



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Printing, Filing and Emailing Purchase Orders

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

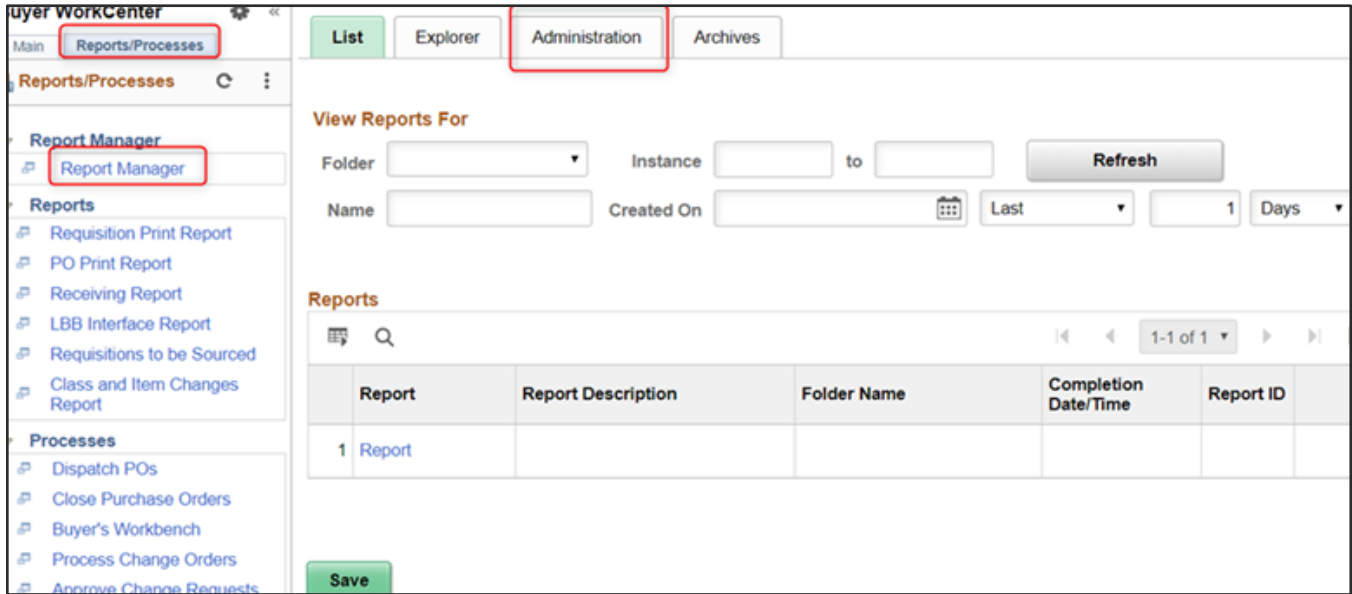
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Printing, Filing and Emailing Purchase Orders

Running the PO Dispatch Process

Before printing, filing or emailing a purchase order (PO), you must first run the PO Dispatch process.



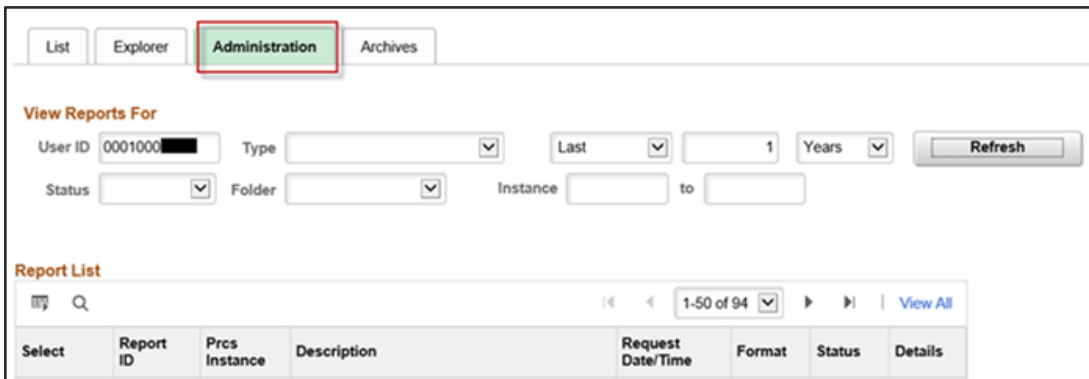
Note: The PDF version of the PO generated by the *Dispatch* process resides on the *Administration* tab of the *Report Manager* page.

