



# PURCHASE ORDER AUTHORIZATION

Purchase Orders now have additional statuses so you can differentiate between those that have been requested, approved, ordered, or denied. Security governs who is a Purchase Order Requestor and who is a Purchase Order Approver: the process is designed so that *Requestors* can ask that an *Approver* order something for them.

If you are a Purchase Order Approver, you can setup agrē to send you a Message when a new order has been requested so that you can approve or deny it. When you actually place the order with a supplier, you change the status of the PO to Ordered and at this point, the product is reflected in Inventory reports as being *On Order*.

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Note: Security settings are managed by your local company security administrators. With new features, we don't presume to know who should have access and who should not, so we leave that up to them.

Before you can use the new purchase order features, you need to be allowed to use them. Security is handled at the Role level: *File > Security> Manage Roles*. If **PO Purchaser** is not allowed, the user will only be able to create POs with a status of Requested.

Save 🗙 Delete 🔞 Exit					
Permissions   counts Receivable   Inventory Accounts Payab	le   General Ledger   Blending	Agronomy Adm	inistration		
Item	Action	Allow?	Deny?	^	Allow All
Purchase Orders	Add	<b>V</b>			
	Сору	<b>V</b>			Deny All
	Edit	<b>V</b>			Clear All
	Delete				Citedi Ali
	Enable on menu				
	Edit GL Acct / Project				
	DO D I	$\sim$			
	PO Purchaser	×			

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#### You may want to create a separate role just for Purchase Order approvers.

### **Configuration Options**

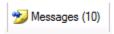
agrē can send you a message when new Purchase Order Requests are placed. When the sweeper runs each evening, it will check for any new purchase order requests and send a message to all users in the role you select.

### File > Config Options > Company > Messages tab

From the drop down list, select the *Role* of users who should receive messages regarding Purchase Orders.

🏷 Company Level Settings					- • ×
🔚 Sayez 🔇 Exit					
General Accounts Receivable Blending	Accounts Payable	Report Options	Report Criteria	Messages AR Statemer	nt Email )
Notify all users in specifed role when:					
New GL Period created	Lonna's Role	•			
Posting made to closed GL Period	LordOfTheUniverse	-		t the role users	
Recurring Journal Entry is due	LordOfTheUniverse	•		messages	
Future AP Payments are made	Student	•			
Inventory is below Min On Hand	Student	•			
New Requested PO is created	PO Messages	•			

When you receive a new message, the *Messages* icon will indicate how many new messages that are waiting in your inbox.



### **Requesting a Purchase**

If a user who is not a PO Purchaser creates a PO, the only status available is *Requested*. If the user is a Purchaser/Approver, they can choose any status (*Requested, Approved, Ordered, Denied*).

占 Add Purchase Or	rder									- • •
Save 🕠 Document	ts 🕄 Refresh 🖾 PO	Activity Detail	🕉 Exit							
Reference:	•	Generate Ref	erence Automaticall	ly		Sub T	Гуре:			•
Supplier:	Abraham's Ag Supply (S00	29)	▼ Find	Add		Locat	tion:	Dog River		•
Date Ordered:	Apr 19, 2021 💌 *					Statu	s:	Requested		-
Expected Delivery:	May 19, 2021 💌 to		<ul> <li>Not Spe</li> </ul>	ecified		Requ	ested By (Staf	f): Chem Shed		
Expiry Date:	May 19, 2021 💌	No Expiry Date			optional	nfi	rmation No:			
General Products (1)	]				requestor	F				
Product/Descript	tion	Qty Ordered	Received Re	emaining	Unit Price Pr	epay	Status	Location	Release	Inventory
> BUCTRIL - BUC	TRIL M (JUG)	5.0	0.0	5.0	\$310.00		Active	Dog River		
Add Product Row	Add Non-Inventory R emove Row Reopen A		er					To	otal:	\$1,550.00

**Note:** The *Requested By* (Staff) field is a text field – any text can be entered. If you will want to search by Requestor when running reports, you must search for the text typed in this field.

## Approving a Purchase

Search the PO grid for those waiting for approval.

📥 Purchase Orde	er Search	×
🕨 Search 📔 Sta	art Over 😵 Exit	
Reference Number Contract Number: Linked WO: Status: Requested By: Location: Sub Type:	r: Requested Show PO with no Release Numbers	
Supplier:	Any Supplier     This Supplier: <a href="https://www.stattyping.oruseFind">Statt typing oruse Find</a> Find	
Order Date:	<ul> <li>Any Date</li> <li>○ Date Range</li> <li>Apr 12, 2021</li> <li>to</li> <li>Apr 19, 2021</li> </ul>	
Create Date:	C Today	
Product:		

### *Edit* the PO.

A Purchase Order								- • ×
🕂 Add 🖉 Edit 🗶 Delete	New Search	Preview Ite	em 🖾 History	😣 Exit				
Supplier	<ul> <li>Date</li> </ul>	Expiry Date	Delivery Date	Status	Reference Number	Contract #	A Locati	on
> Parkland Ag Supply	Sep 08, 2016	Oct 08, 2016	Oct 08, 2016	Ordered	DPO076		🔲 🛛 Dog R	iver
1								
1 Purchase Order found								

Change the status to *Approved* if you will be placing the order with the supplier later, or to *Ordered* if you are placing the order now.

