

## Emailing Purchase Orders

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

In this course we will review how to set up your Eagle system to email purchase orders, how to add vendor contact information, and cover the steps required to send P.O.s using the Purchase Order Format Report.

You will need to verify that certain settings are enabled as well as define the 'from-address' for outgoing emails.

Please review the Emailing Purchase Orders Options and Security document located in the 'Course Materials' portion of this Training on Demand class.

On software level 24 and higher, the email addresses in the 'Notes' section of Vendor Maintenance have been moved to the 'Contacts' tab.

You should no longer use Note Type 5 to add a vendor email address.

Instead, add the contact here by clicking 'Add' and completing the 'Add Contact' dialog box.

Enter your contact's full name and any other relevant information such as their cell or fax number.

Make sure you enter their current accurate email address in the 'email' text box.

In the field labeled 'Primary Contact' you are presented with the option of 'Y' for yes and 'N' for no.

The first contact you add for a vendor will default to the Primary contact.

This designation can be edited at any time.

The 'Purchase Orders' flag will trigger the emailing of PO's when the RPO report is run.

The options here are 'Y' this contact should receive all emailed purchase orders.

'C' this contact should be Carbon Copied on all emailed purchase orders.

Or 'B' this contact should be Blind Carbon Copied on all emailed purchase orders.

Press 'ok' to add this contact to the vendor record and 'cancel' to close the dialog box.

You can 'change' or 'delete' any contacts by clicking the appropriate link.

You can also double click on the contact line to open up the dialog box and make alterations.

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

Purchase orders can be emailed individually or in mass depending on the 'from and to' range you specify when you run RPO.

From the Purchasing and Receiving window, click the 'Reports' tab, and then click 'Print/Fax Purchase Orders'.

From the 'Print Setup' page, set the 'Print To' field, to 'S', 'Spooler Only'.

Under Spooler Options, in the 'Channel Number' field, enter the printer number of a network printer on the system.

This should be same the printer number that you normally print documents and reports to.

Move down to the 'Standard Options' and in the 'Laser PO?' field, select 'Y'.

On the Options page, choose the appropriate 'Print Options' for a laser PO.

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.

On the 'From/To' page, enter a 'Y' in the 'Email PO?' field to email a single purchase order.

Or enter an 'M' to email a range of purchase orders.

If this field is set to 'Y' and the 'From' and 'To' PO Number fields do not both contain the same value, you will receive the following error.

You can identify a range of Purchase Order numbers to email , or email all purchase orders for a given vendor.

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.

Keep in mind, contacts that you denoted with a N for 'Does Not Receive Emailed Purchase Orders' will not be displayed here.

You can also add up to 3 additional email addresses by typing them into the 'More Emails' field.

You will need to separate each address with a semicolon.

If you are running the RPO for more than one purchase order or more than one vendor, the assumption is multiple vendors are involved so no email addresses will appear in this field.

This is noted at the bottom of the screen.

Do not enter email addresses in the 'To Emails' field unless you want all POs to be emailed to those recipients regardless of the PO's vendor contact information.

You can also add a short message, here, if desired.

Use the 'Group By' field if you are emailing multiple POs.

Set this field to 'P' to create one PDF for each PO. Each purchase order will be received as its own separate email and separate PDF attachment.

You can also set this field to 'V' and Group PDFs by Vendor. This will create a single email for each vendor represented in the 'from/to' range. Attached will be one PDF file containing all POs for that vendor.

If a name is listed in the 'Contact' field on the Main Tab of MVR, then this is to whom the email will be addressed for this vendor.

If no contact is listed in this field, the email will be addressed to the first name listed in the 'contacts tab' that is flagged as Primary.

Press 'Run' to email the selected purchase orders.

Once your email is sent, you can verify that its transmission by viewing the Showlog.

Under 'Utilities' in the Eagle Browser, navigate to 'Show Application and System Logs'.

You can also type in SHOWLOG at the launch bar.

Locate the 'Email PO Log' and double click to display the details.

Here you can see that your email was sent and who it was sent to.

Any RPO's that are added to an End of Day queue should be added with the 'To Emails' field empty.

When the queue runs, the contacts that exist in Vendor Maintenance at the time the queue runs will be used.

So as these contacts change, there is no need to delete and re-add the report to the queue.

Now that you have reviewed the required setup, the process to add vendor contact information and understand how to run the RPO report, you are ready to begin emailing purchase orders to your vendors.

This is an efficient way to ensure that your suppliers receive your request and process it in a timely manner.

Additionally, using email will help assure that you receive the correct quantities of merchandise at the correct anticipated cost.

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