

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

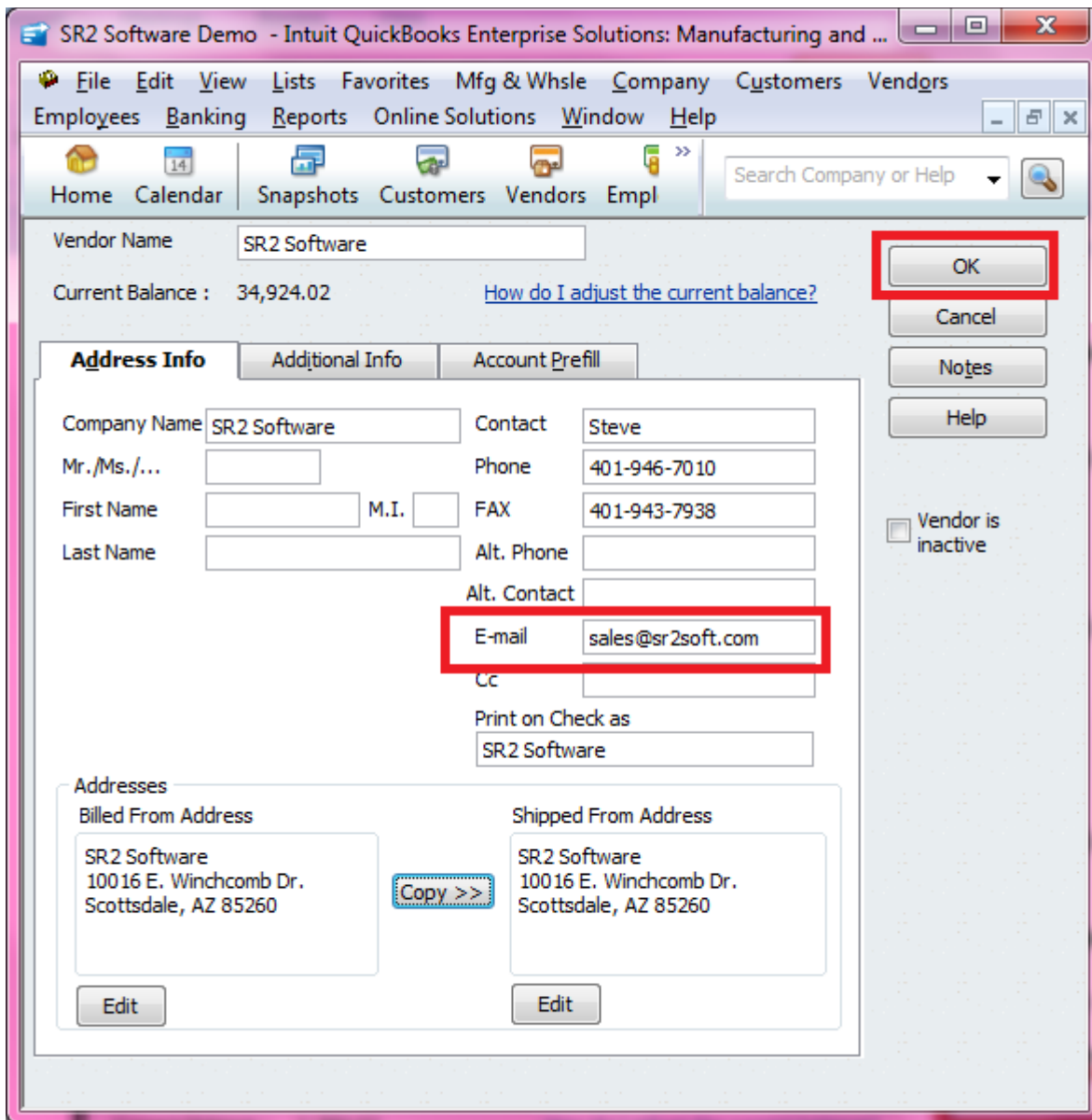
Choose the **Vendor**

Choose **Edit Vendor** in the top right.

The screenshot shows the QuickBooks Enterprise Solutions interface. The 'Vendors' menu item is highlighted in the top navigation bar. In the 'Vendors' list on the left, 'SR2 Software' is selected and highlighted with a red box. The 'Vendor Information' tab for 'SR2 Software' is open, showing details such as Vendor Name, Company Name, Address, and Contact information. The 'Edit Vendor...' button is highlighted with a red box. Below the vendor information, there is a table of transactions for this vendor.

Type	Num	Date	Account	Amount
Item Receipt	5012	08/28/2012	Accounts Payable	-809.85
Item Receipt	5013	08/28/2012	Accounts Payable	-2,755.60
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.

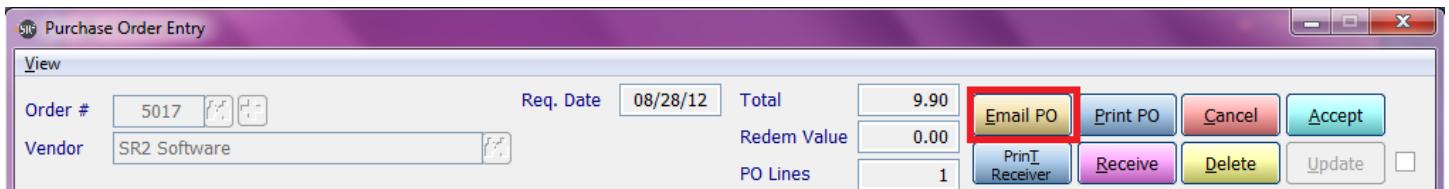


NOTE: If you enter in an Email address for a Vendor OR Update an Email address for a Vendor, you need to do a Refresh from SR2Food® if you want to Email a Purchase Order right away.

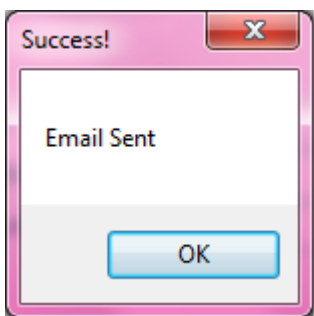
Go to Administrative, choose Server Status. Click on the **Refresh Data from QuickBooks®** Button.



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.



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 |  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.