Purchase Order Authorisation

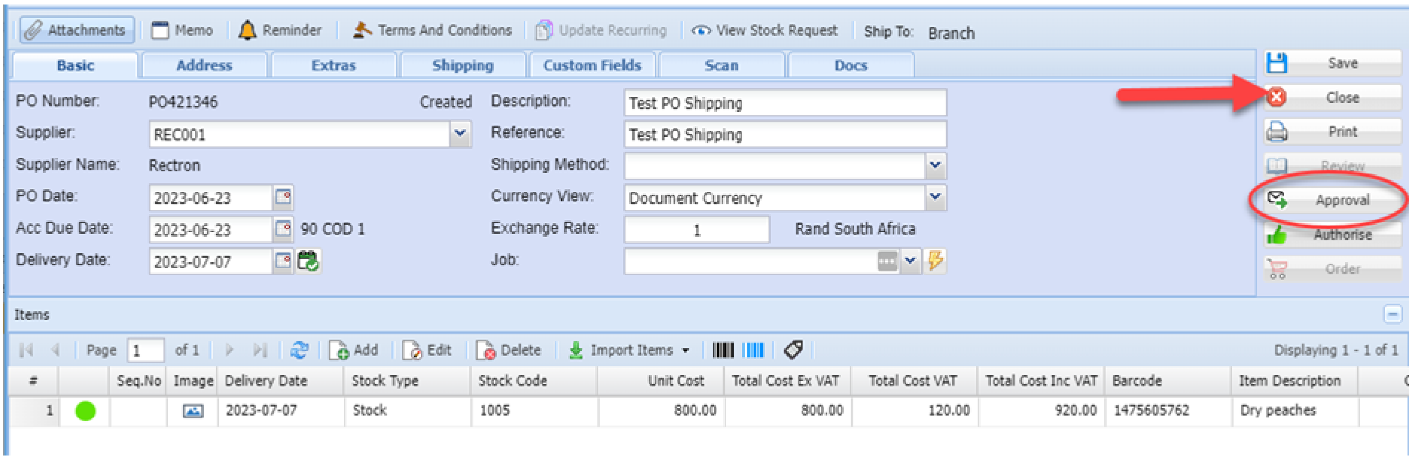
The authorization of the PO is essentially a supervisor/ manager reviewing the purchase order and authorizing the purchase from the supplier.

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.

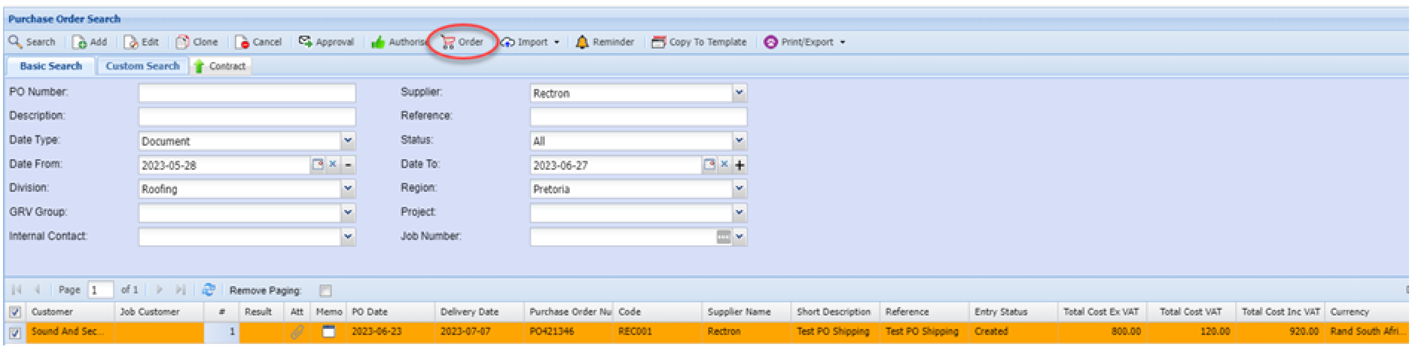


Should you not wish to send the PO for authorization at this point, you can close the screen.

