Email Attachment Import

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Email Attachment Import

Path: Tools > Email Attachment Import.

- How does it work?
    - You can have an email for your organization that is perhaps named AP@yourCompany.org or AccountsPayable@yourCompany.org
    - And you tell your vendors to email documents to that email address.
    - Those emails could be information about PO's or invoices and even have attachments.
    - This view, the Email Attachment Import view is an email interface into that email account named above. You will notice on the left hand side folders that are normally in any email client, Inbox, Trash, Sent Mail, etc.
    - This view has several tools to help you attach these emails to a PO, or a JE, or to an Invoice.
        - After you attach one of these emails, the process will move that email from the INBOX into a folder that you have designated during the setup of the mailbox.
- SGA staff will help you set up this new feature. More on that at the bottom section of this help.
- The buttons at the top of the view.
    - Process PO's/Subject Line. This is the easiest/fastest way to attach emails to PO's.   It is located at the top right of the row of buttons.
        - Have your vendors place the phrase PO and the number like "PO 1234," or Purchase Order and the number like "Purchase Order 1234" anywhere in the subject line of their email.
        - By clicking the button called "Process PO's/Subject Line" the process will;
            - Scan the entire INBOX of this email client and look for emails that match actual PO's in the system
            - It will attach both the email and any attachments from the email to the actual PO in your system.
            - You will receive a log showing.
                - Which emails were attached to which PO.
                - And that the email has been moved to folder "folder name." This is the folder that you named during setup.
                - A message of "Unable to find Purchase Order 1234 for email PO 1234," means that the subject line appeared to have a valid PO, but the specific PO does not exist in SGA.

- Notice how the process “cleans up” the INBOX by moving the emails that found PO into a folder that you designated during setup.
- Attach to PO button
  - Left click on an email to select it, then click the button called “Attach to PO”
  - The view shows
    - The subject and body of the email that you selected.
    - Attachments from that email are shown in the right side of the screen. They are each “checked” to be included in the attachment to the PO. You may “un check” any attachments that you do not want attached to this PO.
    - Bottom Left is a list of drop downs.
      - Attach to Purchase order
        - The default is the button that you clicked. But here you can change from PO to JE for example.
    - PO Number.
      - If the email you selected found a valid PO number, then in the box below is information from that PO. If you wish to view the email click the “View” link.
      - If the email could not find a valid PO you can fix the number or click the search icon to find your PO. When you find a valid PO that information will display in the box and if you want to see all the details about that PO, you click the view link.
    - Set Received Status to;
      - This will change the received status on the PO. The value you see here is the default identified during setup.
  - Move Email to Folder:
    - If you wish to move this email to a different folder, choose it here.
  - Create and attach word document created from email subject and body
    - If you also want the email to be attached, click here. It might be that you wish to attach both the email and the email attachment, or it might be that the vendor did not send an attachment, but you still wish to attach the email from the vendor.
- Delete Existing attachments. 8 attachments already exist.
  - When you connect to a valid PO AND attachments already exist on that PO, checking this box will remove those attachments.
- Open the email.
  - You decide to open the email instead of left clicking the email.
  - There you can download an attachment (which will open the attachment.) and by looking at the attachment that helps you “know which PO to attach it to.
  - Click on the button called Attach to PO.
- Attach to Journal or Attach to Invoice buttons.
  - These work the same way as Attach to PO except that instead of a PO number, you have a Journal Number or an Invoice number.

        - There is no mass attach button like we have for PO’s.
- Move or Delete Buttons
    - Sometimes this email account (AP@yourCompany.org) will receive junk mail or other mail that is not related to PO’s, JE’s or invoices. Use the move or delete buttons to get those emails out of the inbox.
- Reports for PO’s in the detail report writer/Purchase Order folder
    - Look at this one. “Received and Ready to Pay – Detail”
    - You can right click on a detail row and there are several actions you can take. The right click menu is Edit PO, Browse PO Attachments, Invoice for PO (creates and invoice,) Invoice for PO – just this line (creates an invoice for just this line,) Browse Reference, Browse Batch, Account Transactions, Vendor Summary, Vendor Detail.
    - Some clients go into Edit PO and rename the attachments to include in the name the date/time that they received the attachments. They do this especially for Blanket PO’s that might have many attachments.
- Setup for Email Attachment Import
    - It is highly recommended that SGA staff help you with this one time set up.
    - A New Mailbox is created (you can have more than one Mailbox.)
        - Mailbox Type and Name
        - The email address to which the vendor will send the email.
        - Connection information for that email address and the incoming server and outgoing server.
- Default settings
    - PO Received Status on the PO after an email is attached.
    - The default folder to move emails to after it is attached.