

# Email PO Implementation



October 2021

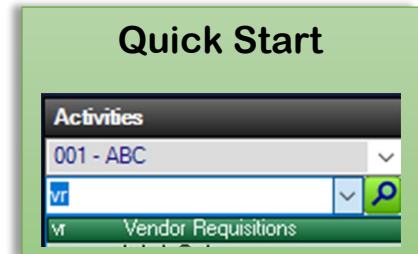
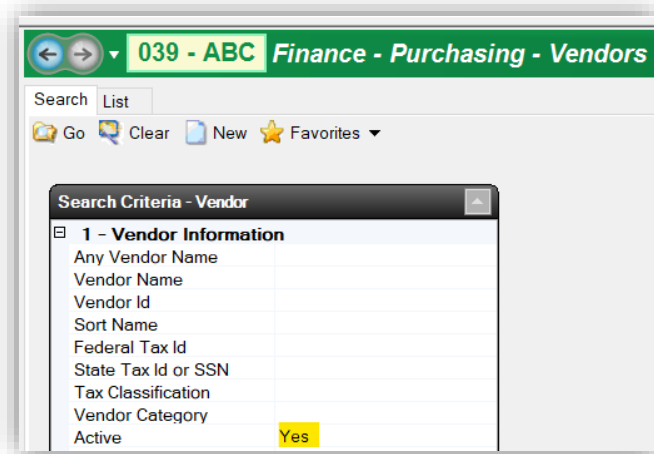
# Emailing Purchase Orders

Escape software supports emailing purchase orders to vendors. If the District is currently using the "standard" purchase order, SCOE IT can turn on this functionality as soon as the set up shown below is finished.

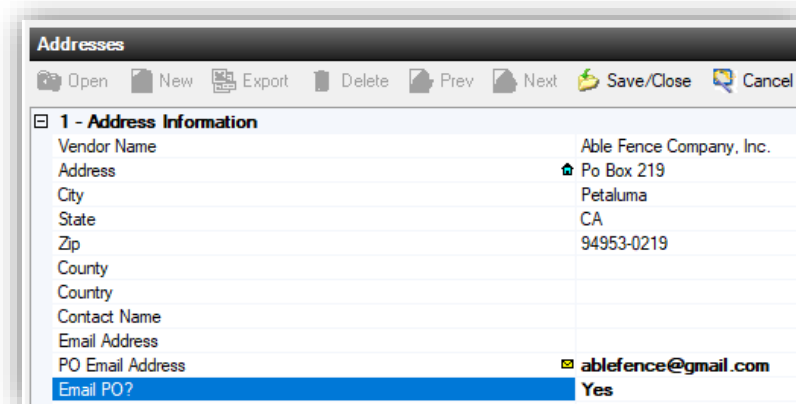
## Update Vendor Record with Email Address

### *Go to Finance-Purchasing-Vendors*

- Enter Vendor Name
- OR Enter Yes Active field to Search for ALL



- From the list open the record
- Open line in Addresses
- **Add Email Address or PO Email Address if different from PO Email**
- **Enter Yes in Email PO field**
- Save/Close



## Vendor Search

After Email added and Email PO? is set to Yes, you can search for all vendors with emails

- Section 2 – Vendor Address Information
- Enter Yes in Email PO? Field
- 

The screenshot shows a web application interface for vendor search. At the top, there is a green header bar with navigation arrows and the text "039 - ABC Finance - Purchasing - Vendors". Below the header, there are tabs for "Search" and "List", and a toolbar with icons for "Go", "Clear", "New", and "Favorites". A "Search Criteria - Vendor" dialog box is open, displaying two sections of search criteria:

1 - Vendor Information	
Any Vendor Name	
Vendor Name	
Vendor Id	
Sort Name	
Federal Tax Id	
State Tax Id or SSN	
Tax Classification	
Vendor Category	
Active	Yes
Online Shopping?	
Comment	
Created By	
Create Date	

