

### Description of Enquiry

This article explains how to setup and process the following in the Procurement module:

- Requisitions,
- Requisition to Purchase Order and
- Purchase Order authorizations making use of a workflow

### Solution / Details

We'll be making use of the following scenario to explain the above:

#### PHASE 1: SETUP AND CONFIGURATION

1. Create the following Agents: TOM, JOHN, ROBERT AND MARK
2. Create the following workflow steps:
  - REQUEST,
  - REQUEST CHECK
  - APPROVAL
3. Create the following workflow: PROCUREMENT, as below:

**Edit Workflow "PROCUREMENT"**

Workflow

Workflow Name:

Description:

Purchase Order Workflow

Workflow Steps

Items marked in Grey will be deleted when the OK button is pressed. Items marked in Blue are new and items in Navy Blue are items that have been edited. Use the UP and DOWN arrows to re-order the Workflow sequence.

Step Code	Description	Agent Type	Agent Name	Allow Reject	Allow Close After Reject	Hide Auto Assignm	Escalation Group
REQUEST	REQUEST		JOHN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
REQUEST CHECK	REQUEST CHECK		ROBERT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
APPROVAL	APPROVAL		MARK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

4. For the last step in the workflow, for agent MARK, select the option below

The screenshot shows the 'Edit Workflow Step' dialog box for the 'APPROVAL' step. The 'Agent' is set to 'MARK (MARK) (-)'. The 'Purchase Order' section has two checked options: 'Approve Purchase Order' and 'Cancel Purchase Order on Reject and Reason'. The 'OK' button is highlighted with a blue border.

Field	Value
Workflow Step Code	APPROVAL (APPROVAL)
Agent	MARK (MARK) (-)
Agent Group	
Allow Reject	<input checked="" type="checkbox"/>
Allow Close After Reject	<input checked="" type="checkbox"/>
Override Automatic Agent Assignment	<input type="checkbox"/>
Escalation Group	Select an Escalation Group
Approve Purchase Order	<input checked="" type="checkbox"/>
Cancel Purchase Order on Reject and Reason	<input checked="" type="checkbox"/>

5. Create two new Incident Types as below:

a) Procurement related Incident Type: **PROCUREMENT**

The screenshot shows the 'Add New Incident Type' dialog box. The 'Description' is 'PROCUREMENT', 'Default Outline' is 'PROCUREMENT', and 'Workflow' is 'PROCUREMENT (PROCUREMENT)'. The 'Purchase Order Incident Type' checkbox is checked. The 'OK' button is highlighted with a blue border.

Field	Value
Description	PROCUREMENT
Incident Type Group	Select an Incident Type Group
Default Outline	PROCUREMENT
Workflow	PROCUREMENT (PROCUREMENT)
Default Escalation Group	
Allow Escalation Group Override	<input checked="" type="checkbox"/>
Requires a Contract	<input type="checkbox"/>
Allow Incident Type Override on New Action of Incident	<input checked="" type="checkbox"/>
Purchase Order Incident Type	<input checked="" type="checkbox"/>

b) Requisition related Incident Type: PROC - NEW REQUISITIONS

The screenshot shows a dialog box titled "Add New Incident Type". It has two main sections: "Details" and "Options".

**Details:**

- Description: PROC - NEW REQUISITIONS (with an unchecked checkbox and a checked "Active" checkbox)
- Incident Type Group: Select an Incident Type Group (dropdown menu)
- Default Outline: PROC - NEW REQUISITIONS

**Options:**

- Workflow: Select a Workflow (dropdown menu)
- Default Escalation Group: Select an Escalation Group (dropdown menu)
- Allow Escalation Group Override
- Requires a Contract
- Allow Incident Type Override on New Action of Incident
- Purchase Order Incident Type

Buttons: OK, Cancel

6. Edit the Agents as below

- Agent JOHN

The screenshot shows the "Edit Agent 'JOHN'" dialog box with the "Purchase Order" tab selected. The "Authorisation" section is expanded.

