Email to Supplier document

Email to Huge ERP setup

When the email is sent to the default email address. It will create a Purchase Order or GRV based on the setup.

The application will try to identify the supplier, but if it cannot, it will use the default supplier

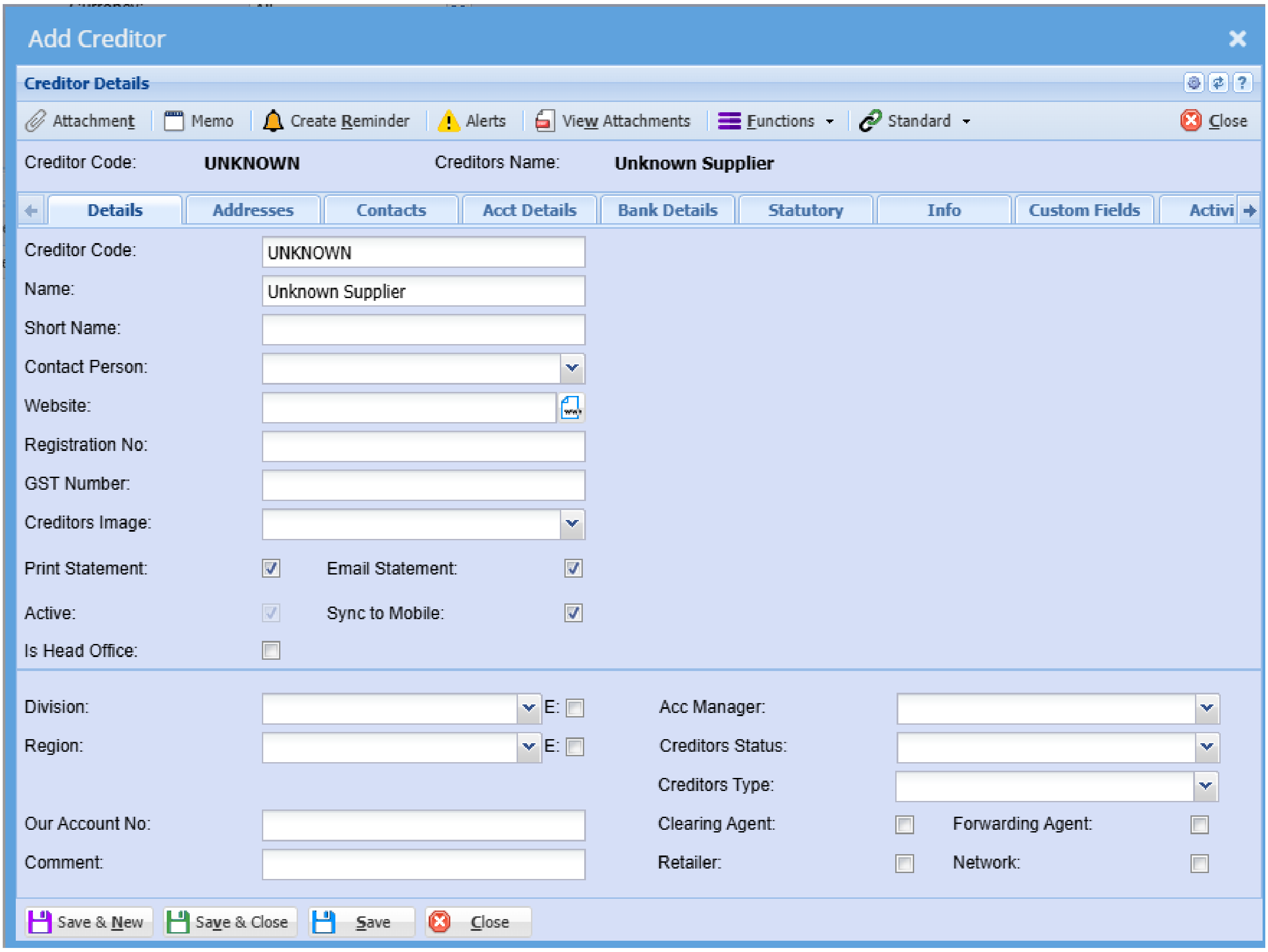
Same goes for the line items, if the app cannot find the supplier item code, it will use the default Custom item.

The Payables Hub email utility will handle the following:

1. Multiple attachments, will create multiple documents
2. Only processes PDF documents
3. Ignores statements

Unknown Supplier

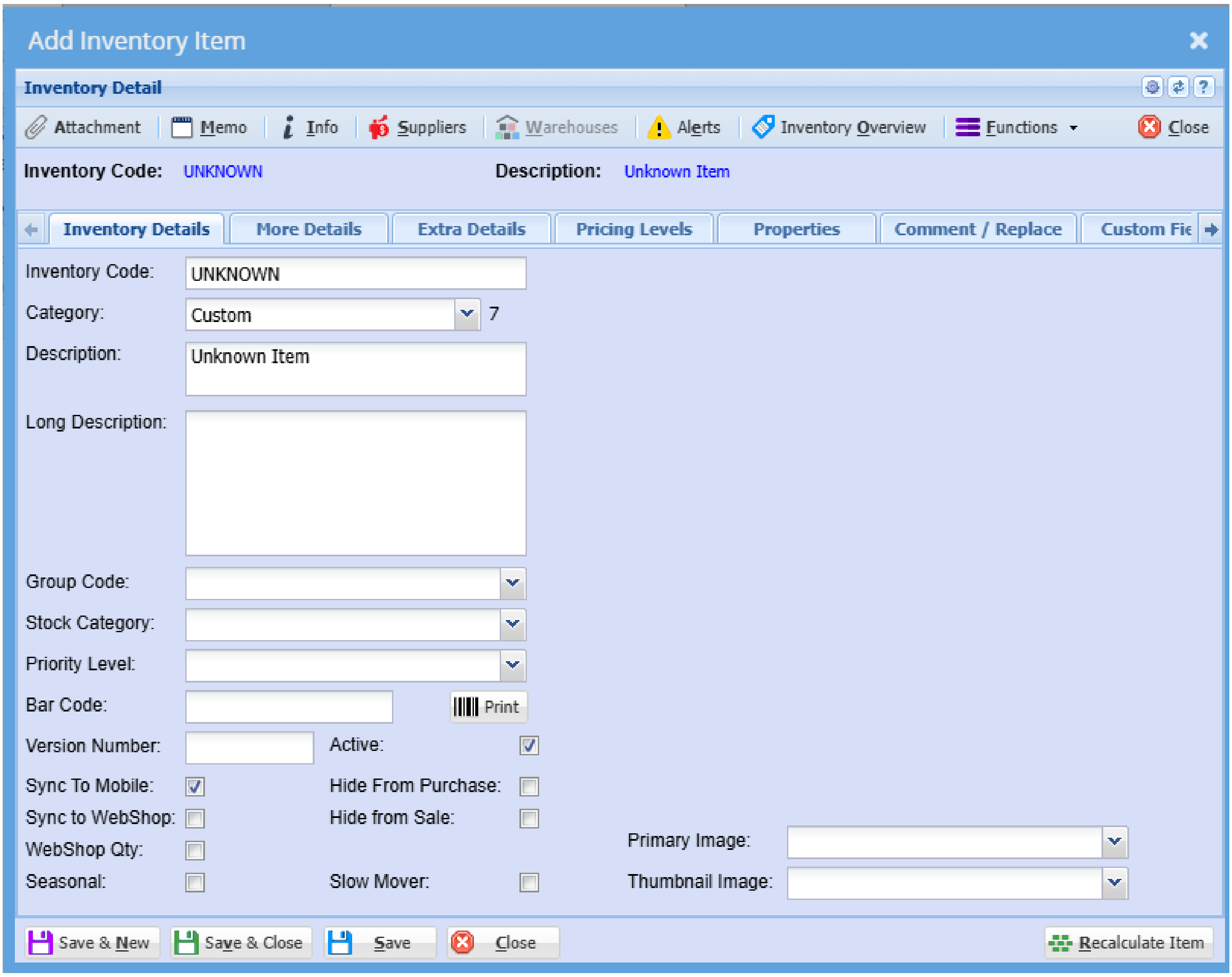
Create an unknown Supplier



Unknown Item setup

Setup a custom type item called Unknown.

