

Using the Centralized AP Inbox

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Centralized AP Inbox review:

Move Email: Move the highlighted or multiple checked emails to a folder chosen from a dropdown.

View Email: Opens the highlighted email in a pop-up window.

Create Folder: This allows the user to create an email folder. The parent folder is selected from the dropdown, and the new folder is named.

View Invoice: If the highlighted email has been captured, this option will open the batch created and display the created invoice.

New: Create a new outgoing email.

Reply: Create a reply to the highlighted email.

Delete: Delete the highlighted or multiple checked emails from the email folder.

Digital Invoice Capture: Initiate the Digital Capture process manually for the highlighted or multiple checked emails.

Within Open Email:

Attach to PO: Opens the **Attach to PO** dialogue window where the user can choose the PO number to which the email and its attachments should be attached.

- **PO Number:** The PO Number to which the email files should be attached. The user may search for the correct PO Number via the Purchase Orders for Vendor dialogue.
- **Set Received Status to:** The received status to which the PO should be changed when the files are attached.
- **Move Email to Folder:** The email folder to which the email should be moved when the process is completed.
- **Create and attach Word document created from email subject and body:** If checked, the system will create a Word document of the email and attach it to the indicated PO.
- **Email attachments:** All attachments are included in the received email. Those checked will be applied according to the above options.

Attach to Journal: Opens the **Attach to Journal** dialogue window where the user can choose the Journal ID to which the email and its attachments should be attached.

- **Journal ID:** The email files should be attached to the Journal ID. The user may search for the

correct Invoice ID via the Clone Journal Entry Batch dialogue.

- **Move Email to Folder:** The email folder to which the email should be moved when the process is completed.
- **Create and attach Word document created from email subject and body:** If checked from the email system, create a Word document of the email and attach it to the indicated Journal ID.
- **Email attachments:** All attachments are included in the received email. Those checked will be applied according to the above options.

Attach to Invoice: Opens the **Attach to Invoice** dialogue window where the user can choose the Invoice ID to which the email and its attachments should be attached.

- **Invoice ID:** The email files should be attached to the Invoice ID. The user may search for the correct Invoice ID via the Vendor Summary Transactions dialogue.
- **Move Email to Folder:** The email folder to which the email should be moved when the process is completed.
- **Create and attach Word document created from email subject and body:** If checked, the system will create a Word document of the email and attach it to the indicated Invoice ID.
- **Email attachments:** All attachments are included in the received email. Those checked will be applied according to the above options.

Move Email: Move the email to the email folder selected from the dropdown.

Apple Mail

Apple Mail sometimes embeds attachments inline, which can cause confusion for recipients. To ensure the file is sent as a standard attachment, you can advise the sender to:

1. Go to **Preferences > Composing** in Apple Mail.
 2. Check the option for **Send Windows-Friendly Attachments**.
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