**Authorisation:**

- Use Group Defaults
- Never requires authorisation (Always used by Administrator Group)
- Always requires authorisation
- Requires authorisation over limit: R 1.00  Exclusive
- Incident Type: PROCUREMENT (-) (-) (PROCURE... (dropdown menu)

- Agent ROBERT

The screenshot shows the "Edit Agent 'ROBERT'" dialog box with the "Purchase Order" tab selected. The "Authorisation" section is expanded.

**Authorisation:**

- Use Group Defaults
- Never requires authorisation (Always used by Administrator Group)
- Always requires authorisation
- Requires authorisation over limit: R 1,000.00  Exclusive
- Incident Type: PROCUREMENT (-) (-) (PROCURE... (dropdown menu)

- Agent MARK

**Edit Agent "MARK"**

General Contact Address Options Retail/Point of Sale Defaults Batch Defaults **Purchase Order**

**Authorisation**

Use Group Defaults

Never requires authorisation (Always used by Administrator Group)

Always requires authorisation

Requires authorisation over limit R9,999,999,999.99  Exclusive

Incident Type PROCUREMENT (-) (-) (PROCURE... ▾

- Agent TOM – This agent is not part of the Purchase Order authorization workflow but the following setup is still required.

**Edit Agent "TOM"**

General Contact Address Options Retail/Point of Sale Defaults Batch Defaults **Purchase Order**

**Authorisation**

Use Group Defaults

Never requires authorisation (Always used by Administrator Group)

Always requires authorisation

Requires authorisation over limit  Exclusive

Incident Type PROCUREMENT (-) (-) (PROCURE... ▾

## PHASE 2: PROCESSING

### Step1: Process a new Requisition

1. Log in with agent TOM:
2. Go to **Procurement | Transactions | New Requisition**:

**New Requisition -- (REQ0001)\***

File View Line Documents Foreign Currency Utilities

Close Post Requisition New Line Insert Line Delete Line

Requisition: Number REQ0001\* Requested By Project Select a Project Incident Type PROC - NEW REQUISITIONS (. ▾

Date 2018/02/21

Line	Module	Item	Item Description	Description	Supplier	Quantity	Expected Price (Exd)	Expected Date	Line Expected Price Total	Incident Type	Agent	Status
1	ST	AAA	AAA	AAA	AB	1.00	R150.00	2018/02/21	R150.00	PROC - NEW REQUISITIONS	TOM	Request
2	ST	BBB	BBB	BBB	AB	1.00	R350.00	2018/02/21	R350.00	PROC - NEW REQUISITIONS	TOM	Request
3	ST	CCC	CCC	CCC	AB	1.00	R400.00	2018/02/21	R400.00	PROC - NEW REQUISITIONS	TOM	Request
4	ST	DDD	DDD	DDD	AB	1.00	R550.00	2018/02/21	R550.00	PROC - NEW REQUISITIONS	TOM	Request
5	ST	EEE	EEE	EEE	AB	1.00	R800.00	2018/02/21	R800.00	PROC - NEW REQUISITIONS	TOM	Request

## STEP 2: Approving the Requisition.

1. While still logged in with agent Tom, find the new requisition under **My Requisitions**

Modified	Reference	Att	Incident Outline	Incident Type	Status	Priority	Agent
2018/02/21 07:51:08	IR000001		Requisition: REQ00001	PROC - NEW REQUIS	Not Started	Normal	TOM

2. Click on **Requisition**.

**Incident "IR000001"**

File Incident Documents Knowledge Base Entity

Close Requisition Print

**Incident Details**

Date Created: 2018/02/21 07:51:09  
 Last Modified: 2018/02/21 07:51:08  
 Priority: Normal  
 Status: Not Started

Last Action: Assigned  
 Action by: TOM  
 Escalates: Never

Customer: [blank]  
 Contract: [blank]  
 Prospective Customer: [blank]  
 Contact Person: [blank]  
 Incident Type Group: [blank]  
 Incident Type: PROC - NEW REQUISITIONS  
 Workflow: [blank]  
 Workflow Step: [blank]  
 Sales Opportunity: [blank]

Escalation Group: [blank]  
 Agent: TOM  
 Inventory Item: [blank]  
 Supplier: [blank]  
 Worker: [blank]  
 Fixed Asset: [blank]  
 Project: [blank]  
 Job Costing: [blank]