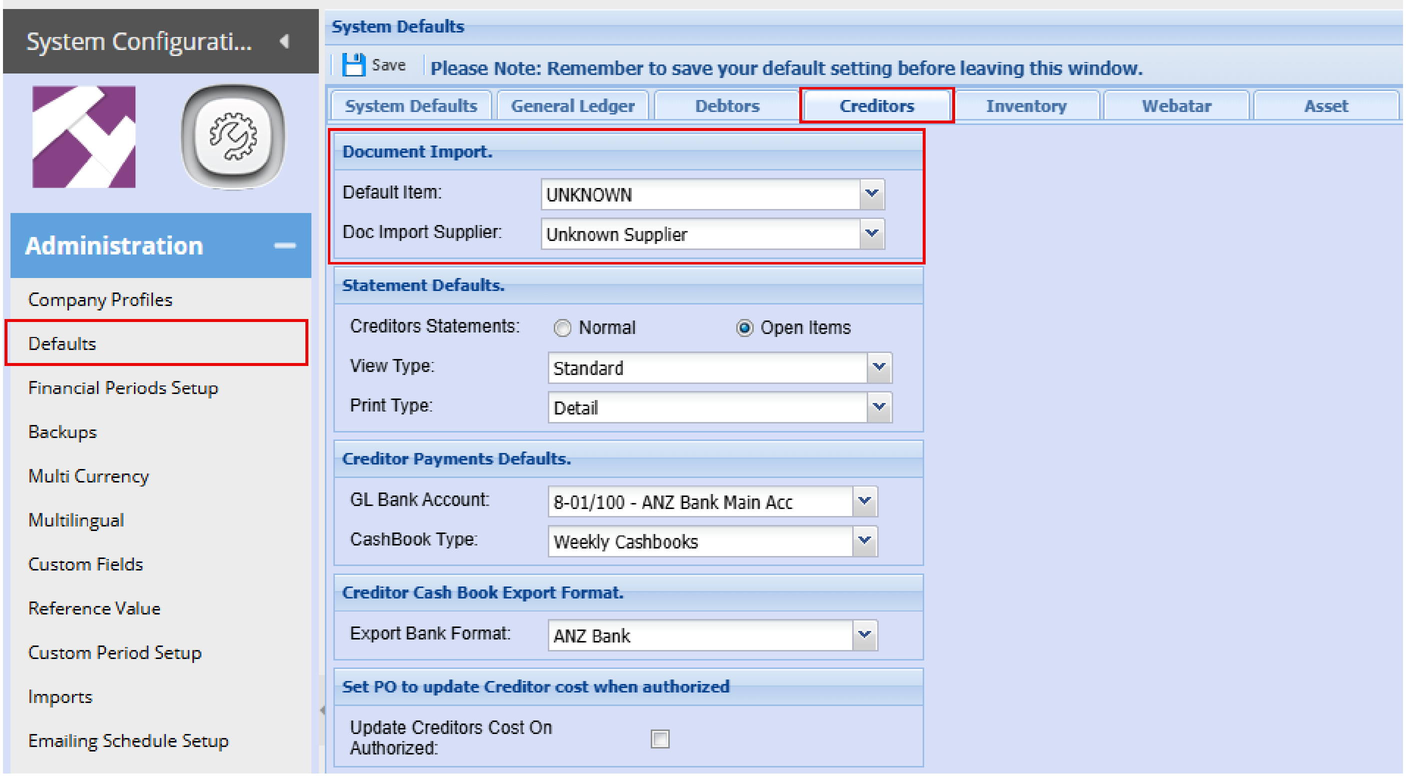
Make the sell price zero and set to amount



