



Purchase Order Authorization

Purchase Orders have 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 agré 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*.

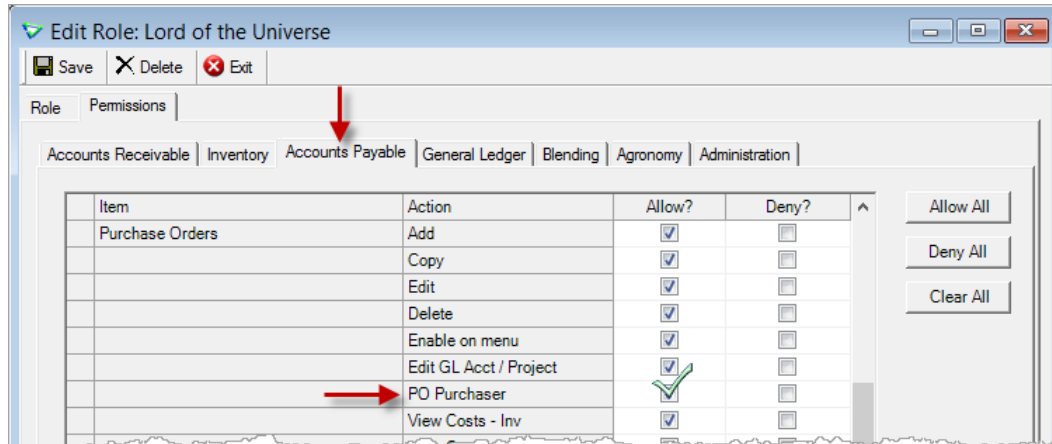
What you'll find:

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Security

Before you take advantage of purchase order status features, you need permission to use them.

If **PO Purchaser** is not allowed, the user will *only* be able to create POs with a status of Requested.

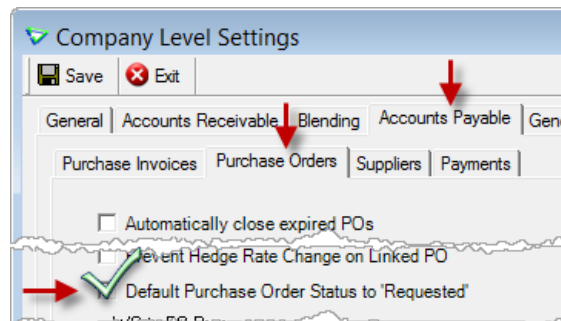


File > Security > Manage Roles / Accounts Payable

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

Configuration Options

If you want ALL purchases go through the approval process, even those created by PO Purchasers that would otherwise default to Ordered, check **Default Purchase Order Status to Requested**.

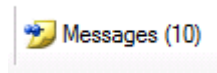


File > Config Options > Company / Accounts Payable / Purchase Orders

agrē can send messages 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

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



Requesting a Purchase

For 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*).

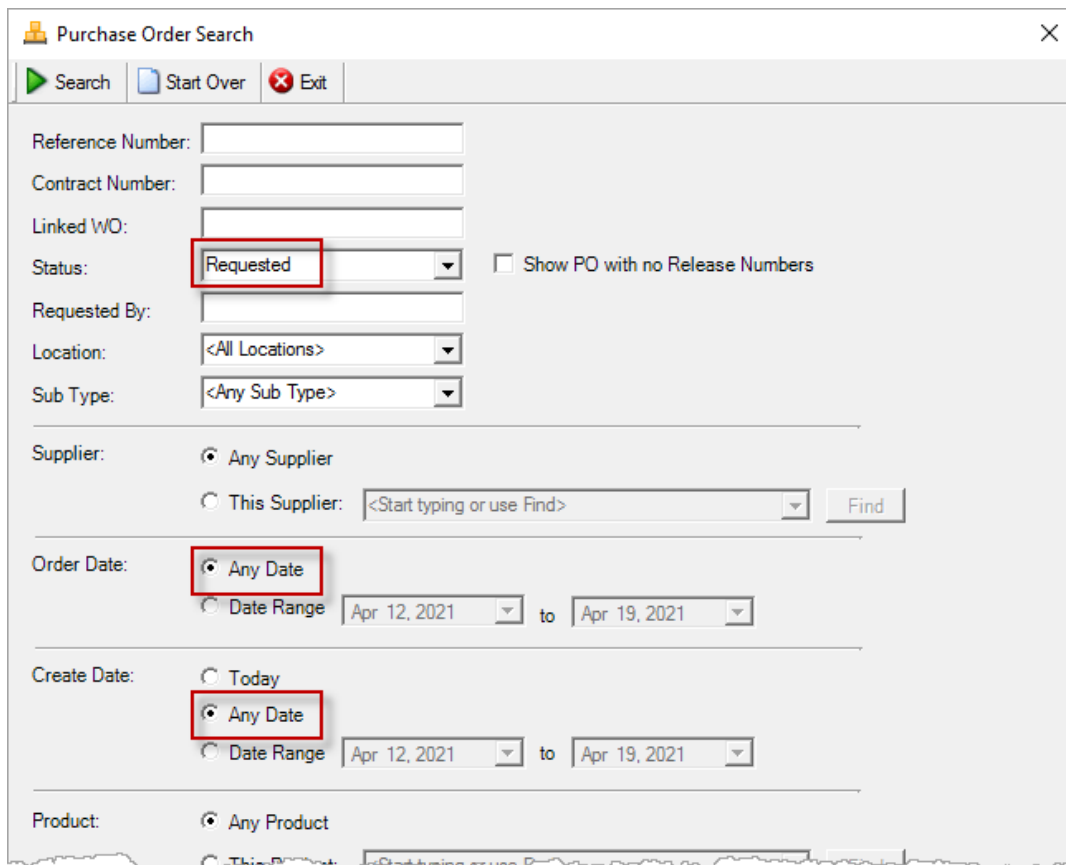
Product/Description	Qty Ordered	Received	Remaining	Unit Price	Prepay	Status	Location	Release	Inventory
> BUCTRL - BUCTRL M (JUG)	5.0	0.0	5.0	\$310.00		Active	Dog River		☒