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

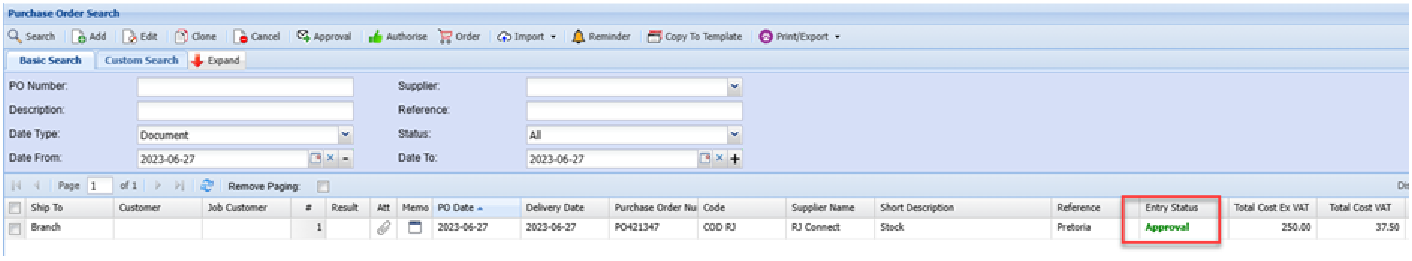
On the Purchase Order Menu, enter the Supplier name or Code, check the date range and click Search.

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



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.

