

115180 BULK EMAIL PURCHASE ORDERS – ONE PO PER EMAIL AND AUTO SEND

1 INTRODUCTION

The bulk purchase order emailing tool has been updated to make it easier to send large groups of orders to suppliers.

There are two new configurable options available for:

1. Automatically send email instead of prompting each email before sending
2. Separate each purchase order onto a separate email - instead of batched into one ZIP file (as per previous behaviour)

Under this project, some business rules were also configured for setting:

- Purchase order email subject
- Attached purchase order file name
- Body of email (unformatted text)

The business rules are NOT automatically installed as part of the release, these need to be installed manually site by site, if required. Fees will apply to this part of the work as it will require a Technical Consultant.

2 BENEFITS

- ✓ Save time when sending batch of emails
- ✓ Easier to continue conversations in email around specific orders without having supplier confusion about which order the conversation relates to

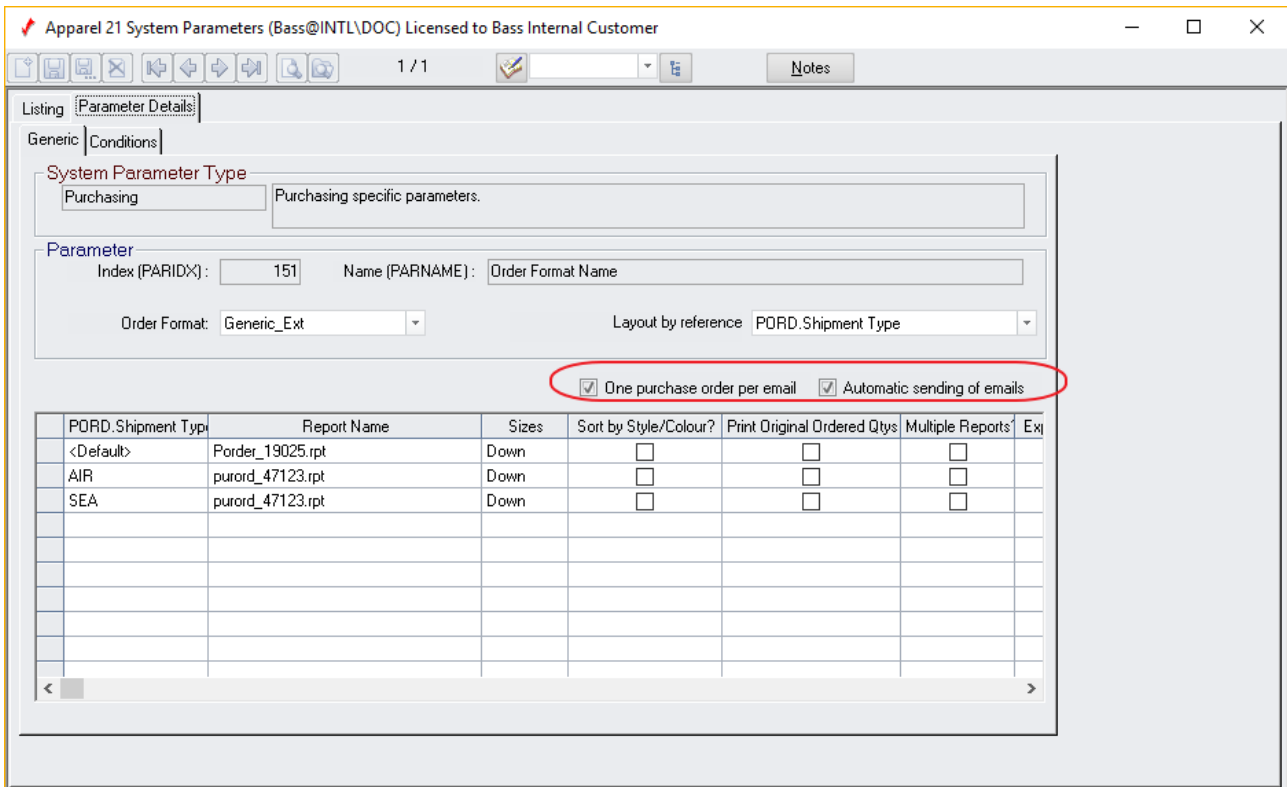
3 ASSUMPTIONS / LIMITATIONS

- Supplier emails must be configured in *Supplier Maintenance* prior to emailing if want to automatically send the emails

4 SETUP

4.1 SYSTEM PARAMETERS

The existing system parameter *Order Format Name* has been updated to include two new options.