Outline: **Requisition: REQ00001**

Category: [blank] Your Reference: **REQ00001** Due By: **2018/02/22 07:51** Linked Event:

Action so far:  
 (21/02/2018 07:51:08) Assigned by TOM to TOM

3. Approve all lines and then click on **Post Requisition**.

**Requisition -- (REQ00001) (IR000001)\***

File View Line Documents Foreign Currency Utilities

Close Post Requisition New Line Insert Line Delete Line

Requisition: [blank] Default

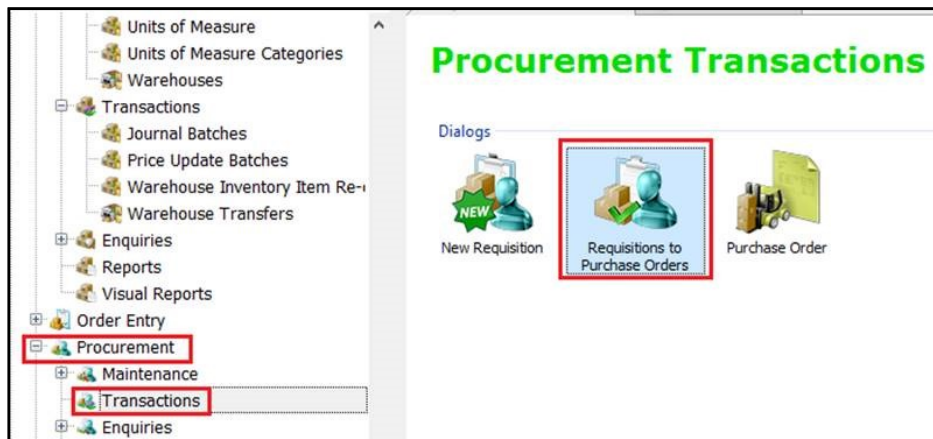
Number: REQ00001 Requested By: [blank] Project: [blank]

Date: 2018/02/21 Incident Type: PROC - NEW REQUISITIONS (,)

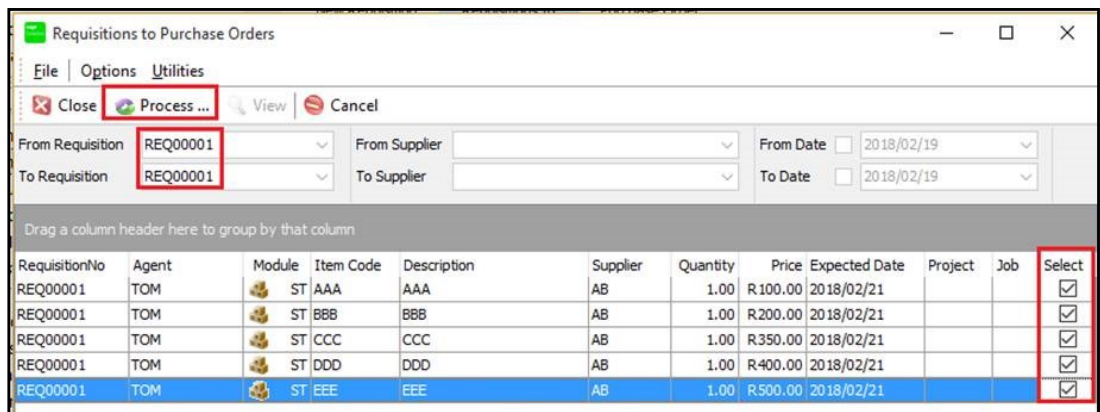
Module	Item	Item Description	Description	Supplier	Quantity	Expected Price (Excl)	Actual Price (Excl)	Expected Date	Line Expected Price Total	Incident Type	Agent	Status	Project
ST	AAA	AAA	AAA	AB	1.00	R150.00	R100.00	2018/02/21	R150.00	PROC - NEW REQUISITIONS	TOM	Approve	
ST	BBB	BBB	BBB	AB	1.00	R350.00	R200.00	2018/02/21	R350.00	PROC - NEW REQUISITIONS	TOM	Approve	
ST	CCC	CCC	CCC	AB	1.00	R400.00	R350.00	2018/02/21	R400.00	PROC - NEW REQUISITIONS	TOM	Approve	
ST	DDD	DDD	DDD	AB	1.00	R550.00	R400.00	2018/02/21	R550.00	PROC - NEW REQUISITIONS	TOM	Approve	
ST	EEE	EEE	EEE	AB	1.00	R800.00	R500.00	2018/02/21	R800.00	PROC - NEW REQUISITIONS	TOM	Approve	

