

Purchase Order Authorisation

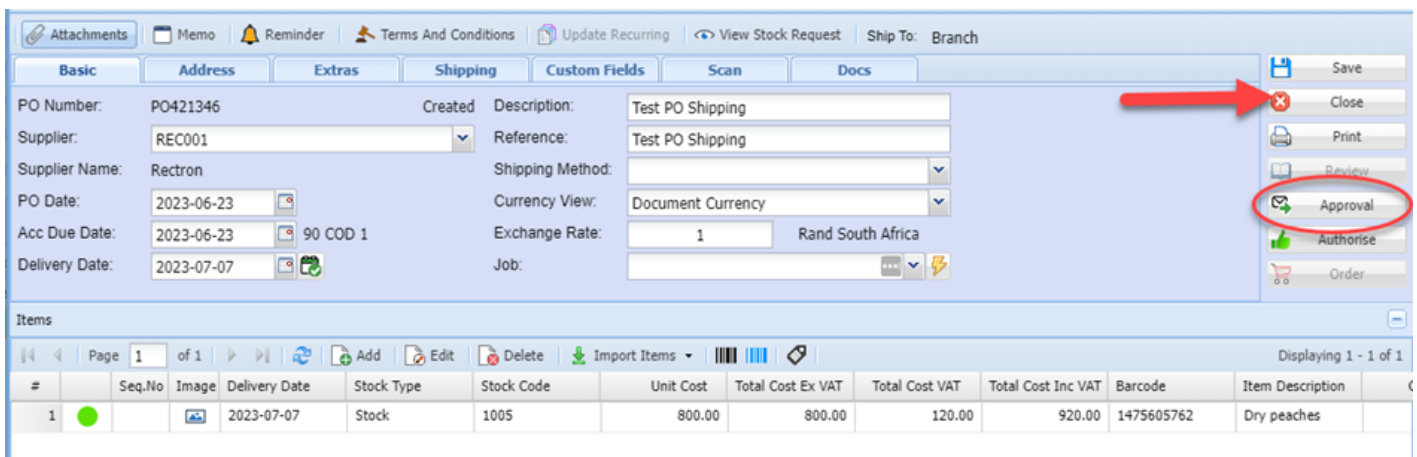
The authorization of the PO is essentially a supervisor/ manager reviewing the purchase order and authorizing the purchase from the supplier.

This authorization in most cases have historically been done manually, where the documents are printed, supporting documents attached and handed to the manager for authorization.

This procedure caters for this manual process of printing hard copies of documents to be automated and electronic.

Once all items have been captured on the Purchase order and all details checked for correctness, click the Approve Button.

Click Close.



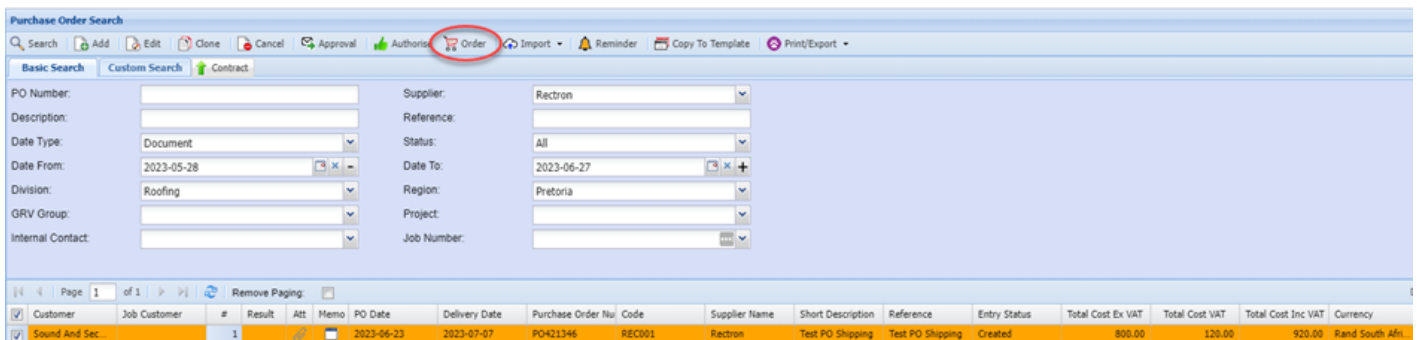
The screenshot shows a software interface for creating a Purchase Order. The 'Basic' tab is active, displaying fields for PO Number (PO421346), Supplier (REC001), PO Date (2023-06-23), and others. On the right side, there is a vertical toolbar with buttons: Save, Close, Print, Review, Approval (circled in red), Authorise, and Order. A red arrow points to the 'Close' button.

Should you not wish to send the PO for authorization at this point, you can close the screen.

When ready to Approve, search for the captured PO as follows:

On the Purchase Order Menu, enter the Supplier name or Code, check the date range and click Search.