Setting default Supplier and Custom item

a. Setup a default custom type item

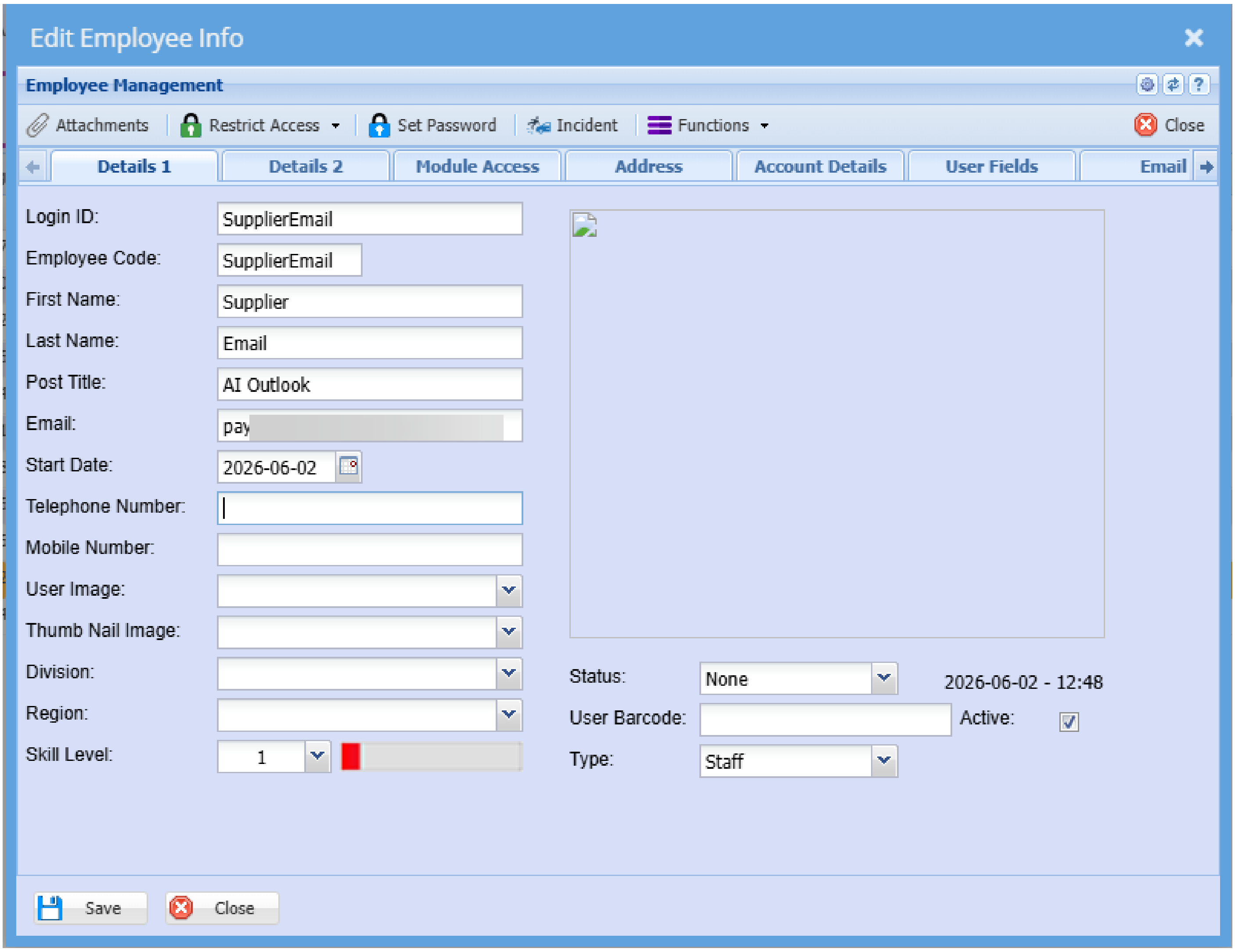
b. Setup a default supplier



User Setup in Huge ERP

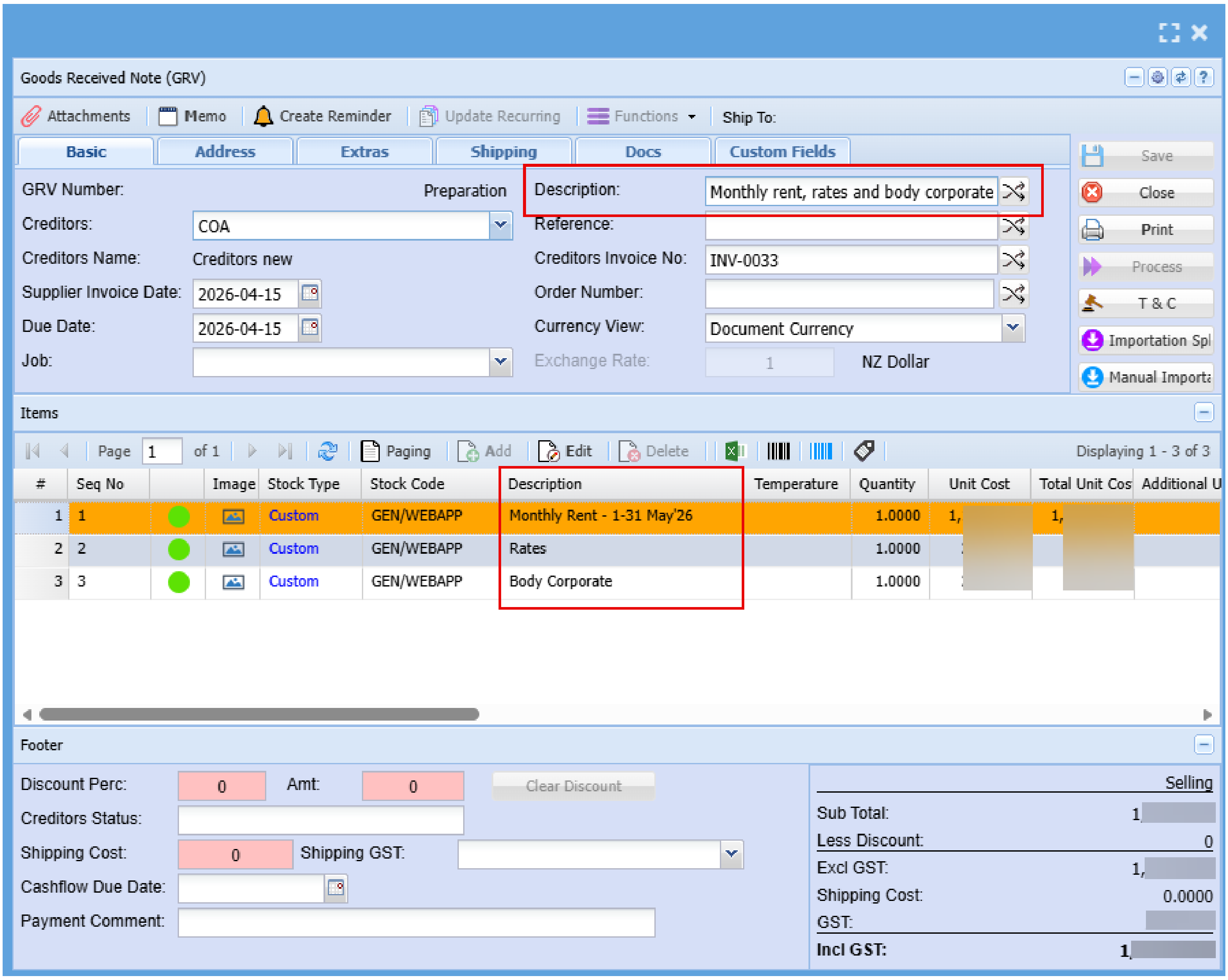
Setup a User for reading of emails - SupplierEmail

This creates a log against the user that we know has had an automatic document created from the Payable Email Hub



