

Vendor Acknowledgement Workflow

Last Modified on 07/29/2024 10:27 am EDT

Vendor Acknowledgement Correspondence via ADI

The aACE Data Interchange (ADI) is a set of data handshakes between an aACE system and external events.

The Vendor Acknowledgment feature is a signature acknowledgement workflow added to Purchase Order Email correspondence. The vendor is allowed to simply click a button, enter a signature and date, then click another button. The new signed document is picked up by aACE and saved to the related record. Logs are all entered automatically.

For a more detailed demonstration of this capability, view our webinar on the subject [here](https://showme.aacesoft.net/?id=10747) (<https://showme.aacesoft.net/?id=10747>).

For a more full demonstration of several email and ADI related capabilities, you can view the entire webinar at [ShowMe](https://showme.aacesoft.net/?id=10738) (<https://showme.aacesoft.net/?id=10738>).

Prerequisites for the Vendor Acknowledgment feature

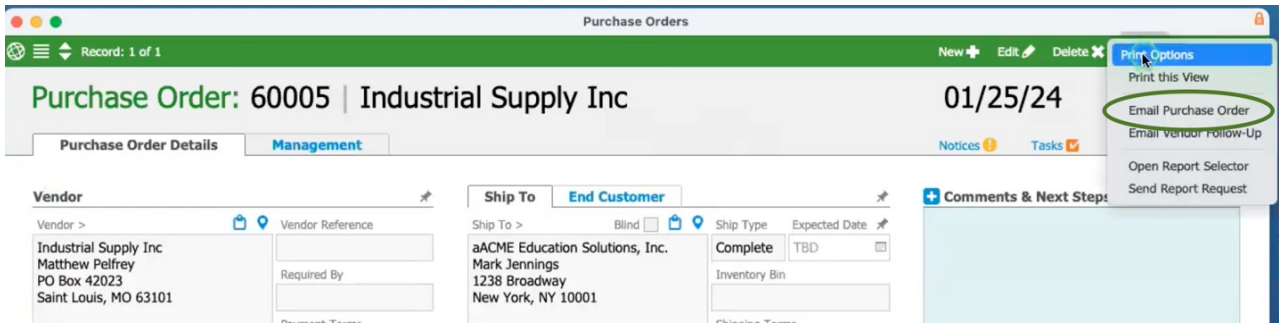
1. [Mailgun integration](https://aace6.knowledgeowl.com/help/setting-up-mailgun) (<https://aace6.knowledgeowl.com/help/setting-up-mailgun>) is a pre-requisite. Email integration is the primary vehicle through which ADI functions.
2. The latest ADI Integration File must be installed onto your system. Contact us to get the file configured and installed.

The Workflow

Send the PO via Email

Navigate to Purchase Orders, select your PO and enter the Detail View.

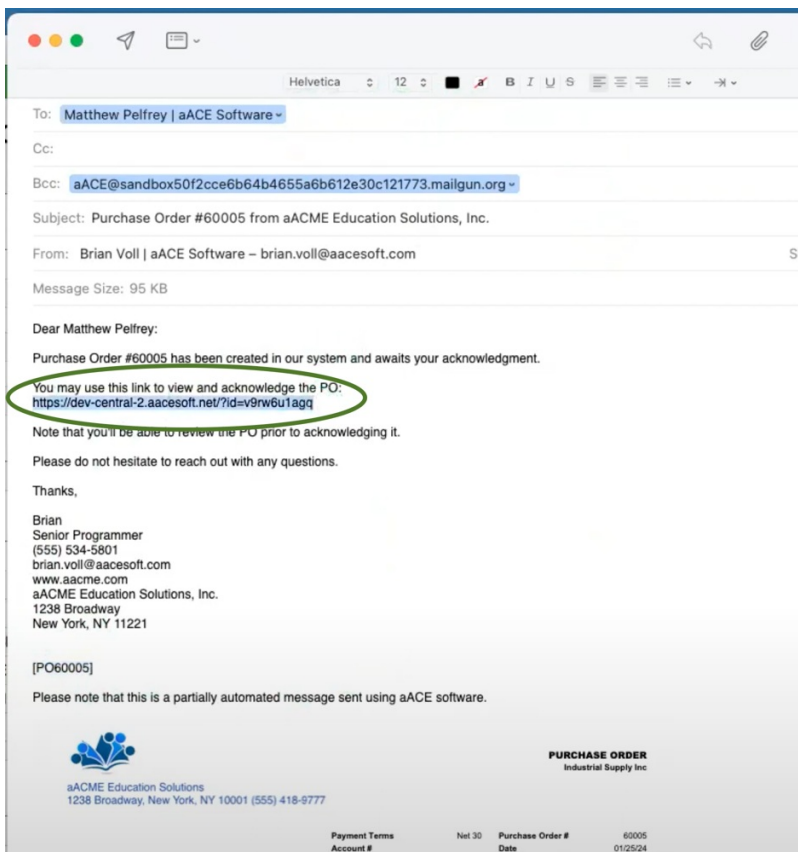
Select Print > Email Purchase Order



The email is populated with all the usual data.