🛓 Edit Purchase C	rder: DPO112		
Save 🗙 Delete	🐘 Documents 😰 Refresh 🖾 PO Activity Detail 🖾 History 🔇 Exit		
Reference:	DP0112 *	Sub Type:	•
Supplier:	Abraham's Ag Supply (S0029) Find Add	Location: Dog Riv	er 💌 🕇
Date Ordered:	Apr 19, 2021 💌	Status: Request	ted 💌 📩
Expected Delivery:	May 19, 2021 💌 to 🔽 🔽 Not Specified	Requested By (Staff): Ordered	
Expiry Date:	May 19, 2021 🔽 🔽 No Expiry Date	Confirmation No: Closed Request	72
General Products (	)	Approve	
See Landian			

You will not be able to import from or link to an Inventory Receipt to a PO until the status is set to *Ordered*.

<**PO** Available> will display if there are PO's either Requested, Approved or Ordered (so that you know a PO is 'out there'), but if the status is anything other than **Ordered**, you will receive a message that the status needs to be updated (in case the Approver forgot to update the PO).

Product BUCTRIL - Buctril M Add Product Row Import From PO	
	Product.     Decenter     Decenter     Decenter       Quantity:     5       Include expired purchase orders       Include completed purchase order lines       Reference     Release No       Date     Qty Ordered       Qty Received     Unit Cost       Prepay?     Location       Supplier Location       > EP00012     Dec 08, 2015       5.0000     \$310.00       Edmonton

There is no change to your *Inventory Position* until the status of the Purchase Order is set to *Ordered*.

agrē				Inven	tory Po Edr	sition nonton
				Product	Name is BUCTR	L - Buctril M
Chemical						
Product Buctril M (BUCTRIL)	Units jug	Min Level	Qty On Hand 1,464.0	Qty Ordered 5.0	Qty Committed 4.0	Qty Available 1,465.0

## Denying a Purchase

If the Approver decides to cancel the request, they edit the PO and change the status to **Denied**.

🛓 Edit Purchase C	rder: DPO112		
Save X Delete	I Documents Refresh I PO Activity Detail I History 😵 Exit		
Reference:	DP0112 *	Sub Type:	•
Supplier:	Abraham's Ag Supply (S0029) Find Add	Location: Dog River	<b>▼</b> *
Date Ordered:	Apr 19, 2021	Status: Requested	<b>_</b>
Expected Delivery:	May 19, 2021 💌 to 🔽 🔽 Not Specified	Requested By (Staff): Ordered	
Expiry Date:	May 19, 2021 💌 🗌 No Expiry Date	Confirmation No: Closed Requested	
General Products (	0	Approved Denied	·

If a Requestor changes their mind about a request, they can edit the PO and change the status to *Closed*.

### Reporting

The *Purchase Order Activity Report* has been modified to print landscape instead of portrait to accommodate extra columns information.

### Purchase Order Activity

Any Purchase Order Status; Any Status; Any Location; Order Dates: Jun 01, 2010 to Oct 01, 2010

Chemical: ACHIEVE	(Achieve Liquid (	Gold) case							
PO	Delivery Date	Expiry Date	Supplier	Ordered	Received	Remaining	Prepaid		Price Ordered Fo
POK319 (Closed)	Sep 27, 2010	Sep 27, 2010	Abraham's AgServices (S26)	1,000	0	0			Kelowna
		Total: Chemic	al: ACHIEVE (Achieve Liquid Gold) case	1,000	0	0		0	
Chemical: BUCTRIL	(Buctril M) jug								
PO	Delivery Date	Expiry Date	Supplier	Ordered	Received	Remaining	Prepaid		Price Ordered Fo
PO052	Oct 30, 2010	Oct 30, 2010	Abraham's Ag Services (S26)	5	0	5			Edmonton
		1	otal: Chemical: BUCTRIL (Buctril M) jug	5	0	5		0	
Chemical: DECIS (D	ecis 5 E.C 10L) jug	9							
PO	Delivery Date	Expiry Date	Supplier	Ordered	Received	Remaining	Prepaid		Price Ordered Fo
PO5528 (Closed)	Sep 05, 2010	Sep 05, 2010	Abraham's Ag Services (S26)	100	0	0			Calgary
		Total	Chemical: DECIS (Decis 5 E.C 10L) jug	100	0	0		0	