## **Emailing Purchase Orders**

You have the ability to Email a Vendor their Purchase Order. The Vendor's Email Address must be in QuickBooks®. \*\*\*\*You need Microsoft Outlook on your PC or Laptop. \*\*\*\*You need Adobe Reader Version 9 or higher on all your PCs and/or Laptops.

Open **QuickBooks®**. Click on the **Vendors button** Choose the **Vendor** Choose **Edit Vendor** in the top right.

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Vendors Transacti	ions	Vendor Information	Attach     Edit Vendor	Reports for this Vendor				
View Active Vendors		Vendor Name SR2 Software	Contact	QuickReport				
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North Coast Seafood	23.380.46	10016 E. Winchcomb Dr.	Email Send to:SR2 Software					
Perdue, Inc.	3,228.25	Scottsdale, AZ 85260	Account Number					
Quality Meats & Seafoods	78,001.36		Terms					
Restaurant Depot	5,390.07	Map   Directions						
Shiela-Marie Imports	2,518.40							
Smith Fine Meats	2,898.36	Notes	A lit Natas	Order Chadra				
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Swift Premium	797.26	Show All Transa 💌 Filter By All	▼ Date This Fiscal Year ▼ 01/01/2012 -	12/31/2012				
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upited fresh	0.00	Item Receipt 5012	08/28/2012 Accounts Payable	-809.85				
Valley Reef	0.00	Item Receipt 5013	08/28/2012 Accounts Payable	-2,755.60				
William & Co.	73.40 +	Item Receipt 5014	08/28/2012 Accounts Payable	-1,250.00				

On the Address Info Tab, enter in the E-mail address in the E-mail field. Click on the OK Button to save it.

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Vendor Name SR2 Software Current Balance : 34,924.02	How do I adjust the current balance?
Additional Info	Account Prefill Notes
Company Name SR2 Software	Contact Steve Help
First Name M.I.	FAX 401-943-7938 Vendor is
Last Name	Alt. Phone inactive
	E-mail sales@sr2soft.com
	Print on Check as SR2 Software
Addresses Billed From Address	Shipped From Address
SR2 Software 10016 E. Winchcomb Dr. Scottsdale, AZ 85260	SR2 Software 10016 E. Winchcomb Dr. Scottsdale, AZ 85260
Edit	Edit

**NOTE:** If you enter in an Email address for a Vendor OR Update an Email address for a Vendor, you need to do a Refresh from SR2Food® if you want to Email a Purchase Order right away.

Go to Administrative, choose Server Status. Click on the Refresh Data from QuickBooks® Button.

SR2 Server - Quickbooks			×
Server Status			
Transactions processed	47		
RUNNING	08/31/12	14.03	
	Refresh Data		
	from Quickbooks	Exit	

## Go into SR2Food® into Purchase Orders.

Enter in a New Purchase Order or choose an existing Purchase Order. Click the **Email PO Button** at the top right.

· Purchas	e Order Entry								x
<u>V</u> iew									
Order #	5017	Req. Date 08/	/28/12 Total	9.90	<u>E</u> mail PO	<u>P</u> rint PO	<u>C</u> ancel	<u>A</u> ccept	
Vendor	SR2 Software	Г., ст. Г. с.	Redem Value PO Lines	0.00	Prin <u>T</u> Receiver	<u>R</u> eceive	Delete	<u>U</u> pdate	

You will receive a pop up telling you that the email was sent. You should go into you inbox and be sure that the email address was valid and that you did not receive and undeliverable message.



The Vendor will receive an email **Subject Purchase Order from** *Your Company Name* 

And a note in the body of the email *Please see the attached PO Thank you*, *Your Company Name Your Telephone Number* 

## Purchase Order from SR2SOFTWARE, INC.

Melissa Sent: Fri 8/3/2012 4:02 PM To: Melissa

Message T2 PO5001\_120803160372.81.pdf (12 KB)

Please see the attached PO Thank you, SR2SOFTWARE, INC. 1-800-214-5045

## NOTE:

Please contact S2Food Support if you would like to Email Purchase Orders. We need to create a Documents Folder. You can create the folder on your own if you would like.

To Email Purchase Orders, on every PC or laptop that will be Emailing Purchase Orders, create a Folder called Documents in the SR2 folder on the C Drive. Go to Computer, C Drive, SR2, right click, choose New, choose Folder, name the folder Documents.

This Documents folder will contain all the Invoices and Purchase Orders that were emailed as a backup to your Sent email from the specific PC or laptop. The Documents folder will fill up quickly if you send a lot of emails and take up space on the PC or Laptop. You may want to use a flash drive to store the documents then purge them from the Documents folder.