Accounts Payable > Purchase Orders

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

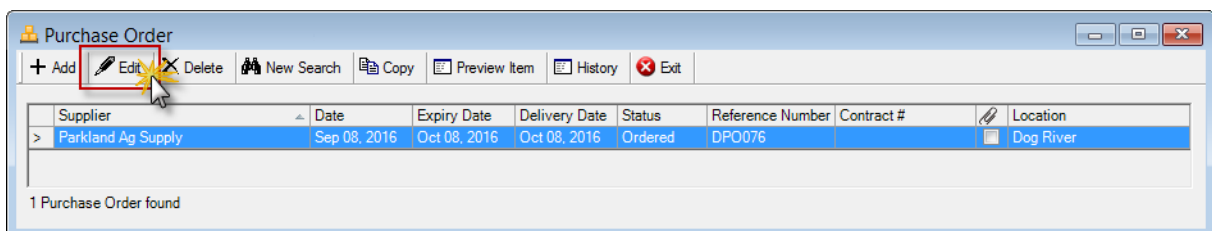
Search the PO grid for those waiting for approval.



The "Purchase Order Search" dialog box contains the following fields and options:

- Reference Number:
- Contract Number:
- Linked WO:
- Status: **Requested** (dropdown menu, highlighted with a red box) ☐ Show PO with no Release Numbers
- Requested By:
- Location: **<All Locations>** (dropdown menu)
- Sub Type: **<Any Sub Type>** (dropdown menu)
- Supplier: ☒ Any Supplier ☐ This Supplier:
- Order Date: ☒ **Any Date** (radio button highlighted with a red box) ☐ Date Range: to
- Create Date: ☐ Today ☒ **Any Date** (radio button highlighted with a red box) ☐ Date Range: to
- Product: ☒ Any Product

Edit the PO.



The "Purchase Order" window displays a table with the following columns: Supplier, Date, Expiry Date, Delivery Date, Status, Reference Number, Contract #, and Location. A red box highlights the "Edit" button in the toolbar, which is represented by a pencil icon.

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.

Reference: DPO112
 Supplier: Abraham's Ag Supply (S0029)
 Date Ordered: Apr 19, 2021
 Expected Delivery: May 19, 2021 to
 Expiry Date: May 19, 2021 ☐ No Expiry Date
 Sub Type:
 Location: Dog River
 Status: Requested
 Requested By (Staff):
 Confirmation No:
 General | Products (1)

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).

Add Inventory Receipt
 Supplier: Abraham's Ag Supply (S0029)
 Reference: 52-8
 Receipt Date: Dec 08, 2015
 Comments:
 Shipping:
 Trucker:
 Supplier Location:
 will display if POs are Requested, Approved, or Ordered

Product	Quantity	Location	Est. Cost	Billed On	PO Reference
> BUCTRIL - Buctril M (JUG)	5.0000	Edmonton	\$310.00		<PO Available>

Purchase Order Link
 Use Selection | Exit
 Product: BUCTRIL - Buctril M (JUG)
 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
> EPO0012		Dec 08, 2015	5.0000	0.0000	\$310.00	☐	Edmonton	

1 Line found
 View Item
 can import from/link to Ordered POs only

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 - Buctril M

Chemical

Product	Units	Min Level	Qty On Hand	Qty Ordered	Qty Committed	Qty Available
Buctril 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**.

Reference: DPO112
Supplier: Abraham's Ag Supply (S0029) Find Add
Date Ordered: Apr 19, 2021
Expected Delivery: May 19, 2021 to ☐ Not Specified
Expiry Date: May 19, 2021 ☐ No Expiry Date
Sub Type:
Location: Dog River
Status: Requested
Requested By (Staff):
Confirmation No:
General Products (1)

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
Total: Chemical: 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 For
PO052	Oct 30, 2010	Oct 30, 2010	Abraham's Ag Services (S26)	5	0	5 ☐	Edmonton
Total: Chemical: BUCTRIL (Buctril M) jug				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
Total: Chemical: DECIS (Decis 5 E.C 10L) jug				100	0	0	0