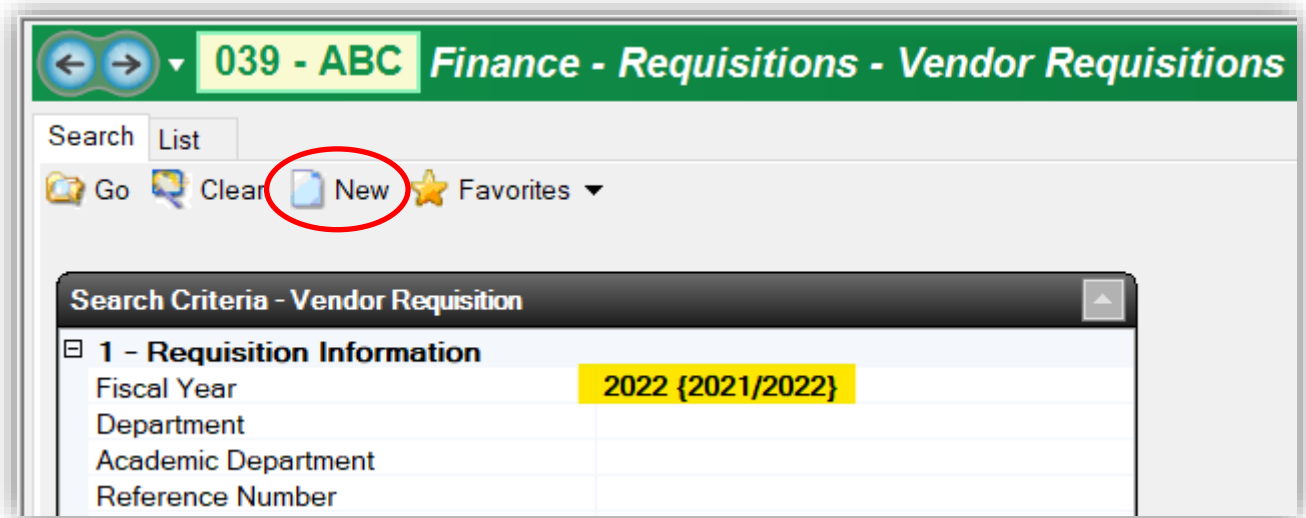
2 - Vendor Address Information	
Name	
Street	
City	
State	
Zip Code	
Contact Name	
Description	
Email PO?	Yes
AP Vendor ACH?	

## Vendor Requisition Attachments

Additional information can be sent to the vendor by using the Attachment Tab

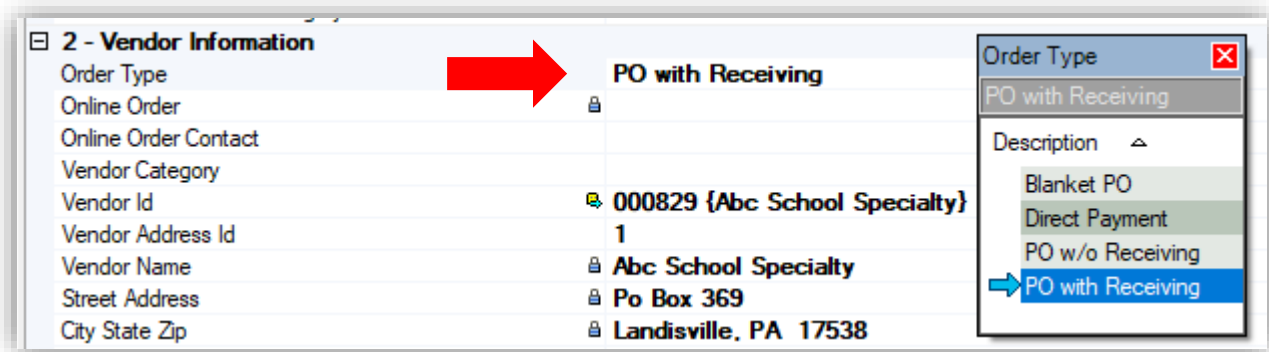
### *Go to Finance-Requisitions-Vendor Requisitions*