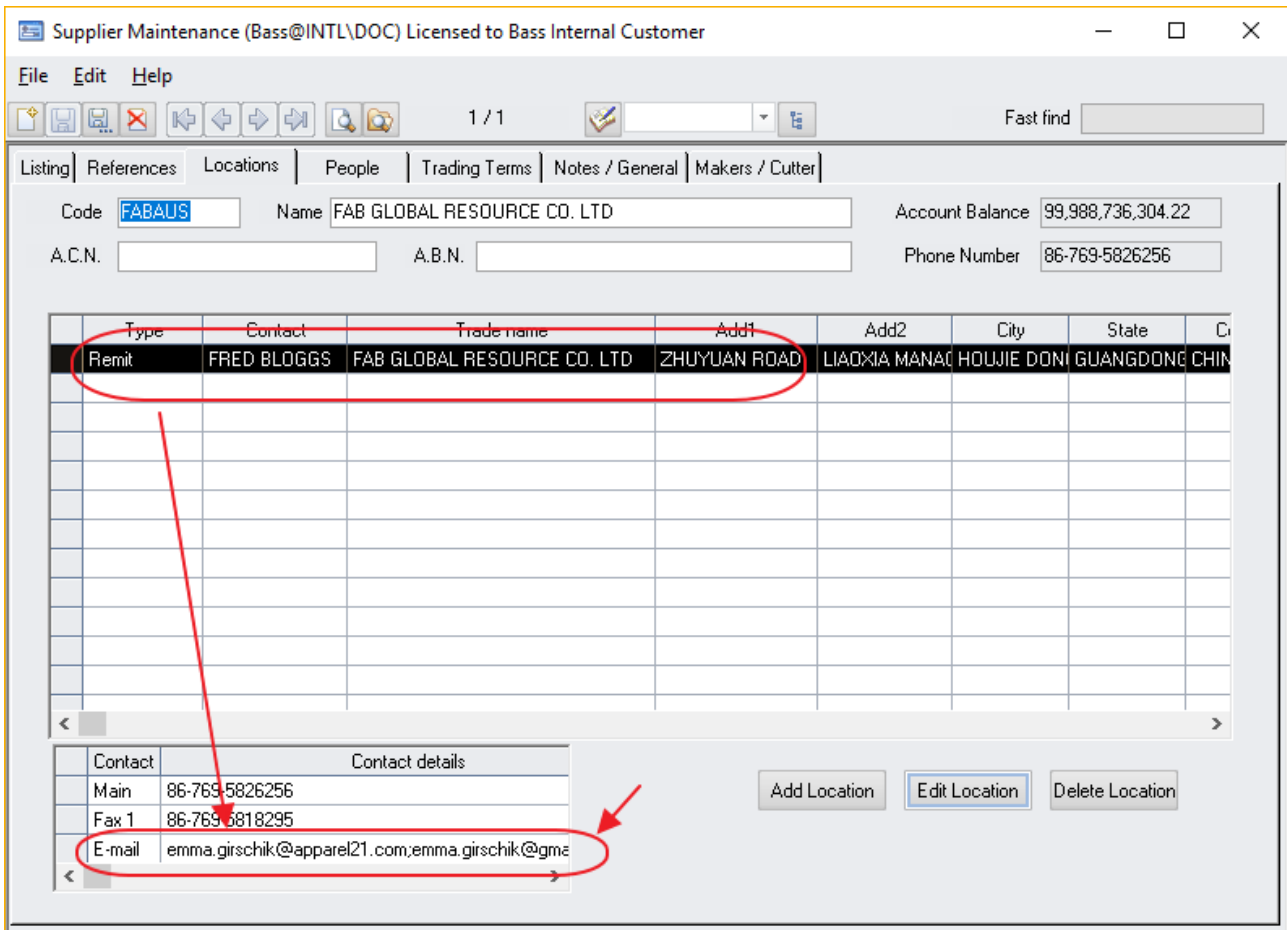
Option	Status	Behaviour
One purchase order per email	Ticked	When bulk email a batch of orders, each order will be sent as a separate email.
One purchase order per email	Unticked	When bulk email a batch of orders, for suppliers with multiple orders, they are zipped to a file containing more than one order.
Automatic sending of emails	Ticked	When email orders, will NOT be prompted with email to add text before sending. Is automatically sent.
Automatic sending of emails	Unticked	When emailing orders, will be prompted before each email is sent. This is useful if want to add manual text to the email body.

4.2 SUPPLIER EMAIL ADDRESSES

The supplier email addresses are configured in *Supplier Maintenance* against the *Remit* location using the *Email* phone type.

If automatically sending the emails, these must be configured correctly before attempting to email orders.

If more than one email address is attached, the first one on the display is used; second email address will NOT receive the email. If email should be sent to 2 addresses, it can be configured in one field as per below.



