**A W A R E M A N A G E R**

Purchase Order Approval

The *Skip Purchase Approval Process* checkbox, found on Purchase Preferences (affects an entire database) and the Division capsule on the Purchase tab (affects only single Divisions), allows new Purchase records to go directly to an Approved status type and assigns a PO Number. Keep in mind that when active, this feature bypasses **all** approval checks, meaning any permission group will be allowed to change Purchase records to an Approved status.

Otherwise, Purchases can be approved in two ways: by changing the status through the form view or by using the Approve Purchase operation in the Purchase capsule. This document will explain these methods.

Type:
- ◉ Requested
- ○ Approved
- ○ Received
- ○ Locked
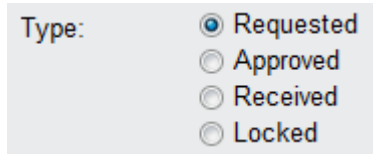
Like Work Status and Work Status Type, Purchases can have any number of statuses but there are only four *types* which the approval process hinges upon: Requested, Approved, Received, and Locked.
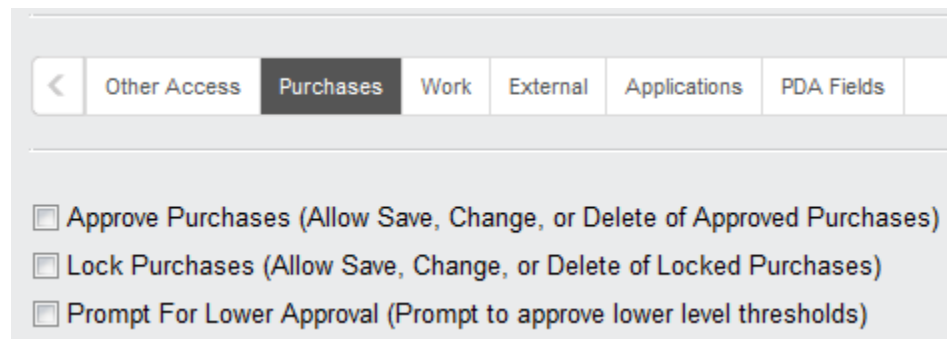
When setting up Purchase Statuses, it is important to have at least one status of Requested and Approved. If you wish to lock purchases after they are complete be sure to also include a Locked Purchase Status Type.

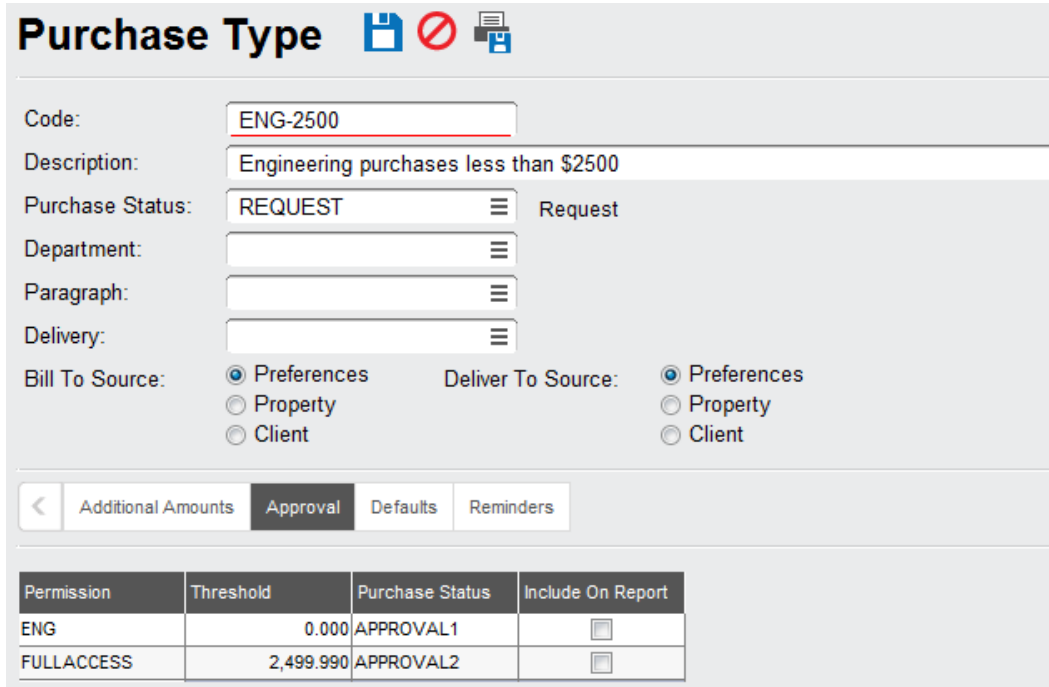REQUESTED → APPROVED → RECEIVED → LOCKED

Permissions

Purchase Order approval is highly contingent on how Permission groups are configured.