Locating a Dispatched PO

Navigation
Dashboard: Purchasing; **Tile:** Buyer WorkCenter

To locate a PO generated in the PO Dispatch process:

1. Select the **Reports/Processes** tab.
2. Select the **Report Manager** page.
A screen with tabs and the *Report List* section appears.
3. Select the **Administration** tab.

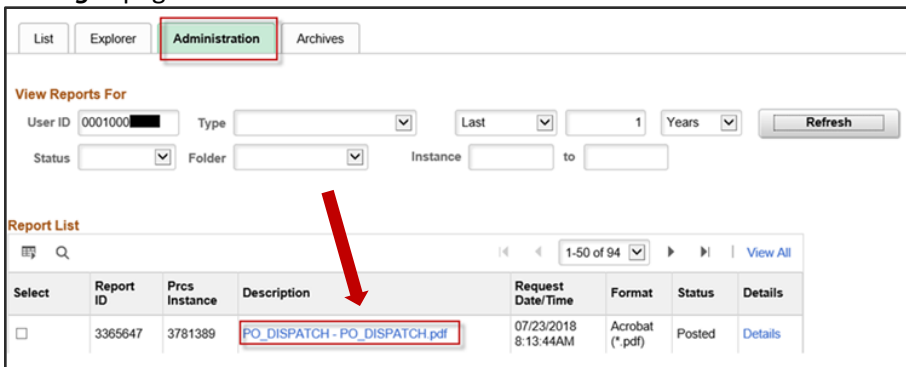


Note: The PDF of the report is available by selecting the report hyperlink in the *Report List* section.

4. Add the *Report Manager* page to the *Favorites* menu by selecting the **Actions** ellipsis (3 dots) in the upper right corner of the CAPPS menu bar and choosing **Add to Favorites**.



5. Open the dispatched PO (PDF) by selecting the hyperlink under the *Report List* section on the *Report Manager* page.

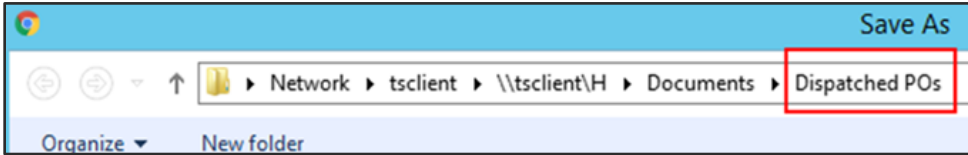


The PO file (PDF) displays.

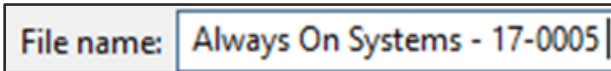


Saving PO Files

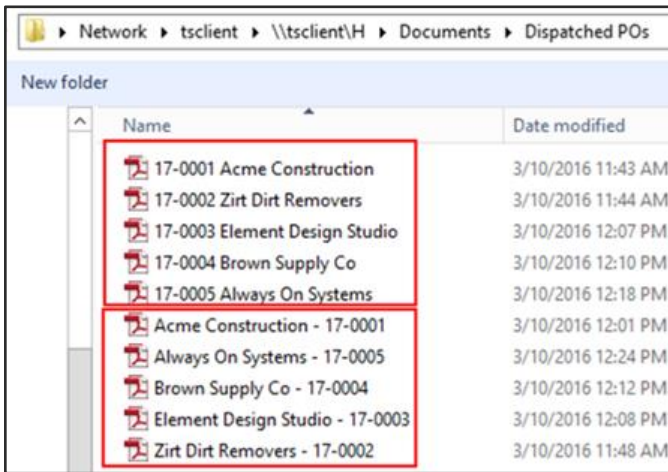
1. Create a folder in a network drive (but not the C drive) and name the folder *Dispatched POs* (or something similar).



2. Save the PO (PDF) using the following naming convention *PO-ID_SupplierName*.
using use the following naming convention *SupplierName_PO-ID*.



