Fax an Approved Purchase Order to a Supplier

1. You will need to know the supplier’s fax number prior to submitting the order for approval.

2. Some fax numbers can currently be found in the List of Values in the supplier Contact field.
   - Fax numbers are those with “FAX” in the first name field.
   - Note one of the Fax numbers provided here; it will be entered in the Approve Document screen.
   - A Fax contact no longer needs entered in the Contact field; this field can remain blank.

3. Once Purchase Order data entry is complete, click the Approve button.

4. Select the Fax check box and enter the supplier’s FAX Number.
   - A Fax number may default from the supplier record, but it can be modified.
   - Dashes between digits are optional.
PRISM Purchase Order Transmission Instructions

5. Click OK to submit the document for approval.
   - Once the document is approved, it will automatically be sent to the PRISM Fax Server. The FPOR850 Print Custom PO Report is no longer necessary.
   - The supplier will receive a copy of the Purchase Order, along with a cover sheet.

6. An e-mail notification will be sent from RightFax@pitt.edu when the Purchase Order has successfully faxed to the supplier. An e-mail notification will also be sent if the fax is not successfully transmitted. The PRISM Fax Server will attempt three times before a failure notice is sent.

   The e-mail notification will automatically be sent to your @pitt.edu e-mail address. If this is not the address at which you receive and read e-mail, make sure the forward function has been set up to forward e-mail from the Pitt account to your desired e-mail address. See “Edit Forwarding Addresses” at accounts.pitt.edu.

   The e-mail will display the PO number, and the date and time the order was successfully sent.

   The Subject line on the e-mail should say SUCCESS. If the Subject line contains FAILURE, review the Return Code details and verify the fax number. If the fax number is correct, please contact the Technology Help Desk at 412-624-HELP (4357).
PRISM Purchase Order Transmission Instructions

E-mail an Approved Purchase Order to a Supplier

Supplier e-mail addresses are not currently stored in PRISM, however if the supplier’s e-mail address is known, this option can be utilized for transmitting an order.

1. Once Purchase Order data entry is complete, click the Approve button.

2. Click the E-Mail check box and enter the supplier’s E-Mail Address.

3. Click OK to submit the document for approval.

- Once the document is approved, it will be automatically emailed to the supplier.
- The supplier will receive an e-mail from the PRISM Workflow Mailer with an attached PDF copy of the Purchase Order.
PRISM Purchase Order Transmission Instructions

Print a Purchase Order

There are several options for printing a hard copy of a Purchase Order. The first option is to print a copy when selecting the Transmission Method in the Approve Document window.

1. Select the Print checkbox when choosing the transmission method.
2. Once the status of the document is approved, select View → Requests.
   - NOTE: The PO must be approved before it can be printed.
PRISM Purchase Order Transmission Instructions

3. Click the Find button.
   - Notice the PO number displays in the Parameter field.
   - Click View Output for the appropriate PO.
   - A PDF version of the PO displays.
PRISM Purchase Order Transmission Instructions

View and Print a Purchase Order

The second option to view and print a copy of a purchase order is found in the View Document functionality.

1. This functionality can be accessed in both the Purchase Order Summary and Purchase Order windows by selecting Inquire → View Document.

   This will open a File Download window. The PDF purchase order document can be opened and printed from here.

2. While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open or save this software. What’s the risk?
Alternate Fax  E-mail and Print Options

If the Purchase Order has already been approved without selecting a transmission method, fax, e-mail and print can also be accomplished from the Communicate window via Purchase Order Summary.

1. Navigator to Purchase Order Summary and find the PO.
   - Stay in the view mode; do not open the PO.

2. Select Tools → Communicate.

3. Select/Enter the appropriate Communication method.

4. Click OK.