

Print or Email Purchase Orders

Document #:	3244	Product:	CenterPoint®
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This procedure is used to print or email purchase orders or multiple purchase orders at one time.

[Step 1: One Time Setup of E-mail Preferences](#)

[Step 2: Define a Default Subject and Message for E-mailed Purchase Orders \(Optional Setup\)](#)

[Step 3: Vendor E-mail/Print Defaults](#)

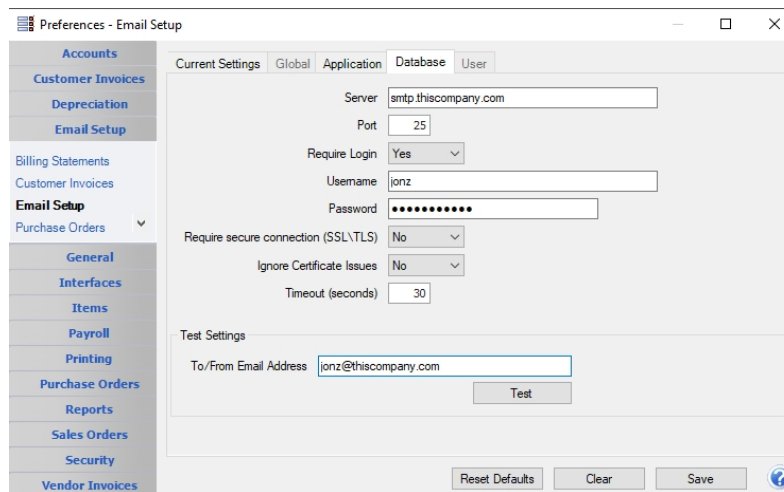
[Step 4: Sent From and Optional E-mail Addresses](#)

[Step 5: Printing or Emailing Purchase Orders](#)

[Step 6: Print or Email Multiple Purchase Orders](#)

Step 1: One Time Setup: Email Preferences

1. Select **File > Preferences > Email Setup > Email Setup**.
2. Select the **Database** tab at the top.
3. Enter your **“To/From” Email Address**. This is the e-mail address used only for testing the SMTP settings. The Sent From address for purchase orders (when you e-mail a group of purchase orders) is set in **Setup > General > Email Addresses**, see Step 4 for more information.



4. Once the To/From Email Address is entered, the system will try to auto fill the **Server** and **Port**. If it's unable to fill the info, you'll have to get the information from your network administrator. They can also let you know what you should select in the **Require Login** and **Require secure connection (SSL/TLS)** field.
5. Click **Test**. An e-mail will be sent indicating the SMTP options have been set correctly. Verify that you received the CenterPoint: Testing SMTP Configuration email. See the [Email Setup](#) topic for additional information.



Note: If you didn't receive the e-mail, then the settings in step 4 must be corrected.

6. Once the e-mail is received, select **Save** in the Preferences screen.

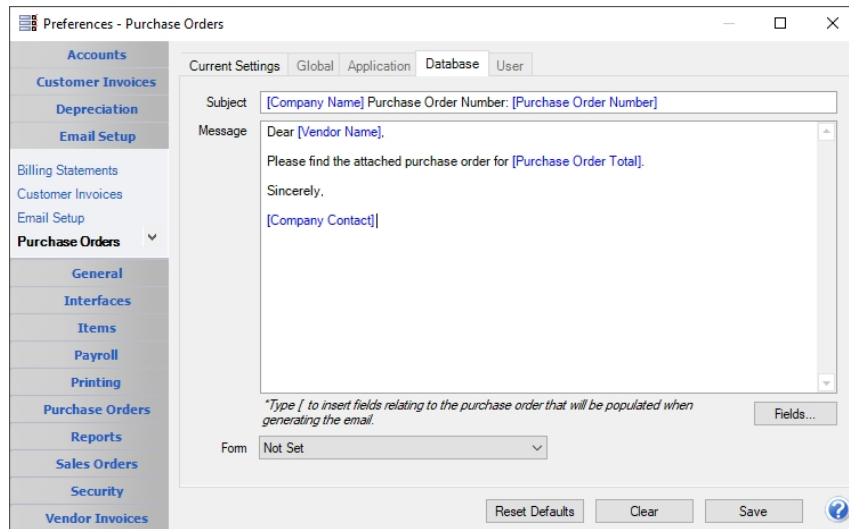
Step 2: Define a Default Subject and Message for E-mailed Purchase Orders (Optional Setup)

If you'd like to use the same e-mail Subject, Message, and Form each time you email a purchase order, it can be added to this preference. This preference also allows you to add Form Fields from the purchase order transaction data to the default Subject line or Message text.

