

## 01 MHC Send Email Drop Down Overview

The MHC Send Email is created using Infor Configuration Console. This Infor Configuration Console steps must be completed before setting up your Vendors. MHC should have provided you with the Infor Configuration Console documentation. However, you can see the appendix at the end of this document which also has the Infor Configuration Console setup steps if needed.

The **MHC Send Email** drop down prior to Go-Live. MHC Software can enable or disable the actual sending of emails throughout the testing process so that can continue testing functionality without sending any unwanted emails to vendors. Infor spreadsheet designer is a suggested tool to do mass updates of the Vendors.

### Set the Purchasing Vendor Default Issue Method to MHC Send Email

The **MHC Send Email** will automatically email the MHC Purchase Orders upon **Issue Final & Mass Issue** final batch jobs if the Vendor's default distribution method in the Purchasing Vendor and Purchase From Locations screens are setup as follows. MHC will distribute purchase orders via all other Issue Methods including Fax and Paper when the MHC Send Email is set to **No** or **Left Blank**.

#### Default Setup for Purchasing Vendor and Purchase From Location under Original PO Issue

**NOTE:** Setting the Infor Issue Method to Paper will not print purchase orders when the **MHC Send Email** is set to **Yes**. If you wish for MHC to print your documents, simply change the MHC Send Email = **No** or **Leave blank**, and keep the Issue Method set to **Paper**.

Original PO Issue

Issue Method: Paper

MHC Send Email: Yes

MHC will email the Purchase Orders to the vendor email address next to Email in **Purchasing Vendor** or **Purchase From Location** depending if the Purchase Order has a **Purchase From Location** assigned to it.

Contact Name: Firstname Lastname

Phone Country Code: 123 Phone Number: 456-4545

Fax Country Code: 123 Phone Number: 456-4849

Email: vendorcontact@mhccom.com

### Change the MHC Send Email on the Purchase Order

The **MHC Send Email** can be change on the Purchase Order form. The **MHC Send Email** can turned On or Off on the Purchase Order itself when doing edits or revisions to the Purchase Order. You can also change the MHC Email Address on the purchase order. After you Save, Release, and Issue Final, MHC will distribute the Purchase Order on these fields are set.

Issue

Purchase Order Issue Method: Paper

MHC Send Email: Yes

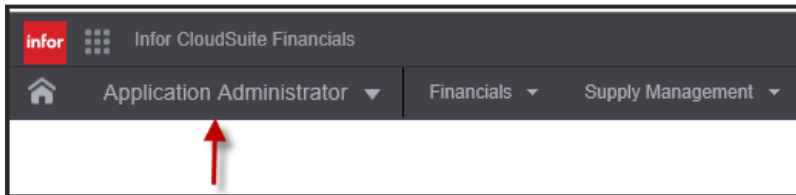
MHC Email : larry@mhccom.com

## 02 Establish the Default **MHC Send Email** value for each Vendor

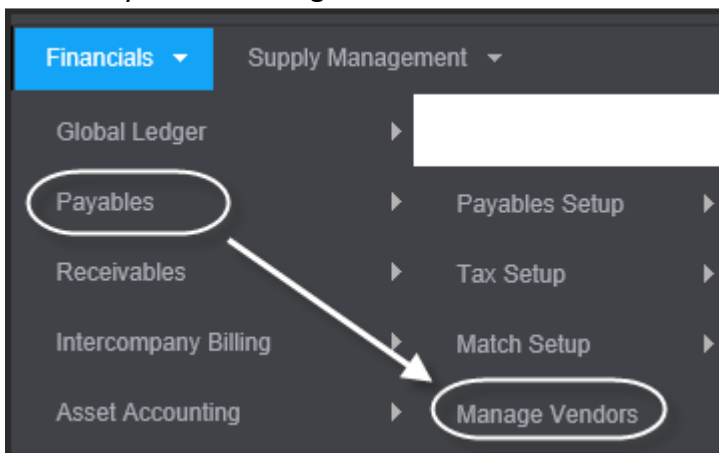
One of the setup steps for the **MHC Send Email** implementation is to establish the default values for issue methods for each vendor, and within each vendor, for each **Purchase From Location**. This document provides the steps to access and update these fields for testing purposes. A script will be used to update all vendors and vendor locations, once this methodology is validated.

### SCRIPT: Set the Purchasing Vendor Default Issue Method to **MHC Send Email**

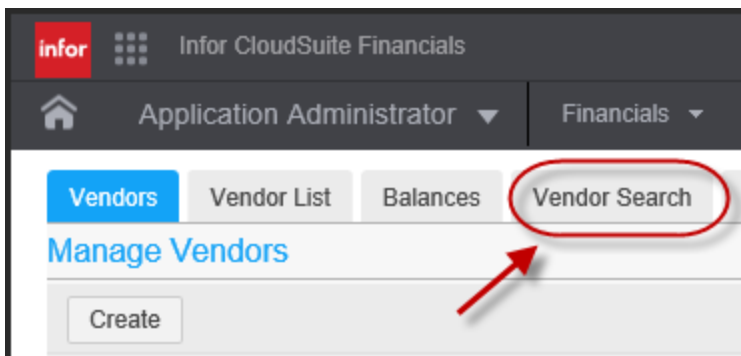
1. In Infor, access the Application Administrator role.



