

# Email to Supplier document

- [Email to Huge ERP setup](#)
- [Change Item code on PO and GRV](#)
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# 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

Add Creditor

Attachment
Memo
Create Reminder
Alerts
View Attachments
Functions
Standard
Close

Creditor Code: UNKNOWN
Creditors Name: Unknown Supplier

Details
Addresses
Contacts
Acct Details
Bank Details
Statutory
Info
Custom Fields
Activi

Creditor Code: UNKNOWN
Name: Unknown Supplier
Short Name:
Contact Person:
Website:
Registration No:
GST Number:
Creditors Image:
Print Statement:
Active:
Is Head Office:

Email Statement:
Sync to Mobile:

Division:
Region:
Our Account No:
Comment:

Acc Manager:
Creditors Status:
Creditors Type:
Clearing Agent:
Retailer:

Forwarding Agent:
Network:

Save & New
Save & Close
Save
Close

## Unknown Item setup

Setup a custom type item called Unknown.

Make the sell price zero and set to amount

Add Inventory Item

Inventory Detail

AttachmentMemoInfoSuppliersWarehousesAlertsInventory OverviewFunctionsClose

Inventory Code: UNKNOWNDescription: Unknown Item

Inventory DetailsMore DetailsExtra DetailsPricing LevelsPropertiesComment / ReplaceCustom Fields

Inventory Code: UNKNOWN

Category: Custom7

Description: Unknown Item

Long Description:

Group Code:

Stock Category:

Priority Level:

Bar Code:Print

Version Number:Active: ☒

Sync To Mobile: ☒Hide From Purchase: ☐

Sync to WebShop: ☐Hide from Sale: ☐

WebShop Qty: ☐

Seasonal: ☐Slow Mover: ☐

Primary Image:

Thumbnail Image:

Save & NewSave & CloseSaveCloseRecalculate Item

## Setting default Supplier and Custom item

- Setup a default custom type item
- Setup a default supplier

System Configurati...



Administration

- Company Profiles
- Defaults
- Financial Periods Setup
- Backups
- Multi Currency
- Multilingual
- Custom Fields
- Reference Value
- Custom Period Setup
- Imports
- Emailing Schedule Setup

System Defaults

Save Please Note: Remember to save your default setting before leaving this window.

System DefaultsGeneral LedgerDebtorsCreditorsInventoryWebatarAsset

Document Import.

Default Item: UNKNOWN

Doc Import Supplier: Unknown Supplier

Statement Defaults.

Creditors Statements: ☐ Normal ☒ Open Items

View Type: Standard

Print Type: Detail

Creditor Payments Defaults.

GL Bank Account: 8-01/100 - ANZ Bank Main Acc

CashBook Type: Weekly Cashbooks

Creditor Cash Book Export Format.

Export Bank Format: ANZ Bank

Set PO to update Creditor cost when authorized

Update Creditors Cost On Authorized: ☐

## 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

Edit Employee Info

Employee Management

Attachments Restrict Access Set Password Incident Functions

Close

Details 1

Details 2

Module Access

Address

Account Details

User Fields

Email

Login ID:SupplierEmail

Employee Code:SupplierEmail

First Name:Supplier

Last Name:Email

Post Title:AI Outlook

Email:pay

Start Date:2026-06-02

Telephone Number:

Mobile Number:

User Image:

Thumb Nail Image:

Division:

Region:

Skill Level:1

Status:None2026-06-02 - 12:48

User Barcode:Active:

Type:Staff

Save

Close

## 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

Goods Received Note (GRV)

Attachments Memo Create Reminder Update Recurring Functions Ship To:

Basic Address Extras Shipping Docs Custom Fields

GRV Number: Preparation Description: Monthly rent, rates and body corporate

Creditors: COA Reference:

Creditors Name: Creditors new Creditors Invoice No: INV-0033

Supplier Invoice Date: 2026-04-15 Order Number:

Due Date: 2026-04-15 Currency View: Document Currency

Job: Exchange Rate: 1 NZ Dollar

Save Close Print Process T & C Importation Spl Manual Imports

Items

Page 1 of 1 Paging Add Edit Delete Displaying 1 - 3 of 3

| # | Seq No | Image | Stock Type | Stock Code | Description                | Temperature | Quantity | Unit Cost | Total Unit Cos | Additional U |
|---|--------|-------|------------|------------|----------------------------|-------------|----------|-----------|----------------|--------------|
| 1 | 1      |       | Custom     | GEN/WEBAPP | Monthly Rent - 1-31 May'26 |             | 1.0000   | 1,        | 1,             |              |
| 2 | 2      |       | Custom     | GEN/WEBAPP | Rates                      |             | 1.0000   | :         | :              |              |
| 3 | 3      |       | Custom     | GEN/WEBAPP | Body Corporate             |             | 1.0000   | :         | :              |              |