- Click New to create a New Vendor Requisition

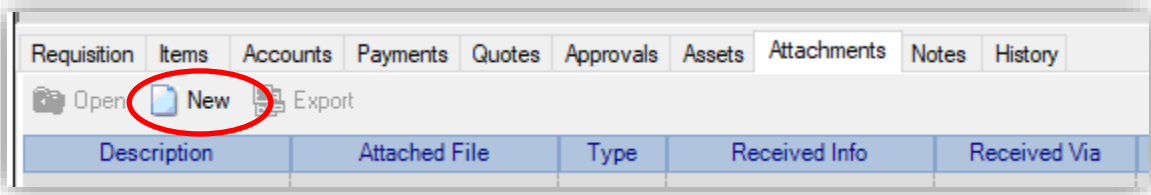


- Enter Requisition criteria
- Enter the Order Type
  - Blanket PO, Direct Payment, PO w/o Receiving or PO with Receiving
  - If PO with Receiving is selected, the items must be received in Receive PO Items before the payment can be processed

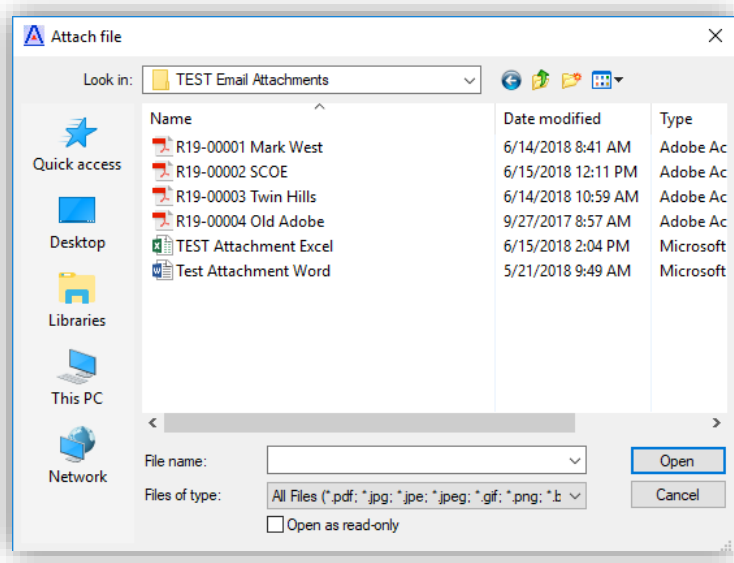
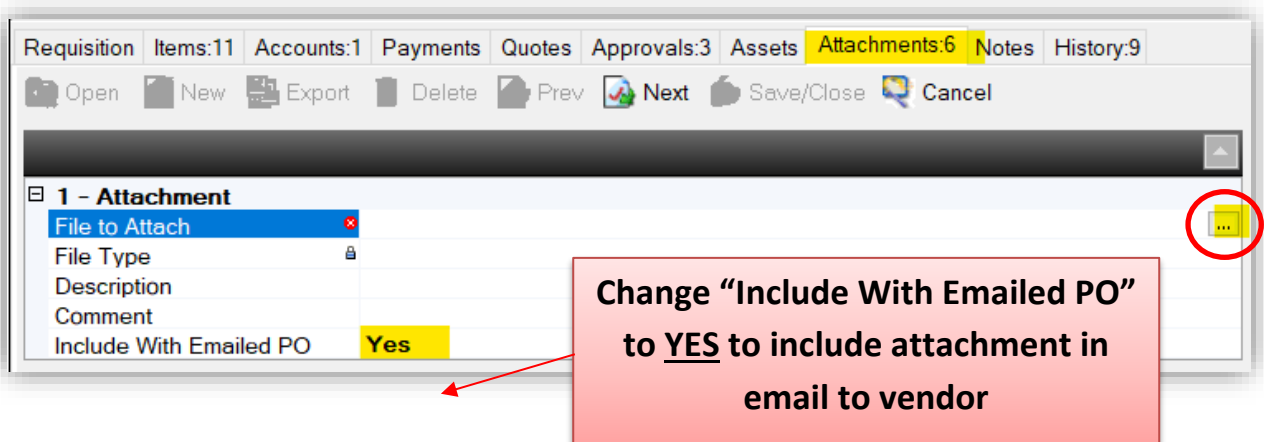
### *Go to Finance-Purchasing-Receive PO Items*



