

# PURCHASE ORDER AUTHORIZATION

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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*.

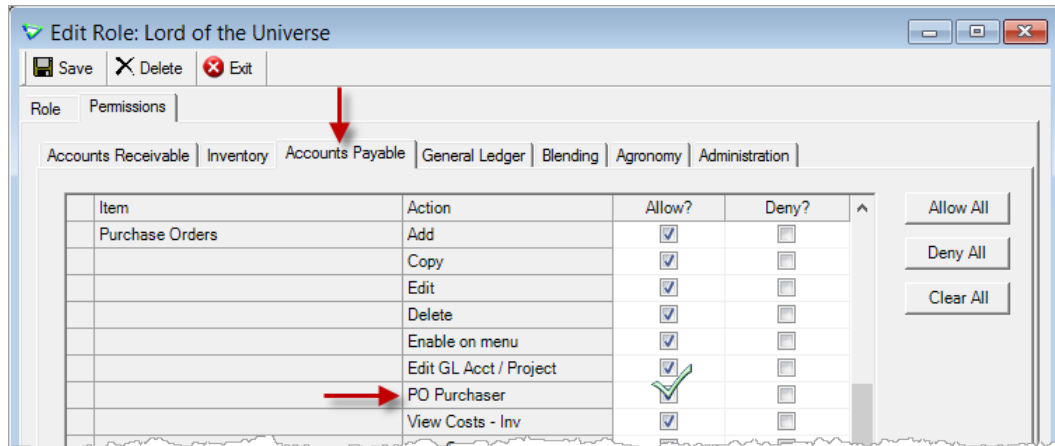
## What you'll find:

|                             |   |
|-----------------------------|---|
| Security.....               | 2 |
| Configuration Options.....  | 3 |
| Requesting a Purchase ..... | 3 |
| Approving a Purchase.....   | 4 |
| Denying a Purchase .....    | 6 |
| Reporting.....              | 6 |

## Security

**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.



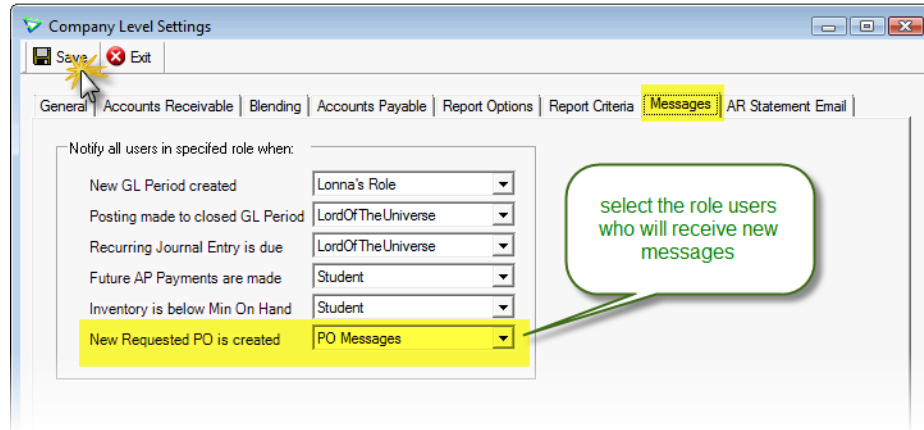
**Tip:** You may want to create a separate role just for Purchase Order approvers.

## Configuration Options

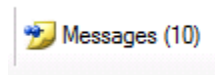
agrē can send you a message when new Purchase Order Requests are placed. When the sweeper runs each evening, it will check for any new purchase order requests and send a message to all users in the role you select.