Footer

Discount Perc: 0 Amt: 0 Clear Discount

Creditors Status:

Shipping Cost: 0 Shipping GST:

Cashflow Due Date:

Payment Comment:

Selling

Sub Total: 1

Less Discount: 0

Excl GST: 1,

Shipping Cost: 0.0000

GST:

Incl GST: 1,

## 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

AttachmentMemoInfoSuppliersWarehousesAlertsInventory OverviewFunctionsClose

Inventory Code: EXP/COMPUTERDescription: Expense Computer

Inventory DetailsMore DetailsExtra DetailsPricing LevelsPropertiesComment / ReplaceCustom Fields

Inventory Code: EXP/COMPUTER

Category: Custom12

Description: Expense Computer

Long Description:

Group Code:

Stock Category:

Priority Level:

Bar Code:

Version Number:Active

Sync To Mobile:Hide

Sync to WebShop:Hide

WebShop Qty:

Seasonal:Slow

Save & NewSave & Close

Manage Supplier

Supplier Details

AddEditDeleteAdd 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

Goods Received Note (GRV)

Attachments Memo Create Reminder Update Recurring Functions Ship To: Branch

Basic Address Extras Shipping Docs Custom Fields Save Close Print

GRV Number: Preparation Description: test

Creditors: DEF001 Reference:

Creditors Name: DEF Company

Supplier Invoice Date: 2026-05-28

Due Date: 2026-05-28 2

Job:

Items

| # | Seq No | Image                                                                             | Stock Type | Stock Code |
|---|--------|-----------------------------------------------------------------------------------|------------|------------|
| 1 | 1      |  | Stock      | 10-1000    |

Footer

Discount Perc: 0 Amt: 0

Creditors Status:

Shipping Cost: 0 Shipping GST: 03 PI GST:15

Cashflow Due Date: 2026-05-28

Payment Comment:

Less Discount: 0

Excl GST: 5.6700

Shipping Cost: 0.0000

GST: 0.8500

Incl GST: 6.5200

Select Item

Item: 10-1000

Save Close

Item edited with replace button

Goods Received Note (GRV)

Attachments Memo Create Reminder Update Recurring Functions Ship To: Branch

Basic Address Extras Shipping Docs Custom Fields Save

GRV Number: Preparation: Description: test Close

---

Goods Received Note Item

Inventory Overview View Image Currency: NZ Dollar Category: Stock Close

Details Notes Case Lots UOM

Item Code: 10-1000 - African Daisy 10cm High Plant Pricing Structure: Default

Item Description: African Daisy 10cm

Item Group:

Quantity: 1

Cost Excl GST: 5.6744

Cost Incl GST: ☐ 6.5

Total Cost: 5.67

GST Value: 0.85

Line Total: 6.52

Sequence No:

Job:

Add as Cost To Company: ☐

Add as Scope Creep SC: ☐

Production Code:

Save & New Save & Close

Select Item

Item: 10-1000 - African Daisy 10cm High Plant

Percentage

8.51

2.84

50.00

33.33

Save Close

## 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](mailto:customeremails@erpsolutions.co.nz)

## Outlook shared mailbox

Customer email addresses are setup as shared email boxes.

### Add in shared mailbox

Exchange admin center

Home

Recipients

Mailboxes

Groups

Resources

Contacts

Mail flow

Roles

Migration

Mobile

Reports

Insights

Public folders

Home > Mailboxes

Manage mailboxes

Create and manage settings for shared mailboxes. You can also manage settings for user mailboxes, but to add or delete them you must go to the [Microsoft 365 admin center](#) and do this on the **active users** page. [Learn more about mailboxes](#)

+ Add a shared mailbox

Mailflow setting

Refresh

Export mailboxes

| Display name ↑ | Email address | Recipient type |
|----------------|---------------|----------------|
|                |               | SharedMailbox  |
|                |               | SharedMailbox  |
|                |               | UserMailbox    |
|                |               | SharedMailbox  |

Mail box setup, then link to a user

Exchange admin center

Search (Preview)

Home

Recipients

Mailboxes

Groups

Resources

Contacts

Mail flow

Roles

Migration

Mobile

Reports

Insights

Public folders

Organization

Settings

Troubleshoot

Other features

Home > Mailboxes

Manage mailboxes

Create and manage settings for shared mailboxes. You can also manage settings for user mailboxes, but to add or delete them you must go to the [Microsoft 365 admin center](#) and do this on the [active users](#) page. [Learn more about mailboxes](#)

