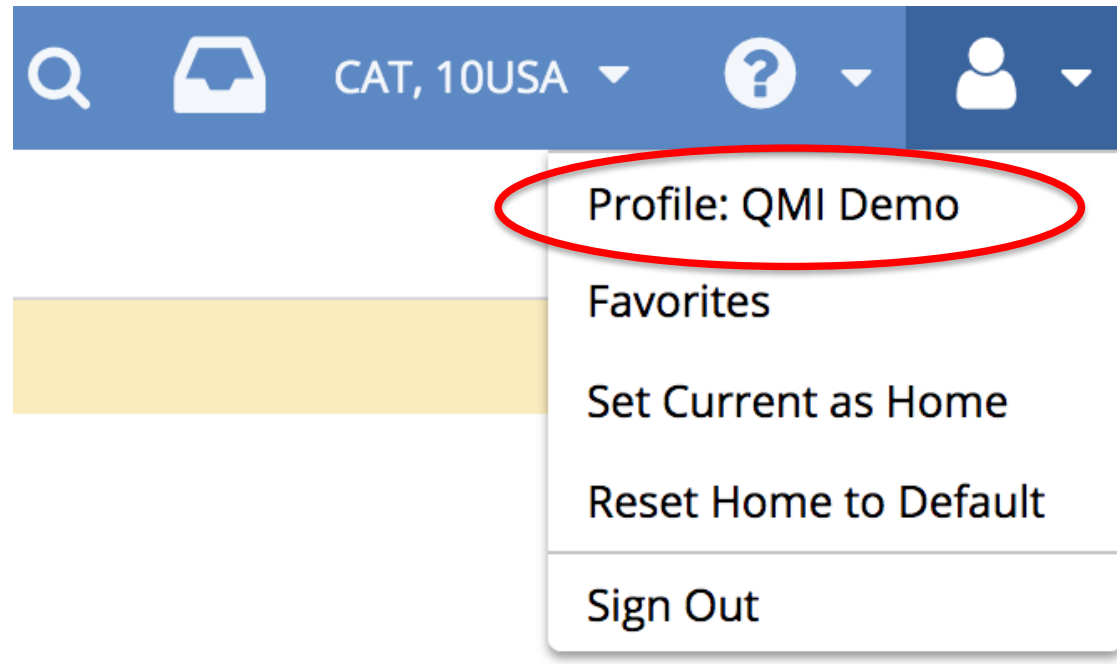
Delivery Immediate (when conditions are first met) ▼

Repeat Every 0 Days 4 Hours 0 Minutes


Save ▼ Close

User Notification Preferences

Profile settings include options for alert notification preferences



User Notification Preferences — Category Settings


Contact Information Languages **Notifications** 

▼ **Notifications**

Receive Notifications

User selects whether to receive alert notifications

▼ **Category Settings**

 Edit More ▼

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

Select for alert delivery to Inbox and/or Email

User Notification Preferences — Event Settings

Contact Information

Languages

Notifications



1 - 3 of 3

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:

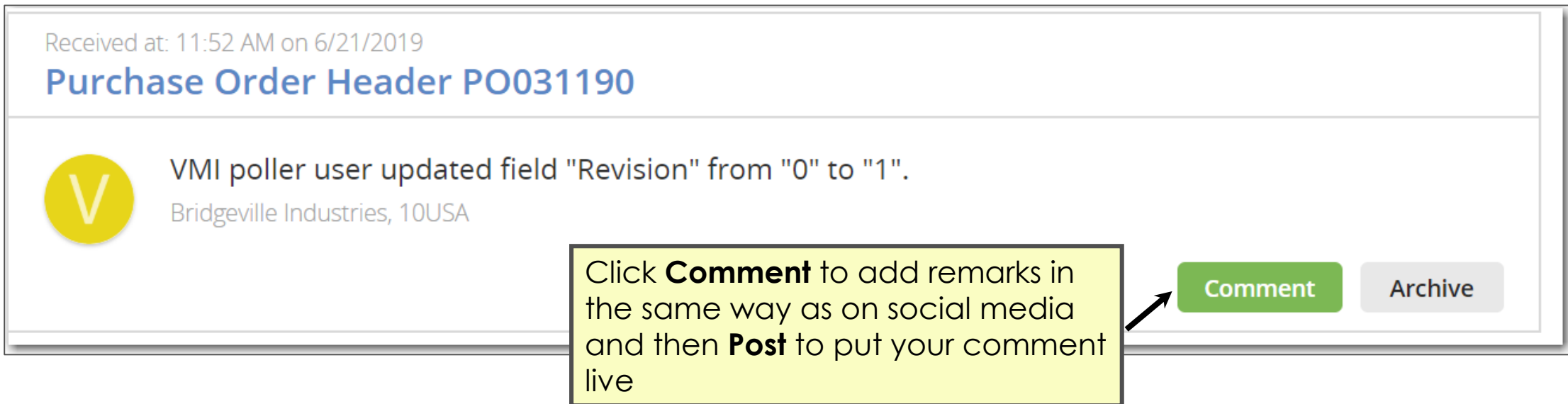
- User Notes/Comments
- Alerts
- This section concentrates on how these collaboration features are delivered using the **Activity panel, Inbox, and email**

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

 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](#)

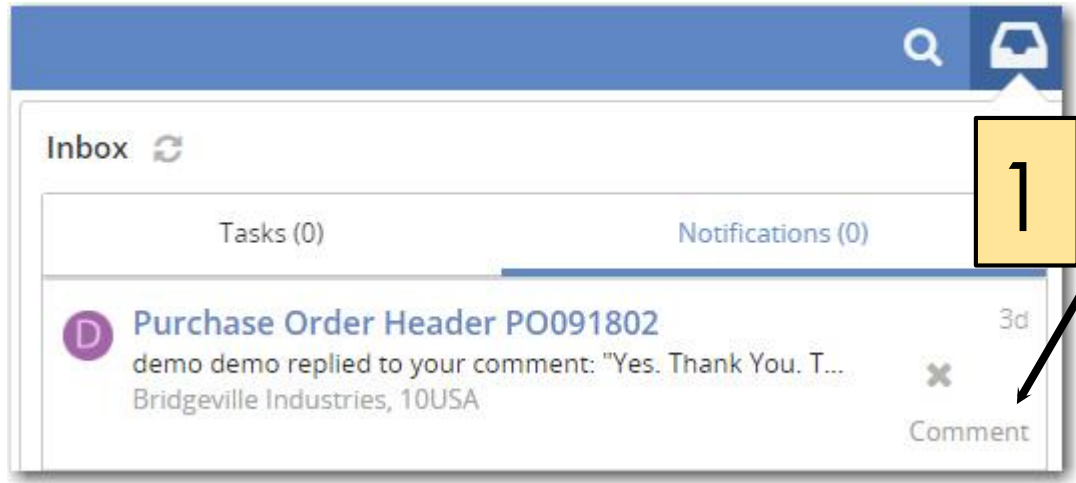
Reply to a User Comment

You can reply to another user's comment using the:

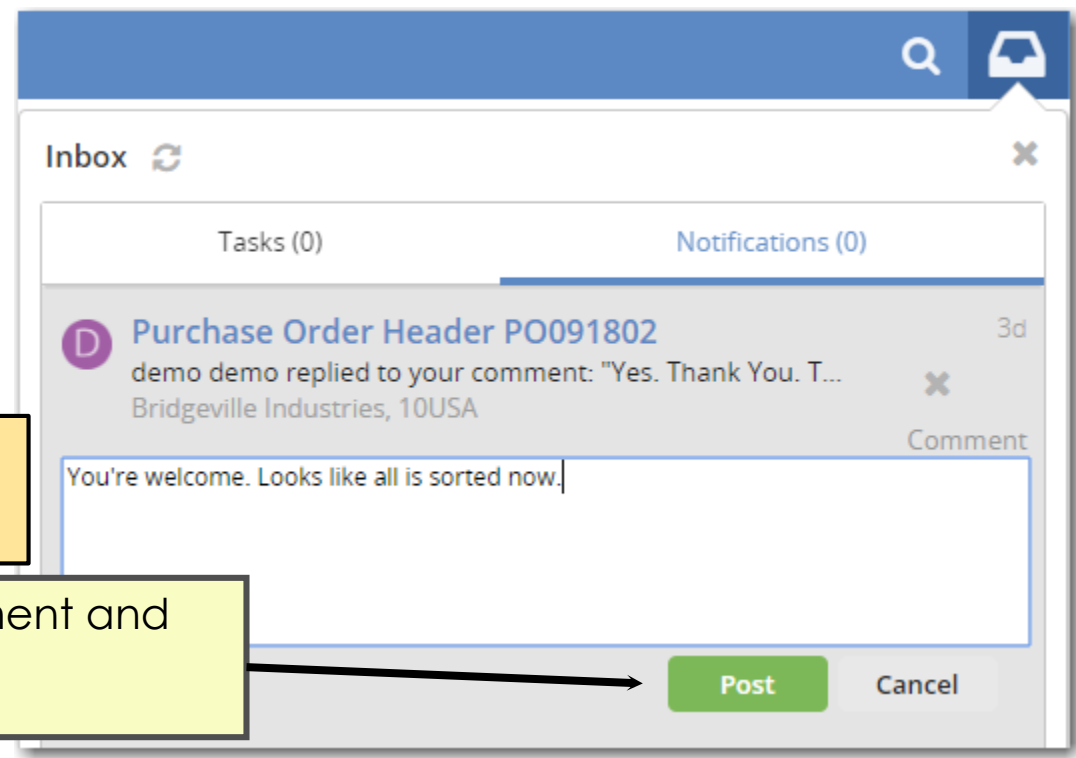
- Inbox
- Extended Inbox
- Activity Panel