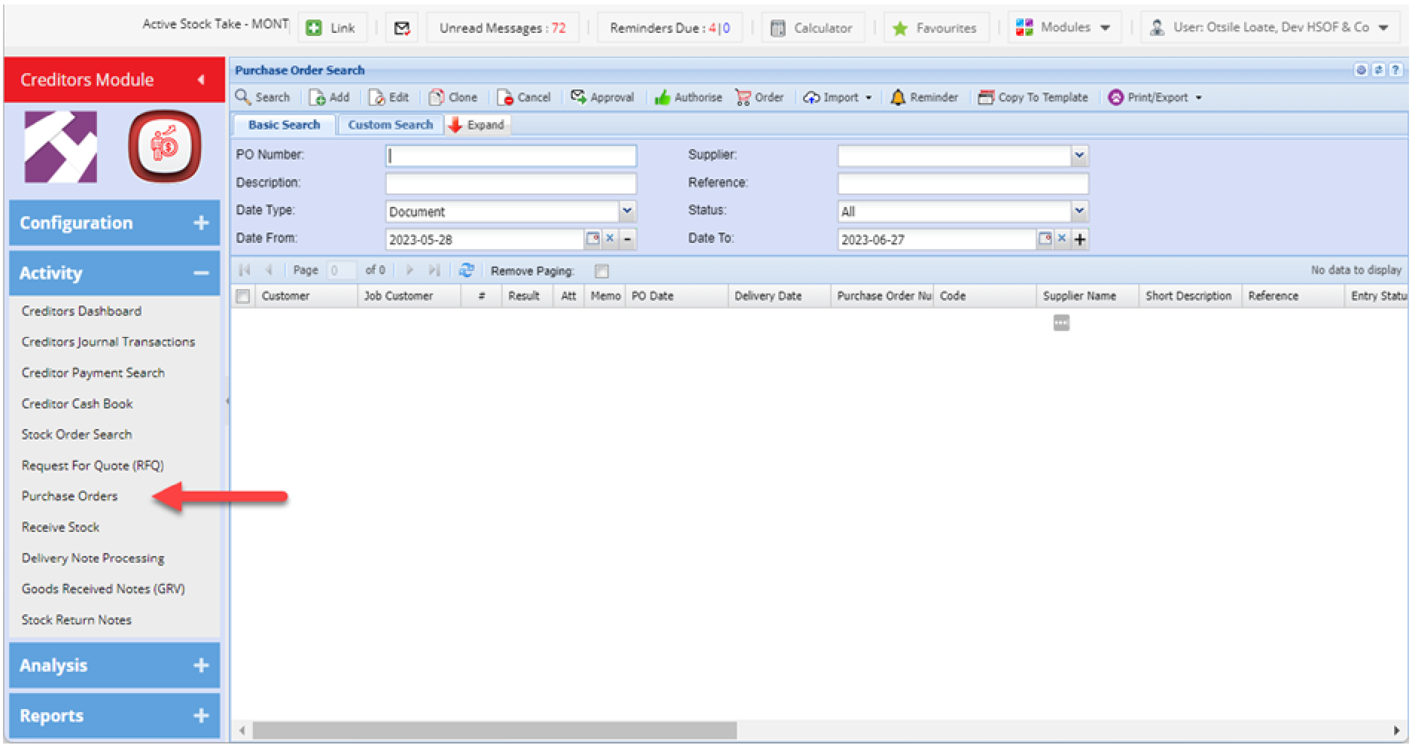


AUTHORISATION PROCESS

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**

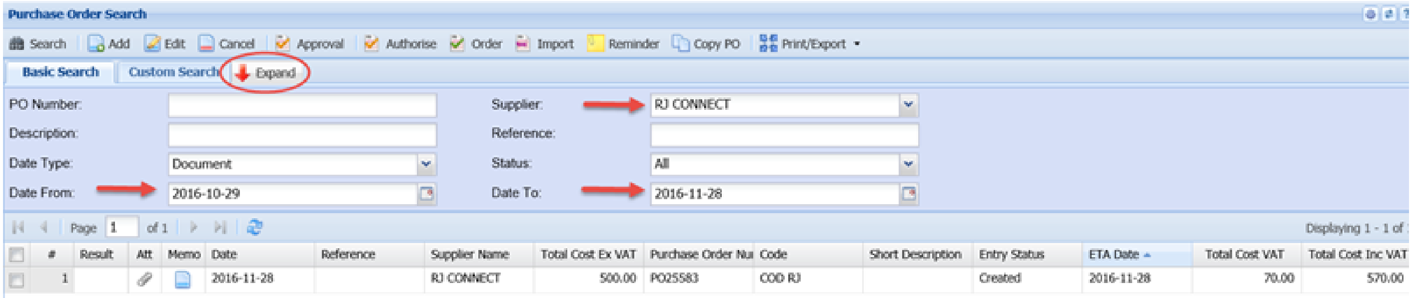
Select Purchase Orders Menu Item



Enter the Supplier code or name.

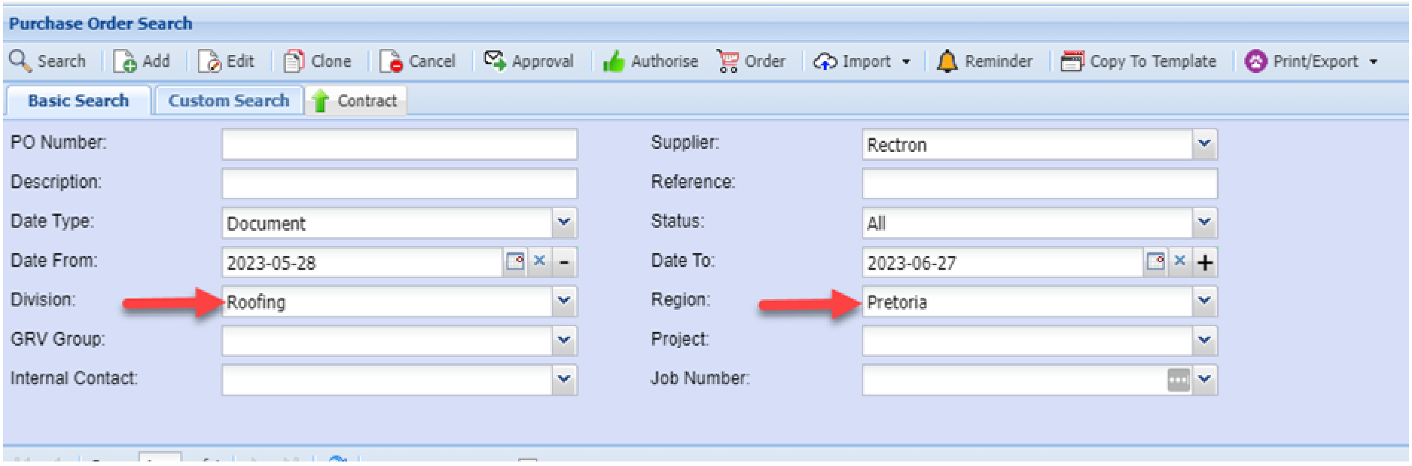
Enter the respective date range that the Purchase Order was captured.