Delete

Mailflow setting

Hide from address list

Edit

Mailbox delegation

Convert to regular mailbox

Refresh

| Display name ↑                                   | Email address | Recipient type | Archive status |
|--------------------------------------------------|---------------|----------------|----------------|
|                                                  |               | SharedMailbox  | None           |
|                                                  |               | SharedMailbox  | None           |
|                                                  |               | UserMailbox    | None           |
|                                                  |               | SharedMailbox  | None           |
|                                                  |               | UserMailbox    | None           |
|                                                  |               | UserMailbox    | None           |
| <input checked="" type="checkbox"/> HSOFPayables | hsofp         | SharedMailbox  | None           |
|                                                  |               | SharedMailbox  | None           |

Link the shared mail box to the customeremail user



## 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

Payables Hub

Overview

Inbox

Client Routing

Unknown Senders

Overview

Invoice mailbox status at a glance

Poll Now

Total Received

39

Processed Today

0

Flagged for Review

35

Unknown Senders

1

Email Status Distribution

Mailbox Poller

Last polled

Next poll

Emails polled (session)

Emails stored (session)

1 minute ago

less than a minute ago

0

0

Recent Emails

| Subject                                 | Client        | From                | Type | Status | Received    |
|-----------------------------------------|---------------|---------------------|------|--------|-------------|
| Int [redacted]                          | Huge Software | michelle [redacted] | PO   | error  | 4 days ago  |
| Huge Payments (Pty) Ltd — (no subject)  | Huge Software | michelle [redacted] | PO   | error  | 5 days ago  |
| Huge Payments (Pty) Ltd — Huge Payme... | Huge Software | michelle [redacted] | PO   | error  | 6 days ago  |
| Mo [redacted]                           | Huge Software | michelle [redacted] | PO   | error  | 11 days ago |

### Inbox

Allows one to check any issues with failed emails

Payables Hub

Overview

**Inbox**

Client Routing

Unknown Senders

MG

Malcolm Granville

**Inbox**

All received invoice emails

Search by subject, sender or client...

All statuses

39 emails

|   | Received    | Client        | From              | Subject                                | Att. | Status    | Type | Actions      |
|---|-------------|---------------|-------------------|----------------------------------------|------|-----------|------|--------------|
| > | 4 days ago  | Huge Software | Michelle Smuts    | Interi                                 | 5    | error     | PO   | Reprocess PO |
| > | 5 days ago  | Huge Software | Michelle Smuts    | Huge Payments (Pty) Ltd — (no subject) | 2    | error     | PO   | Reprocess PO |
| > | 6 days ago  | Huge Software | Michelle Smuts    | Huge Payments (Pty) Ltd — Huge Pay...  | 1    | error     | PO   | Reprocess PO |
| > | 11 days ago | Huge Software | Michelle Smuts    | Ma                                     | 2    | error     | PO   | Reprocess PO |
| > | 19 days ago | Huge Software | Malcolm Granville | Microsoft                              | 1    | processed | PO   | Reprocess PO |
| > | 27 days ago | Barcode Demo  | Service           | SEK                                    | 8    | processed | PO   | Reprocess PO |

## Client Routing

This is where we setup new client routing to ERP namespaces

Payables Hub

Overview

Inbox

**Client Routing**

Unknown Senders

MG

Malcolm Granville

**Client Routing**

Map shared mailboxes to HugeERP servers

+ Add Route

3 routes

| Client        | Mailbox Email | Server URL | Port | Company Code | Status | GRV | PO | Actions |
|---------------|---------------|------------|------|--------------|--------|-----|----|---------|
| Barcode       | pay           | https://   | 443  | n2           | Active | —   | On |         |
| Huge ERP      | pay:          | https://   | 443  | n2           | Active | —   | On |         |
| Huge Software | hso:          | https://   | 443  | h            | Active | —   | On |         |

Setup the new client and link to the server and namespace

Edit Routing Rule

×

Client Name

Huge ERP DEMO NZ1000100

⋮

Mailbox Email

payal

Server URL

https://huge

Port

443

Company Code

nz

Username

Liam

⋮

Password (leave blank to keep current)

⋮

Test Connection

Notes (optional)

☒ Active

☐ GRV Posting

AI parses PDFs and auto-creates GRVs in HugeERP

☒ PO Posting

AI parses PDFs and auto-creates Purchase Orders in HugeERP

Cancel

Save Changes

## Unknown Senders

Setup rules for unknow emails

## 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                        |
|------------------|--------|-------------------|--------------------------------|
| II192@██████████ | 31     | about 1 month ago | <a href="#">+ Create Route</a> |