- Enter Items
- Enter Accounts
- Open Attachment Tab
- Click New to add attachment; You have the option to include or not include attachment when sending email to vendor



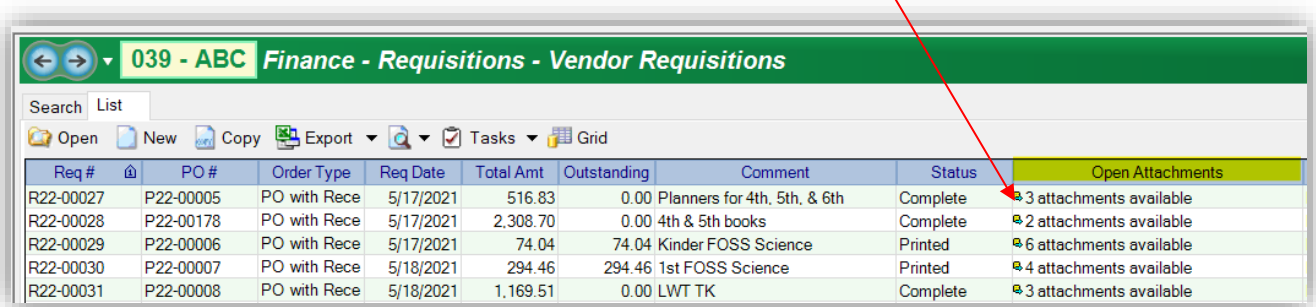
- Use the Browse button in File to Attach field to locate file
- Many file types are allowed such as pdf, jpeg, word, excel, etc.



- Click on file in dialog box then Click Open to attach file
- 
- Save/Close or Submit as usual

## Example List of Requisitions with Attachments

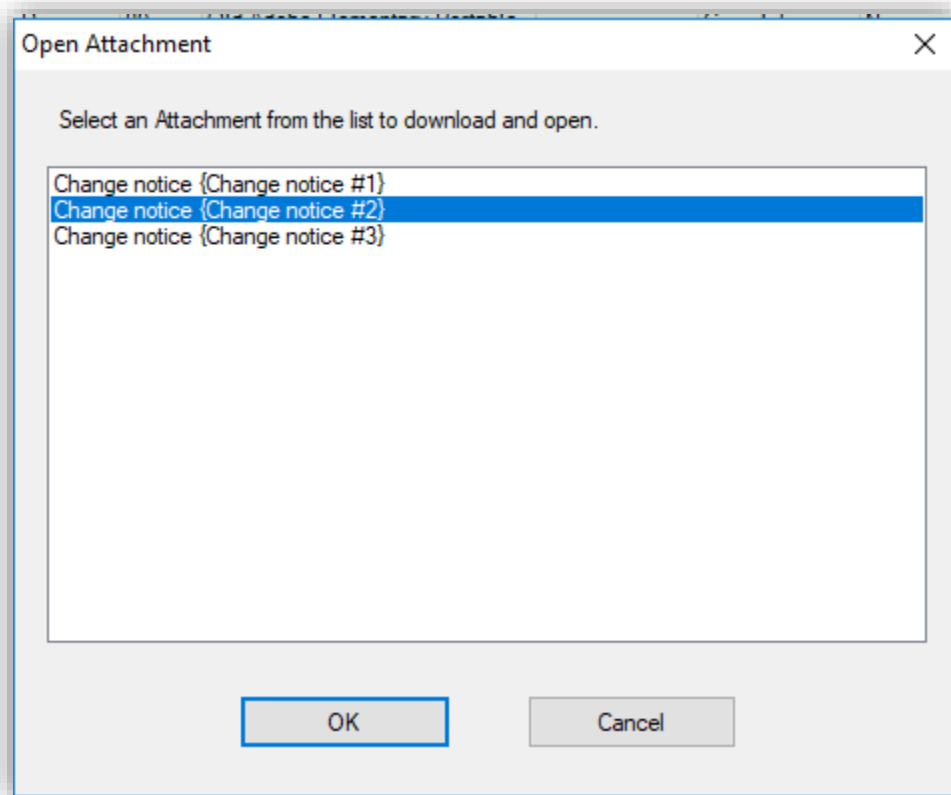
From the List you can click on the quick link in the **Open Attachments** column to view attachments without having to open each requisition.