The following slides show these options in detail

Reply to a User Comment — Inbox

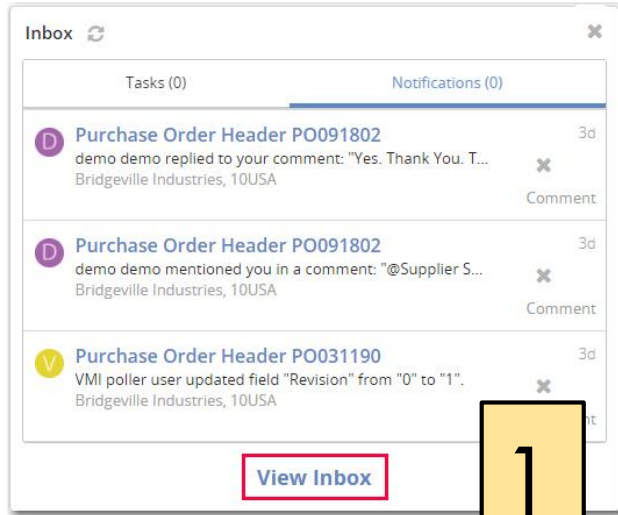


Click **Comment** to open the comment box

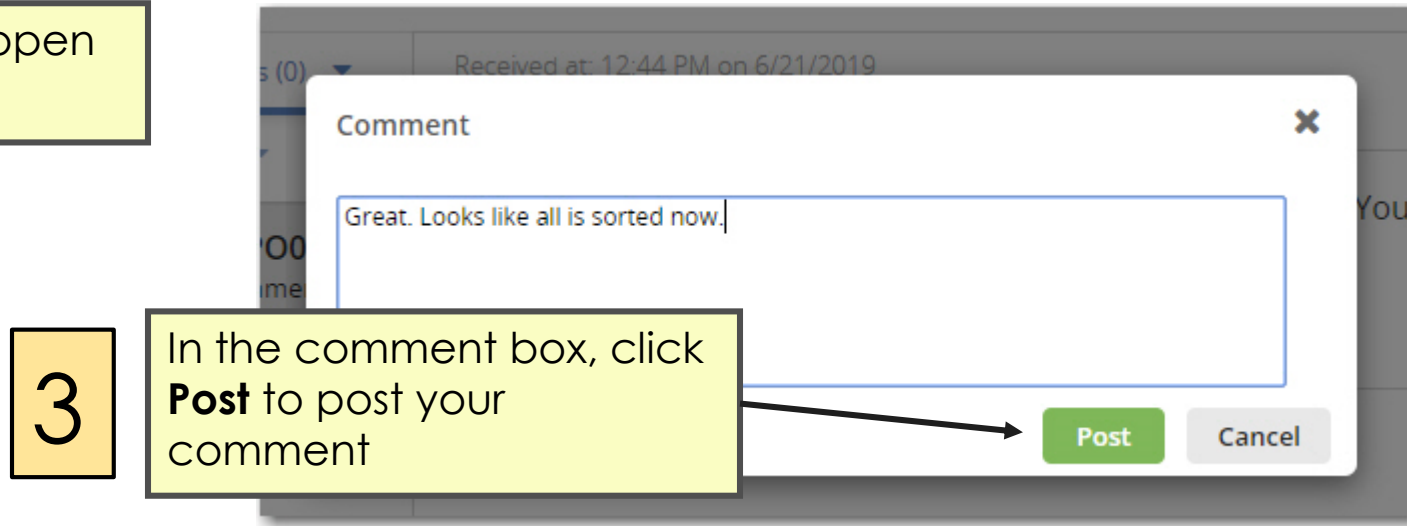


Type your comment and click **Post**

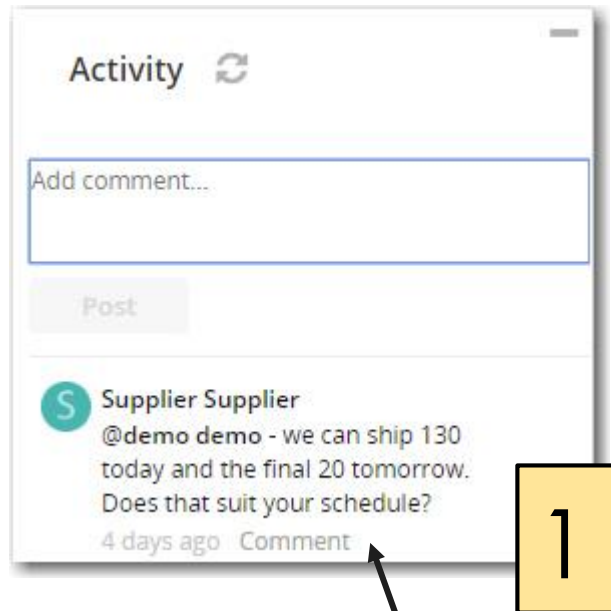
Reply to a User Comment — Extended Inbox



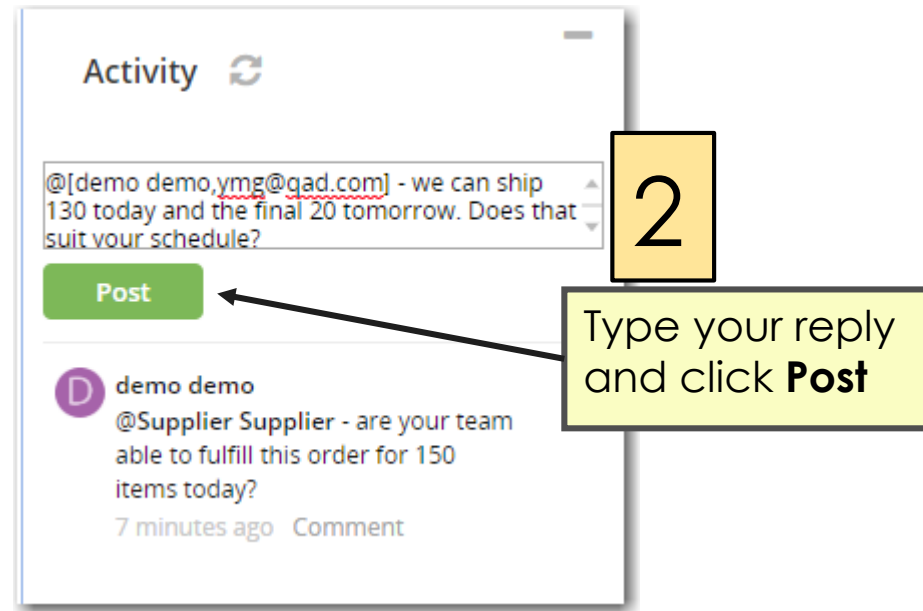
Click **View Inbox** to open the Extended Inbox



