

# Purchase Order

The Purchase Order module allows supervisors to establish and enforce an “approval process” starting with a requisition and ending with an approved purchase order. The Desktop Dashboard alerts users when a requisition is awaiting approval, and an automated e-mail notification system notifies managers when they need to approve requisitions. The module can automatically e-mail a purchase order to the vendor upon approval, if desired.

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## Features and Benefits

- Tracks requisition number, date issued, date received, authorization agent and issued to for each purchase order
- Invoices entered in Accounts Payable are applied to Purchase Order items
- Individual or batch-processing
- Accurate processing: enter, edit, update
- Automatic temporary backup
- Unlimited General Ledger distributions per purchase order
- Extensive inquiry options enable users to perform broad searches for purchase orders and requisitions, and also allow very detail-specific searches
- Prints open purchase order or history lists at any time
- Combines multiple fields to narrow range of purchase orders for inquiries and reports
- Allows archive referencing with extensive storage capability
- Uses predetermined, user-defined distributions
- Provides for up-to-date budget reporting by including encumbrances on Budgeted Financial Statement
- Recreates previous purchase orders for recurring purchases
- Completely customizable purchase order and check request forms and new pre-built forms are available
- Approval process tracks requisitions, purchase orders, and check requests
- Managers can automatically approve requisitions under a certain dollar amount
- Automated e-mail notification system alerts managers when they need to approve a requisition and the Desktop Dashboard alert also displays when a manager needs to take action

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## Required modules:

- Accounts Payable
- General Ledger
- GlobaFILE

Purchase Order - [Home Base]

File Edit Records Reports Utility Help

1. Criteria | 2. Results

View All | View Selected

Req #	PO/CkRq #	Vendor	Date Issued	Issued To	User	Total
<input type="checkbox"/>	1500	1001	Acme Paper Supply	1/5/2011	Sales Demo	\$100.00
<input type="checkbox"/>	322	388	First Baptist Church	10/15/2010	Unknown	\$1,500.00
<input checked="" type="checkbox"/>	123	9	Kabong Springs Co	10/15/2010	Unknown	\$1,500.00
<input type="checkbox"/>		98	Acme Paper Supply	7/21/2010	Unknown	\$100.00
<input type="checkbox"/>		4578	Hatcher, Mr. Matt	7/6/2010	Unknown	\$550.00
<input type="checkbox"/>		10	Hanks, Mr. Fred	5/12/2010	Unknown	\$100.00
<input type="checkbox"/>		3	Acme Paper Supply	8/6/2009	Unknown	\$800.00
<input type="checkbox"/>		1	Consolidated Edison Utilities	3/18/2009	Bill Smith	\$125.00
<input type="checkbox"/>		5	Brown, Mr. Jack	8/29/2008	Bill Smith	\$0.00

9 record(s) in current v

Press to add a new record.

Record purchase orders and check requisitions that automatically interface with Accounts Payable to prevent re-keying.

### PURCHASE ORDER

The following number must appear on all related correspondence.

P.O. #: 9  
P.O. Date: 10/15/2010  
REQUISITION #: 123

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**First Church In The City**  
51 Germantown Court  
Memphis TN 38018

Phone: Fax:

VENDOR: Kabong Springs Co

SHIP TO: First Church In The City  
51 Germantown Court  
Memphis TN 38018

ISSUED TO	AGENT	SHIPPING METHOD	DELIVERY DATE
		FOB Memphis	10/25/2010

QTY	UNITS	DESCRIPTION	UNIT PRICE	TOTAL
10	each	New Springs	\$150.00	\$1,500.00
<b>TOTAL</b>				<b>\$1,500.00</b>

This is a memo that tells all about the stuff I want to buy.

Approval: Boss

Send all correspondence to the above address, phone, and/or FAX.

Authorizes by \_\_\_\_\_ Date \_\_\_\_\_

Customize the appearance of generated purchase orders, which includes changing the color of the form, adding or removing additional order information, adding your organization's logo to the form, and more.