2. Select the Financials drop down.
3. Select Payables > Manage Vendors

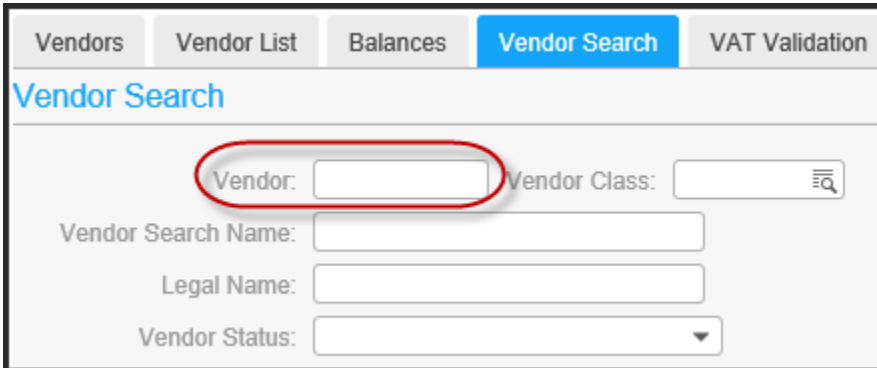


4. Click the Vendor Search tab:

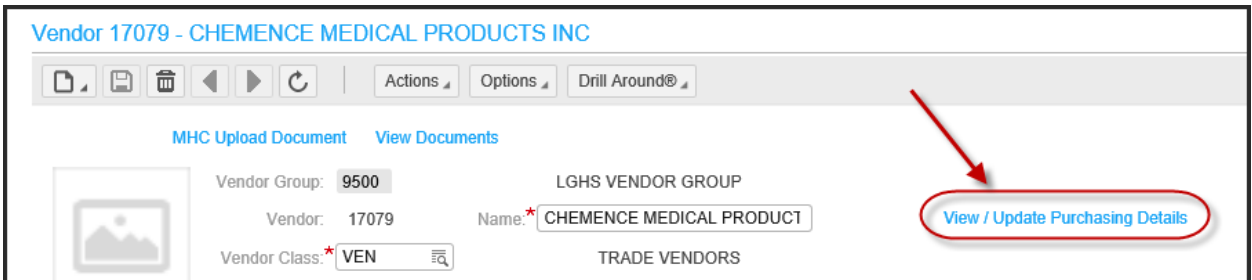


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5. The Vendor Search screen appears. Enter the vendor number in the Vendor field, then press <Enter>.



6. When the vendor record line appears, double-click on that line to open it. In the header section at the top, click on the hyperlink, **View / Update Purchasing Details**:

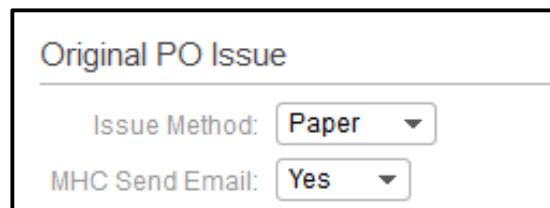


7. The Main tab of this form appears. Enter the **Fax number**, if the fax issue method will be the default. Enter the **Email address**, if Email issue method will be the default:



8. Update the **Original PO Issue** section and section as follows:

- a. Issue Method = **Paper**
- b. MHC Send Email = **Yes**
- c. Save changes.



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9. Click on the **Purchase From Locations** option on the vertical tab menu. The locations menu displays. Double-click on the location to be tested.

<div> <div> <div></div> <div></div> <div></div> <div></div> </div> <div> <div>Actions</div> <div>Options</div> <div>Drill Around®</div> </div> </div>		
Location (A)	Name (A)	Location Type
P100	LGMC	Purchase From
P101	LGOH	Purchase From
P102	PNHK	Purchase From
P120	UHC	Purchase From
P150	AGH	Purchase From
P200	AKMH	Purchase From
P220	SMH	Purchase From
P520	LGSH	Purchase From
P540	OCSP	Purchase From
Records Per Page: 10		

10. The Purchase From Location screen appears. The Main section is identical to that of the Vendor record. You should complete it the same way: Fax number if issuing via fax; or email address if issuing via email:

Contact Name:	<input type="text"/>
Phone Country Code:	<input type="text"/> Phone Number: 770-664-6624
Fax Country Code:	<input type="text"/> Phone Number: 678-820-3320
Email:	customerservice@chemencemedic
Default Buyer:	<input type="text"/>

11. Update the **Original PO Issue** section as follows:

- Issue Method = **Paper**
- MHC Send Email = **Yes**
- Save changes.

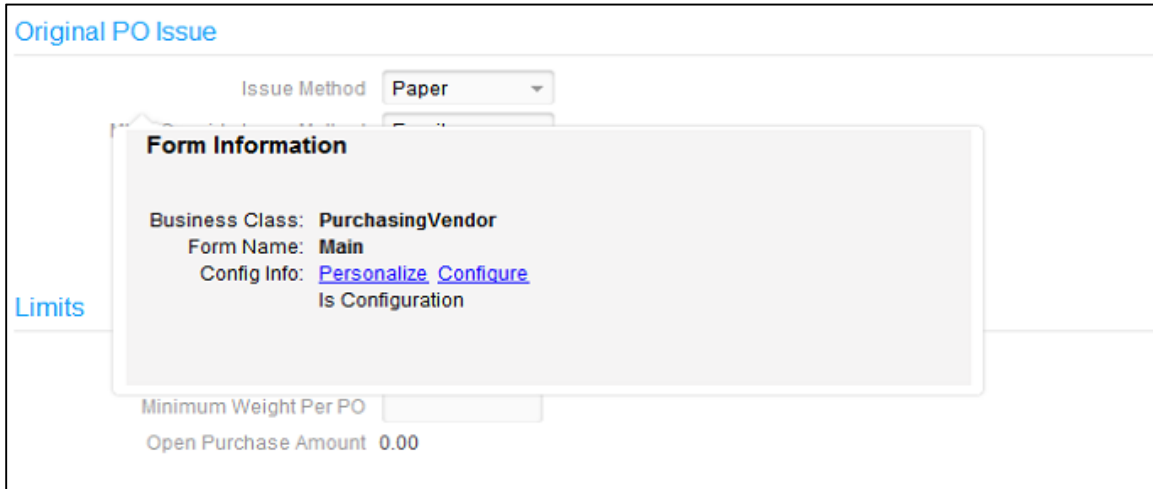
Original PO Issue	
Issue Method:	Paper
MHC Send Email:	Yes

## 03 APPENDIX: Infor Configuration Console Steps

### Add the MHC Send Email to the PurchasingVendor Business Class

#### STEPS: Adding business class attribute **PurchasingVendor.MHCSEndEmail**

1. Login to Infor Rich Client. Navigate to the **PurchasingVendor** Business Class form. Hold Ctrl + shift + left click and choose **Configure**.

