

## Using the Centralized AP Inbox

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# Using the Centralized AP Inbox

## 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.

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## 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.

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## 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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