Click Search



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

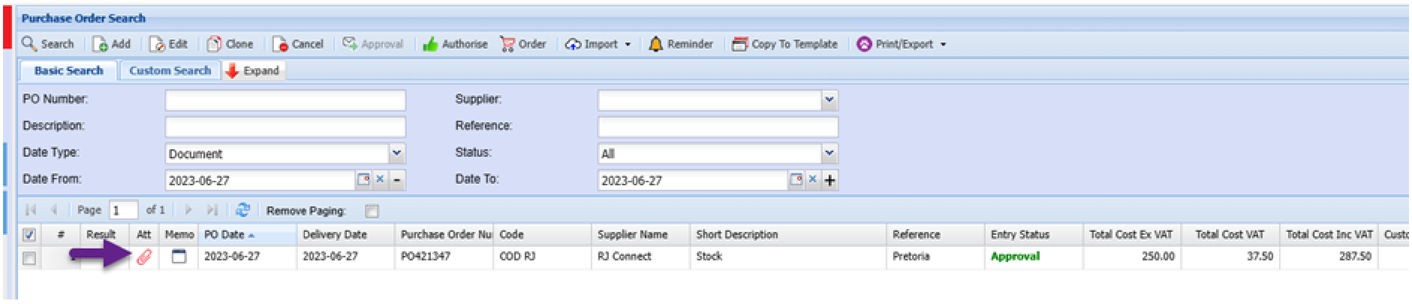


All Purchase orders within the selected criteria will be displayed in the grid.

Click the Attachments shortcut to view ant attachments.

The icon will be red if any attachment are uploaded

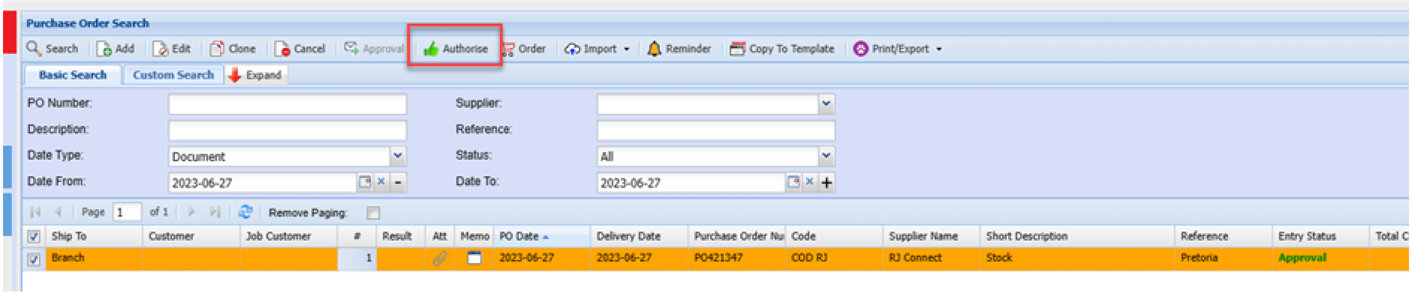
If not, this icon will be grey.



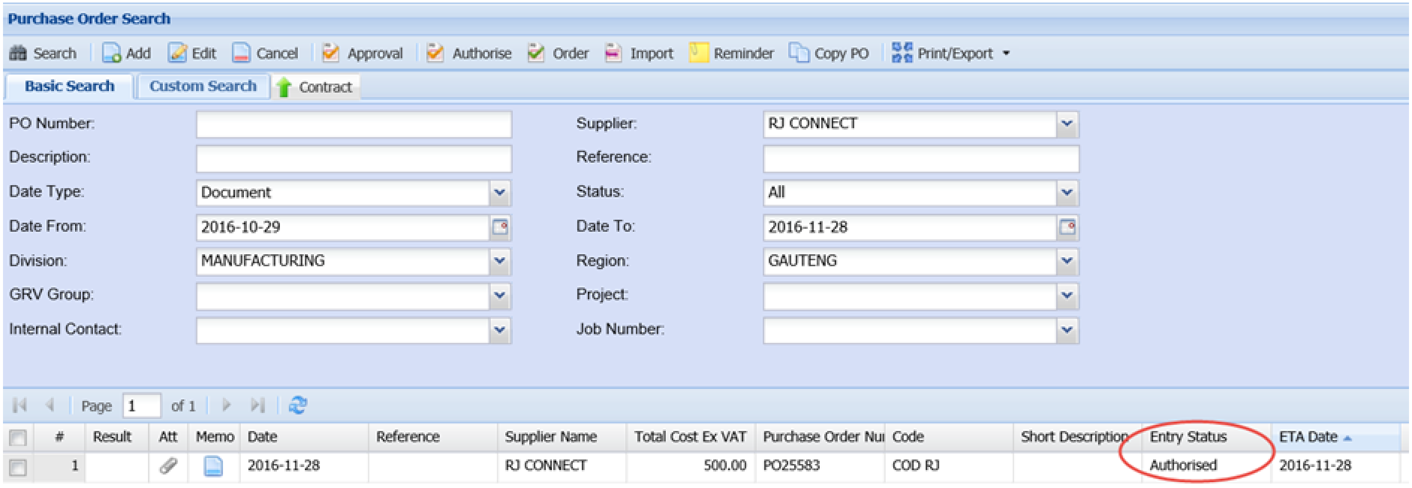
Should you need to check and verify any details of the order, double click on the required PO to open the lines.