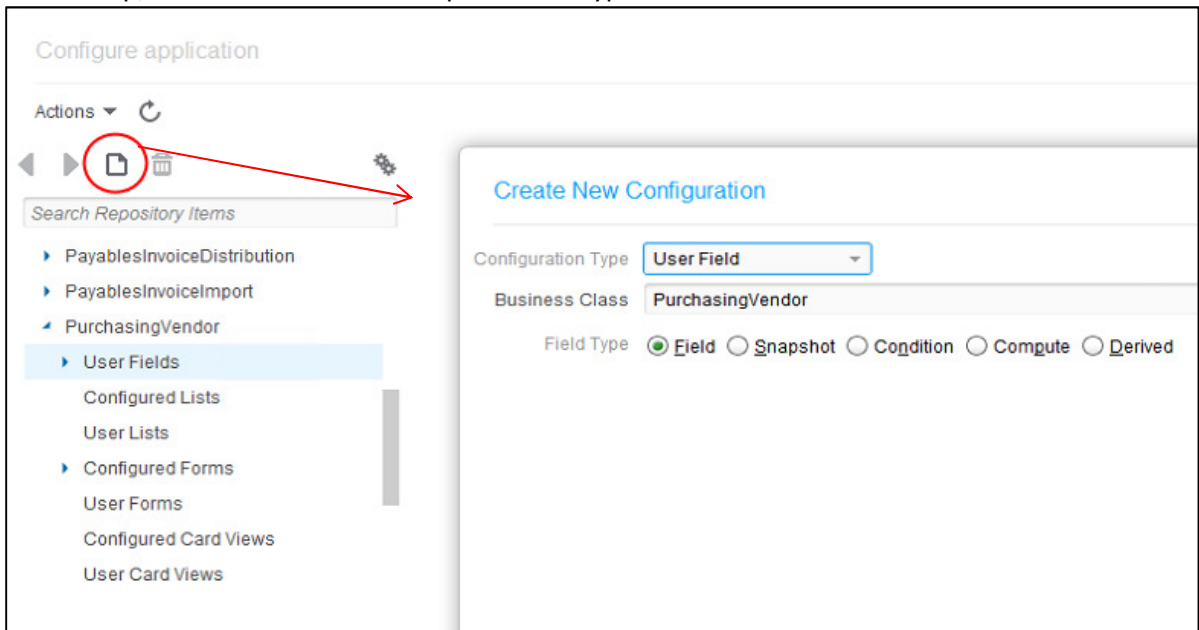


The screenshot shows the 'Original PO Issue' form for the 'PurchasingVendor' business class. The 'Issue Method' is set to 'Paper'. A 'Form Information' dialog box is open, displaying the following details:

- Business Class: **PurchasingVendor**
- Form Name: **Main**
- Config Info: [Personalize](#) [Configure](#)
- Is Configuration

Below the dialog box, the 'Limits' section is visible, showing 'Minimum Weight Per PO' and 'Open Purchase Amount 0.00'.

2. Under the **PurchasingVendor** Business Class, click **User Fields** and click the **New** button at the top, underneath Actions. Keep the Field Type set as **Field** and click OK.



The screenshot shows the 'Configure application' window. The 'Actions' menu is open, and the 'New' button (represented by a document icon) is circled in red. A red arrow points from this button to the 'Create New Configuration' dialog box. The dialog box has the following settings:

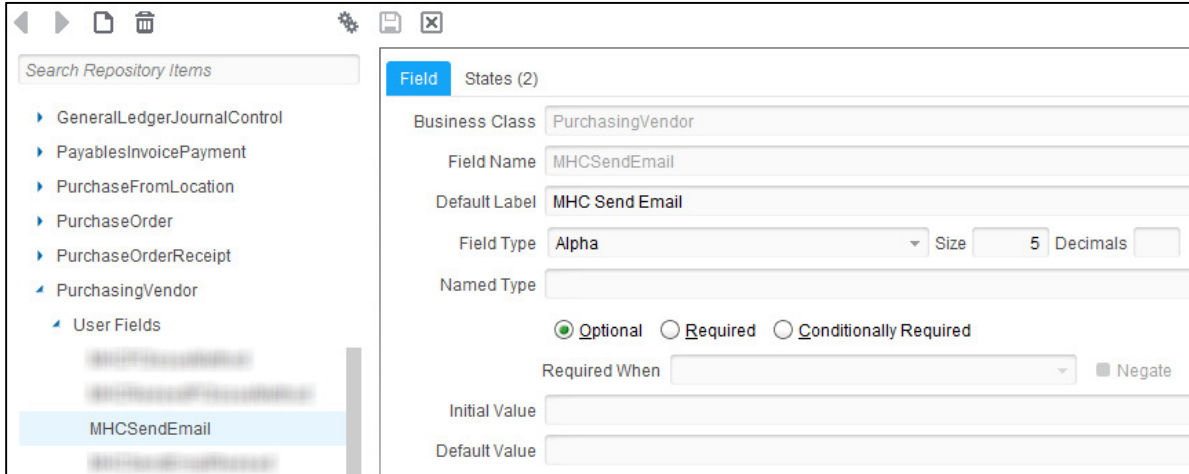
- Configuration Type: **User Field**
- Business Class: **PurchasingVendor**
- Field Type: ☒ **Field** ☐ Snapshot ☐ Condition ☐ Compute ☐ Derived

The left sidebar of the 'Configure application' window shows a tree view with 'PurchasingVendor' expanded, and 'User Fields' selected.

