

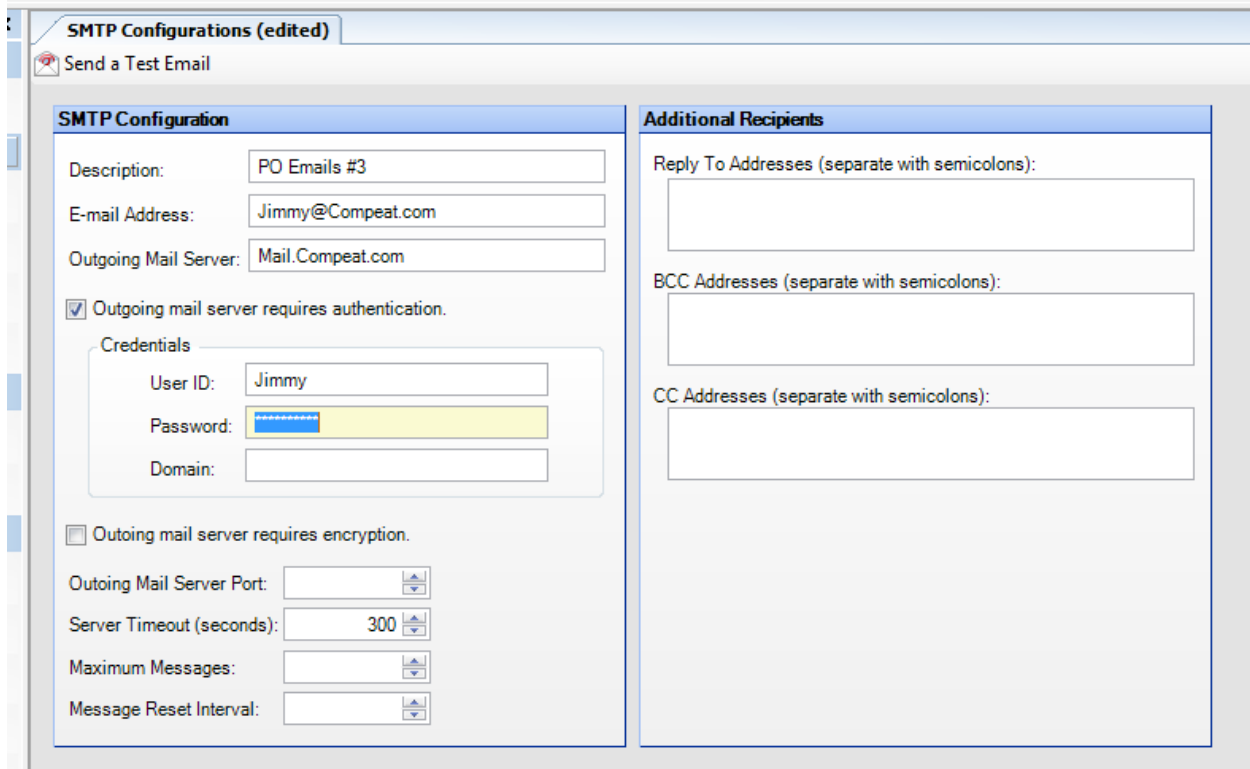
Emailing Purchase Orders

Many vendors will accept a purchase order via email. This can be helpful for quickly transmitting purchase orders to vendors directly from Compeat Advantage. When this functionality is configured, your software will attach a PDF file to an email and your purchase orders can be transmitted quickly to your vendors.

Configuring Email Usage

Before you can use this feature you must enter the email server information you will be using to send PO's from. Compeat does not supply an email address to submit PO's from but almost any email address can be used to configure this.

Setup>SMTP Configurations



You may setup a single SMTP server for all stores to use or create multiple configurations so that each store runs their PO's through their own email address.