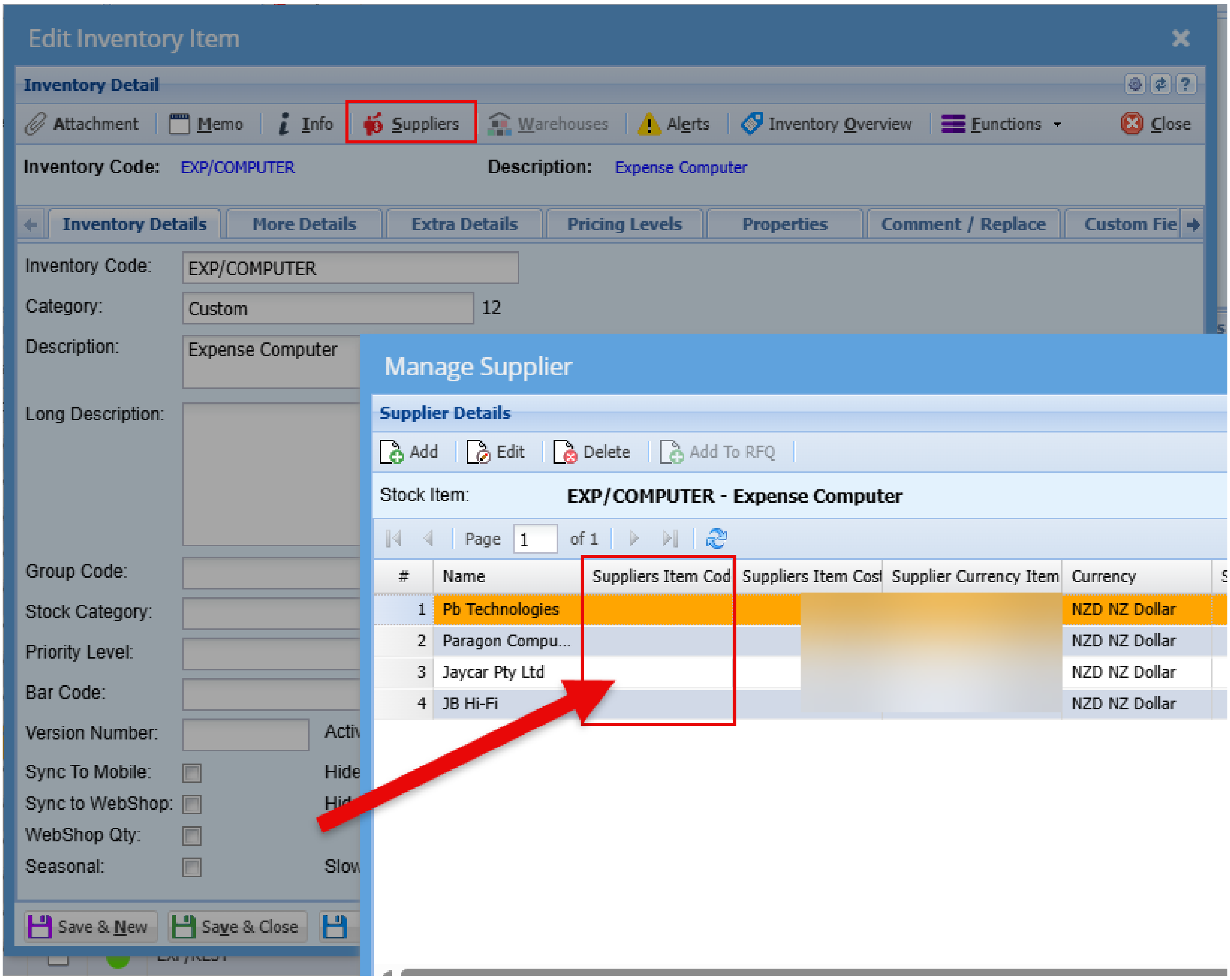
Creation of the supplier invoice as GRV

1. The AI will summarize the invoice and put in as the Description
2. The AI will create each line with the description, quantity and value



Supplier item code

For successful item allocation, ensure that one updates the item code against the supplier related to the stock item you want AI to assign.


Edit Inventory Item
Inventory Detail
Attachment
Memo
Info
Suppliers
Warehouses
Alerts
Inventory Overview
Functions
Close
Inventory Code: EXP/COMPUTER
Description: Expense Computer
Inventory Details
More Details
Extra Details
Pricing Levels
Properties
Comment / Replace
Custom Fie
Inventory Code: EXP/COMPUTER
Category: Custom 12
Description: Expense Computer
Long Description:
Group Code:
Stock Category:
Priority Level:
Bar Code:
Version Number:
Sync To Mobile:
Sync to WebShop:
WebShop Qty:
Seasonal:
Save & New
Save & Close
Manage Supplier
Supplier Details
Add
Edit
Delete
Add To RFQ
Stock Item: EXP/COMPUTER - Expense Computer
Page 1 of 1
Name Suppliers Item Cod Suppliers Item Cost Supplier Currency Item Currency
1 Pb Technologies NZD NZ Dollar
2 Paragon Compu... NZD NZ Dollar
3 Jaycar Pty Ltd NZD NZ Dollar
4 JB Hi-Fi NZD NZ Dollar

Change Item code on PO and GRV

This special function allows one to change an item code only without the selection changing all the details on the item to the new item code.

Mainly used for the email to PO and GRV function where the line item has been set to the default item.

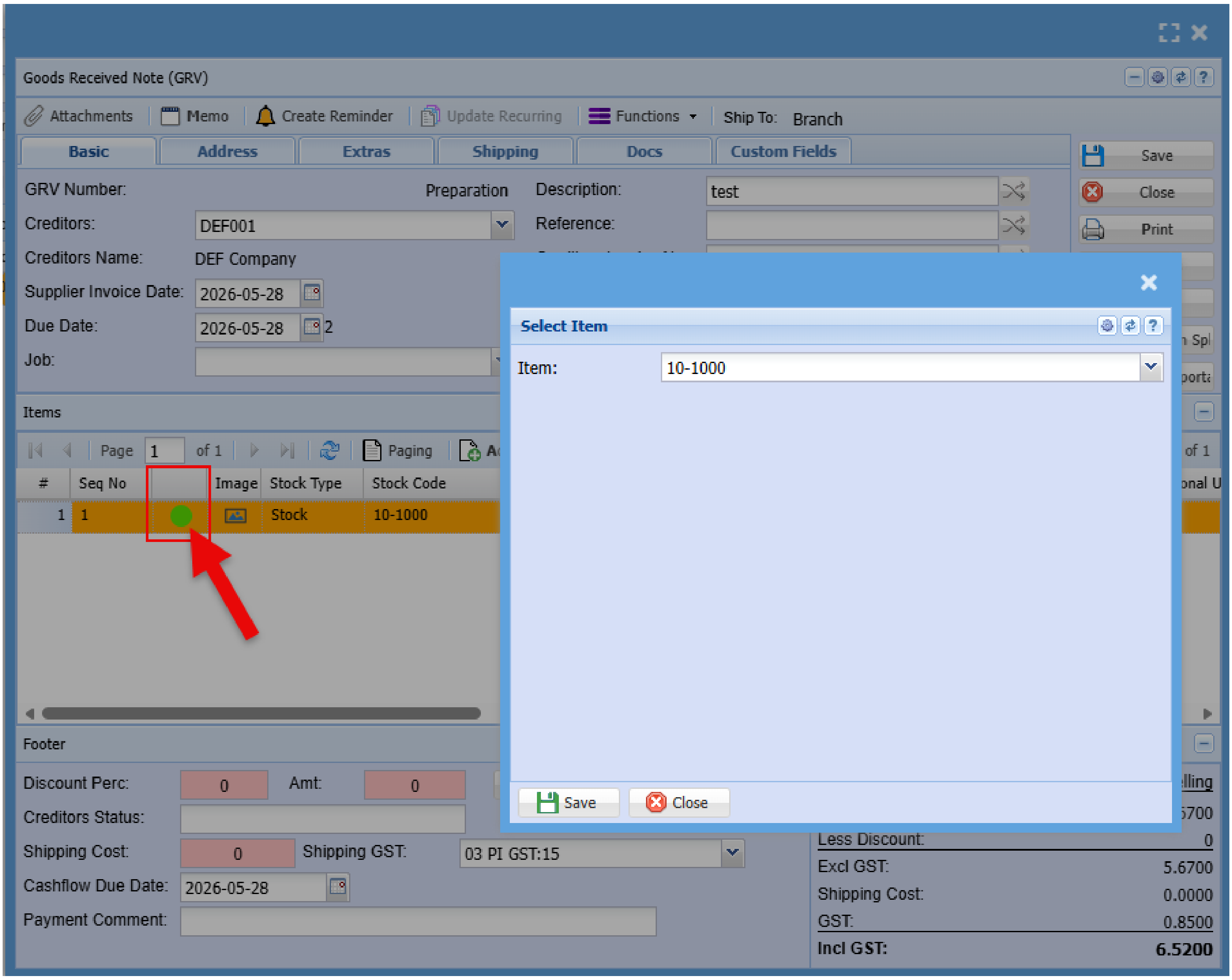
This option is only available on the Purchase Order and GRV function.

The description, quantity and price are correct, but the item code is incorrect.