The screenshot shows a software interface for 'Finance - Requisitions - Vendor Requisitions'. It features a table with columns: Req #, PO #, Order Type, Req Date, Total Amt, Outstanding, Comment, Status, and Open Attachments. A red box highlights the 'Open Attachments' column, and a red arrow points to the '3 attachments available' link in the first row.

Req #	PO #	Order Type	Req Date	Total Amt	Outstanding	Comment	Status	Open Attachments
R22-00027	P22-00005	PO with Rece	5/17/2021	516.83	0.00	Planners for 4th, 5th, & 6th	Complete	3 attachments available
R22-00028	P22-00178	PO with Rece	5/17/2021	2,308.70	0.00	4th & 5th books	Complete	2 attachments available
R22-00029	P22-00006	PO with Rece	5/17/2021	74.04	74.04	Kinder FOSS Science	Printed	6 attachments available
R22-00030	P22-00007	PO with Rece	5/18/2021	294.46	294.46	1st FOSS Science	Printed	4 attachments available
R22-00031	P22-00008	PO with Rece	5/18/2021	1,169.51	0.00	LWT TK	Complete	3 attachments available

- Click on the attachment you want to view
- Click OK to download and open

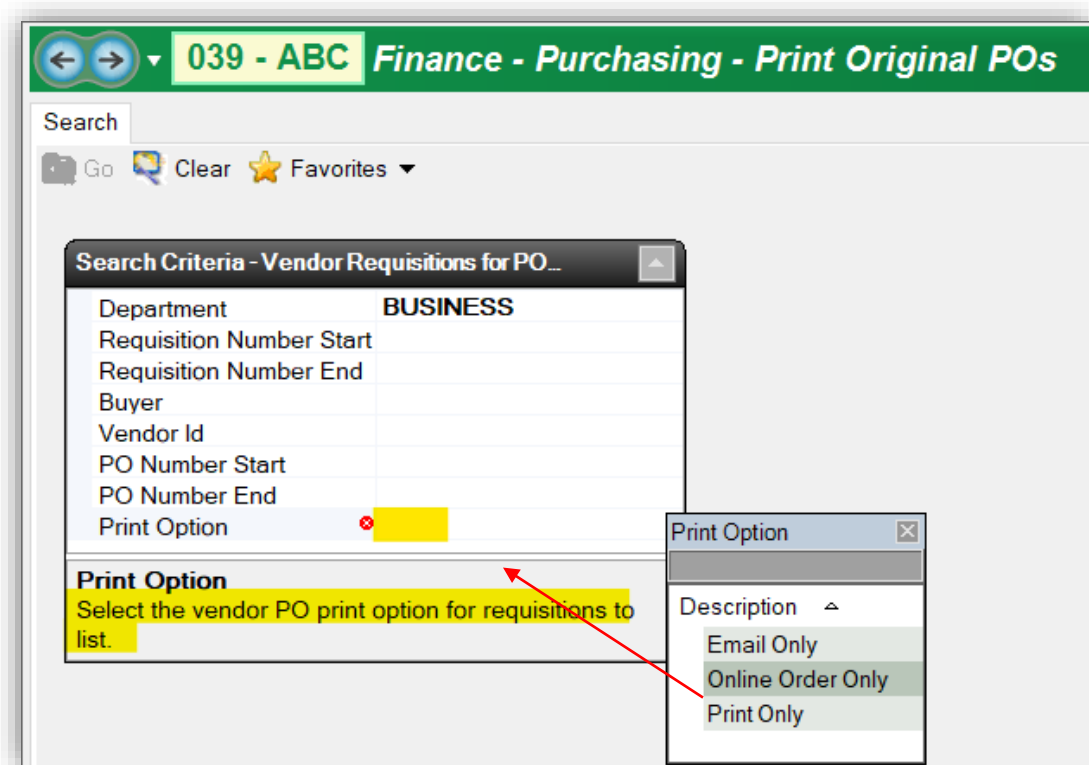
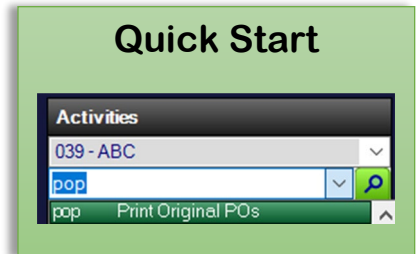


