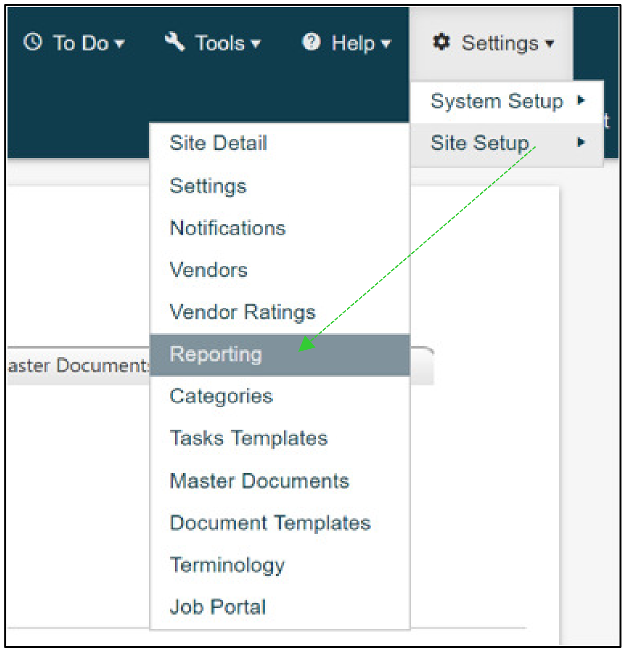
PunchlistManager™

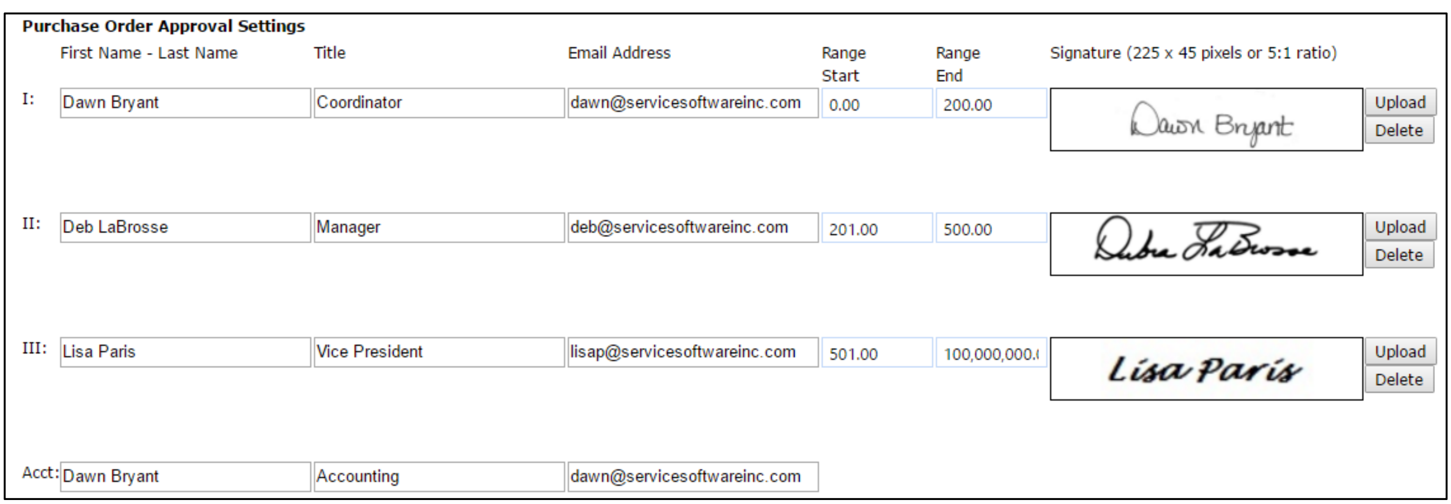
Purchase Order Approval Setup

Purchase Order Approval is a feature that can be setup to generate an approval process that has been pre-assigned to different individuals which is also based off different ranges for a level I, II and III approval (if applicable).

To setup the Purchase Order Approval hover over Tools in the blue toolbar→ Site Setup→ click on Reporting.
Note: *The Purchase Order Approval is generated from a Work Order→ Costs Tab→ PO*



After single clicking on Reporting the Purchase Order Approval Settings are located towards the middle of the page. Apply the information of who will be responsible for Approval Level I with the Approval Range Start (dollar amount) and Approval Range End (dollar amount), along with uploading signatures. Continue with the same setup for who is responsible for Level II and III approval. Next apply the Accounting information.



Purchase Order Approval Settings

	First Name - Last Name	Title	Email Address	Range Start	Range End	Signature (225 x 45 pixels or 5:1 ratio)	
I:	Dawn Bryant	Coordinator	dawn@servicesoftwareinc.com	0.00	200.00	Dawn Bryant	Upload Delete
II:	Deb LaBrosse	Manager	deb@servicesoftwareinc.com	201.00	500.00	Debra LaBrosse	Upload Delete
III:	Lisa Paris	Vice President	lisap@servicesoftwareinc.com	501.00	100,000,000.(	Lisa Paris	Upload Delete
Acct:	Dawn Bryant	Accounting	dawn@servicesoftwareinc.com				

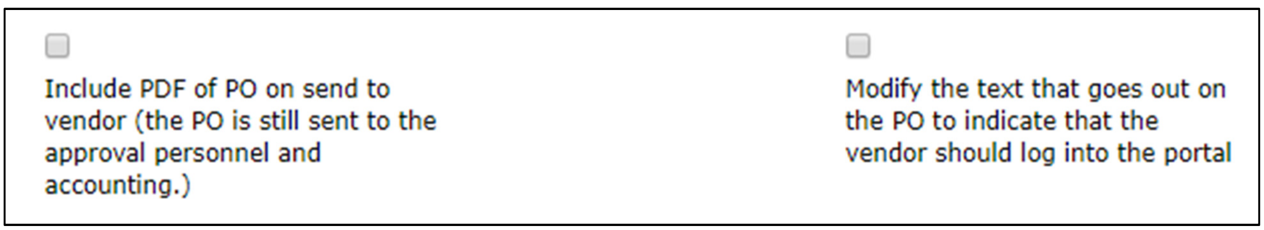
Purchase Order Approval Setup

The PO is viewable in the Vendor Portal after it is approved. The following settings pertain to how the Vendor recieves the approved copy of the PO or how they can view it through the Vendor Portal.

In the Vendor Portal, the PO can be viewed and printed. The below setting sets that time frame for accessibility of the PO in the Vendor Portal.

There are two options for how the Vendor will be notified that they have an approved PO: Check mark one or the other.

1. The aproved PO can be emailed to the Vendor upon final approval as a PDF attached to an auto triggered email.
2. An auto triggered email with a message to log into the vendor portal to see their PO can be sent to the Vendor upon final approval



After the setup is complete select Save located to the bottom left of the page.

Purchase Order Approval Setup

Important Employee Permission information:

Power Users and Users will only be able to manipulate the PO if they have the correct permissions setup in their employee record. Please ensure the following is selected; the ability to Add & Edit Lists (Requests) and Items (Work orders). If the employee will need to delete and/or void a PO after it's created but before it's sent for approval then please check Re-open Charges.

Note: *The Administrator has permission to Create, Change, Void, and Delete a PO. They can also manually override the approval process by adding a date in the field next to each approval level's name.*