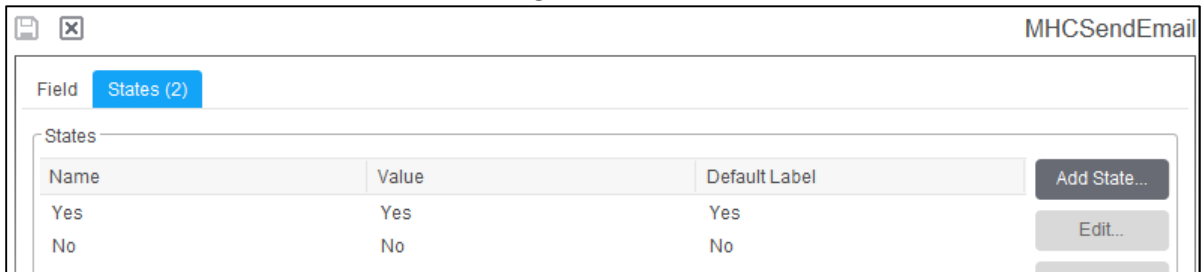
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3. Fill out the following fields and then click the Save icon:

- Field Name: **MHCSendEmail**
- Default Label: MHC Send Email
- Field Type: Alpha
- Size: 5

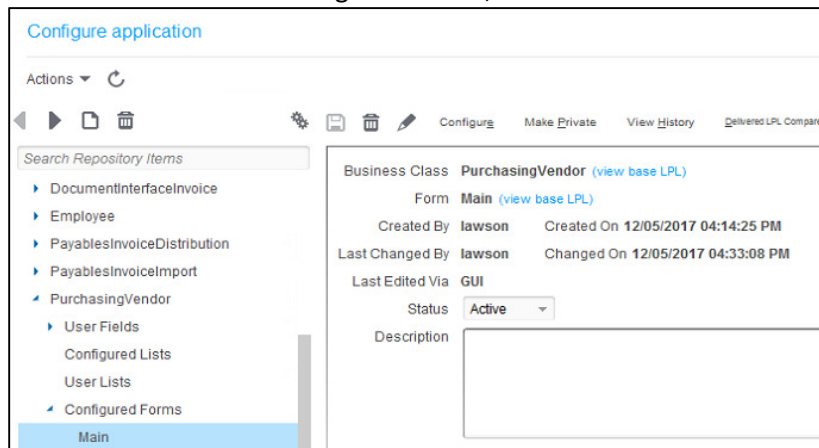


4. Click the **States** tab and add the following **States: Yes** and **No**. Click the **Save** icon.



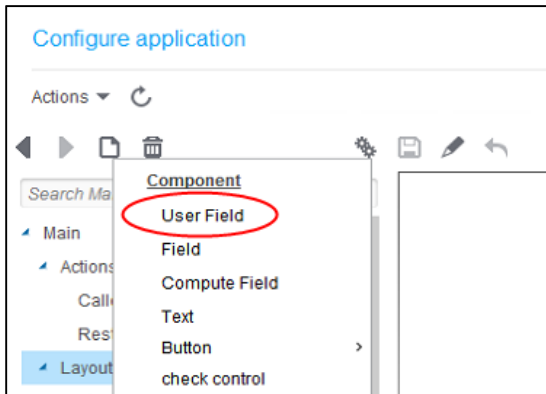
Name	Value	Default Label
Yes	Yes	Yes
No	No	No

5. On the left side under Configured Forms, click **Main** and then click **Configure**.

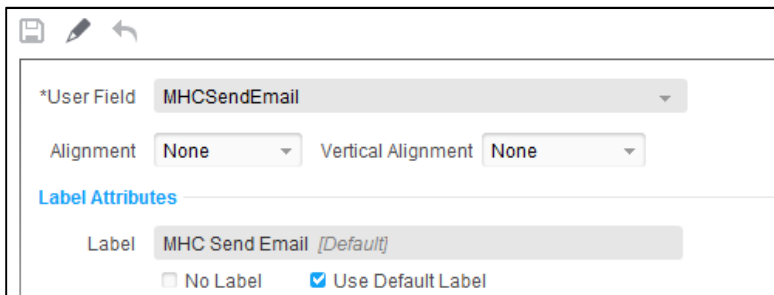


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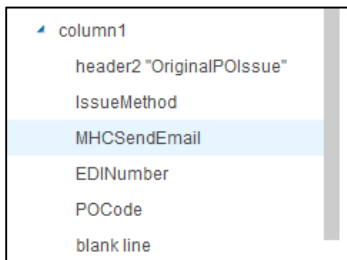
6. Click **Layout** so that it is highlighted, click the “**New**” button at the top by the trash can, and choose **User Field**.



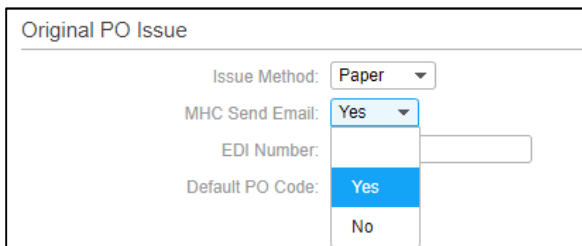
7. Choose the field **MHCSendEmail** that was created in **step 3** from the dropdown and click the **Save** icon.