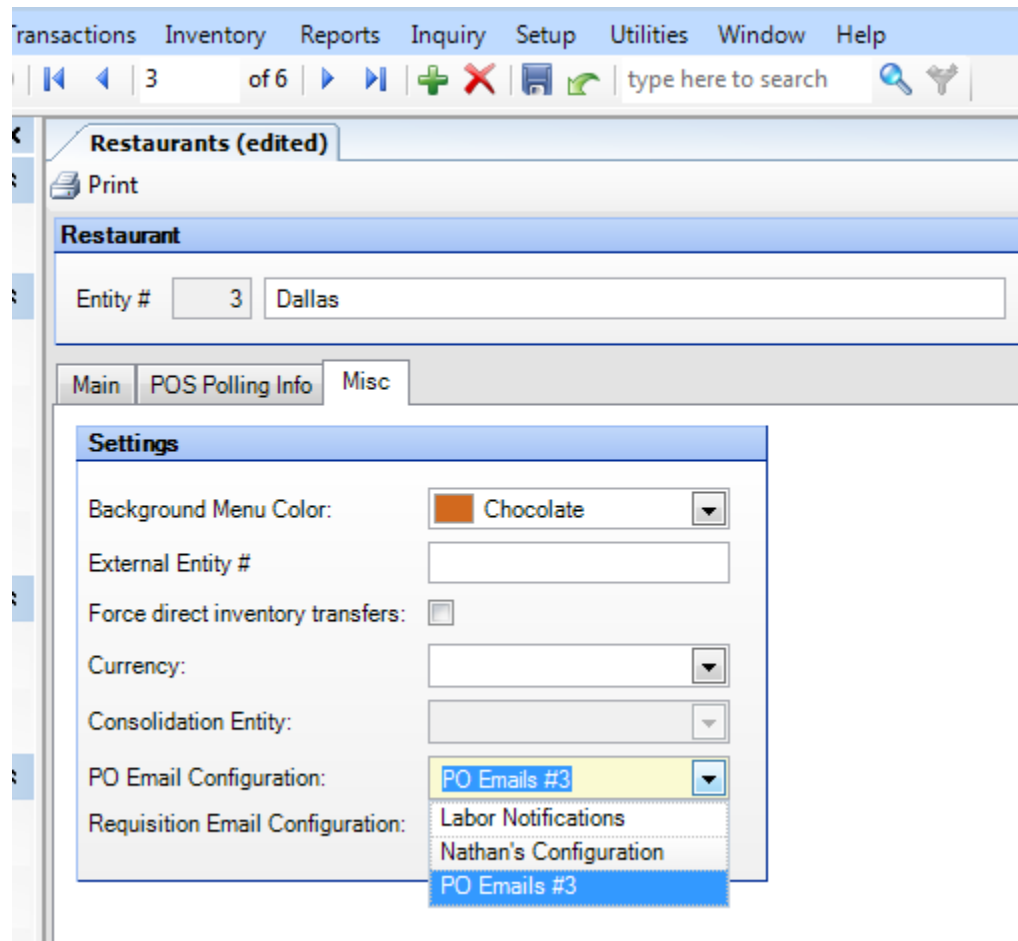
The benefit to having this be store specific is that you can choose to CC/BCC specific emails addresses when submitting through the assigned email server. That allows each store to copy themselves or their GM when submitting PO's. This does not mean you have to use unique email accounts to set this up for multiple stores. You can setup multiple configurations that all use the same email server details but contain unique "reply to addresses". This reply to address is the email that would be used if vendor reply to PO emails sent from each store.

Whoever maintains your company's email system should be able to fill out the required configuration information. You may also send yourself a test email after configuration to verify that the setup is accurate.

Assigning Email Servers to Stores

Once you have built all of the SMTP configurations that you will be using the must be assigned to each restaurant. Navigate to:

Setup>Entities>Restaurants



On the Misc. Tab of the restaurant you can select the email server that this restaurant will be using.

Remember that you can assign the same server configuration to multiple stores if you would like.

Vendor Configuration

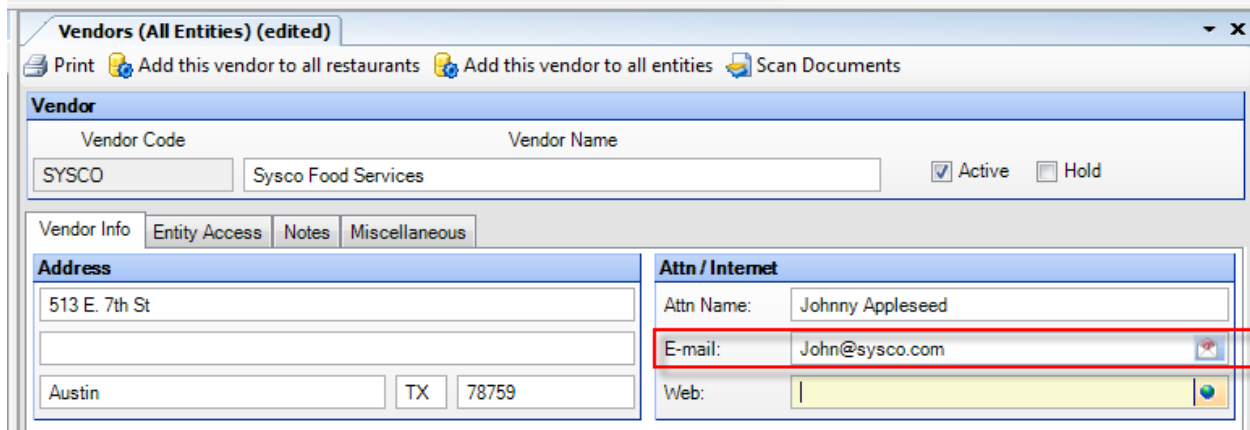
Once you have setup and assigned the mail server configuration you are able to email PO's to your vendors. Simply selecting the "email" option on the top of a PO will bring up a dialogue to submit the PO to your vendor. You will be able to enter in the email address you wish to send the specific PO in question to.