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



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



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.

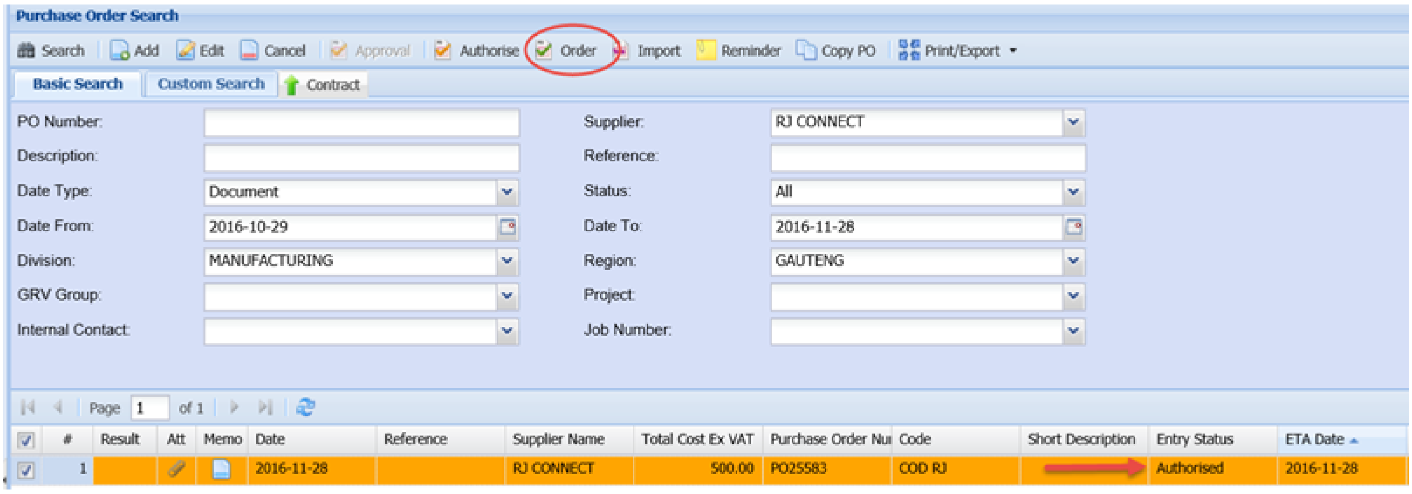
SUBMITTING PO

Search for the PO as per the standard steps:

Creditors Module> Activity> Purchase Orders

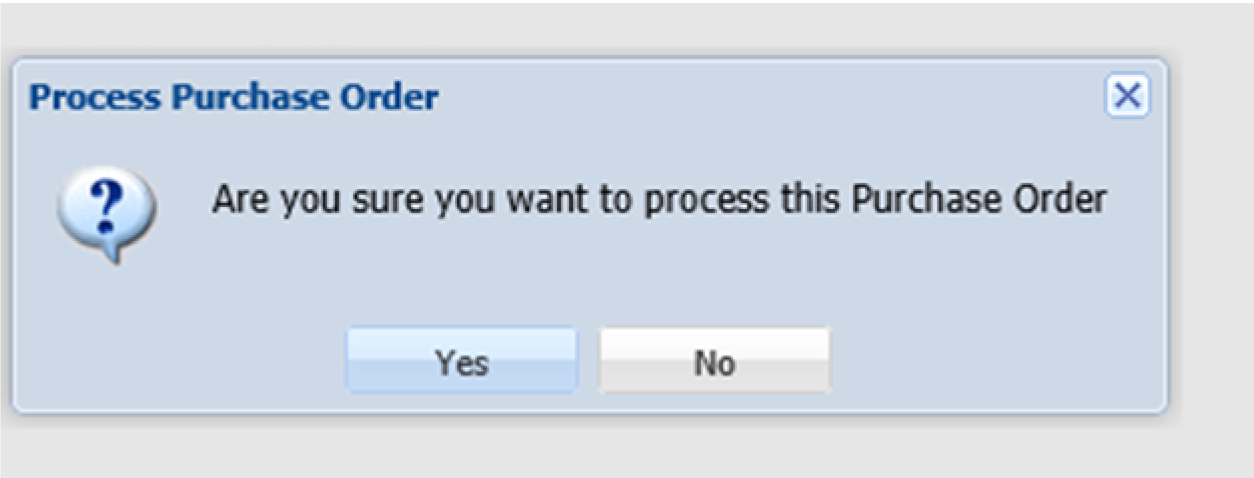
Enter the Search criteria

Click Search

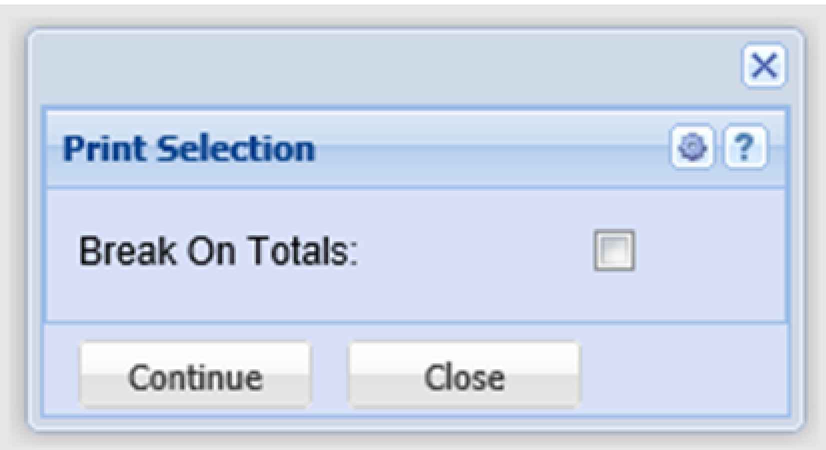


Check that the status is set at Authorized.