4.3 BUSINESS RULES – FILE NAME, EMAIL SUBJECT, EMAIL TEXT

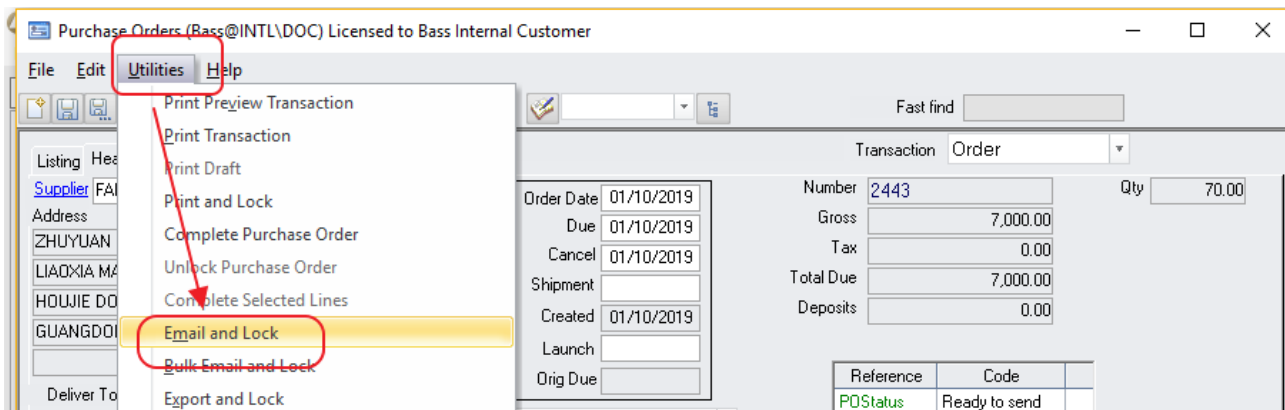
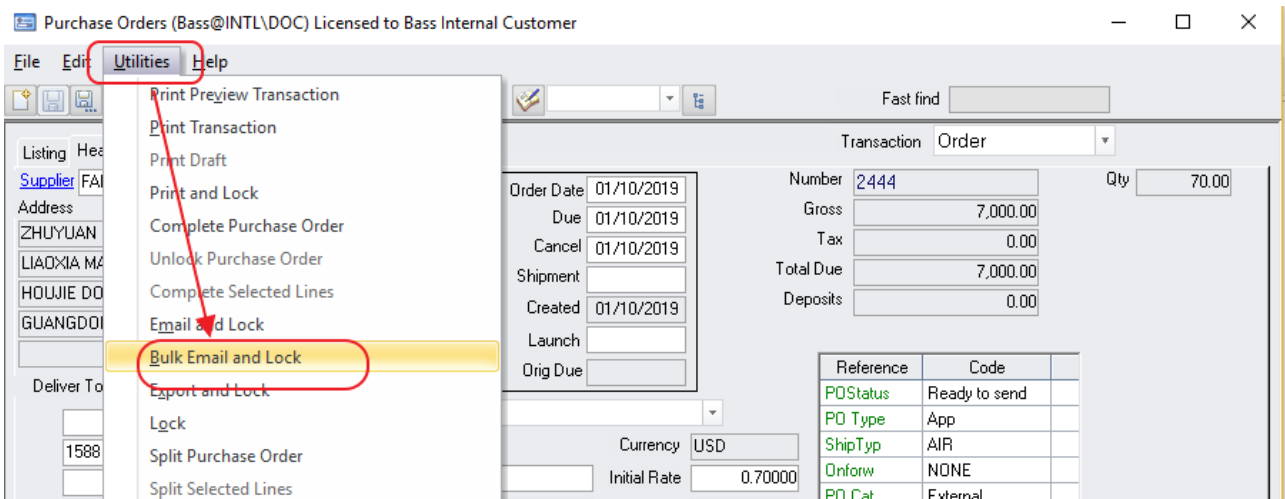
Contact Apparel21 if want to configure business rules for purchase order email file name, email subject and email body text.

Apparel21 team members – refer to job 115180 and see attached “Technical Spec” documents for installation of these features.

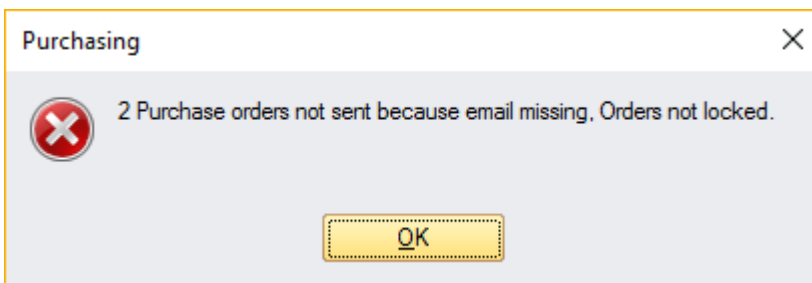
5 DESCRIPTION / USAGE

The changes have been made to the > *Purchase orders* > *Utilities* > *Bulk Email and Lock* feature.

