Using the Centralized AP Inbox

Centralized AP Inbox review:

Move Email: Move the highlighted, or multiple checked emails to folder chosen from a dropdown.

View Email: Opens the highlighted email in a pop-up window.

Create Folder: Allows the user to create an email folder. The parent folder is selected from the dropdown and the new folder is named.

View Invoice: If the highlighted email has been captured this option will open the batch created and with the created invoice displayed.

New: Create new outgoing email.

Reply: Create reply to the highlighted email.

Delete: Delete the highlighted, or multiple checked emails from the email folder.

Digital Invoice Capture: Initiate Digital Capture process manually for the highlighted, or multiple checked emails.

Within open email:

Attach to PO: Opens the "Attach to PO" dialogue window where the user can choose the PO number to which the email and its attachments should be attached.

- **PO Number:** The PO Number to which the email files should be attached. The user may search for the correct PO Number via the Purchase Orders for Vendor dialogue.

- **Set Received Status to:** The received status to which the PO should be changed when the files are attached.

- **Move Email to Folder:** The email folder to which the email should be moved when the process completed.

- **Create and attach word document created from email subject and body:** If checked the system will create a word document of the email and attach it to the indicated PO.

- **Email attachments:** All attachments included in the received email. Those checked will be applied according to the above options.

Attach to Journal: Opens the "Attach to Journal" dialogue window where the user can choose the Journal ID to which the email and its attachments should be attached.

- **Journal ID:** The Journal ID to which the email files should be attached. The user may search for the correct Invoice ID via the Clone Journal Entry Batch dialogue.

- **Move Email to Folder:** The email folder to which the email should be moved when the process completed.

- **Create and attach word document created from email subject and body:** If checked the system will create a word document of the email and attach it to the indicated Journal ID.

- **Email attachments:** All attachments included in the received email. Those checked will be applied according to the above options.

Attach to Invoice: Opens the "Attach to Invoice" dialogue window where the user can choose the Invoice ID to which the email and its attachments should be attached.

- **Invoice ID:** The Invoice ID to which the email files should be attached. The user may search for the correct Invoice ID via the Vendor Summary Transactions dialogue.

- **Move Email to Folder:** The email folder to which the email should be moved when the process completed.

- **Create and attach word document created from email subject and body:** If checked the system will create a word document of the email and attach it to the indicated Invoice ID.

- **Email attachments:** All attachments included in the received email. Those checked will be applied according to the above options.

Move Email: Moves the email for the email folder selected from the dropdown.