Changes in Purchase Order Dispatch Methods

Overview
Note: Label "Vendor" in PS v9.1 is replaced with "Supplier" in PS v9.2. Hence all v9.1 screen shots and Navigations which does use/denote Vendor earlier would now be known/denotes as Supplier.

In order to improve business efficiency on daily processing in ES Financials, F&BS has been working on email delivery of business documents in the Purchasing module.

The fax server used for managing Purchase Order faxing is to be decommissioned in 2015; therefore, it is an appropriate time for the University to look at enhancements such as emailing in ES Financials.

This Tips and Techniques document will outline the changes as well as enhancements around the emailing of purchase orders.

Changes to Dispatch Methods

Dispatch method of EMAIL will be available for selection, with the existing fax option removed. The three dispatch methods will be EMAIL, PHONE, and PRINT.

Proposed Business Process

Below is the complete workflow of creating a PO that is to be dispatched via EMAIL.
**Step 1 - Update Supplier Email Addresses**

PO Dispatch will use Supplier Address’s EMAILID as the recipient email address to send the PO. It is therefore important that appropriate email address is entered in the Supplier setup.

To review the email, navigate to Supplier entry page (Suppliers – Supplier Information – Add/Update – Supplier), click on the Address tab and review the EMAIL ID field, as per below screenshot.

Please review the Suppliers you frequently use and contact the Supplier Maintenance team to update the Email ID field under the Supplier Address tab in Supplier setup. This ensures that the Supplier email is defaulted when you create future PO’s.

Supplier Maintenance contact email: **Supplier.maintenance@anu.edu.au**

**NOTE** Contact Supplier Maintenance to add/update email for the Suppliers you frequently use.
Step 2 – Create PO

Changes on the PO entry page related to emailing PO:

- Review EMAIL address used to email the PO on the Supplier Details page, or on the PO Header Details page
- Add a One-Time Email on the PO Header Details page
- Add an EMAIL CC recipient on the PO Header Details page

Review the EMAIL address used to email the PO

If sending a PO by EMAIL, the email address will be populated in two locations within the PO to give you an idea of where the PO will be dispatched to:

1. Supplier Details
2. PO Header Details
Supplier Details

PO Supplier Information

Express Purchase Order
Supplier Details – Australian Institute of Administrative

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO ID:</td>
<td>NEXT</td>
</tr>
<tr>
<td>Supplier:</td>
<td>AUSTRALIAN-062</td>
</tr>
</tbody>
</table>

Supplier Information

Terms: 21D  Due in 21 Days
Basic Date Type: Inv Date

Supplier Details Message

Country: AUS Australia
Address 1: PO Box 83
Address 2:
City: DEAKIN WEST
Post: 2600

Email ID

PO Header Details

Express Purchase Order
PO Header Details

Business Unit: FB5
PO ID: NEXT
Vendor: AUSTRALIAN-050

PO Details

Vendor: AUSTRALIAN-050
*PO Type: GEN
Billing Location: FB5
Origin: ONL

Process Control Option

Acknowledgements required for: Notrequired
*Method: Email

Vendor/Contact Fax/Email

Email ID: U2514483@anu.edu.au

Add One-Time Email

To enter one-time email, click on PO Header Details on the PO entry page:
The One-time email will replace the default Supplier email address (if it exists).

**Add Email CC recipient**

CC Email Address(es) can be entered on the PO Header Details page (same place as you enter the one-time email as above). This is useful if you need to copy the PO email to someone else other than the Supplier.

You can include more than 1 email in the CC email field, by using a semi-colon as a separator, i.e., Purchasing@dell.com.au; CEO@dell.com.au
**Step 3 - Upload Attachment**

In Add/Update Express POs page, click on the Add Comments link to access PO Header Comments page for uploading attachments.

The PO Dispatch process for EMAIL will pick up 1 document uploaded to PO Header and attach it with the PO in the email.
The tick box for EMAIL under Associated Document will need to be activated, otherwise the document is for internal reference only.

Note:
- Attachments are not applicable to PRINT and PHONE dispatch.
- Only PDF documents of up to 10mb in size are allowed.
  - (10mb PDF ≈ 300 pages of image and text converted from Word)
- Only documents uploaded to the PO header Comment will be emailed out.

**Step 4 – Dispatch PO**

The automated batch process to picks up any PO ready for dispatch (Approved) and will continue to run on a 5hr interval at 10AM, 3PM and 8PM every weekday.

Alternatively, if you need to send out the PO as a matter of urgency, you can still do an adhoc dispatch on the PO page.

On the dispatch submission page, it will display the Supplier Email the PO will be dispatched to.

If this is not where you like to send the PO to, there is still an option to allow you to overwrite Supplier email with the one-time email.
NOTE

If you find that you are entering a one-time email too often, maybe it’s time to have the correct email defaulted as the Supplier’s Address Email via Vendor Maintenance. To do this contact Vendor.Maintenance@anu.edu.au

Step 5 – Email Sent

The PO email generated from ES Financials will use your Business Unit’s generic email as the senders email. This enables the Suppliers to reply straight back to your Business Unit’s generic email address (e.g. JCSMR’s default purchasing email is jcsmr.purchasing@anu.edu.au).

Below is an example of the email that the PO Dispatch process will send to Suppliers.
Step 6 – Review PO Dispatch History


Dispatch history will display all system batched, and adhoc dispatches via EMAIL, PRINT, and pre-existing FAX. For EMAIL dispatches, it will display the recipient email, CC email, and the PDF Image of the PO.

Step 7 – Managing bounced-back Emails

The PO email sent to Suppliers would generally be delivered successfully. Things, however, don’t always go as planned. Emails could be bounced back to you (BU’s generic email) for a couple of reasons:

- Email format entered incorrectly for
  - Supplier Address Email
  - One-Time Email
  - CC Email
- Supplier’s network or email facilities (mail server) are down.

Below is the business process to deal with bounced-back PO emails.

It takes the mail server at least 24 hours to generate the bounced-back email back to you.

The bounced back email will look like this:
Since the bounced-back email will be sent to BU’s generic email, it is the purchasing staffs’ responsibility to contact the Supplier to confirm the correct email and ask the Supplier Maintenance team to update the Supplier setup for future orders.

If you need to dispatch the PO right away, you could send the PO using a one-time email to dispatch the PO to the Supplier to the correct email immediately. Any re-dispatches will still send attachments, and update PO dispatch history accordingly.

**Recap**

Enhancements with emailing PO’s

- Can now send an attachment with a PO
- Now possible to CC someone in the PO email
- Review a copy of the PO PDF file in dispatched history

Your responsibility

- Monitor bounced-back emails
- Keep on top of Supplier’s emails so there will be less PRINT dispatches in the future.

Things that you can do to help

- Contact Supplier Maintenance ([Vendor.Maintenance@anu.edu.au](mailto:Vendor.Maintenance@anu.edu.au)) to add or update Supplier email addresses.
- Contact F&BS BSO ([fbs-bso@anu.edu.au](mailto:fbs-bso@anu.edu.au)) to provide us with your Business Unit’s generic email which will be used as the sending email for PO’s.