### Step 3: Requisition to Purchase Order

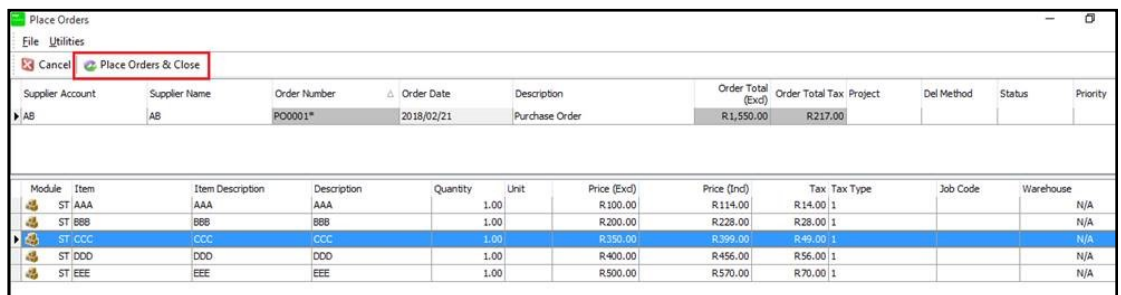
1. While still logged in as agent Tom (or the relevant responsible agent), go to **Procurement | Transactions | Requisitions to Purchase Orders**



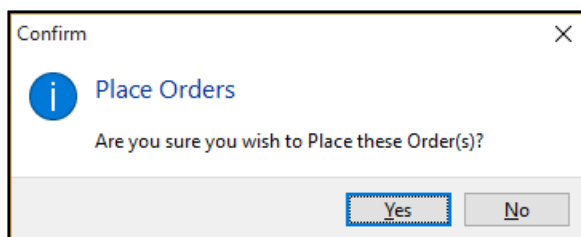
2. Find the requisition. Click all the lines' **Select** options below, and **Process**



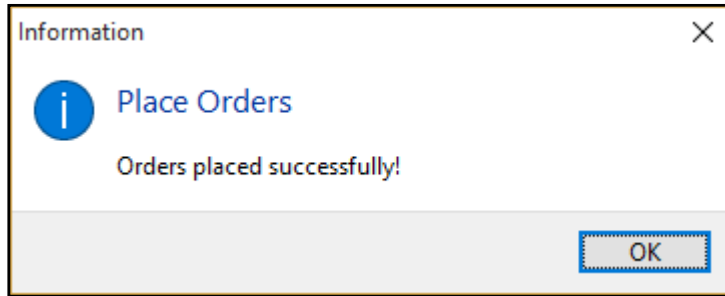
3. Click the **Place Orders & Close** button