Click on the required order once to highlight it, click the Approve Button.



The screenshot shows the 'Purchase Order Search' screen. It has a search form with fields for PO Number, Supplier (Rectron), Date From (2023-05-28), and Date To (2023-06-27). Below the search form is a table of search results. The 'Approve' button in the top toolbar is circled in red.

#	Customer	Job Customer	Result	Att	Memo	PO Date	Delivery Date	Purchase Order No	Code	Supplier Name	Short Description	Reference	Entry Status	Total Cost Ex VAT	Total Cost VAT	Total Cost Inc VAT	Currency
1	✓	Sound And Sec.	1			2023-06-23	2023-07-07	PO421346	REC001	Rectron	Test PO Shipping	Test PO Shipping	Created	800.00	120.00	920.00	Rand South Afr.

This then sends an email to the Manager informing him/ her that there is a PO awaiting authorization.

The PO status will now change from Created to Approval indicating that the PO has been sent for Authorization.

Purchase Order Search

Q Search

Add

Edit

Clone

Cancel

Approval

Authorise

Order

Import

Reminder

Copy To Template

Print/Export

</

AUTHORISATION PROCESS

The Manager will then log onto the system or via the Webatar APP search the required PO and perform the necessary checks.

Go to **Creditors Module > Activity**

Select Purchase Orders Menu Item

Active Stock Take - MONT

Link

Unread Messages : 72

Reminders Due : 4 | 0

Calculator

Favourites

Modules

User: Otsile Loate, Dev HSOF & Co

Creditors Module

Configuration

Activity

Creditors Dashboard

Creditors Journal Transactions

Creditor Payment Search

Creditor Cash Book

Stock Order Search

Request For Quote (RFQ)

Purchase Orders

Receive Stock

Delivery Note Processing

Goods Received Notes (GRV)

Stock Return Notes

Analysis

Reports

Purchase Order Search

Search

Add

Edit

Clone

Cancel

Approval

Authorise

Order

Import

Reminder

Copy To Template

Print/Export

Basic Search

Custom Search

Expand

PO Number:

Supplier:

Description:

Reference:

Date Type:

Document

Status:

All

Date From:

2023-05-28

Date To:

2023-06-27

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Remove Paging:

Customer

Job Customer

#

Result

Att

Memo

PO Date

Delivery Date

Purchase Order Nui

Code

Supplier Name

Short Description

Reference

Entry Status

No data to display

Enter the Supplier code or name.

Enter the respective date range that the Purchase Order was captured.

Click Search

Purchase Order Search

Search Add Edit Cancel Approval Authorise Order Import Reminder Copy PO Print/Export

Basic Search Custom Search **Expand**

PO Number: Supplier:

Description: Reference:

Date Type: Status:

Date From: Date To:

Page 1 of 1

#	Result	Att	Memo	Date	Reference	Supplier Name	Total Cost Ex VAT	Purchase Order Nui	Code	Short Description	Entry Status	ETA Date	Total Cost VAT	Total Cost Inc VAT
1				2016-11-28		RJ CONNECT	500.00	PO25583	COD RJ		Created	2016-11-28	70.00	570.00

Displaying 1 - 1 of

You can further filter your search by clicking on the Expand Button

And entering any of the other criteria that you may have on hand, e.g. Division, Region

Purchase Order Search

Search Add Edit Clone Cancel Approval Authorise Order Import Reminder Copy To Template Print/Export

Basic Search Custom Search **Contract**

PO Number: Supplier:

Description: Reference:

Date Type: Status:

Date From: Date To:

Division: Region:

GRV Group: Project:

Internal Contact: Job Number:

All Purchase orders within the selected criteria will be displayed in the grid.

Click the Attachments shortcut to view ant attachments.

The icon will be red if any attachment are uploaded

If not, this icon will be grey.

Purchase Order Search

Search Add Edit Clone Cancel Approval Authorise Order Import Reminder Copy To Template Print/Export

Basic Search Custom Search **Expand**

PO Number: Supplier:

Description: Reference:

Date Type: Status:

Date From: Date To:

Page 1 of 1 Remove Paging: ☐

#	Result	Att	Memo	PO Date	Delivery Date	Purchase Order Nui	Code	Supplier Name	Short Description	Reference	Entry Status	Total Cost Ex VAT	Total Cost VAT	Total Cost Inc VAT	Cust
				2023-06-27	2023-06-27	PO421347	COD RJ	RJ Connect	Stock	Pretoria	Approval	250.00	37.50	287.50	

Should you need to check and verify any details of the order, double click on the required PO to open the lines.

