

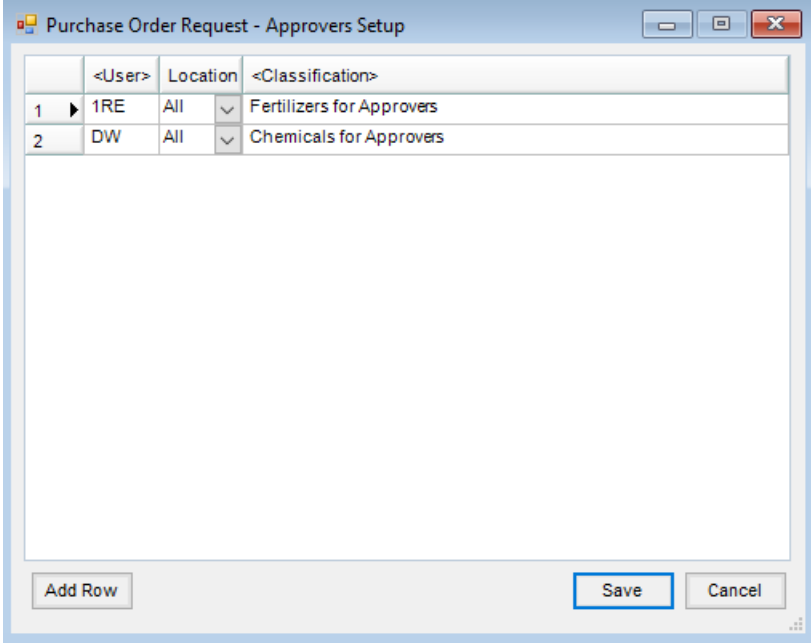
# Add Purchase Order Request

Last Modified on 03/27/2024 3:09 pm CDT

The Purchase Order Request is an approval process for the purchase of specific Products. Once the request is entered, approval or denial must be done by a user set as a *PO approver*. Approvers must first be set up. Approved requests may be imported into a Purchase Order.

## PO Approvers

This area at *Accounting / Setup / Inventory / PO Approvers* allows for the selection of users who can approve Purchase Order Requests.



	<User>	Location	<Classification>
1	1RE	All	Fertilizers for Approvers
2	DW	All	Chemicals for Approvers

Select **Add Row** to add a row and then double-click in the *User* column to choose the User. Select *All* or the specific *Location* from the drop-down menu for which this User is authorized to approve. Double-click in the *Classification* column to select the Product Classification for which the User is authorized to approve.

## Approving a Purchase Order Request

Purchase Order Requests can only be approved by those marked as PO Approvers shown above.

Approvers can receive a notification when a Purchase Order Request has been added by selecting the appropriate time on the *Notify me every X minutes of all open purchase order requests I can approve* drop-down found by adding/editing a User at *Hub / Setup / Users*. For example, if this is set to 20, the Approver will receive a notification of any new Purchase Order Requests every twenty minutes.

A Purchase Order Request must be approved before it is available to be imported into a Purchase Order.

# PO Request Detail

**Add A Purchase Order Request**

PO Request Detail **Ship To**

Date: 12/08/2023 P.O. Request #: 253

Approved By:   Order Completed  Approved

<Vendor> Golden Golden Prairie Supply  Direct Ship  Declined

<Customer>

Approver Comments:

Request Notes:

Price By:  \$/Unit  \$Total

	<Product Name>	Requested	Units	Ordered	<\$ /Unit>	Bill Unit	\$Total	Deptid	Prodid	Purchase Order Number
1	Roundup Weat...	60.000	Gal		29.750	Jugs	714.00	Chem00	RouWeaMax	

Delivery Type: Delivery <Pickup/Delivery Location Name>

Total: 714.00

Create PO

- **Date** – Enter the date of the request.
- **P.O. Request #** – Requests may be auto-numbered or the request number can manually be entered in this area.
- **Approved By** – When the request is approved, the approver displays in this area.
- **Vendor** – Double-click and select the vendor to be used for the request. The selected vendor may be edited until the request is marked as *Approved*. After the request is approved, only those set as PO Approvers are allowed to edit the Vendor.
- **Customer** – Optionally double-click and select the Customer that requested this Product. *Direct Ship* requests require a Customer be selected.
- **Approver Comments** – Optional comments may be entered by whomever is approving this request in this area.
- **Request Notes** – Notes may optionally be entered in this area to give the approver additional information about the request.
- **Order Completed** – This option is disabled when adding a PO Request. It is enabled after the request is saved. Selecting this closes out the request.

- **Direct Ship** – If an order is to be shipped directly from the Vendor to the Customer, this option informs the approver. Selecting this option requires a Customer to be selected before the request may be saved.
- **Approved** – For users listed as PO Approvers, this option will be enabled. The approver selects this option and the request is available to be imported into a Purchase Order.
- **Declined** – For those listed as PO Approvers, this option is enabled. If the request is being denied, the PO Approver can select this option which closes out the request.
- **Price By** – If the unit price is to be entered for each line in the grid, select the *\$/Unit* option. Once the *\$/Unit* is entered, selecting **Apply** calculates the *\$Total* amount and a total dollar amount for the request. The *\$/Total* option should be used when the total amount for that product is known. After the total price is entered, choosing **Apply** back-calculates the *\$/Unit* for the Product and sums the line items on the request.
- **Delivery Type** – Select from *Delivery* or *Pickup* for the request. This information carries through to the Purchase Order if the Purchase Order is created from the Purchase Order Request.
- **Pickup/Delivery Location Name** – Double-click to select the Location for the pickup or delivery. This information carries through to the Purchase Order if the Purchase Order is created from the Purchase Order Request.
- **Create PO** – This option is enabled for approved Purchase Order Requests. Selecting this option and choosing **Save** creates a Purchase Order from saving the Purchase Order Request.

## Ship To

The screenshot shows a software window titled "Add A Purchase Order Request". It has two tabs: "PO Request Detail" and "Ship To". The "Ship To" tab is active and contains a form with the following fields and values:

Field	Value
<ID>	01IND
Name	SSI Farm Services - IN
Address 1	1817 Heliport Loop
Address 2	
City	Terre Haute
State	IN
Zip	47802
GLN	

At the bottom of the window, there is a checkbox labeled "Create PO" which is unchecked, and two buttons labeled "Save" and "Cancel".

- **ID** – Optionally double-click and select a Location where the requested Product should ship.
- **Name, Address** – If a Location is selected in the *ID* area, this information is automatically completed with the name and address of the selected Location. Optionally, a name and address could also be keyed in if the Product is to ship to a different address.
- **GLN** – If a Global Location Number exists for the *Ship To* address, enter it here. This information is used in electronic messages to inform trading partners about locations.