## “Print” Original PO to Email or Print PO

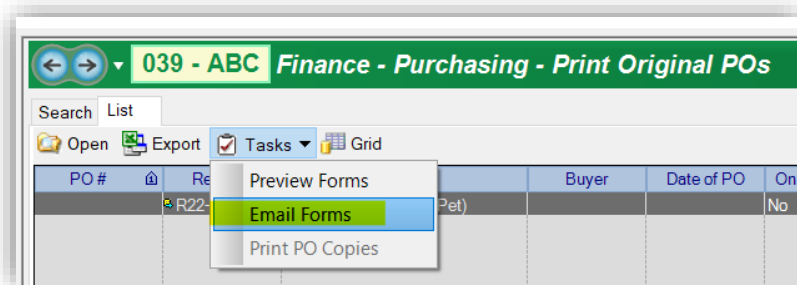
You still have the option to Print or Email and still print a hard copy if needed

### *Go to Finance-Purchasing-Print Original POs*

- Click Go to get list of POs that need to be printed or emailed
- Notice the Print Option depends on vendor setup
  - Enter Email Only
  - Click Go




- Go to Task to select Print or Email Forms
- POs that will be emailed will be listed



- Can still print hard copy if needed
- Both Print Options will have the Authorized Signature. No more waiting for original signature since it's already been approved electronically

## Example PO with Authorized Signature

<b>ABC</b>			<b>PURCHASE ORDER</b> NO: P22-00070 DATE 09/17/2021		
Business Department 1234 Happy Lane Santa Rosa, CA 95403 (707) 524-8410 FAX (707) 524-8400			<b>SHIP TO:</b> ABC 1234 Happy Lane Santa Rosa, CA 95403		
<b>ORDERED FROM:</b> Office Depot PO Box 70025 Los Angeles, CA 90074-0025			<b>FAX:</b>		
<b>IMPORTANT INSTRUCTIONS TO VENDOR</b>					
<ol style="list-style-type: none"> <li>1. Itemized INVOICES in Duplicate.</li> <li>2. Enclose PACKING LIST with ALL shipments.</li> <li>3. No deviation in PRICE or SUBSTITUTION in kind permitted.</li> <li>4. All deliveries F.O.B. Destination unless otherwise specified. If freight is to be charged, prepay, and add to invoice.</li> <li>5. THE LAW REQUIRES MATERIAL SAFETY DATA SHEETS FOR PRODUCTS ON THIS ORDER. PLEASE ENCLOSE WITH INVOICE.</li> <li>6. Purchase order number must appear on packing slip.</li> </ol>					
ORDER LOCATION 1AVS - ABC			REQUISITIONER Tracy Lehmann		REQUISITION # R22-00070
DATE REQUIRED	F.O.B.	TERMS OF PAYMENT	SHIP VIA	BUYER	RPQ #
<b>ITEM</b>	<b>QTY</b>	<b>UNIT</b>	<b>DESCRIPTION</b>	<b>UNIT COST</b>	<b>EXTENSION</b>
1	1	EACH		2,000.00	\$2,000.00
				Order Sub-Total	\$2,000.00
				Sales Tax	.00
				Shipping	.00
				Adjustment	.00
				<b>Order Total</b>	<b>\$2,000.00</b>
Page 1 of 1			Vendor		 Authorized Signature



## Receive PO Items

### Go to Finance-Purchasing-Receive PO Items

- Enter Reference Number or Purchase Order Criteria for one or multiple POs
- If all items received, change Receive All to Yes or leave as No if partially received
- Click Go to create a list of PO with items to receive