8. Drag and drop the new **MHCSendEmail** field down towards the bottom of the list underneath **IssueMethod**.



9. The end results should look like this on the Vendor Purchasing Information screen:



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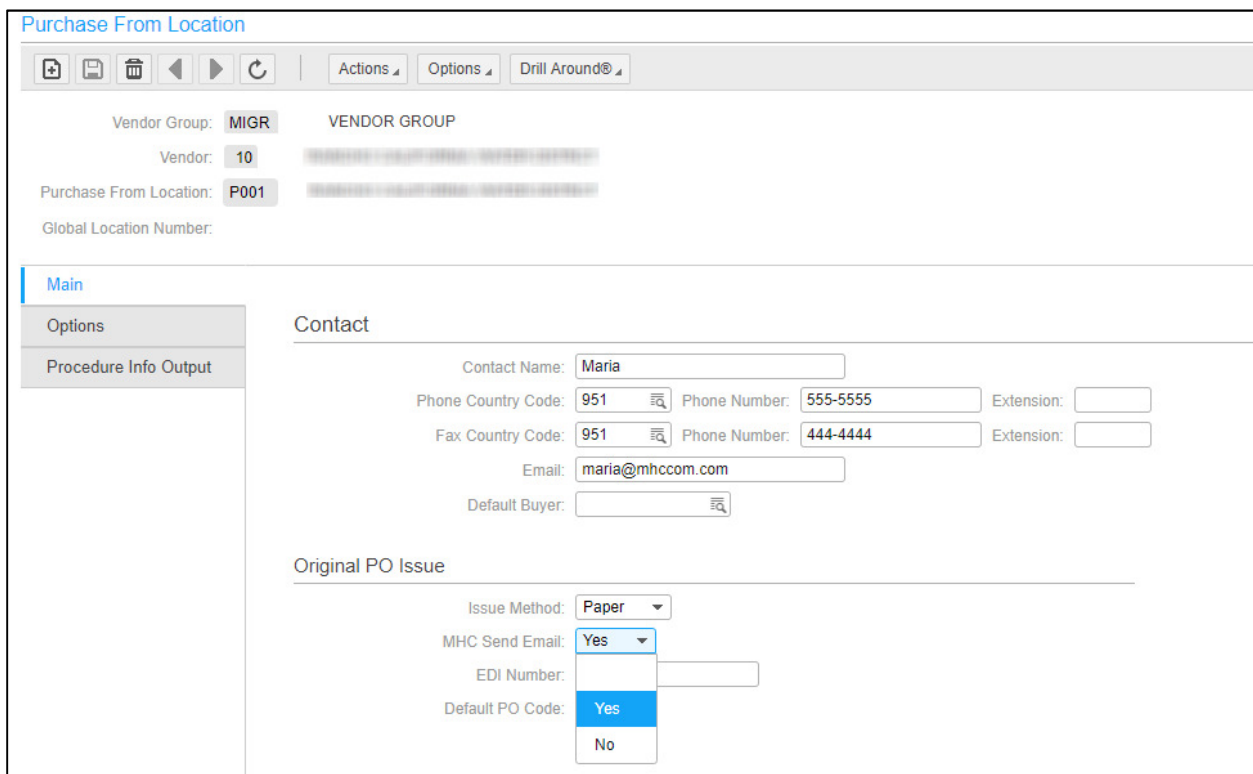
## Add the **MHC Send Email** to the PurchasingFromLocation Business Class

### STEPS: Adding business class attributes

#### **PurchaseFromLocation.MHCSEndEmail**

**10.** Repeat steps 1 – 8 from the previous section but instead of **PurchasingVendor** the business class to be configured will now be **PurchaseFromLocation**.

**11.** The end results should look like this on the **Purchase From Location** screen.



**Purchase From Location**

Vendor Group: **MIGR** VENDOR GROUP

Vendor: **10**

Purchase From Location: **P001**

Global Location Number:

**Main**

Options

Procedure Info Output

**Contact**

Contact Name: **Maria**

Phone Country Code: **951** Phone Number: **555-5555** Extension:

Fax Country Code: **951** Phone Number: **444-4444** Extension:

Email: **maria@mhccom.com**

Default Buyer:

**Original PO Issue**

Issue Method: **Paper**

MHC Send Email: **Yes**

EDI Number:

Default PO Code: **Yes**

No

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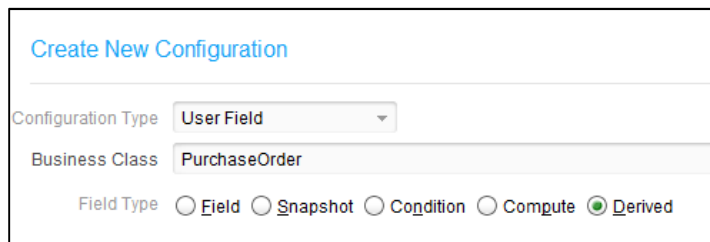


## Add MHC Send Email and MHC Email to PurchaseOrder Business Class

**STEPS:** Add business class attributes on the PurchaseOrder Business Class

**PurchaseOrder.MHCSEmailDerived**  
**PurchaseOrder.MHCSEmail**  
**PurchaseOrder.MHCEmailDerived**  
**PurchaseOrder.MHCEmail**

1. Navigate to the **PurchaseOrder** business class configuration. (See step 1 from section above)
2. Add a new **Derived** User Field called **MHCSEmailDerived**.