I



Click Yes

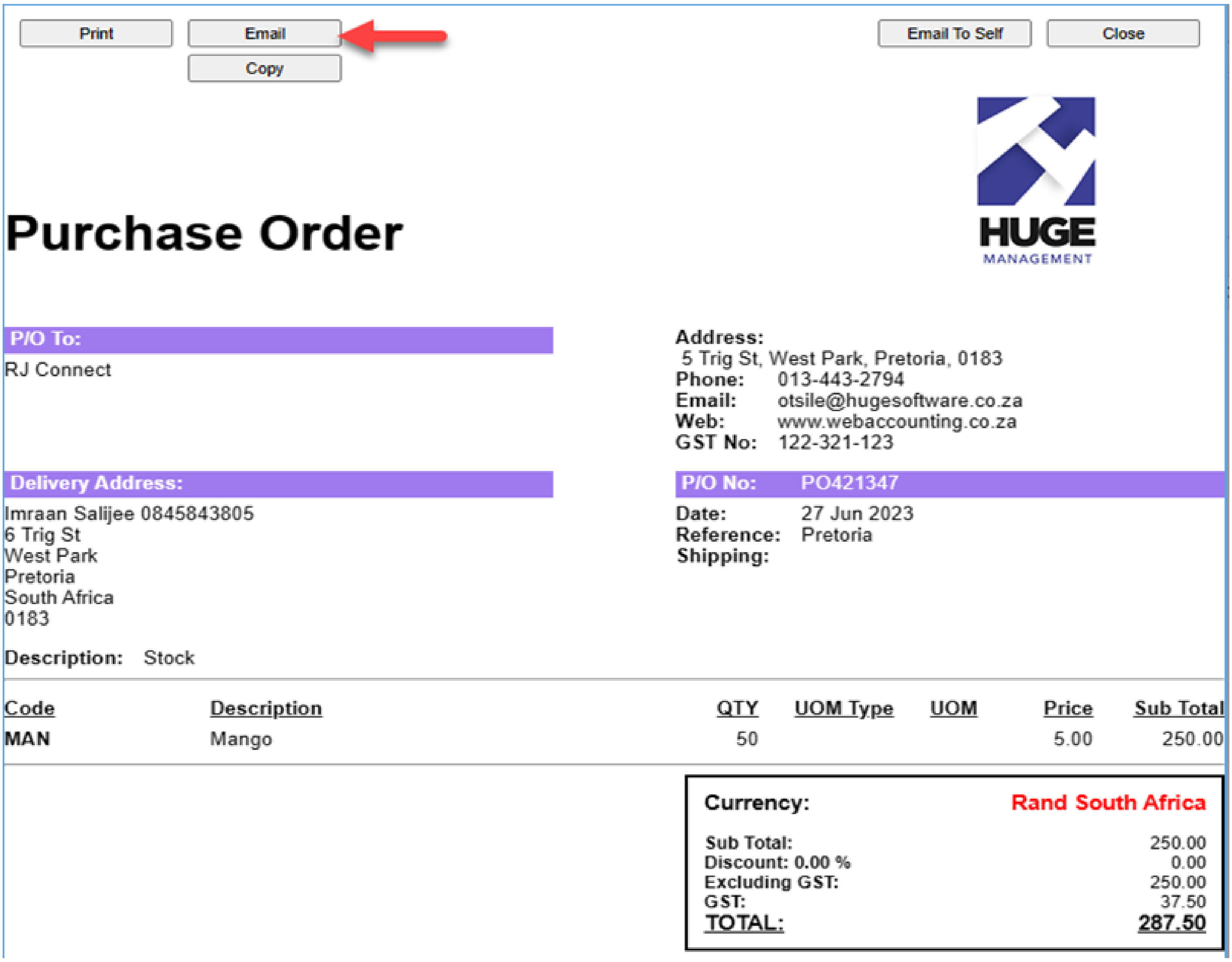


Click Continue

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 capturer 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) capturers 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

HUGE MANAGEMENT

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

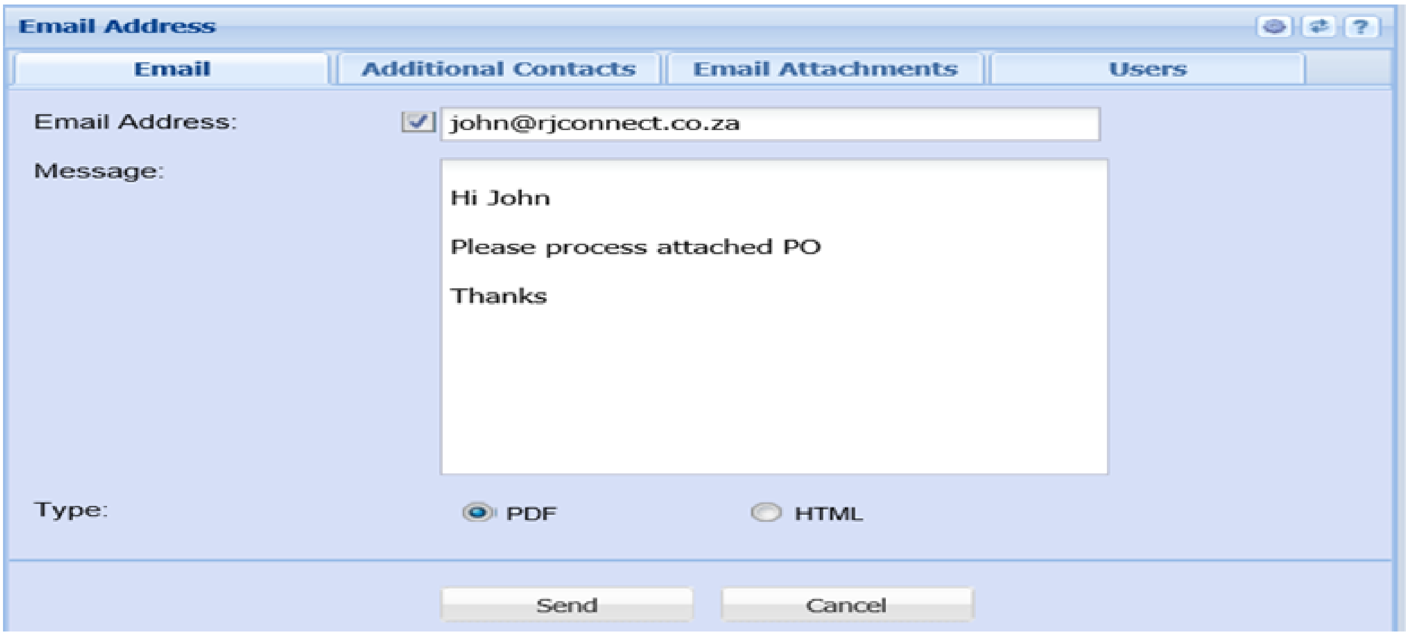
Code	Description	QTY	UOM Type	UOM	Price	Sub Total
MAN	Mango	50			5.00	250.00

