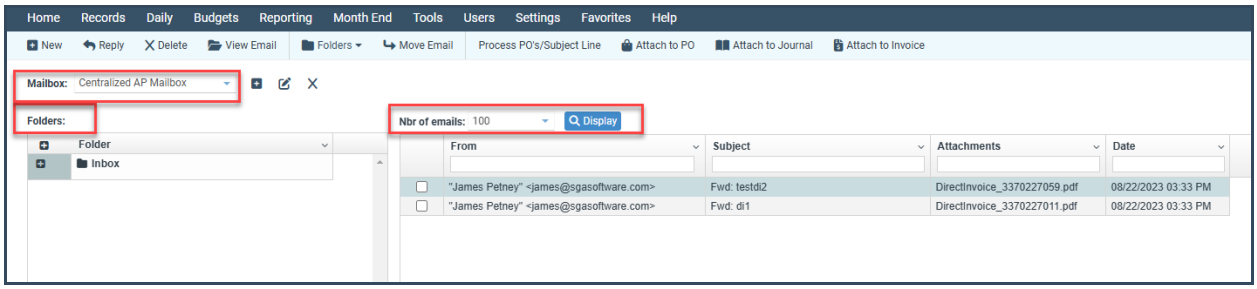
Last Modified on 09/29/2026 9:10 am EDT

Email Attachment Import

Daily > AP Automation > Email Attachment Import

For AP Automation, your organization must identify an email address for vendors to send email documents, such as AP@yourcompany.org or AccountsPayable@yourcompany.org.

Those emails could contain information about POs or invoices and even attachments. The email attachment import view is an interface for the email account named above. On the left-hand side, you will notice a folder hierarchy common to any email client, such as Inbox, Trash, Sent Mail, etc.

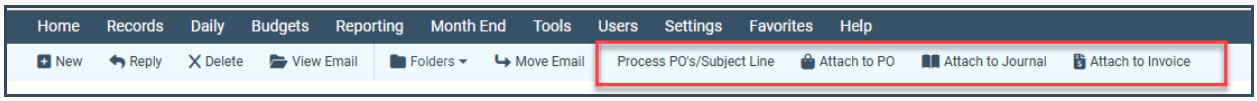


This view screen has several tools for attaching these emails to a PO, a JE, or an Invoice.

After you attach one of these emails, the process will move it from the INBOX to a folder that you designated during the mailbox's setup.

Note: *SGA staff will help you set up this feature. More on that at the bottom section of this help.*

Menu Options (Right-Side)



1. **Process POs/Subject Line:** This is the easiest and fastest way to attach emails to POs. It is located at the top right of the row of buttons.
    - Have your vendors place the phrase PO and the number, like **PO 1234** or Purchase Order and the number, like **Purchase Order 1234** anywhere in the subject line of their email.
    - By clicking the button called **Process POs/Subject Line,** the process will:
        - Scan the entire INBOX of this email client and look for emails that match actual POs in the system.
        - It will attach both the email and any attachments from the email to the actual PO in your system.
        - You will receive a log showing.
            - List which emails were attached to which PO.

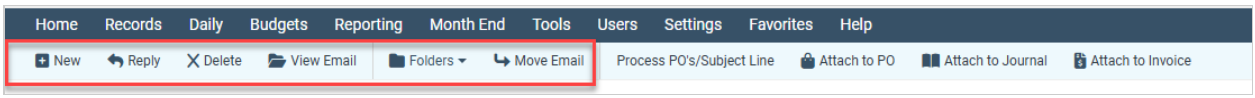
        - The email has been moved to the folder (**folder name)** you named during setup.
        - A message of **Unable to find Purchase Order 1234 for email PO 1234** means that the subject line appeared to have a valid PO, but the specific PO does not exist in SGA.
    - Notice how the process **cleans up** the INBOX by moving the emails that were found PO into a folder you designated during setup.

2. **Attach to PO Button:**
    - Left-click on an email to select it, then click the **Attach to PO button**.
    - The view shows:
        - The subject and body of the email that you selected.
        - The attachments from that email are shown on the right side of the screen. Each attachment is **checked** to be included in the PO attachment. You may **uncheck** any attachments that you do not want attached to this PO.
        - Bottom Left is a list of drop-downs.
            - **Attach to:** Purchase Order.
                - The default is the button you clicked. However, you can change it here from PO to JE.
            - **PO Number:**
                - If the email you selected found a valid PO number, then information from that PO is in the box below. If you wish to view the email, click the **View** link.
                - If the email does not find a valid PO, you can fix the number or click the search icon to find your PO. When you find a valid PO, the information will display in the box, and you can click the view link to see all the details about that PO.
            - **Set Received Status to:**
                - This will change the status of the PO that was received. The value you see here is the default identified during setup.
            - **Move Email to Folder:**
                - If you wish to move this email to a different folder, choose it here.
            - **Create and attach a Word document created from the email subject and body (Check Box)**
                - If you also want the email to be attached, click here. It might be that you wish to attach both the email and the email attachment, or it might be that the vendor did not send an attachment, but you still want to attach the email from the vendor.
    - Delete existing attachments. Eight attachments already exist.
    - When you connect to a valid PO AND attachments already exist on that PO, checking this box will remove those attachments.

- Open the email.
- You decide to open the email instead of left-clicking the email.
- You can download an attachment (clicking on it will open the attachment) and examine it to help you decide which PO to attach it to.
- Click on the button called **Attach to PO**.

3. **Attach to Journal or Attach to Invoice buttons:**
    - These work the same way as Attach to PO, except that instead of a PO number, you have a Journal Number or an Invoice number.
        - There is no mass attach button as we have for POs.

Menu Options (Left-Side)



1. **The new and reply** buttons work like any other email provider. You can create a new email or reply to an existing one.
2. To view an email, double-click the email or highlight the email and click **View Email**.
3. **Folders** allow you to create more folders for email organization.
4. **Move or Delete Buttons**
    - Sometimes, this email account (AP@yourCompany.org) will receive junk mail or other mail unrelated to POs, JEs, or invoices. Use the move or delete buttons to get those emails out of the inbox.

Other

1. **Reports for POs in the detail report writer/Purchase Order Folder**
    - Look at this one. **Received and Ready to Pay – Detail**
    - You can **right-click** on a detail row, and there are several actions you can take. The right-click menu is Edit PO, Browse PO Attachments, Invoice for PO (creates an invoice), Invoice for PO – just this line (creates an invoice for just this line), Browse Reference, Browse Batch, Account Transactions, Vendor Summary, Vendor Detail.
    - Some clients go into Edit PO and rename the attachments, including the date and time they received them. They do this, especially for Blanket POs that might have many attachments.
2. **Set up for Email Attachment Import**
    - It is highly recommended that SGA staff help you with this one-time setup.
    - A New Mailbox is created (you can have multiple Mailboxes).
        - Mailbox Type and Name.
        - The email address to which the vendor will send the email.

        - Connection information for that email address, the incoming server, and the outgoing server.
3. **Default Settings**
    - PO Received Status on the PO after an email is attached.
    - The default folder to move emails to after they are attached.