The screenshot shows the 'Receive PO Items' form. The title bar reads '039 - ABC Finance - Purchasing - Receive PO Items'. Below the title bar, there are navigation buttons: 'Go', 'Clear', 'New', and 'Favorites'. The main form area is titled 'Purchase order Information' and contains the following fields:

- Beginning Req / PO Sequence
- Date Received: 10/18/2021
- Beginning Sequence
- Receipt # 1
- Date Received: 10/18/2021
- Reference Number: R22-00023 {P22-00004, Vndr 095295-CPM E}
- Receive All: No

A 'Quick Start' callout box is overlaid on the right side of the form. It contains the following information:

- Activities
- 039 - ABC
- rpi
- rpi Receive PO Items

- Click in the Rcv Now field to indicate number of items received

The screenshot shows the 'Receive PO Items' list view. The title bar reads '039 - ABC Finance - Purchasing - Receive PO Items'. Below the title bar, there are navigation buttons: 'Export', 'Undelete', 'Cancel All', and 'Tasks'. The main table contains the following data:

Req Number	PO Number	Vendor Name	Item	Ordered	Received	Rcv Now	Date Rcvd	Result
R22-00189	B22-00015	Creative Ceramic	1	1	0	1	10/18/2021	

- Go to Task to post Items

The screenshot shows the 'Receive PO Items' list view. The title bar reads '039 - ABC Finance - Purchasing - Receive PO Items'. Below the title bar, there are navigation buttons: 'Export', 'Undelete', 'Cancel All', and 'Tasks'. The main table contains the following data:

Req Number	PO Number	Vendor Name	Item	Ordered	Received	Rcv Now	Date Rcvd	Result
R22-00189	B22-00015	Creative Ceramic	1	1	0	1	10/18/2021	

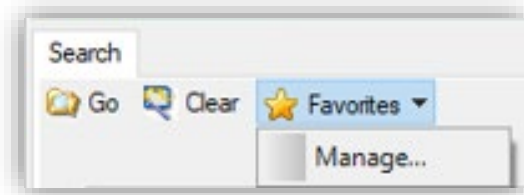
The 'Tasks' button is highlighted, and a 'Post' task is shown in a dropdown menu.

## How to Create a Search Favorite

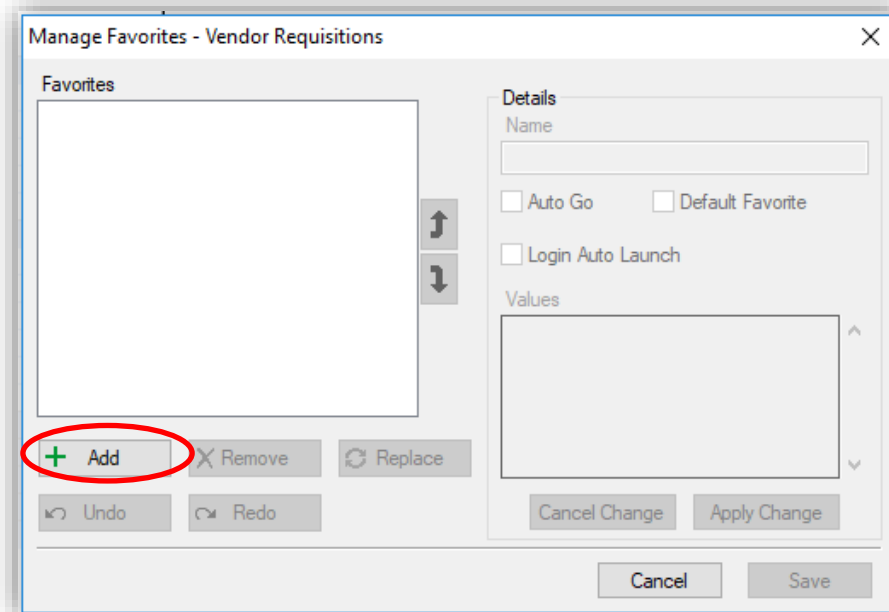
### *Go to Finance-Requisitions-Vendor Requisitions*

- Enter Search criteria
- Click Go to create list
- If the results are as expected click on Favorites
- Click on Manage to create favorite