But now there's a link.

What this link represents is an opportunity for the vendor to acknowledge that he's received the PO without either of us picking up the phone, or him sending me a signed contract that I need to manually process.



The user sends the Email.

The Vendor's Workflow

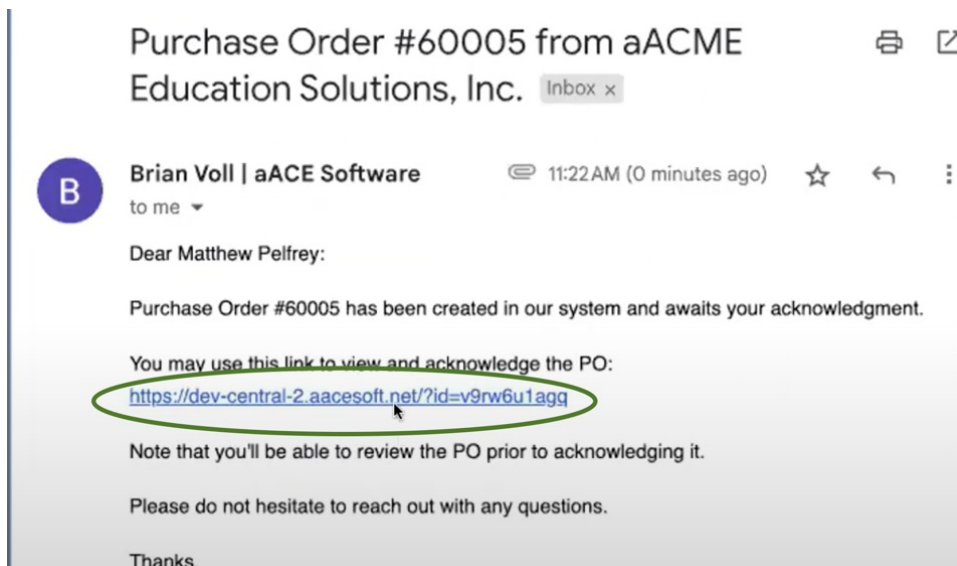
From this point onward the process as simple for the recipient as possible.

There are no logins. The vendor is not required to create, remember, or recover any credentials.

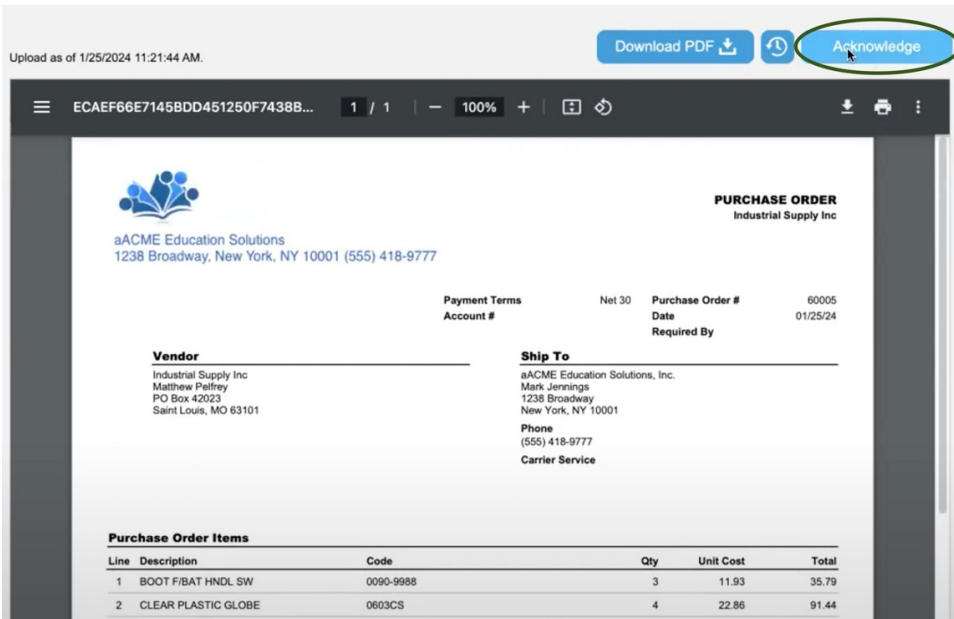
The process is self-contained and, to a certain extent, ephemeral. It's a transaction with a specific workflow and a specific goal. The goal for this workflow is not to give the vendor a complete history of our relationship, the goal is to let him do business with us now as efficiently as possible.