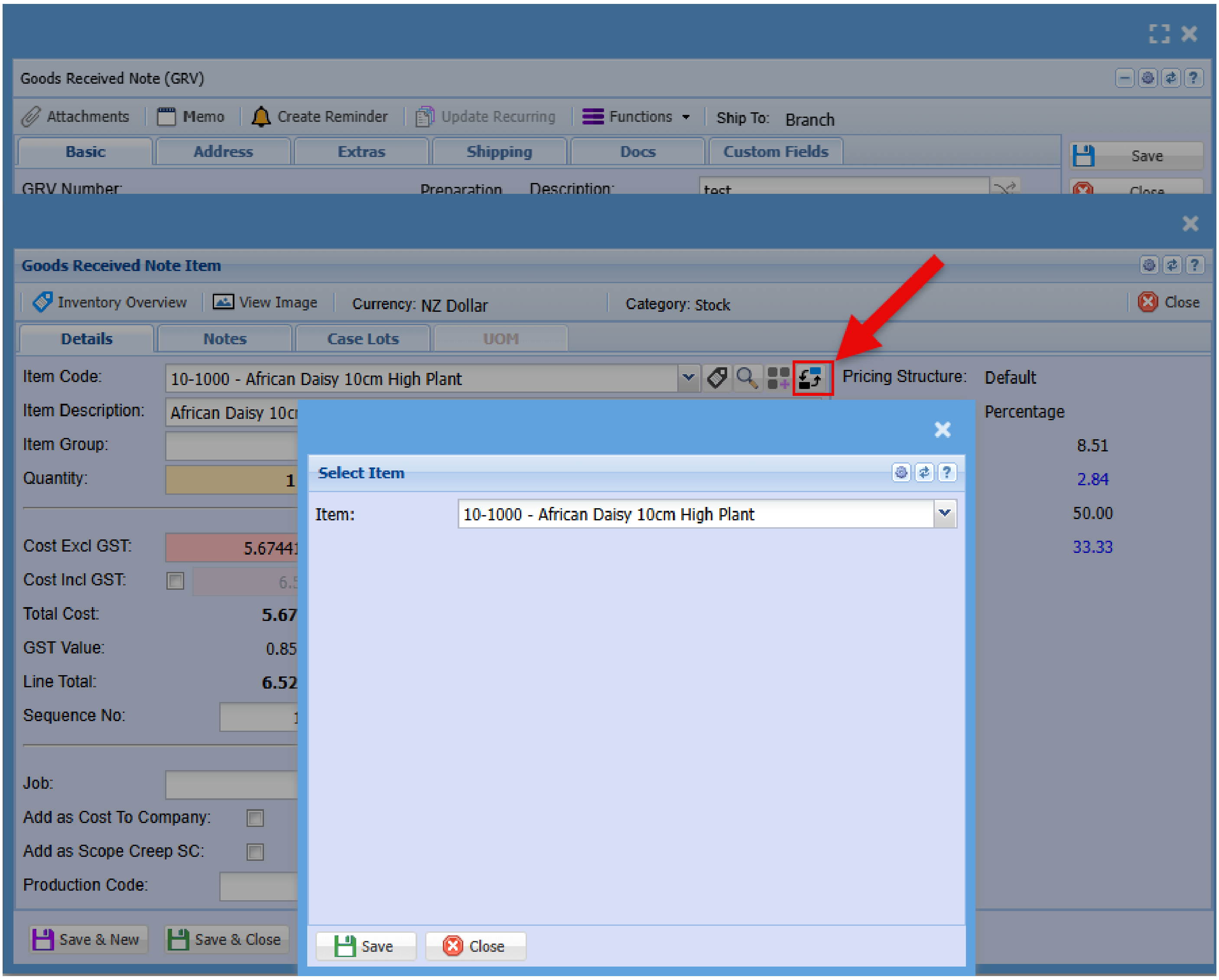
To only change the item code there are two ways to change:

1. Click on the icon on the grid
2. Click on the replace item code button

Click on the icon on the grid



Item edited with replace button



Rules:

- Cannot have a blank item code
- If document is completed or processed, one cannot change

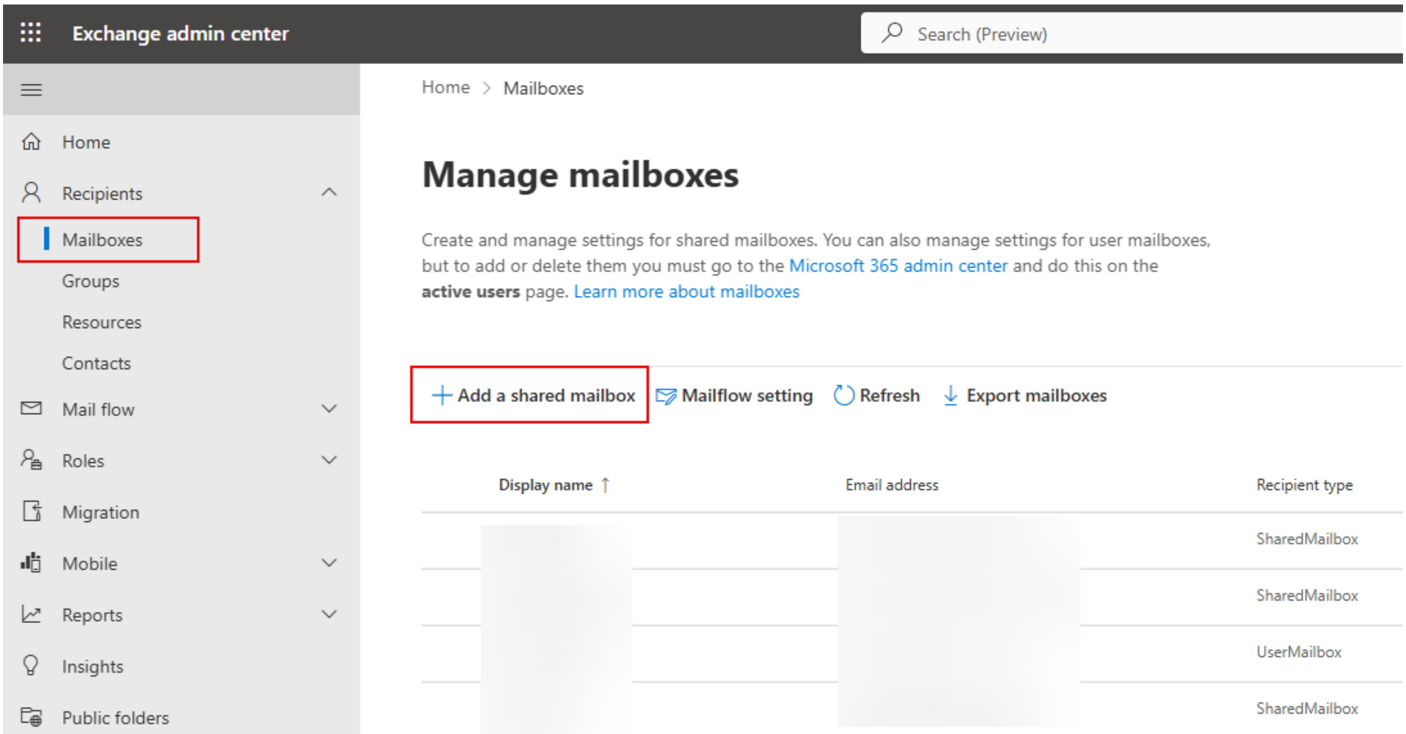
Shared Email Box

Shared email box is setup on Outlook and linked to customeremails@erpsolutions.co.nz