1. Select **File > Preferences > Email > Purchase Orders**.
2. Select the **Database** tab at the top.
3. Enter a default **Subject** and **Message**.
4. If you want to insert Form **Fields** into the Subject or Message of the email, click the **Fields** button or type **[** at the location the form field should be inserted. The available Form Fields for purchase orders are:

Company Address 1	Company Address 2	Company City, State, Zip	Company Contact	Company Email
Company Fax	Company Name	Company Phone	Company Web Address	Custom 1-8
Date Required	Memo 1	Memo 2	Payment Terms	Payment Terms Abbreviation
Purchase Order Date	Purchase Order Number	Purchase Order Total	Shipping Method	Shipping Method Abbreviation
Vendor Abbreviation	Vendor Name			

- » For example, you can customize the default Subject and Message for emailed purchase orders to include data fields from the purchase order data along with default text:
 - » In the **Subject** box, click **Fields** or type **[**, and then select **Company Name**.
 - » In the **Subject** box, type **Purchase Order Number:**, click **Fields** or type **[**, and then select **Purchase Order Number**.
 - » In the **Message** box, type **Dear**, click **Fields** or type **[**, select **Vendor Name**, and then type a **comma.E**.
 - » In the **Message** box, type **Please find the attached purchase order for**, click **Fields** or type **[**, and then select **Purchase Order Total**.
 - » In the **Message** box, type **Sincerely,**.
 - » In the **Message** box, click **Fields** or type **[**, select **Customer Contact**.



 Note: To create paragraphs, press your Ctrl and Enter keys at the same time.

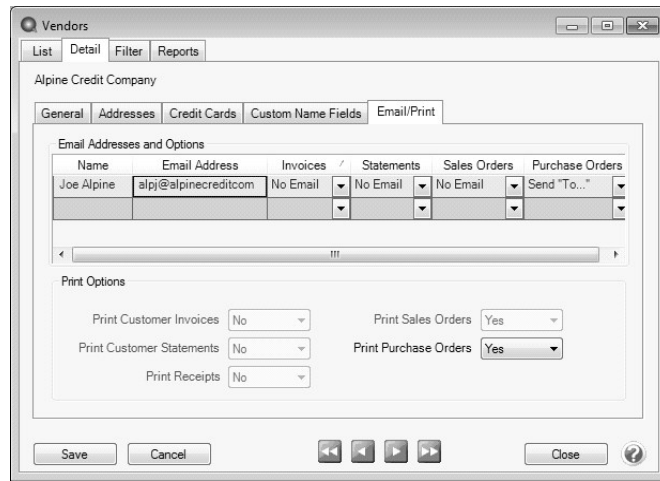
5. Select a default **Form** for emailing sales orders. This form will be used to format the PDF file that will be attached to the email.
6. Click **Save**.

Step 3: Purchase Order E-mail/Print Defaults

Prior to e-mailing a purchase order to a vendor, the vendor file must include an e-mail address and e-mail form options on the Email/Print tab.

If your vendors don't currently have e-mail addresses on the **Email/Print** tab in their record, use the following step to update their records individually.

1. Select **Setup > Names > Names** or **Setup > Vendors**.
2. Find the appropriate vendor and click **Edit**.
3. Click the **Email/Print** tab.
4. Click on the **Email/Print** tab. The Email Addresses and Options fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor or a customer. Use these options to set up multiple e-mail addresses where invoices, statements, sales orders, and purchase orders can be sent for this vendor. You can also select how each e-mail is to be sent, **No Email**, **Send "To..."** (directly to the recipient), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (as a blind carbon copy, for example, the person sending the email may want to enter their own e-mail address so they have an audit trail of emails sent). The Email Addresses and Options settings will be used to set the default image on the Email button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. An envelope image with a check mark on it will mean the form will be emailed and an Envelope image with a cross-through on it will mean the form will not be emailed.



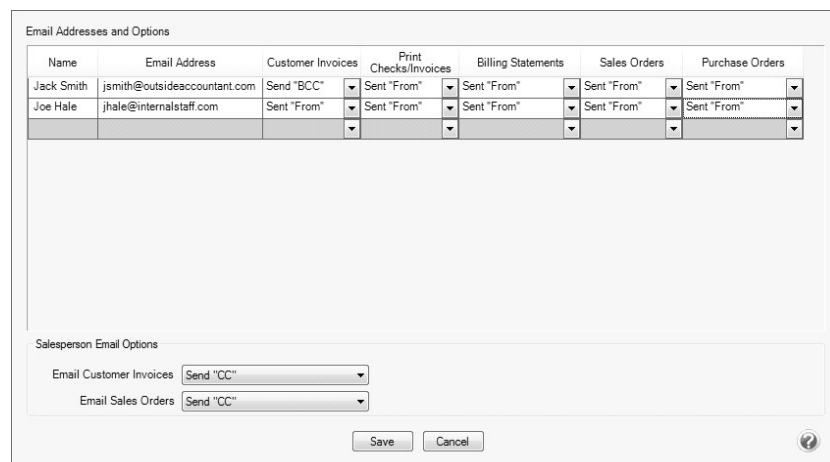
The **Print Options** fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor a customer. The available fields are: **Print Customer Invoices, Print Customer Statements, Print Receipts, Print Sales Orders, and Print Purchase Orders**. Use these options to determine if invoices, statements, sales orders, and purchase orders should be printed for this customer. The Print Options settings will be used to set the default image on the Print button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. A printer image with a check mark on it will mean the form will Print and a Printer image with a cross-through on it will mean the form will not print.