By clicking the link in the email, the vendor is brought to a secure webpage where he can view the PDF, download the PDF, view an activity log, or (the primary workflow)

Acknowledge the PO.



The PDF here is exactly what's generated in aACE, meaning if we customize the printout in any way, those customizations don't need to be recreated in another platform.



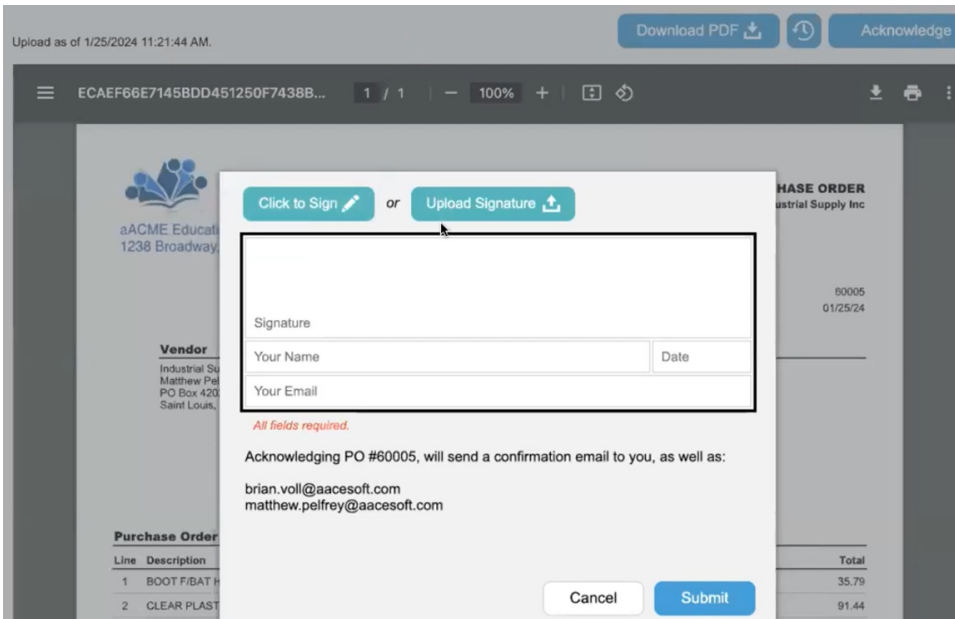
Once the customer clicks the **Acknowledge** button, a **Signature** window appears.

Acknowledgment Settings

There are a few options for signature capture. The option you choose will depend on your business requirements. The system can be set up using:


- No signature required. Simply acknowledge.
- You may wish to require the vendor to print the PDF, "wet" sign, and upload the signed document.
- E-signature as we see below, using the options of Click-to-Sign or Uploading a Signature graphic.

The E-Signature workflow allows the vendor to quickly enter his information and click the **Submit** button.



When the **Submit** button is clicked, an email will go out to the signer, to the initiating sender, and any intermediary (so they're aware of the acknowledgement). This gives us a flexibility in the workflow for the PO to be passed around. For example, I may send the PO to my main contact at the vendor company, but maybe the order is above a certain dollar threshold and a manager needs to approve it.

The PO acknowledgement email displays who approved it, and when the PO was approved.

 **aACE@sandbox50f2cce6b64b4655a6b612e30c121773.mailgun.org**
Acknowledgment for Purchase Order #60005 from aACME Education Solutions
To: Matthew Pelfrey | aACE Software, Cc: Matthew Pelfrey | aACE Software, Brian Voll,
Reply-To: Brian Voll

Purchase Order #60005 has been acknowledged:

Signed By: Matthew Pelfrey
Signed On: 1/25/2024

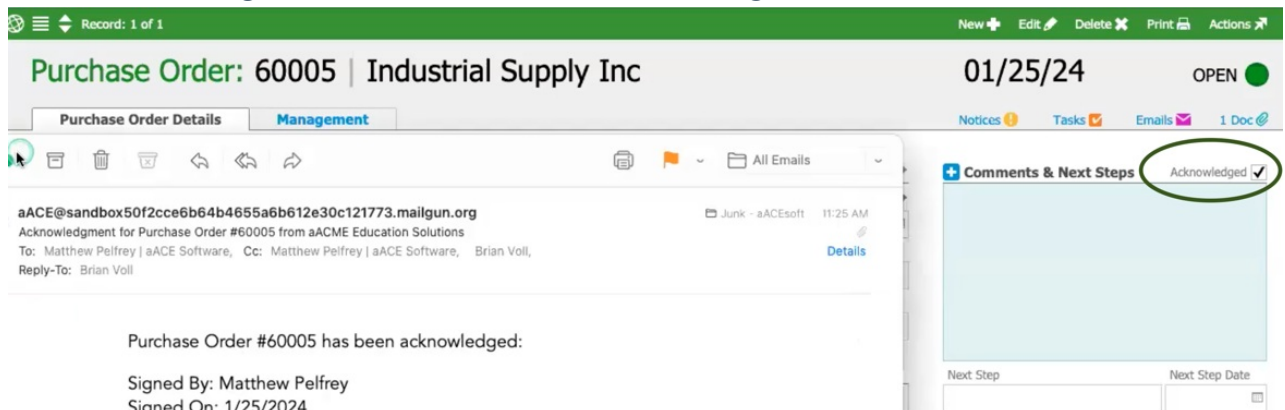
The signed document is attached. If you believe this PO was acknowledged in error, please contact us immediately.