Create New Configuration

Configuration Type **User Field**

Business Class **PurchaseOrder**

Field Type ☐ Field ☐ Snapshot ☐ Condition ☐ Compute ☒ Derived

3. The Field Type will be **Alpha** with a size of **5**. In the **Definition** box enter the following (note this needs to look exactly as it does in the following screenshot with the tabbing as is):

```
if (PurchaseFromLocation entered)
    MHCSEmailDerived = PurchaseFromLocationRel.MHCSEmail
else
    MHCSEmailDerived = PurchasingVendorRel.MHCSEmail
```



Derived

Business Class **PurchaseOrder**

Field Name **MHCSEmailDerived**

Default Label

Field Type **Alpha** Size **5** Decimals **0**

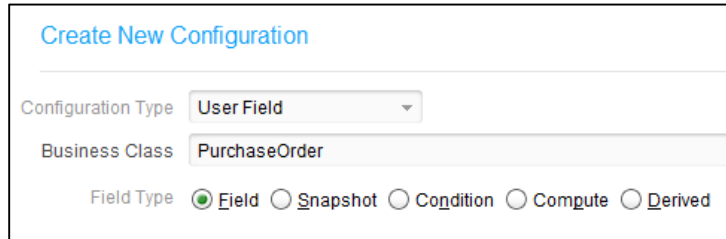
Definition

```
if (PurchaseFromLocation entered)
    MHCSEmailDerived = PurchaseFromLocationRel.MHCSEmail
else
    MHCSEmailDerived = PurchasingVendorRel.MHCSEmail
```

4. Click **Save**.

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5. Create another normal **User Field** called **MHCSendEmail**.



**Create New Configuration**

Configuration Type: **User Field**

Business Class: **PurchaseOrder**

Field Type: ☒ **Field** ☐ Snapshot ☐ Condition ☐ Compute ☐ Derived

6. The Field Type will be **Alpha** with a size of **5**. Give this field 2 States, **Yes** and **No**.



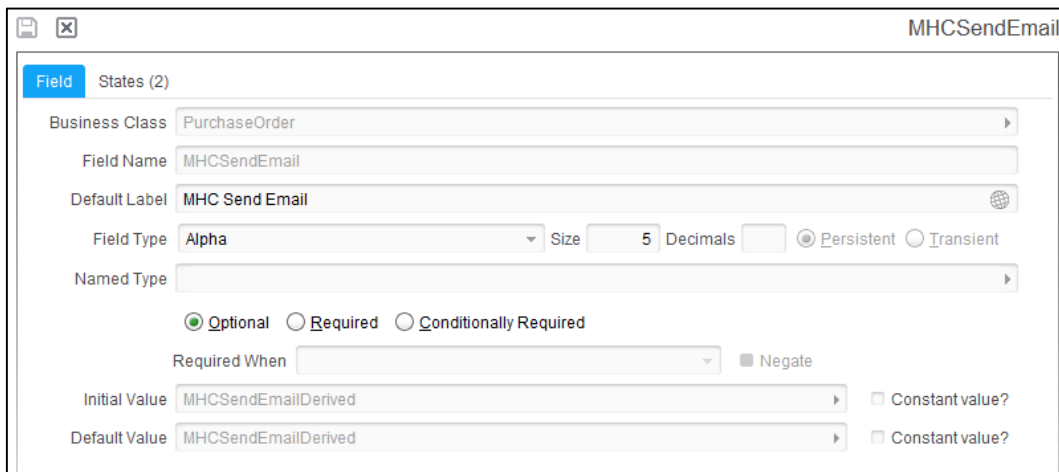
**MHCSendEmail**

Field: **States (2)**

Name	Value	Default Label
Yes	Yes	Yes
No	No	No

Buttons: Add State..., Edit...

7. In the **Initial** and **Default Value** fields, navigate to the **MHCSendEmailDerived** field we created in step 2.



**MHCSendEmail**

Field: **States (2)**

Business Class: **PurchaseOrder**

Field Name: **MHCSendEmail**

Default Label: **MHC Send Email**

Field Type: **Alpha** Size: **5** Decimals: **0** ☒ Persistent ☐ Transient

Named Type: **Optional** ☐ Required ☐ Conditionally Required

Required When: **Required When** ☐ Negate

Initial Value: **MHCSendEmailDerived** ☐ Constant value?

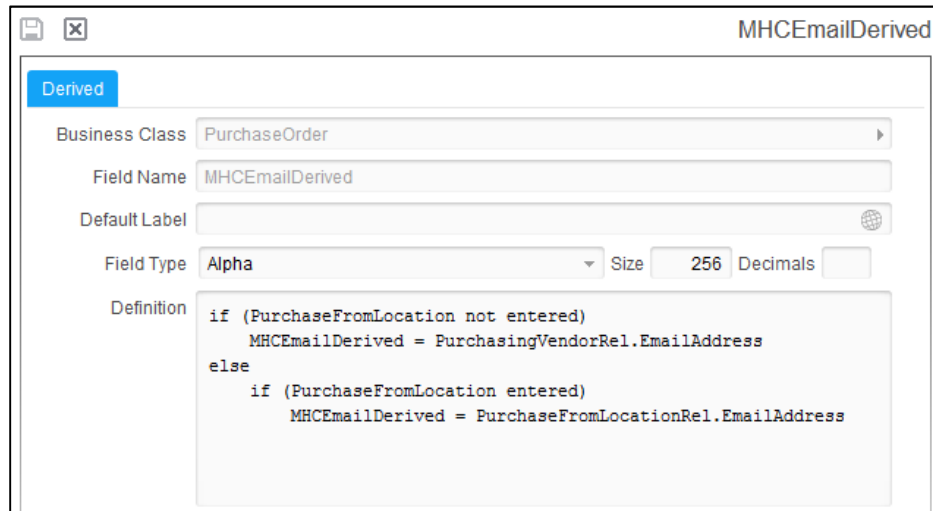
Default Value: **MHCSendEmailDerived** ☐ Constant value?

