

SNAP InBox Example: A/P Invoice sent via email (with a pdf Invoice attached) will be turned into a SNAP Document that will be attached to the A/P Invoice (and PO) in your Step1 Data.

This example illustrates how you can use your SNAP InBox to automatically attach a pdf copy of the A/P Invoice to the Vendor Invoice (and PO) in Step1 (using SNAP Level 2 and the S4 interface):

Assume your vendors email A/P Invoices to a special purpose email address (ie APInvoices@xyz.com)

Also assume you have a Step1 user setup called APInvoices (whose email address matches the email address vendors are sending the A/P invoices to). Having a special user setup like this will keep that person's 'real' snapdash tabs from getting overrun with all of these A/P invoice documents. (This user will not need to login to any Step1 modules except SNAPDash).

Also assume there is a SNAP SubTopic setup for 'A/P - Invoices' that has the default ViewControlCode and FYI user lists setup (if you want to restrict View access). The A/P person will need the SubTopic's ID, which will help automate things.

You should NOT auto forward all that email to the SNAP inbox right away. There may be spam or other email that reaches that address in error, that could either be deleted or forwarded to the proper address, and then those won't get pulled into SNAP and have to be deleted there.

Here would be the normal procedure:

1. Have the A/P person periodically login to that email acct, and for each email/invoice do the following:
 - Enter the A/P Invoice using the A/P module (same as you do now).
 - AFTER entering the A/P Invoice, forward the email to your SNAP inbox after adding the following 'parse' codes to the body of the email. (The SNAP Parse Codes are not case-sensitive, and can be anywhere in the message body, but each must be on a separate line, and at the start of a line):

```
Snap VendorAcct ABC100
Snap APInvoice 654321
Snap PO 3552
Snap Subject A/P Invoice 654321
Snap SubTopicID 1059
Snap Document
```

2. DBComm will then grab that email and setup a SNAP Document and automatically do the following:
 - Set the Document Subject from the Email Subject.
 - If the 'Snap Subject xxx' parse code is found, it will override and set the Doc subject to the parse code value. (In the example above, it will set 'A/P Invoice 654321' as the Doc subject to avoid confusion, instead of 'Fwd: xx')
 - Copy the email message body into the Note/Doc Text.
 - Set the APInvoices user as the Author of the Doc (since the email from-address matches that users email address).
 - Upload the pdf email attachment to S4 and Link it to the new SNAP Document.
 - Attach the Doc To Vendor ABC100 (Do Not Check the 'Show/View' checkbox for Vendor)
 - Attach the Doc to Vendor Invoice 654321 (Do Check the 'Show/View' checkbox for Vendor Invoice)
 - Attach the Doc to PO 3552 (Do Check the 'Show/View' checkbox for PO)
 - Set the SubTopic for this Doc to SubTopicID 1059 (which is the 'A/P - Invoices' SubTopic) (which could automatically set the ViewControl to 'Restricted' and FYI the A/P User Group (based on the SubTopic defaults), to restrict Viewer access for this Doc (and the linked A/P Invoice) to the users in the A/P User Group).
 - Close the SNAP Document.

3. After doing the above, the Doc (and linked A/P Invoice pdf) will show up on the Notes/Docs tab when Viewing that A/P Invoice and also when Viewing the associated PO. It will Not show up on the Documents tab when Viewing that Vendor (but is still attached to that Vendor for searching purposes).

4. The Doc has been Closed, so it won't show up in the SNAPDash Open Notes tab. If there was anything that needed to be modified for this SNAP Document, then you could check 'Show All', to show All or your Closed Notes/Docs, search in the subject field to find the relevant APInvoice document, and then modify it as needed.