**File > Config Options > Company > Messages** tab

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



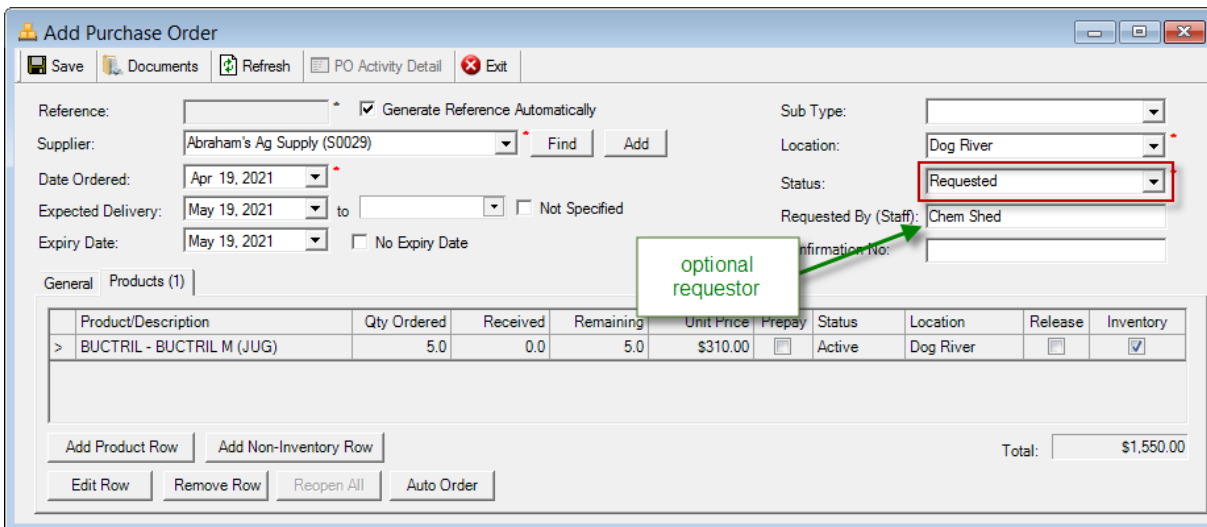
When you receive a new message, the **Messages** icon will indicate how many new messages that are waiting in your inbox.



## 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*).



**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 Order Search

Search Start Over Exit

Reference Number:

Contract Number:

Linked WO:

Status: **Requested**  Show PO with no Release Numbers

Requested By:

Location:

Sub Type:

Supplier:  Any Supplier  
 This Supplier:  Find

Order Date:  Any Date  
 Date Range  to

Create Date:  Today  
 Any Date  
 Date Range  to

Product:  Any Product  
 This Product:

*Edit* the PO.

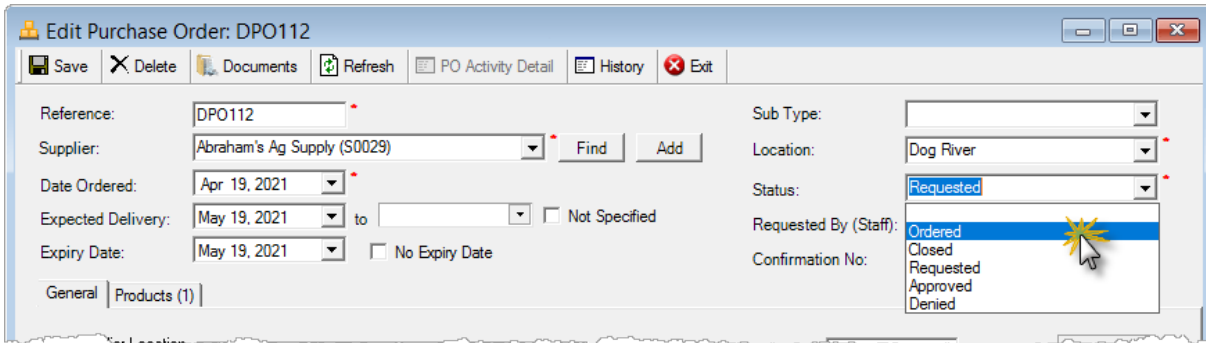
Purchase Order

+ Add **Edit** Delete New Search Copy Preview Item History Exit

| Supplier             | Date         | Expiry Date  | Delivery Date | Status  | Reference Number | Contract # | Location  |
|----------------------|--------------|--------------|---------------|---------|------------------|------------|-----------|
| > Parkland Ag Supply | Sep 08, 2016 | Oct 08, 2016 | Oct 08, 2016  | Ordered | DPO076           |            | Dog River |