Reply to a User Comment — Activity Panel



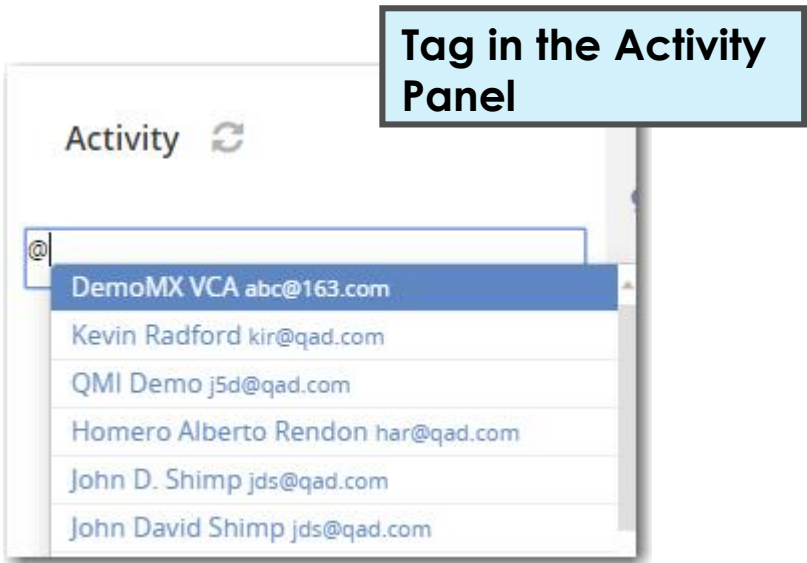
Click **Comment** under the message to reply directly to the message