The Permission capsule has options for each permission group to control the ability to Approve Purchases, Lock Purchases, and whether that group will be prompted to approve purchase amounts below their threshold level (necessary when using partial approval).

< Other Access | **Purchases** | Work | External | Applications | PDA Fields

☐ Approve Purchases (Allow Save, Change, or Delete of Approved Purchases)
☐ Lock Purchases (Allow Save, Change, or Delete of Locked Purchases)
☐ Prompt For Lower Approval (Prompt to approve lower level thresholds)

Purchase Types

When configuring Purchase Types, you can set the default starting Purchase Status for purchases entered of that type (must be a **Requested** Status Type).
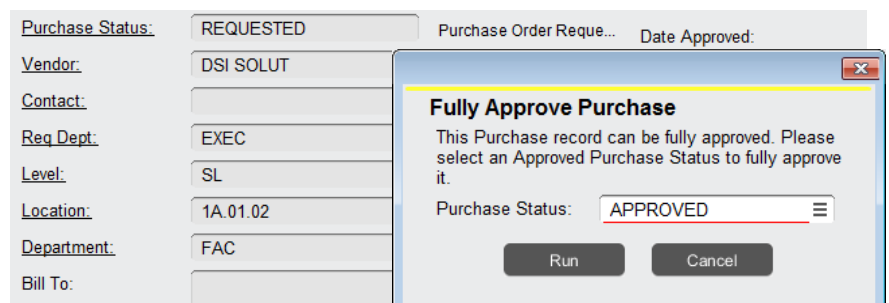

The Approval tab is where you configure a partial approval process (if you do not need partial approval, leave this tab blank) by setting threshold limits for permission groups.

When moving a Purchase Order to a fully approved status, it is important to **not manually change the status.**

Closing out New or Edit mode will be sufficient for the system to prompt you on if you would like to fully approve the purchase.

When you receive the message as seen at right, you can change the Purchase Status to an Approved status which will fully approve the PO, give a PO number, and register a Date Approved.

Partial Approval

For Purchase Types that utilize the Approval tab and partial approval, the approval process is slightly more involved. Only permission groups listed on the Approval tab can approve the purchase and their threshold level indicates the amount at which their approval becomes necessary for the PO to be fully approved. You can think of the threshold as the PO's minimum amount at which the permission group will need to get involved in the approval process and register their approval.

Permission	Threshold	Approver	Date Approved	Time Approved	Purchase Status	Include On Report
FULLACCESS	1,000.000	AMJXT	November 12, 2012	16:11	APPROVAL3	☑
PM	500.000	PM	November 12, 2012	16:10	APPROVAL2	☑
ENG	100.000	ENG	November 12, 2012	16:09	APPROVAL1	☑

The Approval tab on the purchase order record itself keeps track of changes to the Purchase Status.

The Purchase Status column indicates the status the purchase will move to once approved by a user from each permission group (this status must be a **Requested** status type). This makes it possible to track partial approval of POs.

The user can only fully approve the purchase and change the status to an Approved Purchase Status Type if their permission group and threshold level (as established on the Approval tab of the Purchase Type) allows them to approve the entire amount of the purchase.

They can fully approve the purchase if all other permission levels have also approved it or if they select the option to "Approve Lower Level Thresholds". Otherwise, they will only be able to change the status to a Requested Purchase Status Type.

In the example above, APPROVAL1, 2, 3 are Request Purchase Status Types and are meant to denote partial approval of the Purchase Order.

In this Approval example, Engineers (ENG) with $100 threshold and a Property Manager with $500 threshold means that any purchase over $500 requires the approval of both permission groups or for the PM to approve the ENG's lower levels. Anything over $1000 would require a Full Access permission group's approval.

A user who does not have their Permission record listed on the Approval tab can approve Purchases if the amount is below the lowest threshold.

A W A R E M A N A G E R

Approval Process

When a user wants to partially or fully approve a PO, it can be done in two ways. You can either (1) edit the Purchase order record through the form view or (2) use the Approve Purchases operation.

