

Accounting and Disbursements Division Accounts Payable Branch

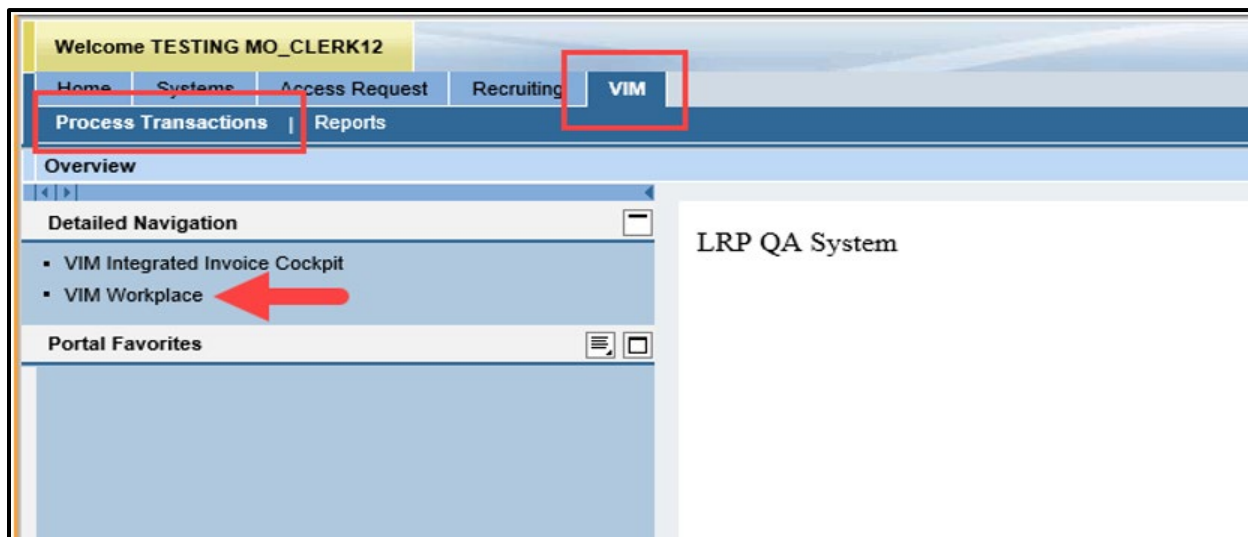
VIM Workplace Exception Vendor Communication

Overview

How to send VIM email to vendor requesting for more information.

Instructions

- 🖥 Login to SAP to access VIM
 - VIM will be another accessible main tab in SAP
- 🖥 VIM Portal: VIM | Process Transactions | VIM Workplace | Personal View