Please note that this is a fully automated message sent using aACE software.



In aACE

Once acknowledged, the PO is marked as **Acknowledged**.



Record: 1 of 1

New + Edit Delete Print Actions

Purchase Order: 60005 | Industrial Supply Inc 01/25/24 OPEN

Purchase Order Details Management Notices Tasks Emails 1 Doc

Comments & Next Steps Acknowledged ✓

Next Step Next Step Date

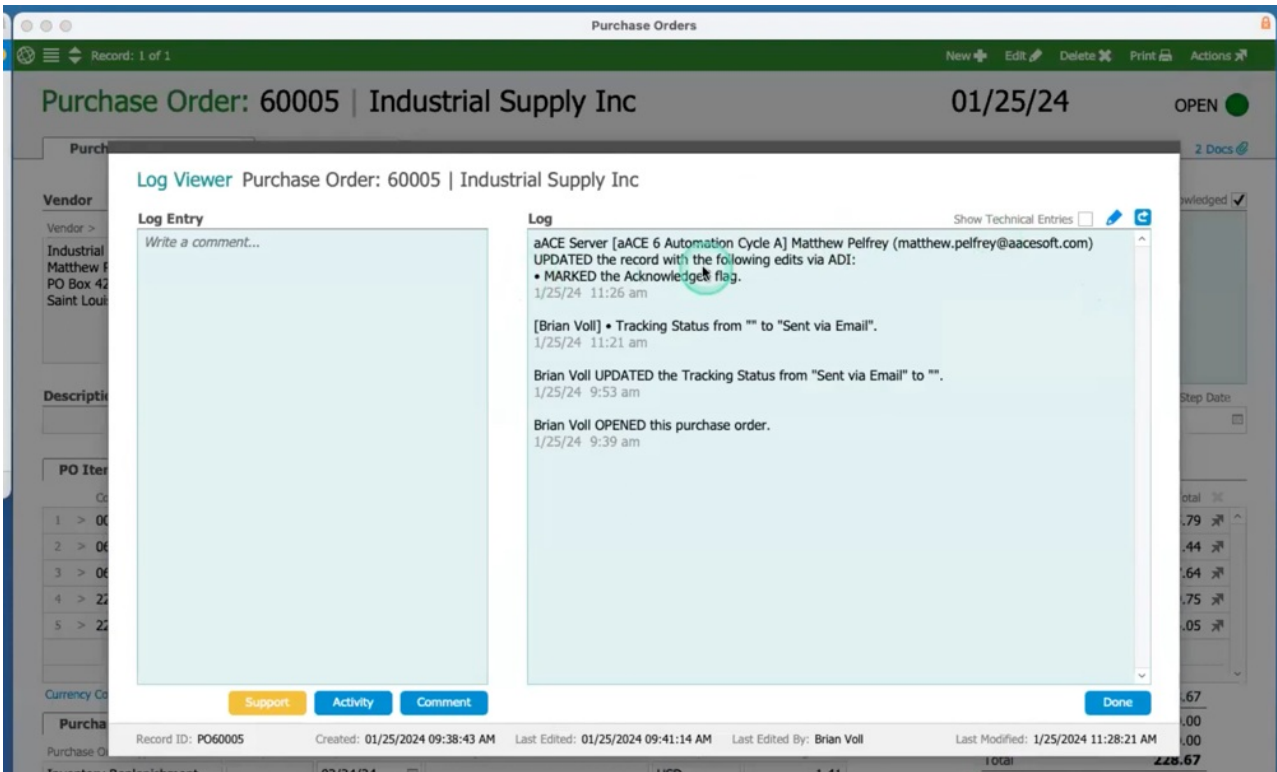
aACE@sandbox50f2cce6b64b4655a6b612e30c121773.mailgun.org
Acknowledgment for Purchase Order #60005 from aACME Education Solutions
To: Matthew Pelfrey | aACE Software, Cc: Matthew Pelfrey | aACE Software, Brian Voll,
Reply-To: Brian Voll

Junk - aACEsoft 11:25 AM

Purchase Order #60005 has been acknowledged:

Signed By: Matthew Pelfrey
Signed On: 1/25/2024

The event is logged.



A copy of the PO, with the signature page appended, is attached to the received Email and to the PO record.

