

## PRINT TO PDF AND EMAIL P/O PURCHASE ORDER

### BUSINESS REQUIREMENT

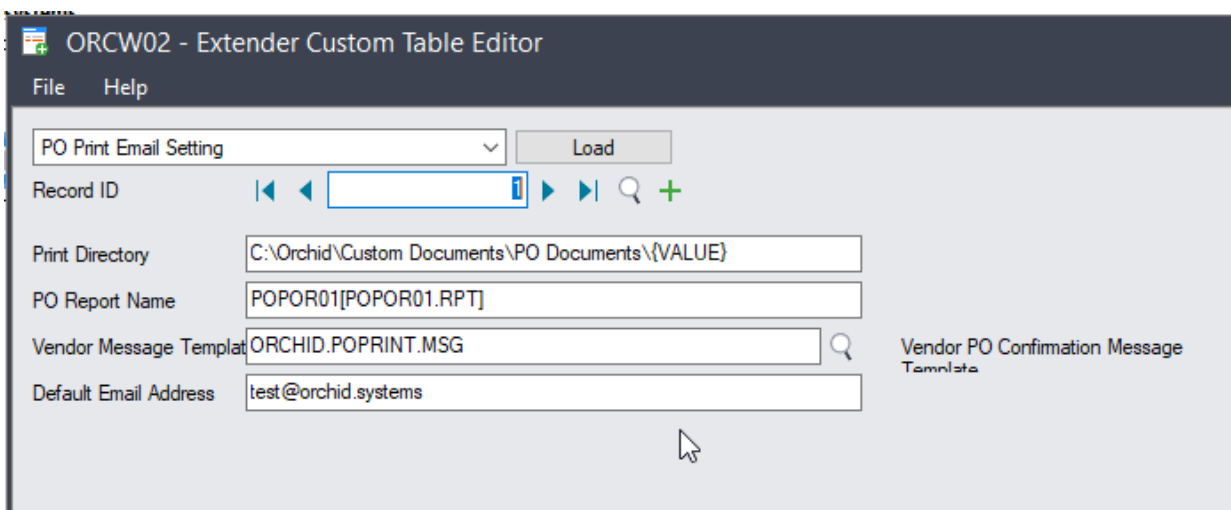
Client wants to save P/O Purchase Orderes as PDF in folders configured for Document Management Link and email them to customers from a single button on the P/O Entry screen.

### KEY LEARNINGS

The module includes a custom script to add buttons to the P/O Screen to print or print and email  
The module also includes a custom table to maintain the configuration details.

### STEPS TO INSTALL AND CONFIGURE

- Import module and restart the Sage desktop
- Use the Custom table Editor to configure the printing parameters



The screenshot shows the 'ORCW02 - Extender Custom Table Editor' window. It has a menu bar with 'File' and 'Help'. Below the menu bar is a dropdown menu set to 'PO Print Email Setting' and a 'Load' button. Below this is a 'Record ID' field with navigation buttons (back, forward, search, and a plus sign). The main area contains four configuration fields: 'Print Directory' with the value 'C:\Orchid\Custom Documents\PO Documents\{VALUE}', 'PO Report Name' with the value 'POPOR01[POPOR01.RPT]', 'Vendor Message Template' with the value 'ORCHID.POPRINT.MSG', and 'Default Email Address' with the value 'test@orchid.systems'. To the right of these fields is a search icon and the text 'Vendor PO Confirmation Message Template'.

The module can create subfolders by Vendor / Purchase Order number  
{value} is replaced by the Vendor Code.

{value2} is replaced by the P/O Number In the example above, we create a subfolder per vendor and save all documents in the same folder per vendor.

## USING IT

PO Orders Print and Email app adds custom buttons to the P/O Order Entry screen to print and email P/O to vendors

ORCW02 - P/O Purchase Order Entry

File Settings Help

PO Number PO000000004 Entered By ADMIN

Vendor Number 6010 J. D. Garner Enterprises Last Receipt No.

Order Taxes Optional Fields Totals

Template From Requisition On Hold Job Related

PO Date 08/01/2019 FOB Point Arrival Date

PO Type Active

Ship-To Location Ship-Via

Bill-To Location Terms Code \* DUETBL Due by Invoice Date

Vendor Acct. Set \* USA Accounts payable, Other

Description Reference

| Lin... | Completed | Q Item Number | Item Description             | Q Location | Drop-Ship | Quantity Ordered | Q Unit of Measure | Q Unit Cost |
|--------|-----------|---------------|------------------------------|------------|-----------|------------------|-------------------|-------------|
| 1      | No        | F1-265/B      | Filing Cabinet - 2 Drawers   | 3          | No        | 50               | Ea.               | 99.980000   |
| 2      | No        | F1-265/T      | Filing Cabinet - 2 Drawers   | 3          | No        | 50               | Ea.               | 75.860000   |
| 3      | No        | F1-270/T      | Filing Cabinet - 2 Drawer... | 3          | No        | 50               | Ea.               | 151.860000  |
| 4      | No        | F1-465/B      | Filing Cabinet - 4 Drawers   | 3          | No        | 50               | Ea.               | 165.320000  |
| 5      | No        | F1-465/T      | Filing Cabinet - 4 Drawers   | 3          | No        | 50               | Ea.               | 165.320000  |
| 6      | No        | F1-470/T      | Filing Cabinet - 4 Drawer... | 3          | No        | 50               | Ea.               | 198.330000  |

Item/Tax... Calc. Taxes Consolidate

Order Subtotal 42,833.50

Post Delete History... Print to PDF Print/Email PDF Close

The vendor email address is based on the vendor delivery method configured in A/P.  
Blank email: Email Admin address in config table

If the vendor delivery method is set to Mail, the PDF is generated and saved in the configured folder, but not emailed.