8. Click **Save**.

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9. Create another **Derived User Field** called **MHCEmailDerived**. Give it a Field Type of **Alpha** and a size of **256**. In the Definition field put the following:

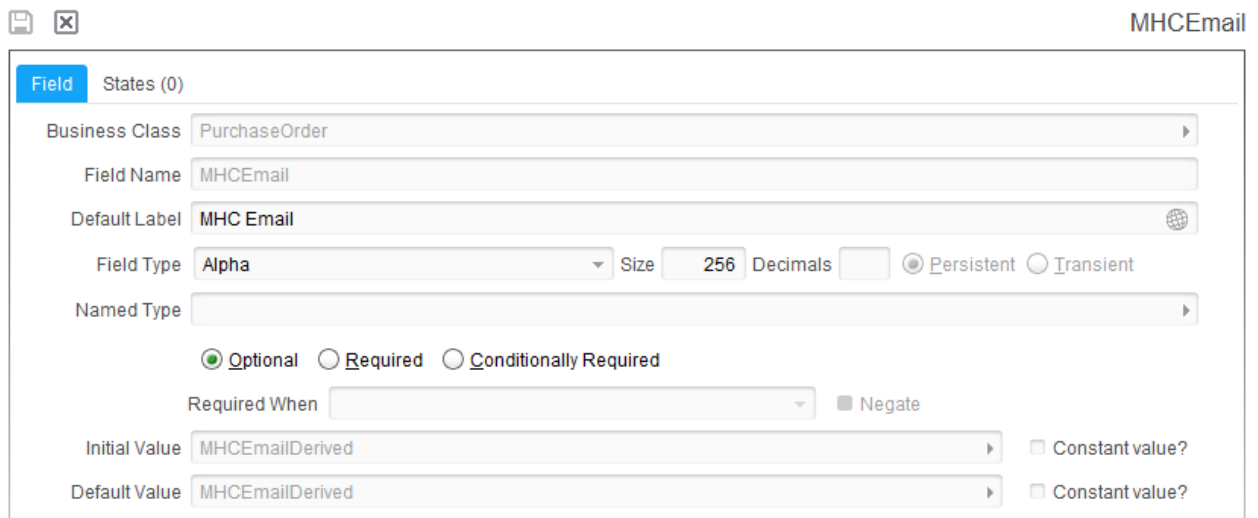
```
if (PurchaseFromLocation not entered)
    MHCEmailDerived = PurchasingVendorRel.EmailAddress
else
    if (PurchaseFromLocation entered)
        MHCEmailDerived = PurchaseFromLocationRel.EmailAddress
```



The screenshot shows the 'MHCEmailDerived' field definition form. The 'Derived' tab is selected. The 'Business Class' is 'PurchaseOrder'. The 'Field Name' is 'MHCEmailDerived'. The 'Default Label' is empty. The 'Field Type' is 'Alpha', 'Size' is '256', and 'Decimals' is '0'. The 'Definition' field contains the following code:

```
if (PurchaseFromLocation not entered)
    MHCEmailDerived = PurchasingVendorRel.EmailAddress
else
    if (PurchaseFromLocation entered)
        MHCEmailDerived = PurchaseFromLocationRel.EmailAddress
```

10. Create another normal **User Field** called **MHCEmail**. Field Type is Alpha and size is **256**. In the **Initial** and **Default Value** fields, navigate to the **MHCEmailDerived** field we created in step 8.




The screenshot shows the 'MHCEmail' field definition form. The 'Field' tab is selected. The 'Business Class' is 'PurchaseOrder'. The 'Field Name' is 'MHCEmail'. The 'Default Label' is 'MHC Email'. The 'Field Type' is 'Alpha', 'Size' is '256', and 'Decimals' is '0'. The 'Named Type' is empty. The 'Optional' radio button is selected. The 'Required When' dropdown is empty, and the 'Negate' checkbox is unchecked. The 'Initial Value' and 'Default Value' fields both have 'MHCEmailDerived' selected. The 'Constant value?' checkboxes are unchecked.

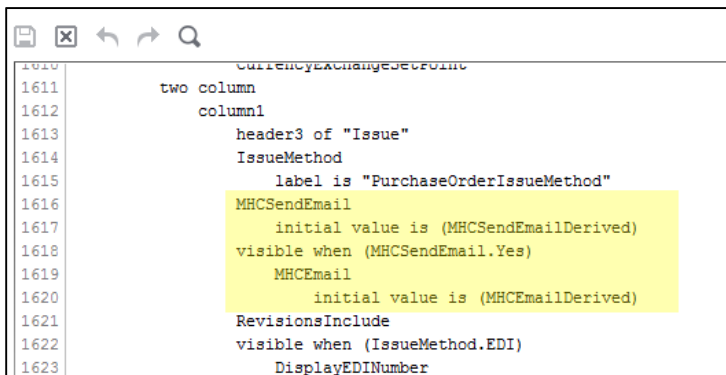
11. Click **Save**.

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**12.** Add these new User Fields **MHCSendEmail** and **MHCEmail** to the **PurchaseOrderHeader** form, underneath IssueMethod. Click on the **Configured Forms** and choose **PurchaseOrderHeader** in the **Form** field and click **OK**.

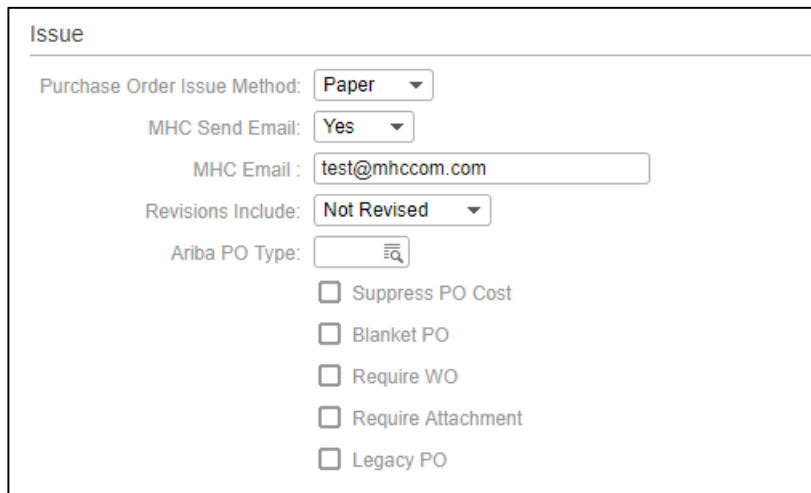
**13.** Click the **LPL pencil**  button and then scroll down to the **header3 of "Issue"** section. Type out the following LPL underneath the IssueMethod:

```
MHCSendEmail
    initial value is (MHCSendEmailDerived)
visible when (MHCSendEmail.Yes)
MHCEmail
    initial value is (MHCEmailDerived)
```



