

UNIVERSITY OF DELAWARE[®] EXCHANGE

Updating Notification Preferences

Revised 6/4/2023

Notification Preferences

- You may receive more email notifications from UD Exchange than you prefer
- This Guide will illustrate how to turn off the default email notifications that you receive when you shop or process carts for others.
- You may use the basic steps in this guide to customize other types of notifications you receive.



Organization Message


Welcome to the University of Delaware Exchange **Test Site!**


The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST PeopleSoft instance, which is not dynamically updated for production values of custom fields such as projects, work orders and speedtypes, or supplier active/inactive status. **The last refresh of FITST was completed on April 5, 2023.** Custom fields are current as of that date.


As you use this site for training and testing, you may see small differences from guides and the production site. The integration with catalog suppliers depends on their having a test site for integration; some suppliers (such as Amazon) do not have a test site and are not in this catalog. The test site is where the administrators test new solutions before moving to production and while building new guides. Please email procurement@udel.edu if you have specific questions; chances are we are working on it!


Catalog & Forms Showcase (Under Development)


Procurement Forms



Non-PO Payment Request



Honorarium Payment Request


Subaward Request


NIIMBL Subaward Request


RFX Request (Option 2)


NSB Customer Setup


NEW Waiver of Bid Request

Office/Misc Supplies

Click the Profile icon on the home page.
Select **View My Profile**.

MY ASSIGNED APPROVALS

Requisitions To Approve

9

Vouchers

10

UNASSIGNED APPROVALS

Requisitions

1

ORDERS

My Returned Requisitions

1

CONTRACT

Contracts eSignature Errors

11

ADMINISTRATIVE ITEMS

Manage Search Exports - Completed

2

Margot Martin

View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

My Pending Requisitions

6

My Pending Purchase Orders

1

Logout

Quick Links

[UD Exchange How To Guides](#)

[How Do I Buy ____ ???](#)

[Commodity Code-Account Crosswalk](#)

[Non-PO Payment Matrix](#)

[Non-Catalog Item](#)

[NEW Waiver of Bid Form](#)

[Request Contract](#)



My Profile ▶ User's Name, Phone Number, Email, etc.

Margot Martin

User Name 700586502

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

Administration & Integration

Shopping, Carts & Requisitions

Change Requests

Purchase Orders

Catalog Management

Accounts Payable

Receipts

Contracts

Sourcing Director

Supplier Management

Form Requests

User History

Administrative Tasks

User's Name, Phone Number, Email, etc.

First Name

Margot

Last Name

Martin

Phone Number

+1 302-831-2162

ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address *

ud-mart@udel.edu

Department

PROCUREMENT SERVICES (04750)

Position

▼

Reports To

Kristen Pickering

L

Remove User

Select User

Authentication Method

SAML ▼

User Name *

700586502

★ Required

Save Changes

Navigate to Notification Preferences > Shopping, Carts, & Requisitions.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All Search (Alt+Q) 0.00 USD Logout

My Profile

Notification Preferences

Shopping, Carts & Requisitions

Margot Martin

User Name 700586502

User Profile and Preferences

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

Administration & Integration

Shopping, Carts & Requisitions

Change Requests

Purchase Orders

Catalog Management

Accounts Payable

Receipts

Contracts

Sourcing Director

Supplier Management

Form Requests

User History

Administrative Tasks

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice	Email
Prepared By - PR line item(s) rejected	Email & Notification
Prepared By - PR rejected/returned	Email & Notification
Cart Assigned Notice	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	Email & Notification
Assigned Cart Processed Notification	Email & Notification
PR submitted into workflow	Notification
PR pending Workflow approval	Email & Notification
PR pending Ad-Hoc Workflow approval	Email & Notification
PR Workflow Notification available	Email & Notification
PR Workflow complete / PO created	Email & Notification
PR line item(s) rejected	Email & Notification
Cart/PR rejected/returned	Email & Notification
Sourcing Event created from Requisition	Notification
PR created from an awarded Sourcing Event	Notification
Cart created from an awarded Sourcing Event	Notification

Edit Section

If you're not sure what each notification is for, click the ? icon next to it to see an explanation. Click **Edit Section**.

An email is sent to the specified user when the assigned cart has been successfully approved and processed.

Margot Martin

User Name 700586502

- User Profile and Preferences
- Update Security Settings
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- Administration & Integration
- Shopping, Carts & Requisitions
- Change Requests
- Purchase Orders
- Catalog Management
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests
- User History
- Administrative Tasks

Notification Preferences:

In this example, if you are a Shopper that no longer wants to receive notifications when your Requester has submitted your orders for approval, select the **Override** button on the **Assigned Cart Processed Notification** line.

Prepared By - PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Prepared By - PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Processed Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	Email & Notification
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR pending Ad-Hoc Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Sourcing Event created from Requisition	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
PR created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

94

18

Logout

My Profile

Notification Preferences

Shopping, Carts & Requisitions

User Profile and Preferences

Update Security Settings

Default User Settings

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Change Requests

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Prepared By - Cart Assigned Notice

Default

Override

Email

Prepared By - PR line item(s) rejected

Default

Override

Email & Notification

Prepared By - PR rejected/returned

Default

Override

Email & Notification

Cart Assigned Notice

Default

Override

Email & Notification

Receive PR and PO notifications for Carts Assigned to Me

Default

Override

Email & Notification

Assigned Cart Processed Notification

Default

Override

None

Assigned Cart Deleted Notification

Default

Override

None

PR submitted into Workflow

Default

Override

None

PR pending Workflow approval

Default

Override

Email & Notification

PR pending Ad-Hoc Workflow approval

Default

Override

Email & Notification

PR Workflow Notification available

Default

Override

None

PR Workflow complete / PO created

Default

Override

None

PR line item(s) rejected

Default

Override

None

Cart/PR rejected/returned

Default

Override

Email & Notification

Sourcing Event created from Requisition

Default

Override

Notification

PR created from an awarded Sourcing Event

Default

Override

Notification

Cart created from an awarded Sourcing Event

Default

Override

Notification

Select None from the override menu.

Click Save Changes.

Save Changes

Cancel

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Privacy Policy



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [UDX Profile Settings](#)

