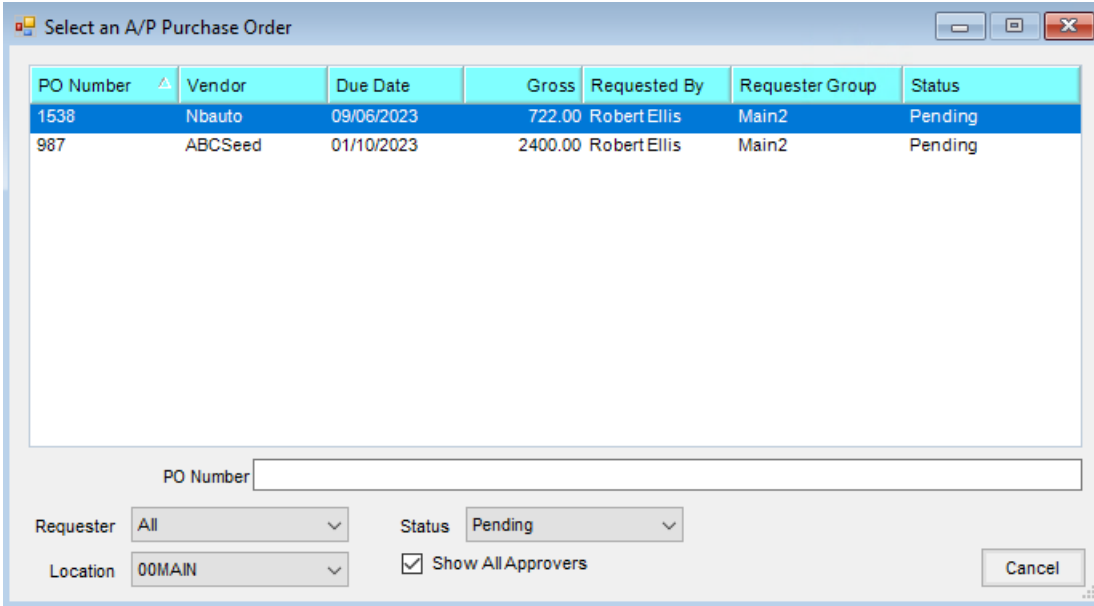


AP POs for Approval

Last Modified on 08/07/2023 10:33 am CDT

Overview

This option, found at *A/P / AP Purchase Orders for Approval*, is only visible to A/P PO Approvers and displays A/P Purchase Orders. The orders may be filtered by *Requester*, *Location*, or *Status*. The *Show All Approvers* option allows viewing all A/P POs instead of only the those created by the approver's requester group.



The screenshot shows a window titled "Select an A/P Purchase Order" with a table of purchase orders and filter options below it.

PO Number	Vendor	Due Date	Gross	Requested By	Requester Group	Status
1538	Nbauto	09/06/2023	722.00	Robert Ellis	Main2	Pending
987	ABCSeed	01/10/2023	2400.00	Robert Ellis	Main2	Pending

Below the table, there is a search field for "PO Number" and filter options:

- Requester: All
- Status: Pending
- Location: 00MAIN
- Show All Approvers
- Cancel button

Setup

A process may be set to allow specific users to approve AP POs. This requires setup, but once the setup is complete, the approver can easily see the AP POs requiring their attention.

The setup for this process is company-based. These rules apply if the *Requester Group* window has data populated. If no data is populated in that grid, the PO approval process does not occur.

Requesters

A Requester Group is a collection of employees who may add AP Purchase Orders. Requester Groups are set up at *Hub / Setup / Users* by selecting the **Requester Groups** button. A user may only be added to one group. All users in the group must have an email address on the *Profile* tab of the user file to be able to save the changes.

A/P PO Approvers

Employees with authority to approve A/P Purchase Orders are established at *Setup / A/P / AP PO Approvers*. Once set up, when an A/P Purchase Order is entered, all approvers who can authorize the A/P Purchase Order receives an email that the A/P Purchase Order is available for review.

	<Approver>	Threshold	<Requester Group>
1	1RE	500.00	Main
2	ssi	500.00	Main2
3	ABC	500.00	Main2

Buttons: Add Row, Save, Cancel

- **Approver** – Double-click to select the employee allowed to approve A/P Purchase Orders.
- **Threshold** – Enter the minimum dollar amount that requires approval. A/P Purchase Orders under this threshold are automatically approved.
- **Requester Group** – Double-click to select the Requester Group which is a user classification that includes all the users whose requests may be approved by this approver.