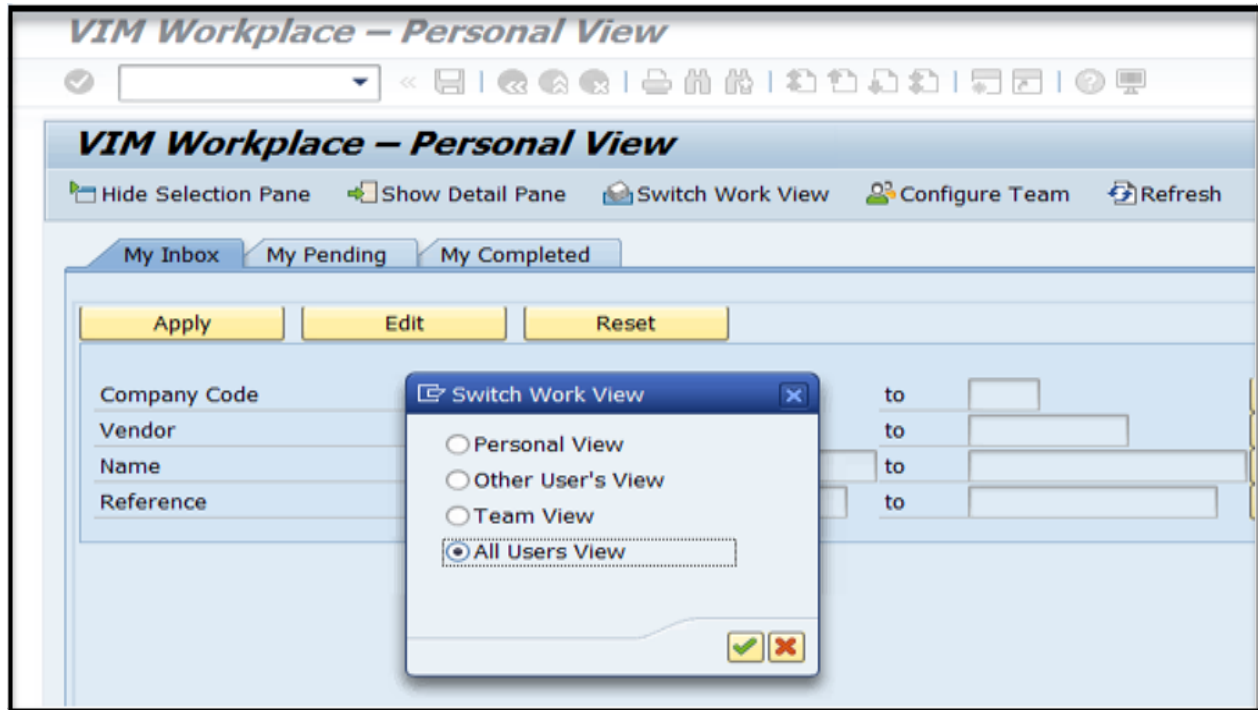


- Switch Work View | All Users View

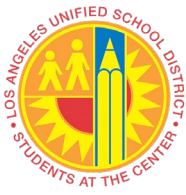


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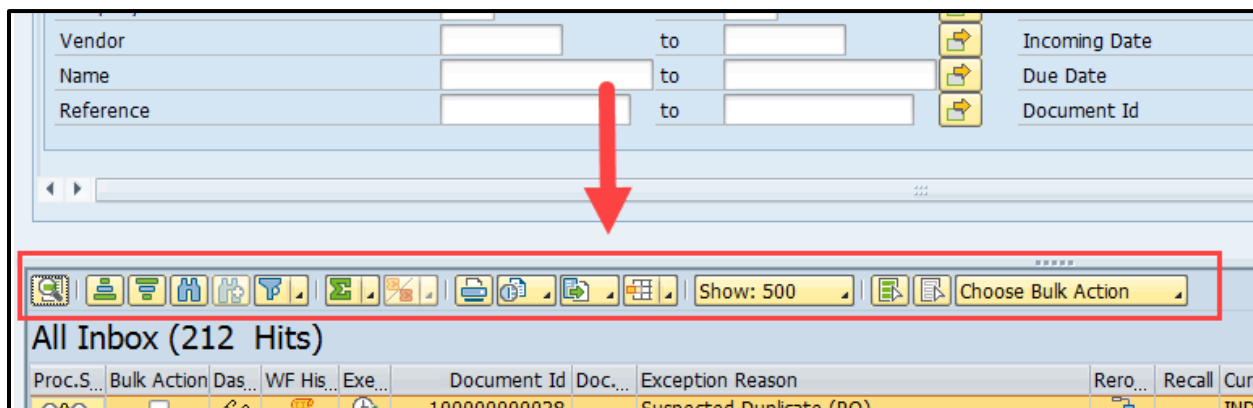
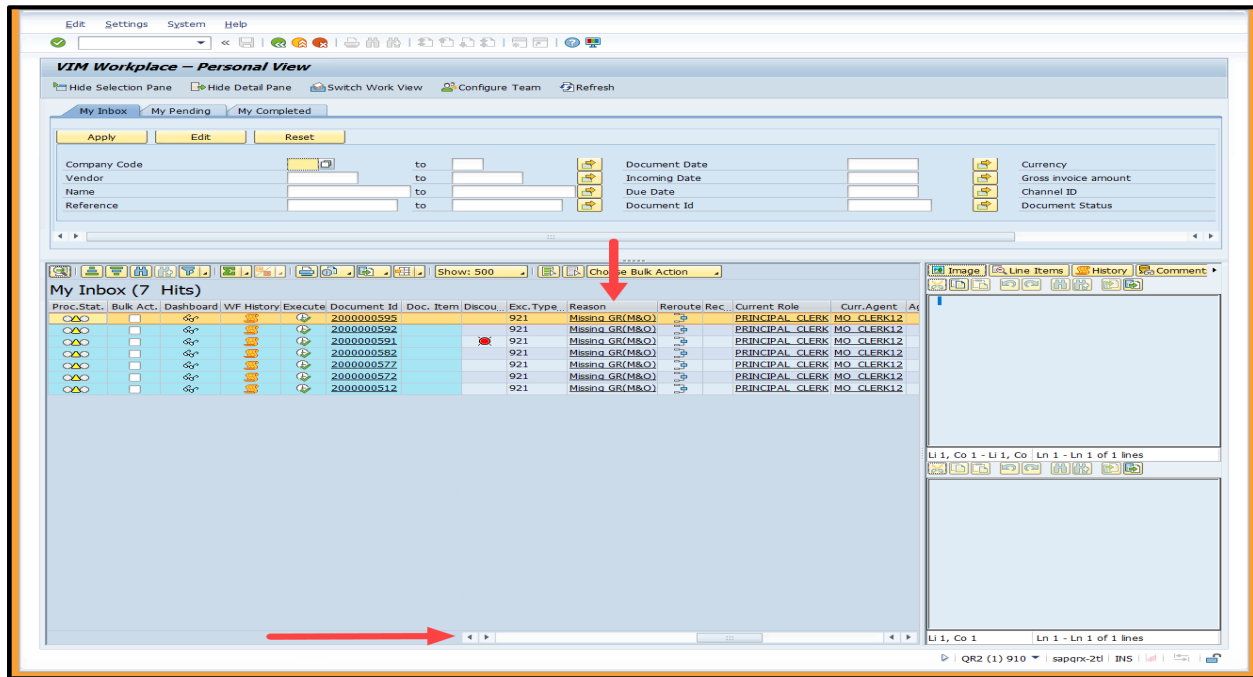