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.

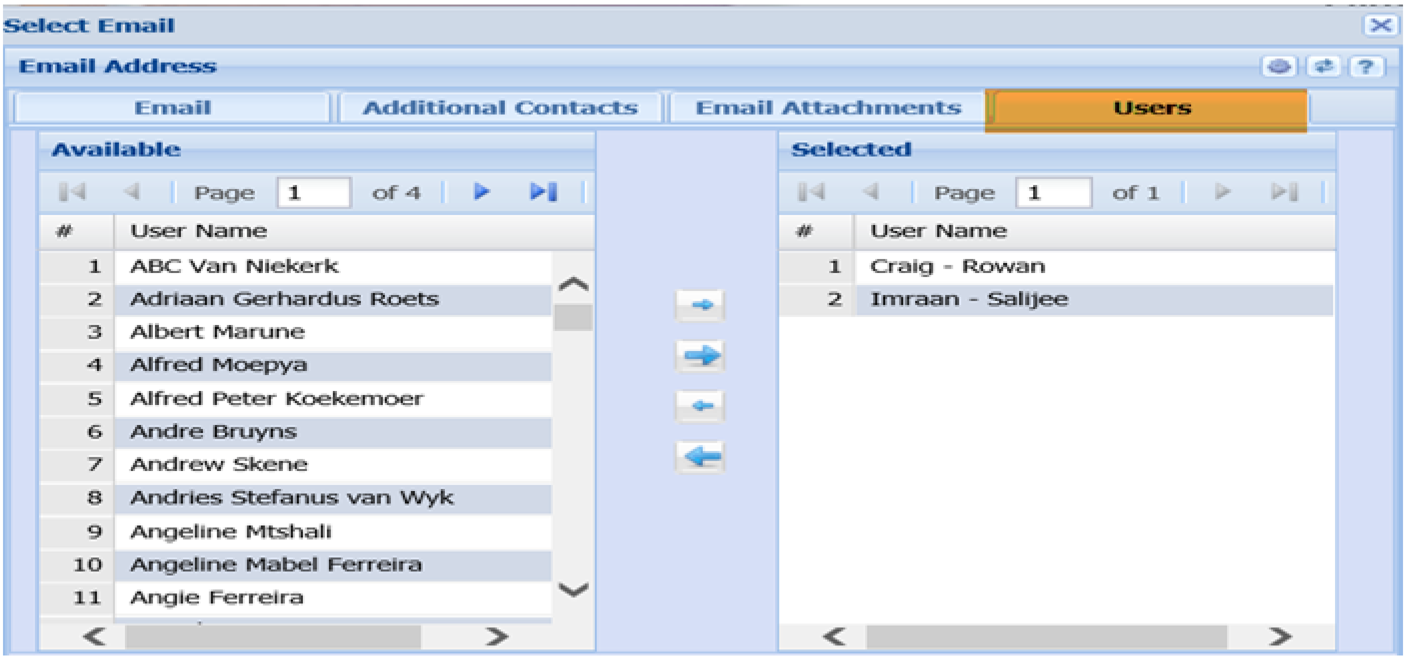


Click Send

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.



Click Send

Revision #4
Created 23 August 2023 05:56:01 by Paige
Updated 25 May 2026 20:39:32 by Paige