After PO entry is completed or edited by a user belonging to the appropriate permission group, they will be given the option of partial approval and can fully approve the purchase if threshold criteria are met (see message above).
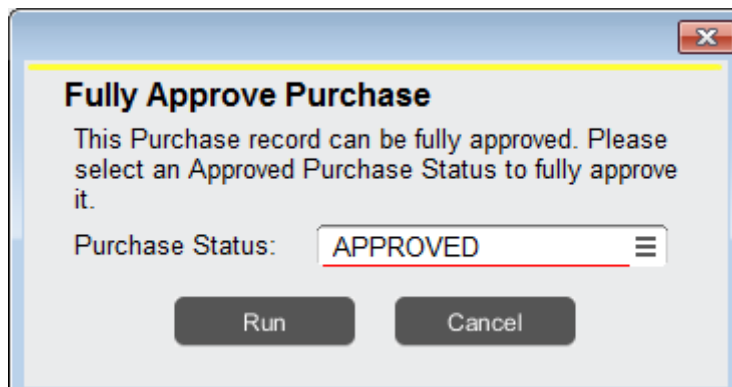
Form View Approval

From this menu, hitting "Yes" to approve will register a partial approval. In Purchase preferences, you can turn on the option to assign the PO Number on first approval so that a PO number will be assigned at the first partial approval.

A purchase will only be fully approved if the permission group approving it can meet the purchase's threshold amount and the other permission groups have approved it or the higher threshold permission group chooses to **Approve Lower Level Thresholds.**

In the example above, if the PO total is $600, the PM permission group can fully approve the purchase because the total amount has not reached the Full Access threshold of $1000 (so the Full Access does not need to register their approval). To fully approve the PO, either a user from the ENG permission group must register their partial approval or the PM permission group user will have to "Approve Lower Level Thresholds" on their behalf. Checking "Approve Lower Level Thresholds" will record the user's Contact code next to all permission groups on the purchase record's approval tab.

Be careful changing the Purchase Status through the form view – unless you receive this approval window, approval lines won't be recorded and a PO number won't be assigned.

AWAREMANAGER

Approve Purchases Operation

The second way to approve purchases is through the Approve Purchases operation. The operation can be run on one Purchase record in the list (selected lines) or all visible Purchase records in the list view (all lines).

Operations

- Create Work Record
- Create Inventory
- Update Work Materials
- Generate Letters
- Generate Email
- **Approve Purchases**

The same criteria apply for the PO to be fully approved: for the user approving, the total PO amount must meet the permission group's threshold level (as defined by Purchase Type on Approval tab), and all other permission groups must register their partial approval **OR** the highest permission group must select "Approve Lower Level Thresholds." A report will display on the screen at the completion of the operation and will outline whether the user fully approved the purchase or partially approved it.
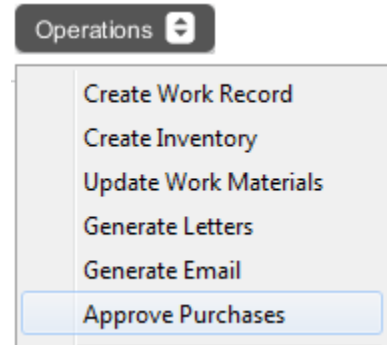
Request Number	PO Number	Description	Starting Status	Current Status
Partially Approved 08-0018	00015		REQUEST	APPROVAL1

Approve Purchases

- ○ Selected Lines
- ○ All Lines

Purchase Status: APPROVED

☐ Approve Lower Level Thresholds

[Run]   [Cancel]
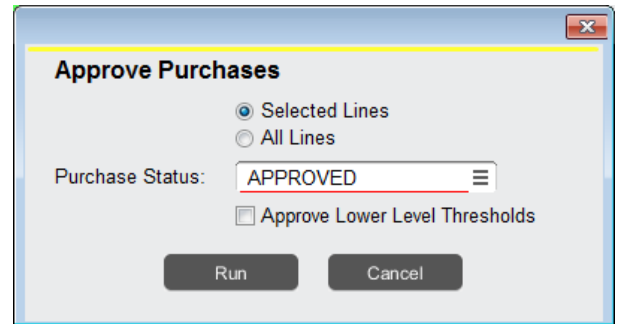
Here, a user may have entered an Approved status type, but the PO could only be moved to partial approval "Approval2" due to another permission group needing to be involved in the purchase or because the user did not choose to approve lower level thresholds.

Request Number	PO Number	Description	Starting Status	Current Status
Approved 0233	103	3 boxes of wiring	REQUEST	APPROVED

In this report, the user running the operation was able to fully approve the PO, either because all other thresholds had registered their partial approval or because they approved lower level thresholds on their behalf.

Once fully approved, the PO can later be updated to a status type of Received to indicate the materials have arrived and later to a status type of Locked to lock the record for accounting purposes.