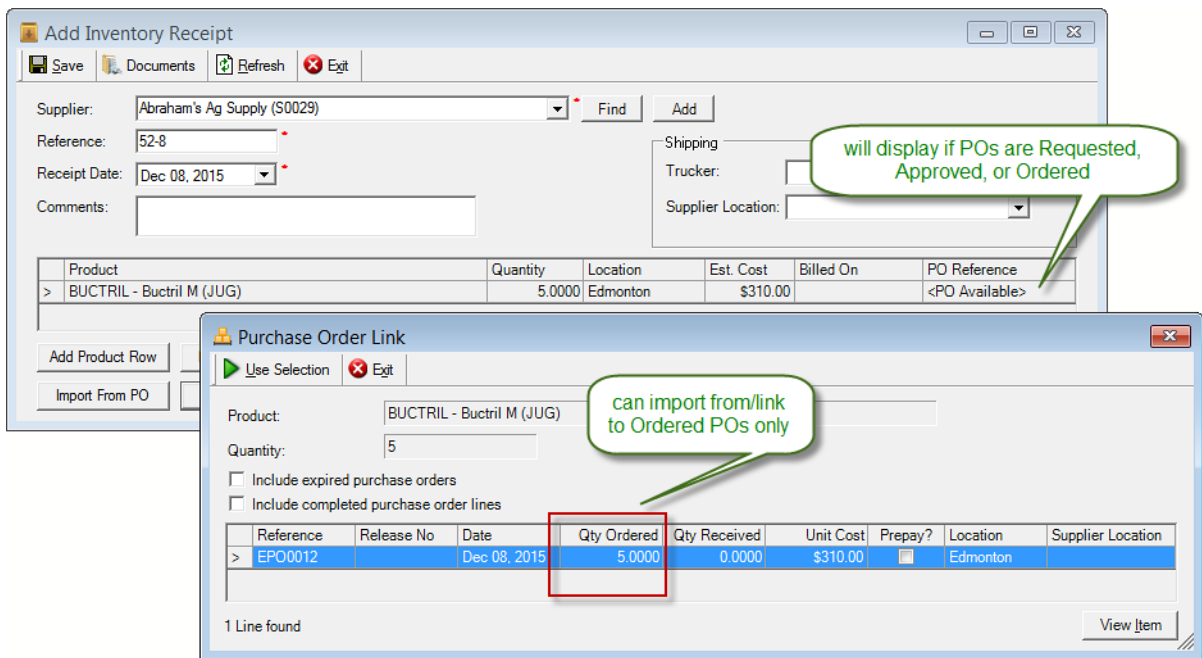
1 Purchase Order found

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.



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).



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



## Inventory Position Edmonton

Product Name is BUCTRIL - Bucril M

### Chemical

| Product            | Units | Min Level | Qty On Hand | Qty Ordered | Qty Committed | Qty Available |
|--------------------|-------|-----------|-------------|-------------|---------------|---------------|
| Bucril M (BUCTRIL) | jug   |           | 1,464.0     | 5.0         | 4.0           | 1,465.0       |

## Denying a Purchase

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

The screenshot shows the 'Edit Purchase Order: DPO112' window. The 'Status' dropdown menu is open, and the 'Denied' option is highlighted. A red arrow points to the 'Denied' option.

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 For |
|--|---------------|--------------|-----------------------------|---------|----------|-------------------|-------------------|
| POK319 (Closed)  | Sep 27, 2010  | Sep 27, 2010 | Abraham's Ag Services (S26) | 1,000   | 0        | 0                 | Kelowna           |
| <b>Total: Chemical: ACHIEVE (Achieve Liquid Gold) case</b> |               |              |                             | 1,000   | 0        | 0                 | 0                 |

#### Chemical: BUCTRIL (Buctril M) jug

| PO  | Delivery Date | Expiry Date  | Supplier                    | Ordered | Received | Remaining Prepaid | Price Ordered For |
|---|---------------|--------------|-----------------------------|---------|----------|-------------------|-------------------|
| PO052   | Oct 30, 2010  | Oct 30, 2010 | Abraham's Ag Services (S26) | 5       | 0        | 5                 | Edmonton          |
| <b>Total: Chemical: BUCTRIL (Buctril M) jug</b> |               |              |                             | 5       | 0        | 5                 | 0                 |

#### Chemical: DECIS (Decis 5 E.C 10L) jug

| PO  | Delivery Date | Expiry Date  | Supplier                    | Ordered | Received | Remaining Prepaid | Price Ordered For |
|---|---------------|--------------|-----------------------------|---------|----------|-------------------|-------------------|
| PO5528 (Closed)                                     | Sep 05, 2010  | Sep 05, 2010 | Abraham's Ag Services (S26) | 100     | 0        | 0                 | Calgary           |
| <b>Total: Chemical: DECIS (Decis 5 E.C 10L) jug</b> |               |              |                             | 100     | 0        | 0                 | 0                 |