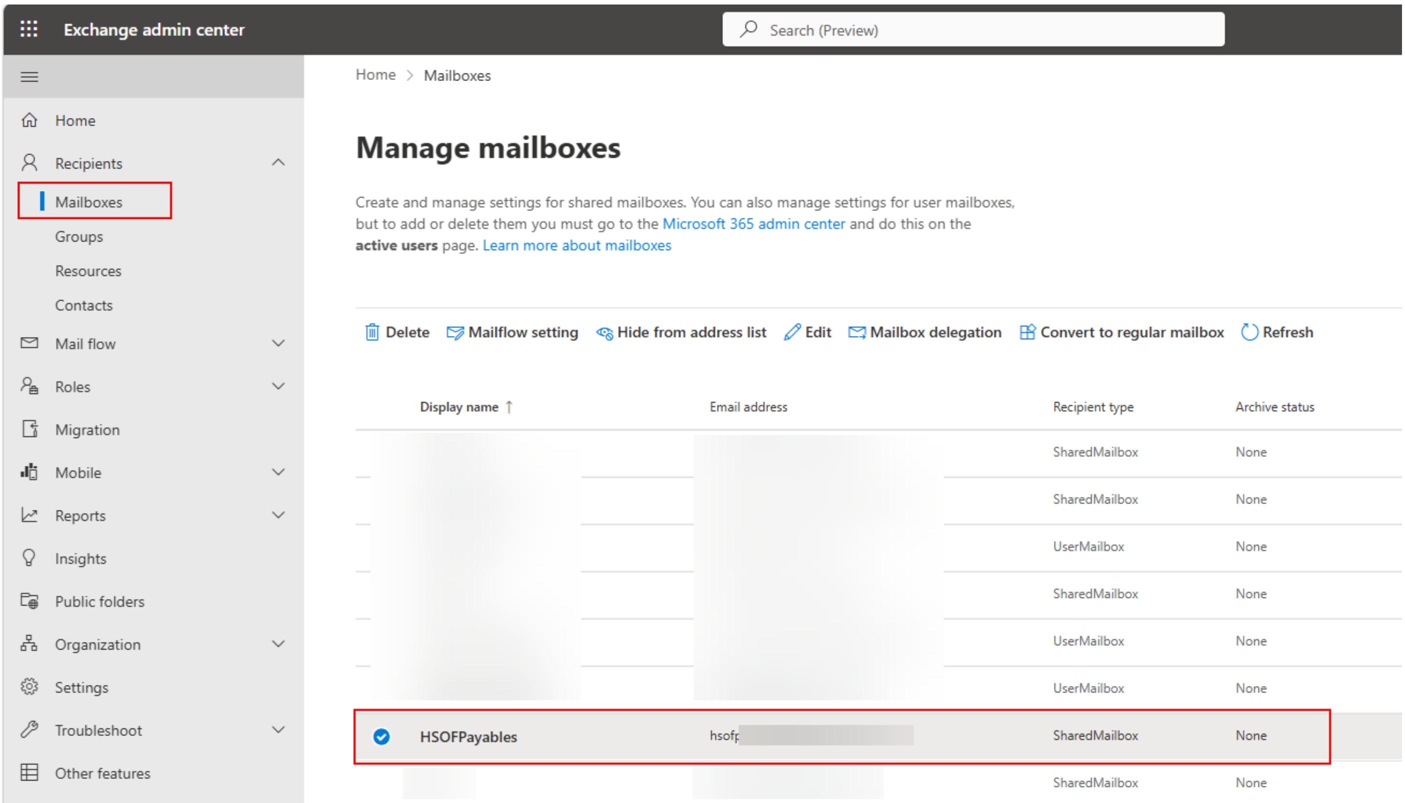
Outlook shared mailbox

Customer email addresses are setup as shared email boxes.

