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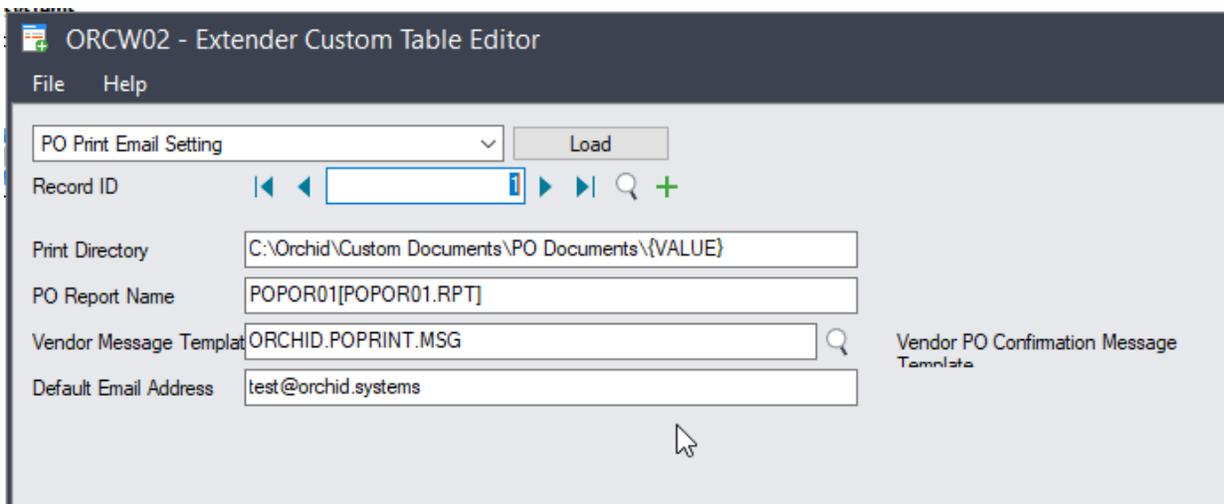
The module can create subfolders by Vendor / Purchase Order number
{value} is replaced by the Vendor Code.

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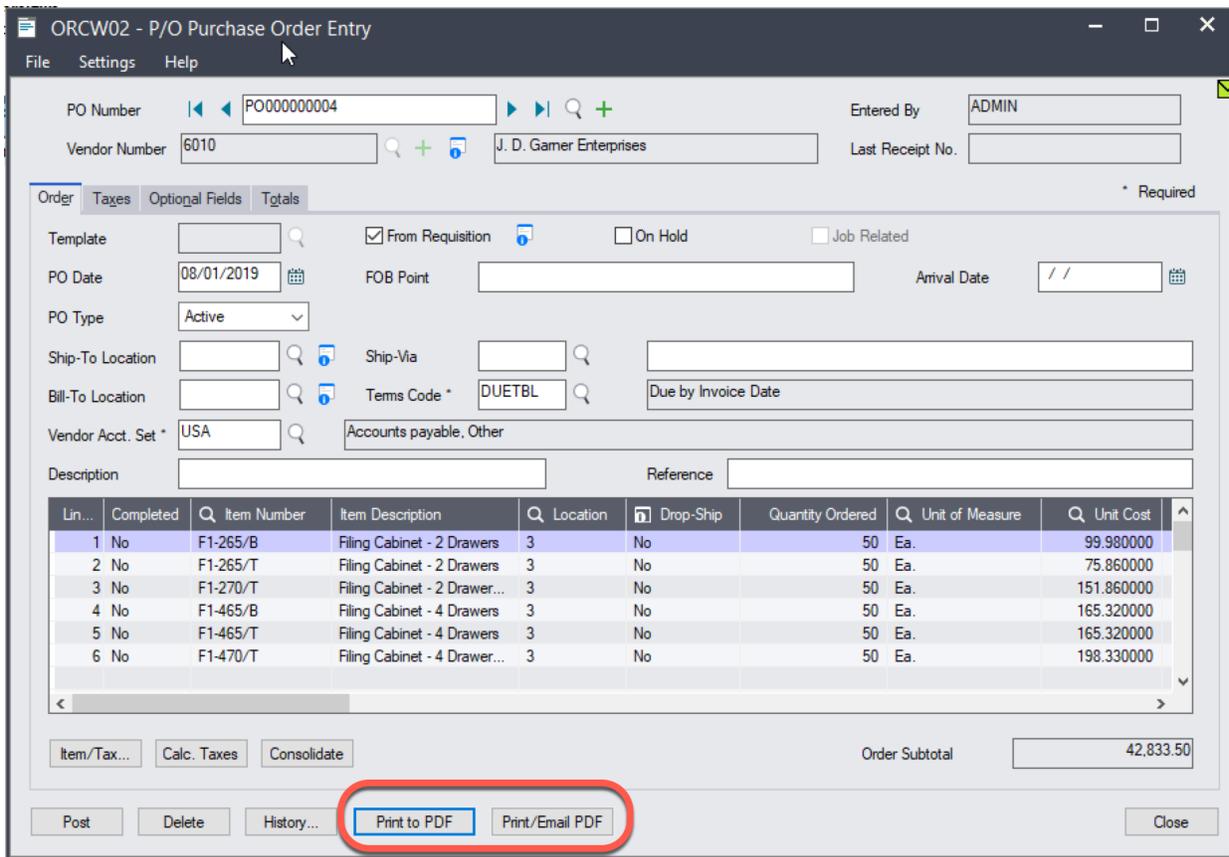
The vendor email address is based on the vendor delivery method configured in A/P.
Blank email: Email Admin address in config table

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