**14.** Click **Save**.

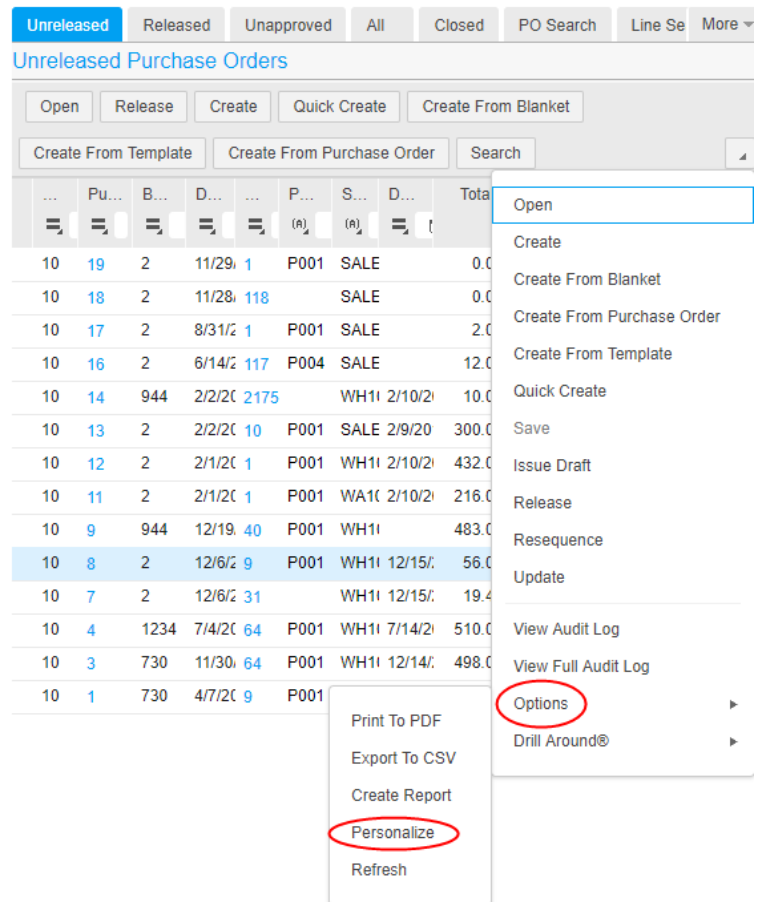
**15.** The end result should look like this on the **PurchaseOrderHeader** form (values come from either PurchasingVendor or PurchaseFromLocation depending on which one is present):



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## 16. Add the **MHCSEmail** to the PurchaseOrder list view.

- Choose the **All Actions Menu**, choose **Options**, then choose **Personalize**.
- Click the **Add Field** button.
- Type in **MHCSEmail** and give it a label.



Unreleased Purchase Orders

Open Release Create Quick Create Create From Blanket

Create From Template Create From Purchase Order Search

...	Pu...	B...	D...	...	P...	S...	D...	Total
10	19	2	11/29/18	1	P001	SALE		0.0
10	18	2	11/28/18	118		SALE		0.0
10	17	2	8/31/17	1	P001	SALE		2.0
10	16	2	6/14/17	117	P004	SALE		12.0
10	14	944	2/2/17	2175		WH11 2/10/17		10.0
10	13	2	2/2/17	10	P001	SALE 2/9/17		300.0
10	12	2	2/1/17	1	P001	WH11 2/10/17		432.0
10	11	2	2/1/17	1	P001	WA11 2/10/17		216.0
10	9	944	12/19/16	40	P001	WH11		483.0
10	8	2	12/6/16	9	P001	WH11 12/15/16		56.0
10	7	2	12/6/16	31		WH11 12/15/16		19.4
10	4	1234	7/4/17	64	P001	WH11 7/14/17		510.0
10	3	730	11/30/16	64	P001	WH11 12/14/16		498.0
10	1	730	4/7/17	9	P001			

Options menu:

- Open
- Create
- Create From Blanket
- Create From Purchase Order
- Create From Template
- Quick Create
- Save
- Issue Draft
- Release
- Resequence
- Update
- View Audit Log
- View Full Audit Log
- Options
- Drill Around®

Personalize menu:

- Print To PDF
- Export To CSV
- Create Report
- Personalize
- Refresh

d. Result:

Unreleased	Released	Unapproved	All	Closed	Alerts	PO Search	Line Search	AOC Search	Receipt Search	Encumbrances	Contract Costs	Diversity
Unreleased Purchase Orders												
Open	Release	Create	Quick Create	Create From Blanket	Create From Template	Create From Purchase Order	Search	Refresh				
Company	Purchase Order	Buyer	Date	Vendor	Purchas...	Ship To	Delivery Date	Total	Currency	MHC Send Email		
10	23	2	11/15/2018	10	P001	SALES		0.00	USD	Yes		
10	24	2	11/19/2018	3734		SALES		0.00	USD	No		
10	25	2	11/19/2018	3734		SALES		0.00	USD	Yes		
10	26	2	11/19/2018	3734		SALES		0.00	USD	Yes		
10	27	2	11/19/2018	9	P001	SALES		2.00	USD	No		
10	28	2	11/19/2018	10	P001	SALES		0.00	USD	Yes		
10	29	2	11/19/2018	10	P001	SALES		0.00	USD	Yes		
10	30	2	11/19/2018	9	P002	SALES		0.00	USD	Yes		