- Displays all DP Documents with issue/s
 - Use bottom scroll bar to access the Exception Reason column (along with other columns such as PO, Vendor, Invoice, Discount, etc.)
 - Any column can be sorted or filtered by using the various function icons



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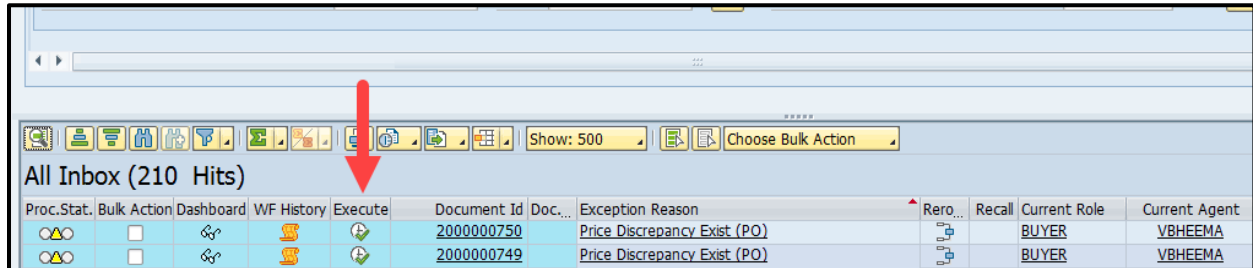


Click “Execute” icon to access invoice for review



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- A separate screen, displaying the invoice image, will appear
 - User can close the invoice image window or keep window open to review

