

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.



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

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

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](#)



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

Last Name

Phone Number ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address *

Department

Position

Reports To

Authentication Method

User Name * 700586502

★ Required

Navigate to 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

[Edit Section](#) ?

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	None
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

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

- 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

Prepared By - Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email
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 checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification	<input type="radio"/> Default <input checked="" 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	
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	
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
Cart created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification

None

Select **None** from the override menu.
Click **Save Changes**.

Save Changes Cancel



Questions:

- procurement@udel.edu

Resources:

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

