Emailing Purchase Orders

Submitting purchase orders to your vendors is a key step in maintaining proper stock levels and fulfilling customer special requests.

Objectives

- Setting Up Emailing Purchase Orders
- Vendor Contact Information
- Purchase Order Format Report (RPO)
- Viewing the Show log

Setting Up Emailing Purchase Orders

Let us see how to set up your email address in the system options. From the *Home* page, enter *OPT* in the *Launch* bar.

On the *Options Configuration* page, select *ID.* In the *Option ID* field, enter 8214 and click *OK.*
Option ID 8214 lets you define the *from address* for emails.

The option table displays. Click the *Current Value* column and type your store's or purchasing agent's email address.

Select *Change* on the toolbar to save the changes. Refer to the *Help* document for more information on how to set up network report printing.

Vendor Contact Information

Let's add vendor contact information. In *Vendor Maintenance,* select the *Contacts* tab.

From the *Vendor* drop-down menu, select your vendor. Select *Add* to add a vendor email address**.** Enter your *contact's full name* and any other relevant information such as *phone* or *cell number.*

In the *Email* field, make sure you enter their current accurate email address. The *Primary Contact* field has the option of *'Y'* for yes or *'N'* for no. If you select *Y,* the first contact you add for a vendor will default to the *Primary contact*.

The Purchase Orders field triggers emailing POs when you run the RPO report. To stop receiving purchase orders by email, choose *N.*

If you want the contact to receive all emailed purchase orders, then select *Y.* Select *C* to carbon copy all the emailed purchase orders.

Select *B* if you wish the contact to be blind carbon copied on all emailed purchase orders.

You can edit this field at any time. Finally, click *OK* to add this contact to the vendor record.

You can *Change* or *Delete* any contacts by clicking the Change or Delete links. You can also double-click on the contact line to make any changes.

Purchase Order Format Report (RPO)

Using the *Purchase Order Format Report* or *RPO,* you can email purchase orders in a PDF file.

From the Home page, enter *RPO* in the *Launch* bar or select *Purchasing and Receiving,* and then click *Reports.*

Choose *Print/Fax Purchase Orders.*

In the *Print Setup* page, set *Print To field* to *S* for spooler only.

In the *Spooler Options Channel Number* field**,** enter the *printer number* of a network printer on the system. This should be the same printer number to which you normally print documents and reports.

In the *Laser PO* field, select *Y.*

Now, select *Options.* In the *Print Options* drop-down, select the appropriate print option for the laser print.

In the *From/To* page, select *Y* in the *Email PO*? field to email a single purchase order. Or select *M* to email a range of purchase orders. These options are included to avoid accidentally emailing a large group of purchase orders.

Enter the *vendor* number. You can also email purchase orders for a given *Date Created* range or based on your *Buyers Initials.*

If you are running the *RPO* for a single PO or a single vendor, all email addresses entered in *Vendor Maintenance* will appear in the *To Emails* field.

Note that the system will not display the contacts that you denoted with *N* for *Does Not Receive Emailed Purchase Orders*.

In the *More Emails* field, you can add up to 3 additional email addresses. You can also add a short message here.

Use the *Group By* field if you are emailing multiple POs. You can Save this *RPO* format to use each time you would like to email purchase orders.

Click the *Save* button and give it an easily identifiable name. Select *Run* to email the selected purchase orders.

The emails will be addressed to the name listed in the *Contact* field in the *Main* tab of the *Vendor Maintenance* page. If no contact is listed in this field, the system addresses the email to the first name listed in the *Contacts* tab that is flagged as Primary.

Viewing the Show log

Once your email is sent, you can verify its transmission by viewing the *Show log.* In the *Launch* bar, type *SHOWLOG.* Or, select *Utilities* and then choose *Show Application and System Logs.*

Select the *Email PO Log* and double-click it to display the details. Here you can see when and to whom your email was sent.

Any *RPOs* added to an *End of Day* queue should be added with the *To Emails* field empty. When the queue runs, the system uses the contacts that exist in Vendor Maintenance. As these contacts change, there is no need to delete and re-add the report to the queue.

For more information on purchasing, refer to the documents available in the Help menu.

Recap

Emailing purchase orders is an efficient way to ensure that your suppliers receive your request and process it on time.

About Epicor

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