

Option to Email Purchase Orders from PO Print Screen

APTAFUND-4013

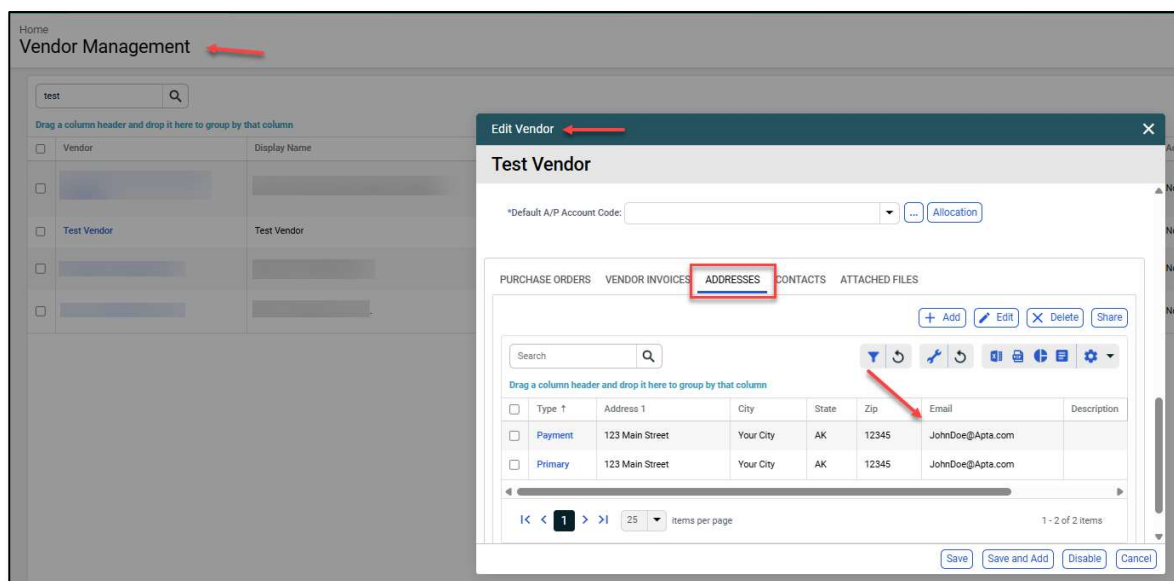
Introduction

To enhance workflow efficiency and lighten the workload, a new feature has been added to the Print PO pop-up, allowing users to email the Purchase Order directly from the same window.

The Set-Up

Setting up this new functionality requires minimal effort. First, users should identify the vendors to whom they intend to email Purchase Orders. Next, they need to navigate to the vendor's Addresses tab and confirm that the correct email address is listed under the Payment Address. This is the same email used for ACH payment notifications, provided that option is selected during the creation of the AP ACH file

We have added the ability to mass update this field for an efficient workflow when multiple employees have the same rate.



Vendor Management – Edit Vendor Add or Edit email address

Contact Support:

Apta5support@HarrisComputer.com

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Print Purchase Order Pop-up

Please refer to the Print Purchase Order pop-up and note the checkbox labeled 'Email this PO.' This option must be manually selected each time you wish to email a PO, as it does not remain checked by default

Print Purchase Order Pop-Up

Please note that when selecting the 'Send Email to Vendor' option, the copy type you choose will determine what is sent to the vendor. For example, if you select 'All Copies' and have four copy types configured, the vendor will receive all four. To avoid this, the best practice is to select only the 'Original Copy' or a specific copy when printing and emailing. If additional copies are needed for internal use, they can still be printed separately after the email is sent.



Copy Type Selection Dropdown

One Time Option

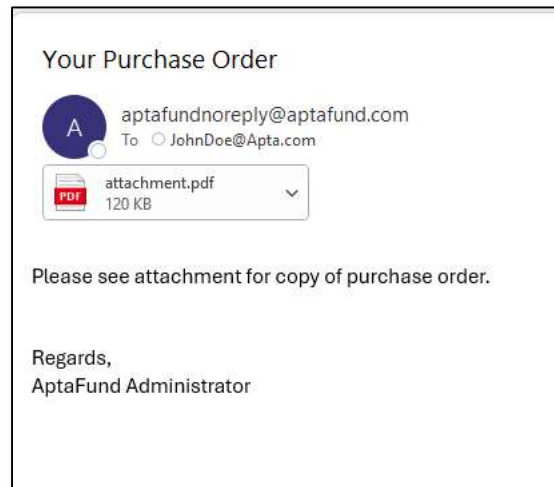
Please be aware that a Purchase Order can only be emailed once. Any subsequent attempts to resend the email will be ignored by the system

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What will your vendors receive?

Vendors will receive an email indicating that a PDF of the Purchase Order is attached. Please note that the content of this message is system-generated and cannot be customized at this time.



Vendor Email Body

Qty	Unit	Part #	Description	Alloc. Amt.	Unit Price	Tax Rate	Total Price
1,0000	each		Flat of Pencils	\$500.00	\$500.00	0.00%	\$500.00
							Subtotal: \$500.00
							Tax: \$0.00
							Shipping: \$0.00
							TOTAL: \$500.00

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How will I know if the email was sent?

In AptaFund, click on your 'My Job Queue' hyperlink to view a summary of the email action. This summary will indicate whether the email was successfully sent or, if not, provide details about the error encountered.

Home -> User
My Job Queue

☐ Show All Users' Jobs

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Description	Job Status	Job Type	Start Time	Stop Time	Job Result	Error Message
<input type="checkbox"/>	PO Email to Vendors	Finished	Email	06/23/2025 02:47:28 PM	06/23/2025 02:47:32 PM	Email job processed successfully.	