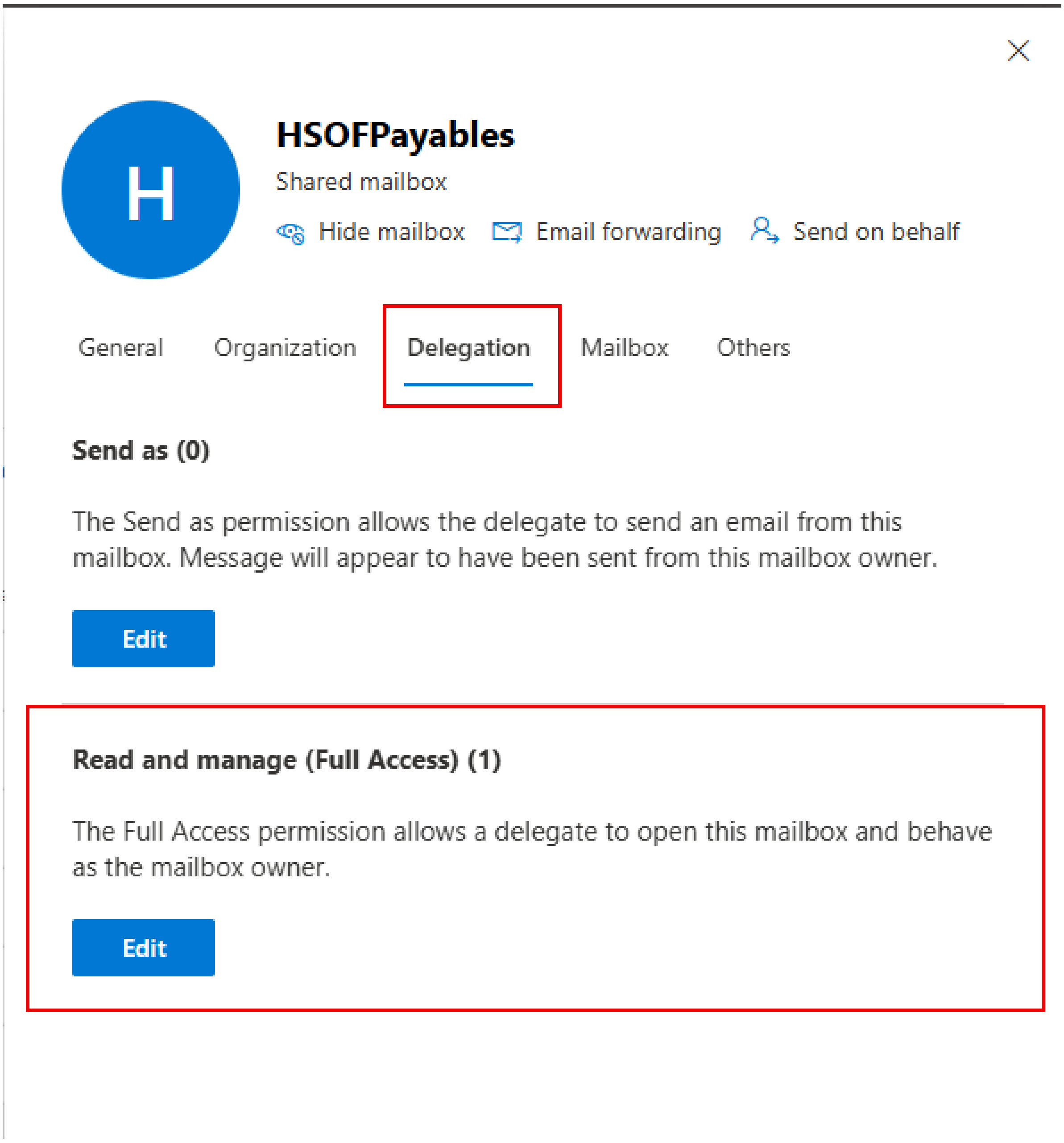
Add in shared mailbox



Mail box setup, then link to a user



Link the shared mail box to the customeremail user

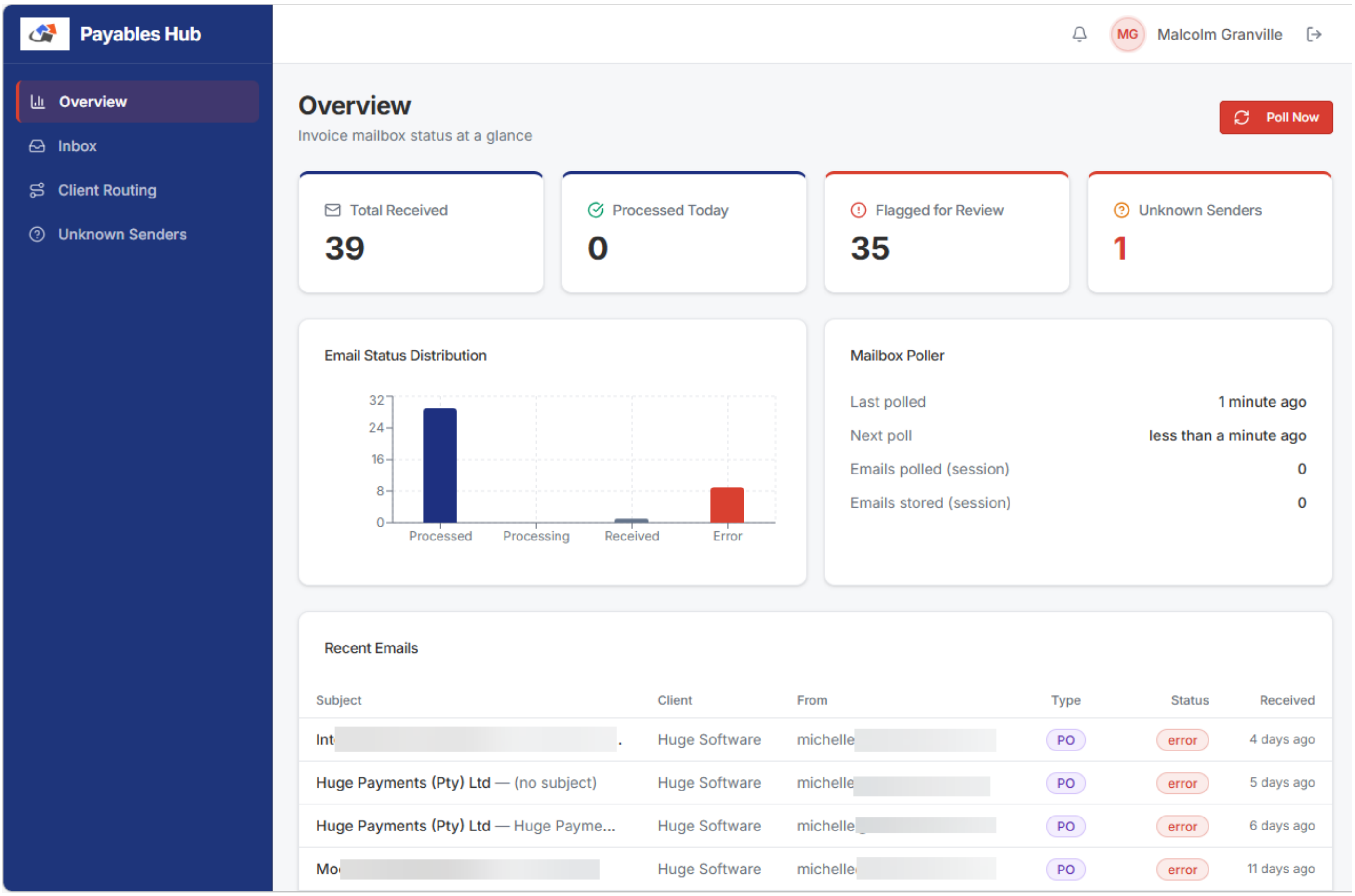

H
HSOFPayables
Shared mailbox
Hide mailbox
Email forwarding
Send on behalf
General
Organization
Delegation
Mailbox
Others
Send as (0)
The Send as permission allows the delegate to send an email from this mailbox. Message will appear to have been sent from this mailbox owner.
Edit
Read and manage (Full Access) (1)
The Full Access permission allows a delegate to open this mailbox and behave as the mailbox owner.
Edit

Email utility setup

The online AI email utility allows emails of supplier invoices to be created as Purchase Orders or GRVs in the Huge ERP system.