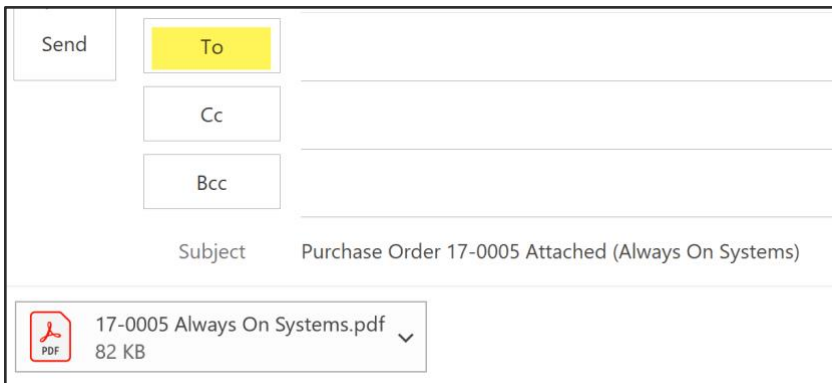
Note: Saving the PDF using both of the above naming conventions allows for a numerical search by the PO ID or an alphabetical search by the supplier name.



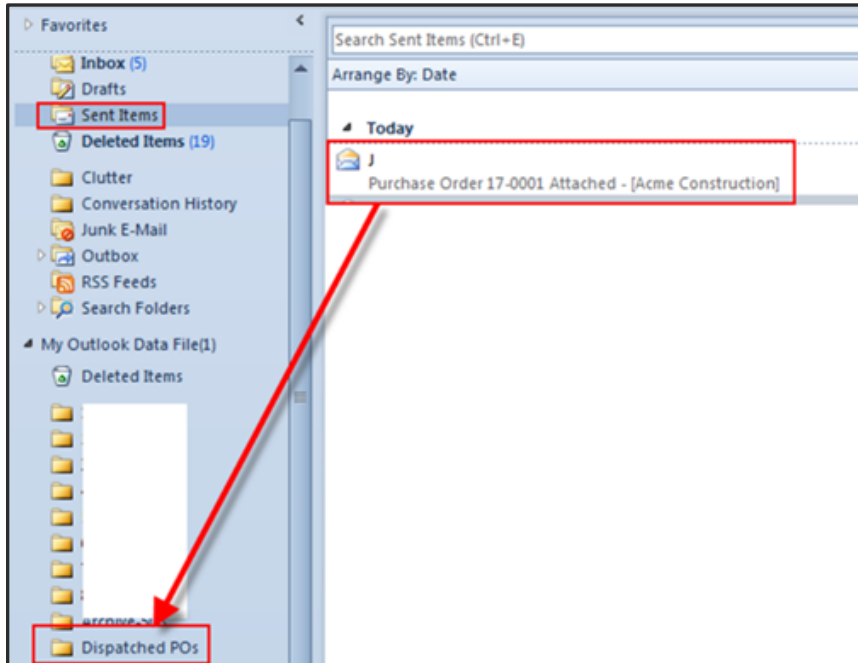
Emailing and Filing PO Emails

1. Attach the PDF to an email addressed to the supplier's contact person and use the following naming convention for the SUBJECT field: *Purchase Order <PO #> Attached <(supplier name)>*.
For example: Purchase Order 17-0005 Attached (Always On Systems).

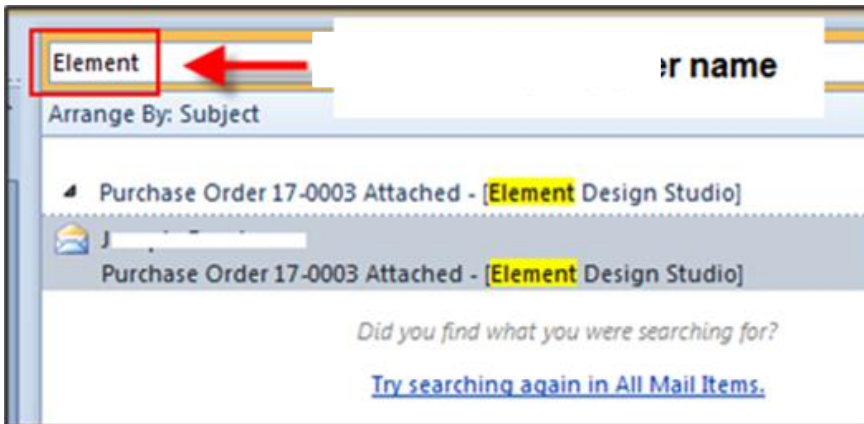
Note: Consistency in titling the SUBJECT field makes it easier to find the email quicker at a later date.



2. Create a new folder in Outlook named *Dispatched POs* or something similar.



Note: Finding emails in the *Dispatched POs* folder is easier when the supplier name is entered consistently in the SUBJECT field as outlined the prior section.



3. Move the email from the *Outlook Sent Items* folder created in step 2 (above).

Revision History

Date	Description of Change	Changed By
Dec. 9, 2024	Initial release.	J. Goodman