Once you have reviewed the PO and performed the necessary checks and ready to Authorize,

Highlight the required purchase order and click the Authorize Button

Purchase Order Search

Search Add Edit Clone Cancel Approval **Authorise** Order Import Reminder Copy To Template Print/Export

Basic Search Custom Search Expand

PO Number: Supplier: Reference: Status: All Date Type: Document Date From: 2023-06-27 Date To: 2023-06-27

Page 1 of 1 Remove Paging: ☐

Ship To	Customer	Job Customer	#	Result	Att	Memo	PO Date	Delivery Date	Purchase Order Nui	Code	Supplier Name	Short Description	Reference	Entry Status	Total C
☒	Branch		1				2023-06-27	2023-06-27	PO421347	COD RJ	RJ Connect	Stock	Pretoria	Approval	

You will notice the status has changed to “Authorized”.

Purchase Order Search

Search Add Edit Cancel Approval Authorise Order Import Reminder Copy PO Print/Export

Basic Search Custom Search Contract

PO Number: Supplier: RJ CONNECT Reference: Status: All Date Type: Document Date From: 2016-10-29 Date To: 2016-11-28 Division: MANUFACTURING Region: GAUTENG GRV Group: Project: Internal Contact: Job Number:

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#	Result	Att	Memo	Date	Reference	Supplier Name	Total Cost Ex VAT	Purchase Order Nui	Code	Short Description	Entry Status	ETA Date
1				2016-11-28		RJ CONNECT	500.00	PO25583	COD RJ		Authorised	2016-11-28

An email is then sent to the capturer that the PO has been authorized and he/she may proceed to forward the PO to the Supplier.

SUBMITTING PO

Search for the PO as per the standard steps:

Creditors Module> Activity> Purchase Orders

Enter the Search criteria

Click Search

Purchase Order Search

Search Add Edit Cancel Approval Authorise **Order** Import Reminder Copy PO Print/Export

Basic Search Custom Search Contract

PO Number: Supplier: RJ CONNECT

Description: Reference:

Date Type: Document Status: All

Date From: 2016-10-29 Date To: 2016-11-28

Division: MANUFACTURING Region: GAUTENG

GRV Group: Project:

Internal Contact: Job Number:

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#	Result	Att	Memo	Date	Reference	Supplier Name	Total Cost Ex VAT	Purchase Order Nui	Code	Short Description	Entry Status	ETA Date
1				2016-11-28		RJ CONNECT	500.00	PO25583	COD RJ		Authorised	2016-11-28

Check that the status is set at Authorized.

Process Purchase Order

Are you sure you want to process this Purchase Order

Yes No

Click Yes

Print Selection

Break On Totals: ☐

Continue Close

Click Continue

The purchase order will Print to Screen.

Select Email to send the PO to the Supplier

Note: Should you not have segregation of duty, i.e.. A clerk capture the Order and a manager then Authorizes Orders, the below steps can then all be done by the same person (if authorized to do so) captures Authorize, and Order steps as outlined above can all be done at the time of capturing the PO by the Authorized person.

Print

Email

Copy

Email To Self

Close



Purchase Order

P/O To:
RJ Connect

Address:
5 Trig St, West Park, Pretoria, 0183
Phone: 013-443-2794
Email: otsile@hugesoftware.co.za
Web: www.webaccounting.co.za
GST No: 122-321-123

Delivery Address:
Imraan Salijee 0845843805
6 Trig St
West Park
Pretoria
South Africa
0183

P/O No: PO421347
Date: 27 Jun 2023
Reference: Pretoria
Shipping:

Description: Stock

Code	Description	QTY	UOM Type	UOM	Price	Sub Total
MAN	Mango	50			5.00	250.00

Currency: Rand South Africa

Sub Total:250.00

Discount: 0.00 %0.00

Excluding GST:250.00

GST:37.50

TOTAL:**287.50**

Click the Email Button

Verify the email address is correct.

Enter your message.

Email Address

Email | **Additional Contacts** | **Email Attachments** | **Users**

Email Address: ☒ john@rjconnect.co.za

Message:

Hi John

Please process attached PO

Thanks

Type: ☒ PDF ☐ HTML

Click Send

This will send an Email with PDF attachment of the PO to your Supplier.

You can CC yourself and any other colleagues if necessary.

Click the Users tab and double click on the required names in the Left Column to select.

Select Email

Email Address

Email | **Additional Contacts** | **Email Attachments** | **Users**

Available

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#	User Name
1	ABC Van Niekerk
2	Adriaan Gerhardus Roets
3	Albert Marune
4	Alfred Moepya
5	Alfred Peter Koekemoer
6	Andre Bruyns
7	Andrew Skene
8	Andries Stefanus van Wyk
9	Angeline Mtshali
10	Angeline Mabel Ferreira
11	Angie Ferreira

→

→

→

←

Selected

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#	User Name
1	Craig - Rowan
2	Imraan - Salijee

Click Send

Revision #4

Created 23 August 2023 05:56:01 by Paige

Updated 25 May 2026 20:39:32 by Paige