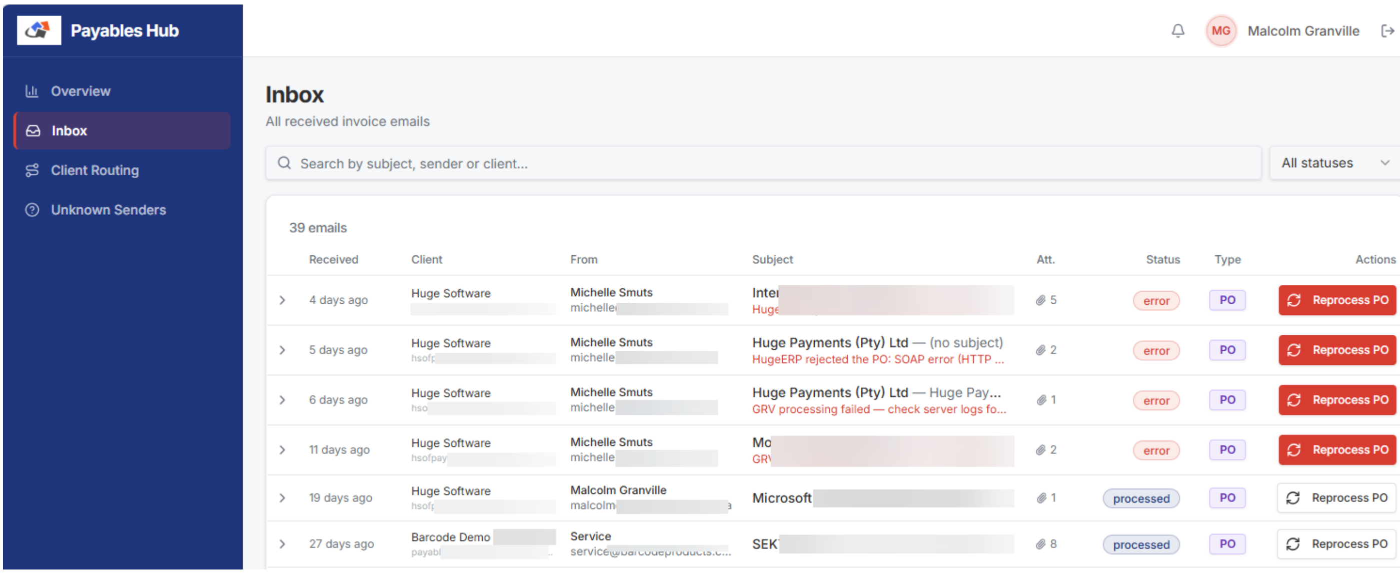
Setting up Company utility

Overview menu



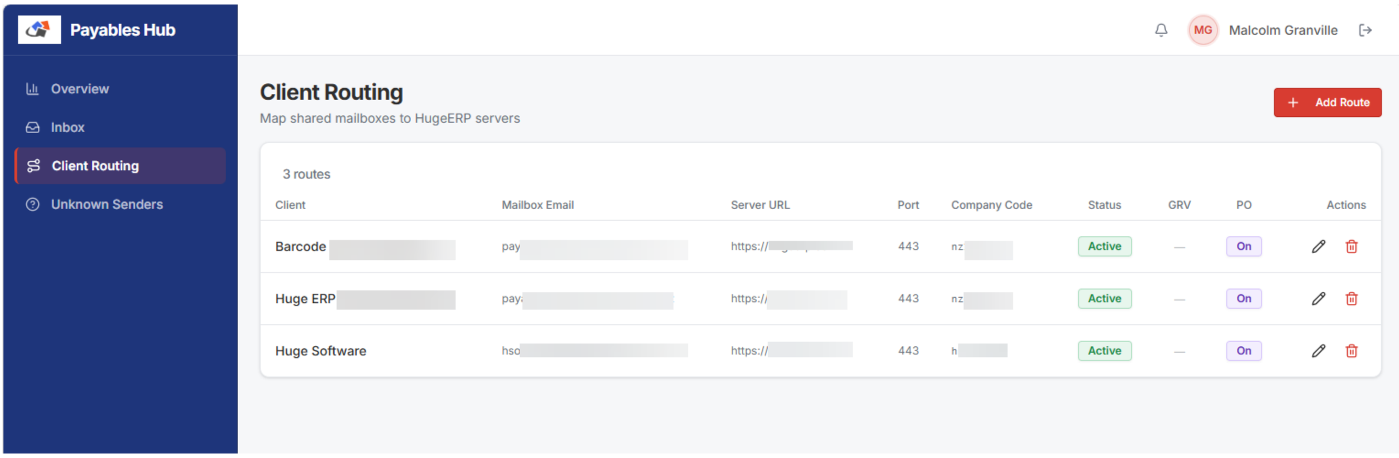
Inbox

Allows one to check any issues with failed emails

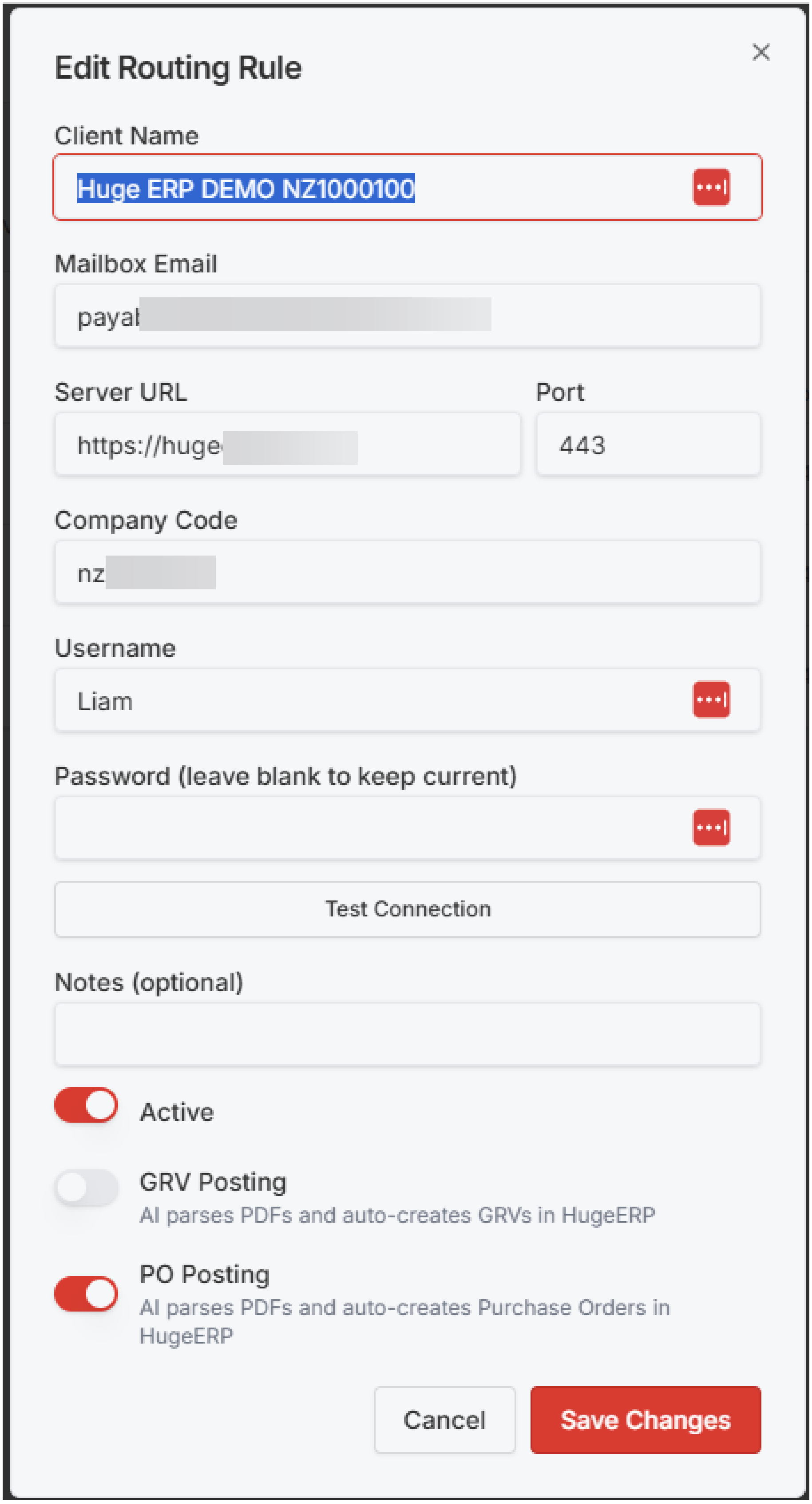


Client Routing

This is where we setup new client routing to ERP namespaces

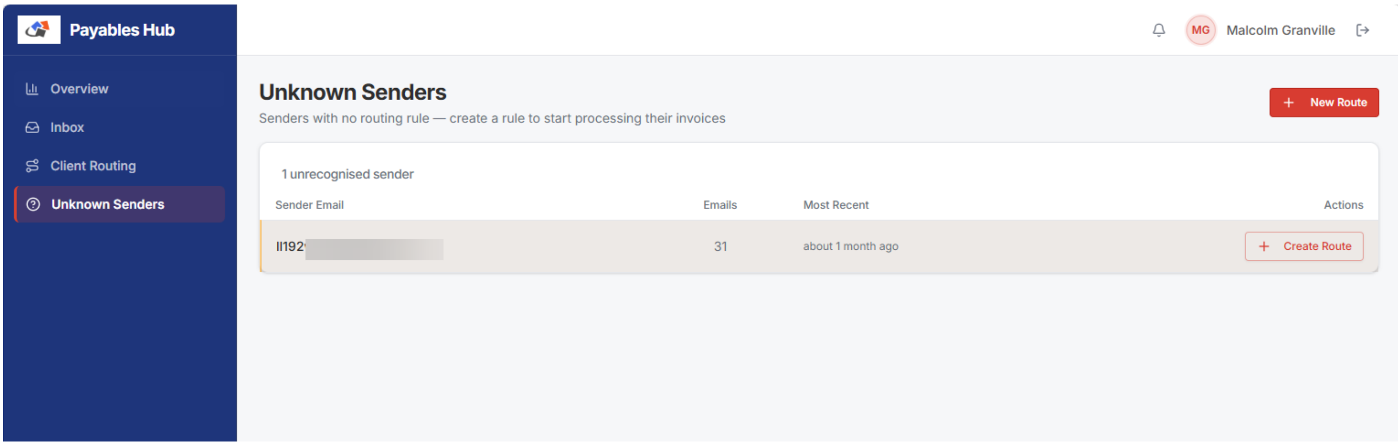


Setup the new client and link to the server and namespace



Unknown Senders

Setup rules for unknow emails


Payables Hub
Overview
Inbox
Client Routing
Unknown Senders
MG
Malcolm Granville
Unknown Senders
Senders with no routing rule — create a rule to start processing their invoices
New Route
1 unrecognised sender
Sender Email
Emails
Most Recent
Actions
ll192
31
about 1 month ago
Create Route