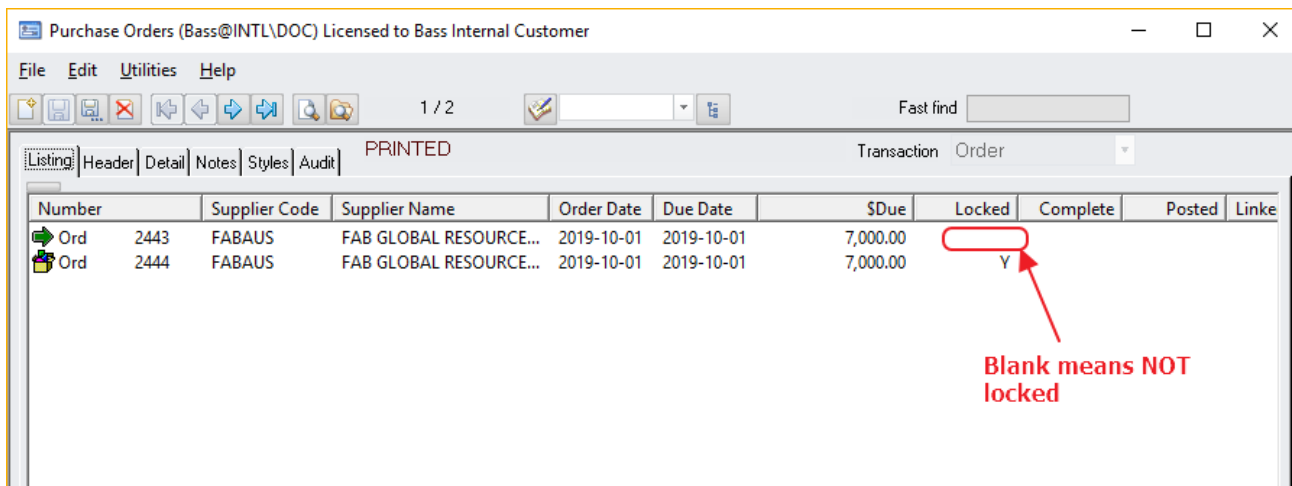
The *Automatic sending of emails* feature will also apply to the > *Purchase Orders* > *Utilities* > *Email and Lock* feature.



When either of these options are used, if there is no email set up against the supplier *Remit* location, the order/s will not be sent or locked and the message below will display.

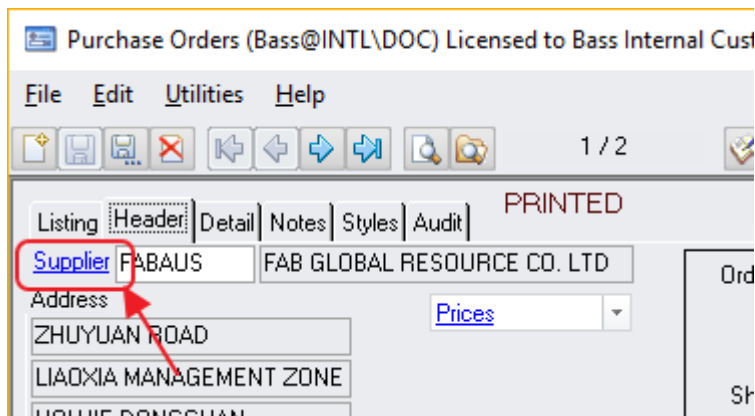


If this occurs, look at the *Listing* to see which orders were NOT locked, these are the ones with the missing email addresses.



The quick solution is then to:

1. Find orders in the list that are NOT locked
2. Select *Header* tab of first order not locked
3. Click on Supplier link > this opens *Supplier Maintenance*



4. Go to *Locations* tab of supplier
5. Select the *Remit* location and click *Edit Location*
6. Add *Email* contact type

Location [X]

Add Location

Trade Name : FAB GLOBAL RESOURCE CO. LTD

Contact : FRED BLOGGS

Type : Remit

Address 1 : ZHUYUAN ROAD

Address 2 : LIAOXIA MANAGEMENT ZONE

City : HOUJIE DONGGUAN

State : GUANGDONG

Country : CHINA

Post Code :

Reference	Code
Country	

Contact Type	Contact Details
Main	86-769-5826256
Fax 1	86-769-5818295
→ E-mail	emma.girschik@apparel21.com

Add Contact Delete Contact

OK Cancel

NUM

7. Click *OK* to close and *Save* on supplier
8. Go back to *Purchase Orders* screen
9. Repeat for each supplier with orders NOT locked
10. Once finished, select > *Utilities* > *Bulk email and lock* again and it will reattempt to email the orders not previously locked