However, many customers would like the system to automatically pull up the vendor's email address for them when they select the "email" button on a PO.

To have this email address auto fill you must assign this to the vendor record.

Setup>Accounts Payable>Vendors (All entities)

On the main tab of the vendor record you can fill in an email address that PO's will be sent for all stores.



Vendors (All Entities) (edited)

Print Add this vendor to all restaurants Add this vendor to all entities Scan Documents

Vendor

Vendor Code: SYSCO Vendor Name: Sysco Food Services Active Hold

Vendor Info Entity Access Notes Miscellaneous

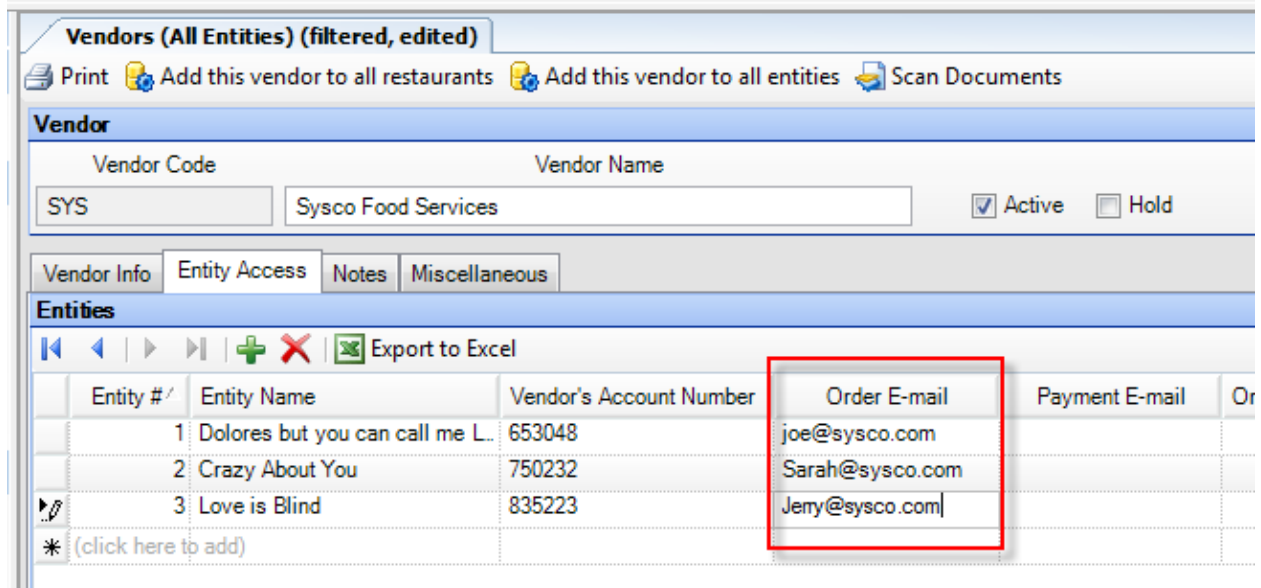
Address

513 E. 7th St
 Austin TX 78759

Attn / Internet

Attn Name: Johnny Appleseed
 E-mail: John@sysco.com
 Web:

If each store wishes to submit PO's to a different email address you can override the global email address by going to the 'Entity Access' tab and assigning email addresses to each entity.



Vendors (All Entities) (filtered, edited)

Print Add this vendor to all restaurants Add this vendor to all entities Scan Documents

Vendor

Vendor Code: SYS Vendor Name: Sysco Food Services Active Hold

Vendor Info Entity Access Notes Miscellaneous

Entities

Export to Excel

Entity #	Entity Name	Vendor's Account Number	Order E-mail	Payment E-mail	Or
1	Dolores but you can call me L.	653048	joe@sysco.com		
2	Crazy About You	750232	Sarah@sysco.com		
3	Love is Blind	835223	Jery@sysco.com		
* (click here to add)					