Approving AP POs

Open AP Purchase Orders needing approval are found at *Accounting / A/P / AP Purchase Orders for Approval*. AP Purchase Orders may be filtered for *Status (All, Pending, or Approved)*, *Location*, *Requester*, and *Approver*. Only users listed as AP PO Approvers have the option to accept or decline.

Select an A/P Purchase Order

PO Number	Vendor	Due Date	Gross	Requested By	Requester Group	Status
1538	Nbauto	09/06/2023	722.00	Robert Ellis	Main2	Pending
987	ABCSeed	01/10/2023	2400.00	Robert Ellis	Main2	Pending

PO Number

Requester: Status:

Location: Show All Approvers

If one or more requestor groups have been established, only users in the Requestor Group may add AP Purchase Orders. AP Purchase Orders have *Approved* and *Declined* checkboxes that may be viewed by requestors. Only AP PO Approvers may edit these options.

The *Approved* and *Declined* checkboxes can only be viewed when editing after the AP Purchase Order is saved.

AP Purchase Orders cannot be approved while being added. However, an AP Purchase Order under \$ *Threshold* is auto-approved. An approver may approve the AP Purchase Order by editing or by using the *AP Purchase Orders for Approval* window. Once the AP Purchase Order is marked as *Approved*, it is no longer able to be edited and can only be imported into an AP Bill or voided. If an AP Purchase Order is declined, it is marked as *Processed*. A declined (processed) PO cannot be voided.

Edit an AP Purchase Order

<Vendor> Nbauto N and B Auto Parts

PO Date 08/07/2023

Description

PO # 1538 1099 Pay

Notes Fuel injector repair

PO Details

	<G/L Account>	Description	\$ Amount	Comment	Part Number	Unit Price	Quantity	<Vehicle ID>
1	6030000-00	Shop Expenses	722.00	fuel inje...		0.00	0.000	

Details

Discount

Terms

Pay by date 09/06/2023 Disc Amt 0.00

Predefined Split

Split ID

Amount

Acct ID

Approved
Declined

Date

Amt Paid 0.00

Check#

Gross \$ 722.00

Discount 0.00

Net \$ 722.00

Approved AP Purchase Orders are available to import into an AP Bill.

Import AP PO into AP Bill

When adding an AP Bill, the AP Purchase Order may be imported by selecting **Import PO**.

The 'Add a Bill' window includes the following fields and sections:

- Vendor:** Nbauto, N and B Auto Parts
- Regular:** 0.00, **Prepay:** 0.00
- Bill Date:** 08/07/2023
- Due Date:** 09/06/2023
- Invoice #:** 1538-1
- Use Prepay:**
- On Hold:** **Post to Prior Month:**
- Description:** [Empty]
- 1099 Amount:** [Empty], **Last Years Dataset:** (None)
- PO #:** [Empty]
- 1099 Pay:**
- Notes:** [Empty text area]
- Expense Breakdown Table:**

	<G/L Account>	Description	\$ Amount	Comment	Quantity	<Vehicle ID>
1						
- Discount:** Terms, Pay by date, Disc Amt
- Predefined Split:** Split ID, Amount, Acct ID, Apply
- Buttons:** Import File, **Import PO** (highlighted), Save, Cancel
- Summary:** Gross \$ 0.00, Discount, Net \$ 0.00

Only approved AP Purchase Orders are available to import.

The 'Select an AP Purchase Order' dialog box contains the following table:

PO	PO Date	Gross
1538	08/07/2023	722.00

Buttons: Select, Cancel

PO: [Input field]

Once imported, the PO number is referenced on the AP Bill.

Add a Bill

<Vendor> Nbauto N and B Auto Parts Regular 0.00 Prepay 0.00

Bill Date 08/07/2023

Due Date 09/06/2023

Invoice # 1538-1

Description

PO # 1538

Notes Fuel injector repair

Use Prepay

On Hold Post to Prior Month

1099 Amount 0.00 Last Years Dataset (None)

1099 Pay

Discount

Terms

Pay by date 09/06/2023 Disc Amt 0.00

Predefined Split

Split ID

Amount

Acct ID

Apply

Import File

Import PO

Gross \$ 722.00

Discount 0.00

Net \$ 722.00

Save

Cancel

Expense Breakdown						
	<G/L Account>	Description	\$ Amount	Comment	Quantity	<Vehicle ID>
1	6030000-00	Shop Expenses	722.00	fuel inje...	0.000	