REQUISITION/ PURCHASE ORDER EMAIL NOTIFICATIONS

BEN Financials users responsible for Requisition and Purchase Order approval now have the option to receive the approval notifications via e-mail. All users will continue to receive these notifications in the BEN Financials Notifications homepage. However, users can change a Preference setting and additionally receive the notifications via e-mail. Making this change is recommended for users that do not regularly login to BEN Financials to check for new notifications. Below are the steps required for a user to take in order to turn the e-mail notifications on as well as a sample e-mail notification.

To turn on the e-mail notifications for requisition and purchase order approval:

1. Access the BEN Financials homepage (http://benapps.isc-seo.upenn.edu) and click the BEN Financials link.

2. Use your username and password then click the ‘Login’ button.

3. Click the ‘User Preferences’ link in the top right corner of the screen.

4. Update the Notifications Email Style to ‘HTML mail with attachments’ or ‘Plain text mail with attachments’ (whichever type of e-mail format you prefer) and click the ‘Apply’ button.
After changing the Email Style to enable the notification e-mails the user will receive Requisition and Purchase Order notification emails. The e-mail will contain the following details:

1. E-mail is sent to the user’s e-mail address that is populated in BEN Financials

2. To take an action (Approve, Reject, etc.) on the requisition and/or purchase order from the email notification
   - Click on the “Notification Detail” attachment (located at the top of the notification)
   - OR
   - Click on the “Please click here to View the Notification Detail” link (located at the bottom of the notification)
NOTE: If you are not logged into BEN Financials at the time you open the “Notification Details” attachment or click on the “Please click here to View the Notification Detail” link, you will be prompted to log in. Once you have logged in successfully, you will gain access to the “To-Do Notification” in BEN Financials.

3. To “Edit Requisition or View Requisition Details” from the email notification
   - Click on the “Notification References” attachment (located at the top of the notification). It will open a screen which gives you the ability to “Update requisition -OR- View Requisition Details”
   - You also have the ability to “View Requisition Details” by clicking on the link within the notification

4. After an approval action has been initiated for the Requisition or Purchase Order another e-mail is sent detailing the action that has been taken.
Please note that after an action has been taken on the requisition or PO notification the e-mail can be deleted. However, deleting the notification e-mail will not also remove it from the user’s Notifications page in BEN Financials.

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<th>Item Description</th>
<th>UOM</th>
<th>Account Code Combination</th>
<th>Quantity</th>
<th>Unit Price</th>
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</thead>
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