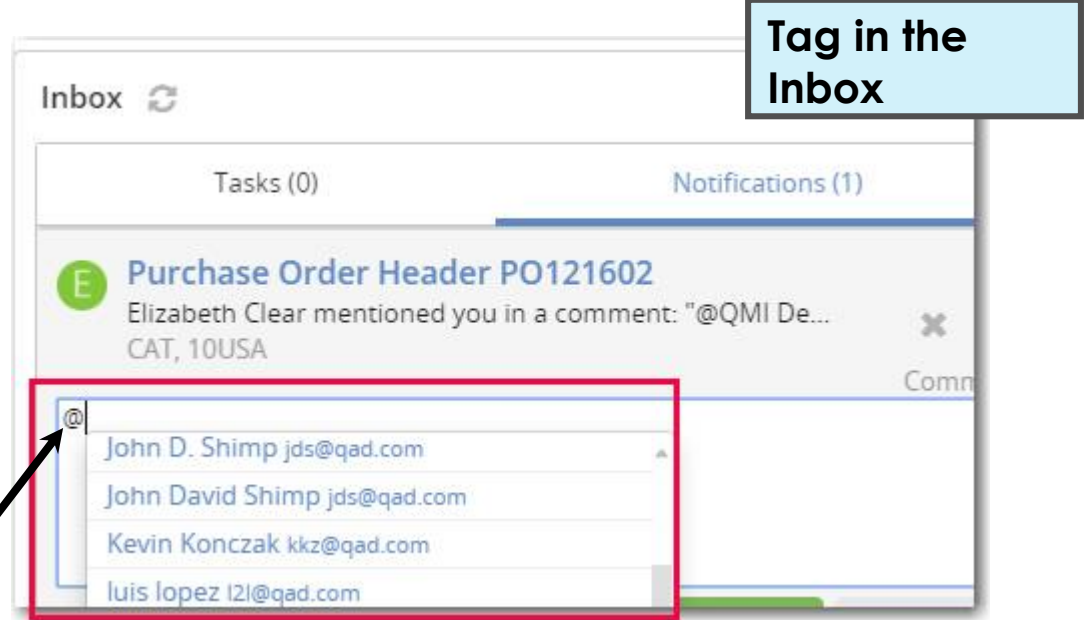
Type your reply and click **Post**

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

Contact Information Roles Contact Details Languages Address Change Password Preferences Document Request Notifications

▼ Contact Information

User ID

Active

Email

Business ID

First Name

Middle Name

Last Name

Job Title

▼ Roles

Specify your email address and save the changes

Comment/Alert by Email — User Profile Setup



Configure Category and Event settings for email in the User Profile

Category Settings

Edit More

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

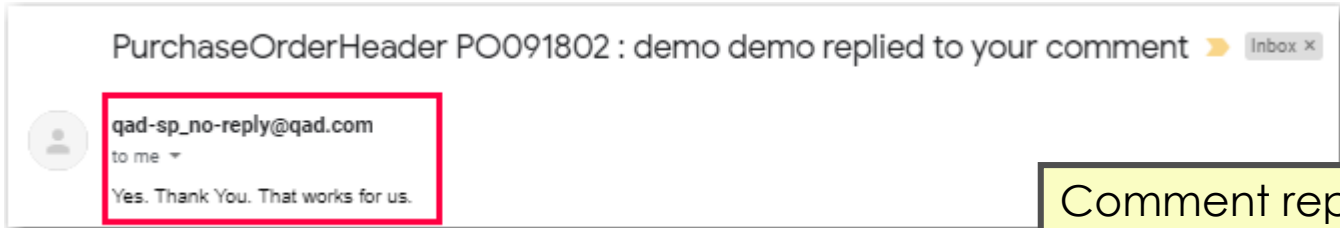
Event Settings

Edit Details More

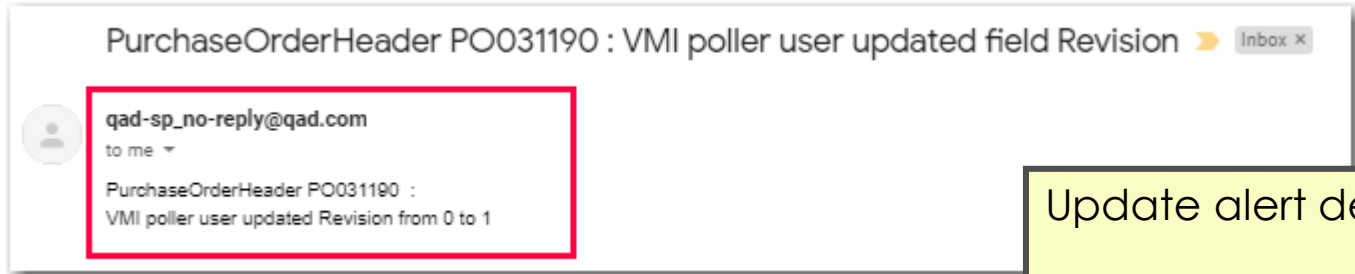
Category Name	Event Name	QAD Inbox	Email
Activity	Activity Feed Comment	All	All
Activity	Activity Feed Tagged	All	All
Alerts	Alert Message	All	All
Alerts	Field Tracking	All	All

Receiving Comments by Email

Important: Emails are for notification purposes only. You cannot reply by email



Comment reply delivered to email



Update alert delivered to email



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