5. Click **Save**.

Step 4 - Sent From and Optional E-mail Addresses

You can optionally add e-mail addresses where messages and attached documents can be sent to; for example: internal staff, outside accountants, or other addresses that are not related to the vendor the transaction is entered for. You can also select how each e-mail is to be sent, directly to the recipient, as a carbon copy, or as a blind carbon copy or set a default "From" email address for each document type (invoice or print checks/invoices).

1. Select **Setup > General > Email Addresses**.




2. Enter the **Name**, the **Email Address**, and select how **Purchase Orders** should be sent, **No Email, Send "From..."** (the default e-mail address the purchase order is sent from), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (blind carbon copy).
3. Click **Save**.


Step 5 - Printing or E-mailing Individual Purchase Orders

When entering purchase orders, the Print and E-mail icons will display the defaults for the selected vendor. For example, if you have a vendor setup to E-mail Only, the Print icon will display a red X on it and the E-mail icon will have a Green check mark. If you have the File > Preferences > Purchase Order > Require Purchase Order Approval preference turned on, then purchase orders cannot be printed or emailed until they are approved.

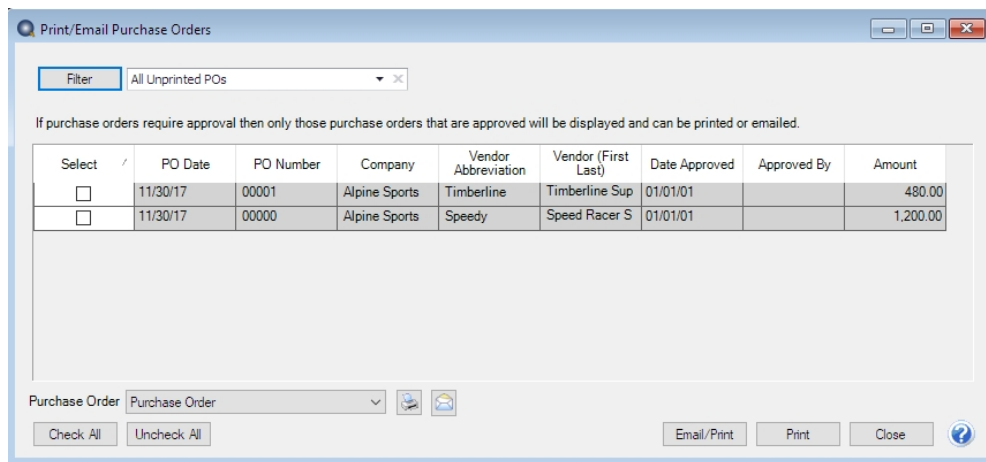
1. If a vendor is setup to e-mail their purchase orders, the system will automatically prompt you to e-mail the purchase when the purchase order is saved.
2. You can change the print or e-mail settings for a vendor from the purchase order entry screen by simply clicking on the Print or E-mail icons. If you click on the E-mail icon, the settings from the Email/Print tab in Setup > Vendors or Setup > Names display. You can add additional recipient e-mail addresses to the To, CC, or BCC boxes by separating the addresses with a semi-colon. You can also change the Form the invoice should be printed on.
3. Use the Print/Email Purchase Orders screen to e-mail a group of purchase orders.

 Note: if a vendor has multiple purchase orders selected in the Processes > Purchases > Print/Email Purchase Orders screen, they will get a separate e-mail for each purchase order being sent. See the Step 6: Print or Email Multiple Purchase Orders.

Step 6: Print or Email Multiple Purchase Orders

 Note: If purchase orders require approval, they will only display on this screen only after they are approved and can then be printed or emailed.

1. Select **Processes > Purchases > Print/Email Purchase Orders**.



Select	PO Date	PO Number	Company	Vendor Abbreviation	Vendor (First Last)	Date Approved	Approved By	Amount
<input type="checkbox"/>	11/30/17	00001	Alpine Sports	Timberline	Timberline Sup	01/01/01		480.00
<input type="checkbox"/>	11/30/17	00000	Alpine Sports	Speedy	Speed Racer S	01/01/01		1,200.00

2. All unprinted, approved purchase orders will display. If you would like to filter the list of purchase orders that display, click the **Filter** button, select your filter criteria, and either **Apply** the filter to the list (you will see Custom in the Filter box) or **Save** the filter so you can select the named filter in the Filter box.



3. To select all purchase orders for printing, click **Check All** or select each purchase order you want to print. To unselect all purchase orders from the printing selection, click **Uncheck All**.
4. Select the **Purchase Order** form type.
5. Click the **Printer** icon to select the printer and the number of copies to print.
6. Click the **Envelope** icon to change the defaults set in File > Preferences > Email Setup > Purchase Orders for the Subject, Message, and Form.
7. Click **Email/Print** to email and/or print all selected purchase orders or click Print to print all selected purchase orders. Purchase orders will be printed and/or emailed based on the selections made for the vendor in Setup > Names or Setup > Vendors.
8. Verify or change your Email Settings.
9. Click **OK**.
10. You will receive a *Process Completed Successfully* message when the invoice is e-mailed.
11. Click **Close**.