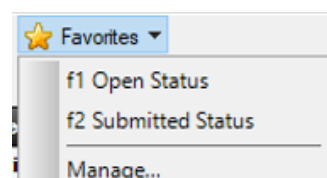
**Create Favorites  
to Save Time**



- Click +Add
- Name your favorite
- Auto Go means the search will automatically launch when favorite selected
- Default Favorite will be your default every time in the screen
  - This can be helpful when in multiple fiscal years
- Click Apply Change
- Click Save



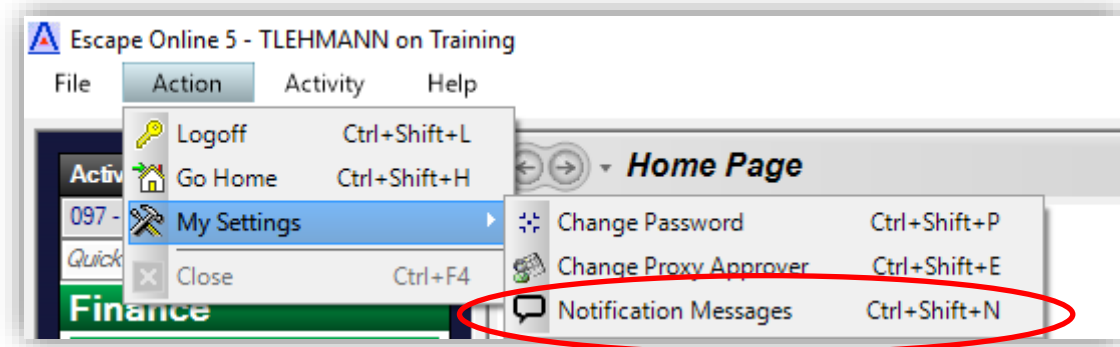
- Your Favorite is now available to select
- Can make 20 Favorites per search or report



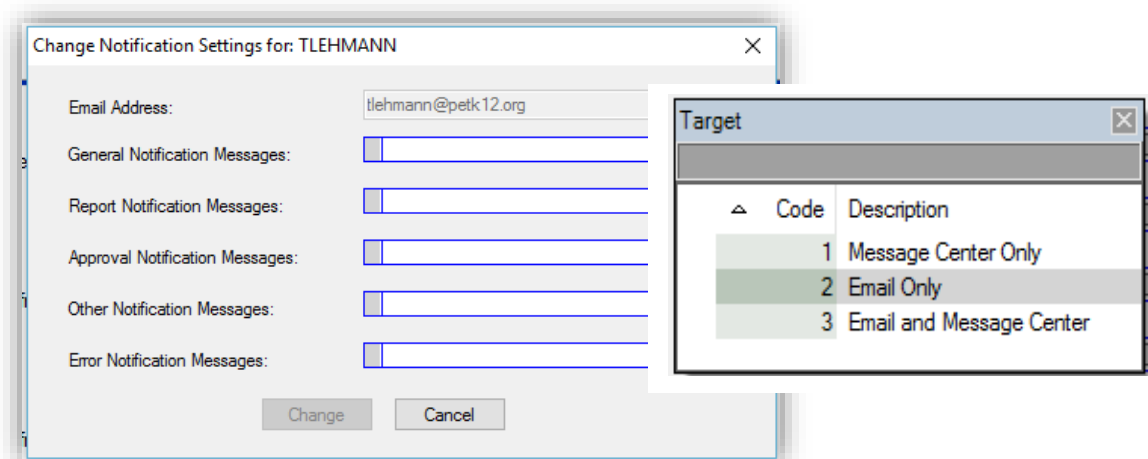
## Notifications Preferences and Proxy Setup

*\*Must be on Escape Home Page to setup*

*Go to Action – My Settings – Click on Notification Messages*



- Choose desired Notification Messages for each item
- Use drop down to select Message Center, Email or Both
- Default is Message Center Only setup in Org Record



*Go to Action – My Settings – Click on Change Proxy Approver*

If approver is out of office and Proxy Approver is needed:

- Type the Escape User ID or use the drop down menu to select the Proxy Approver
- Enter Expire Date: Usually date return to office