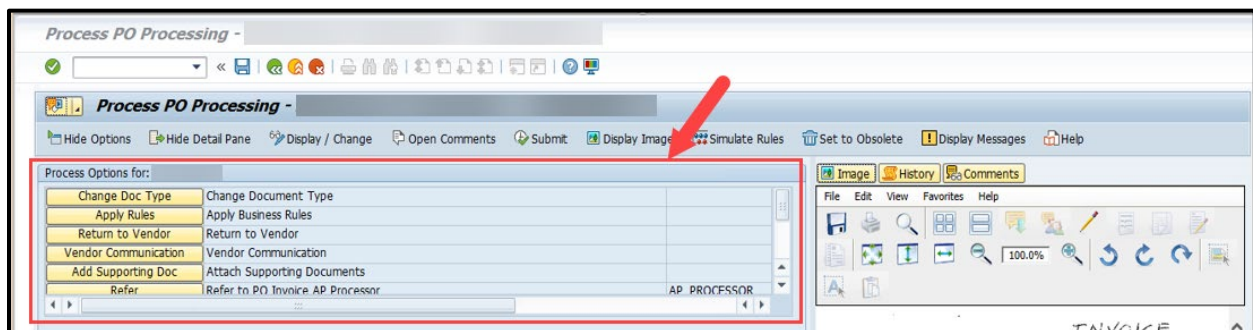


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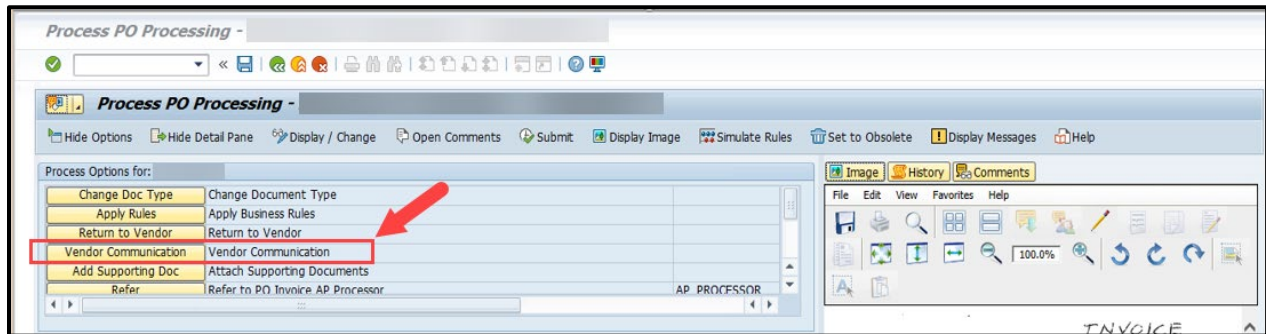
Process Options and other DP Document fields are now accessible



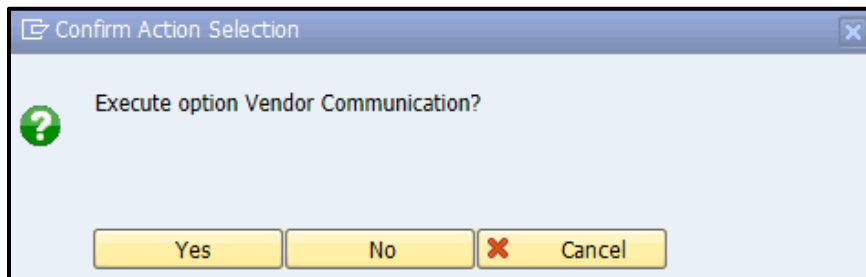


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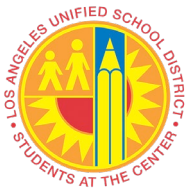
VIM Workplace Exception Vendor Communication



- “Confirm Action Selection” window will appear
 - Click “Yes” to execute option vendor communication



- “Vendor Communication” screen will appear



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VIM Workplace Exception Vendor Communication

- Confirm vendor email address
 - If incorrect, delete current information and enter correct vendor email address
 - Additional email address(es) can be added, if needed
- Subject field auto-populate with specific information
- “Attach Invoice Image” box is checked
- Check necessary box(es) in the “Reason” section pertaining to invoice issue(s)
- Enter necessary comment(s) in “Comment to Vendor” and “DP Process Comments” fields
 - “Comment to Vendor” – this will appear on email communication to vendor
 - “DP Process Comments” – this is an internal notation for VIM users
- Select Mail Template
- Click “Generate Preview” to view message in Preview section



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VIM Workplace Exception Vendor Communication

- Displays selected "Reason" and written "Comment for Vendor"
- Click "Send" icon
- "Return to Vendor" window will appear
- Click "Yes"

Vendor Communication

E-Mail Address: VENDOR@ABCD.COM

☐ CC Requester:

Subject: Inv #19-1342 \$6,900.78 Info Required

☒ Attach Invoice Image

Reason

- ☐ Quantity issue
- ☐ Duplicate invoice
- ☒ Recipient address incorrect
- ☐ Missing or incorrect PO number
- ☐ Facilities- After the Fact/Contract/Task Order Expired
- ☐ Billing Period not within NTP/Task Order/Vendor Authorization or Contract Period
- ☐ Billing period covers two fiscal years
- ☐ Work is not within scope of services in the contract
- ☐ Approval Signature Missing/Approval Signature not in Authorized Approver List

Comment for Vendor

Remittance Information

Additional Documents

File Type	Arch. Doc. Type	Arch. Date
		01
		01
		01
		01

Language: EN

Mail Template

ZAPTX_VEN_COMM_TEMPLATE

Generate Preview

Preview

Dear Vendor,

Accounts Payable received the attached reference invoice and is unable to process the invoice. To continue the reviewing and approval process, please see "Reasons" and provide additional information requested under "Comments".

Invoice Details
Invoice # : 19-1342

Reasons:
Recipient address incorrect

Comments:
Remittance Information

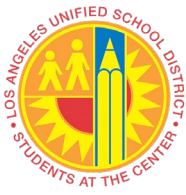
Accounts Payable will review the additional information and will contact you if more information and/or corrective action is needed.

Thank you,

Vendor Communication

Send the Vendor Communication Email

Yes No



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- Email notification will be sent to the vendor