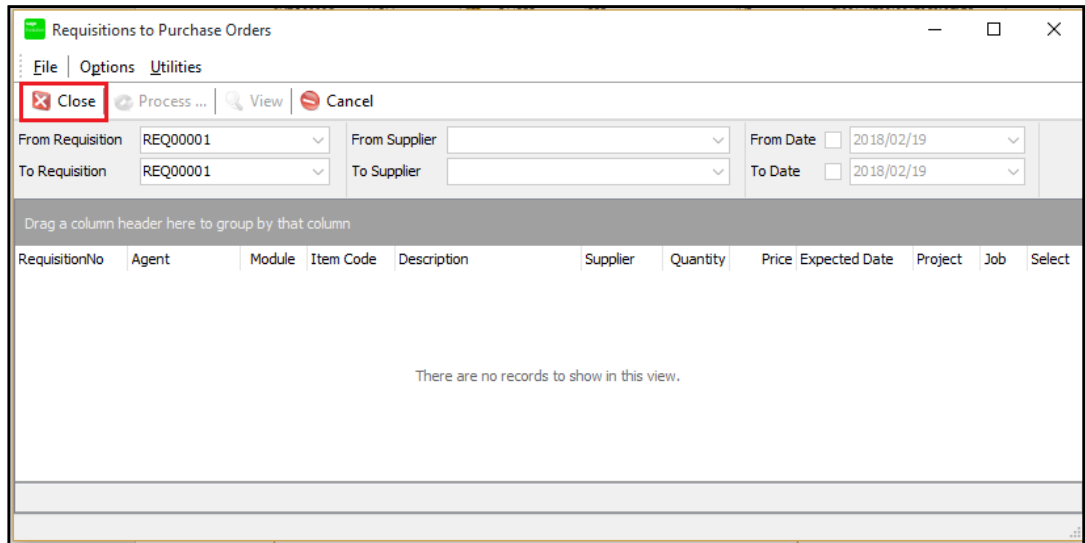
4. Click the **Yes** button below



- Click the **OK** button below

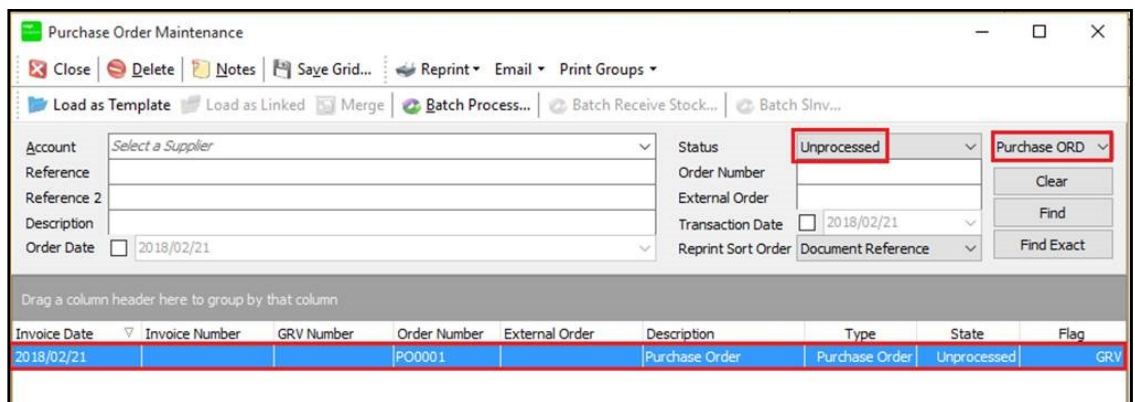


- Click the **Close** button below which should now be cleared of the processed authorization.

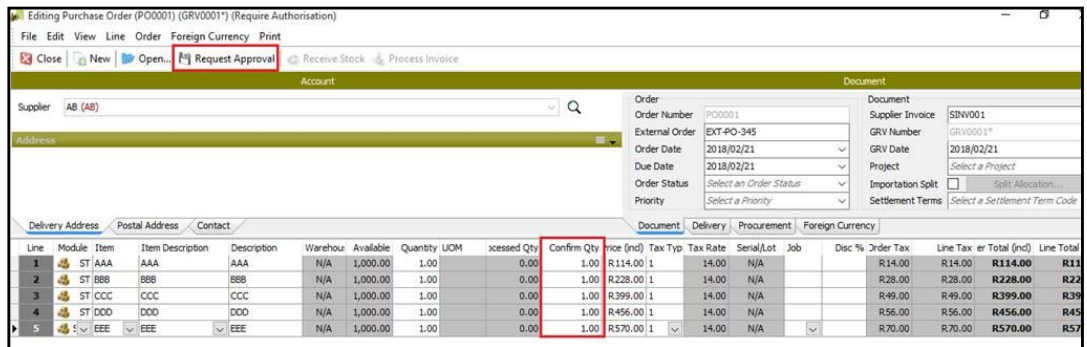


#### STEP 4: Initializing the Purchase Order Authorizations' Workflow

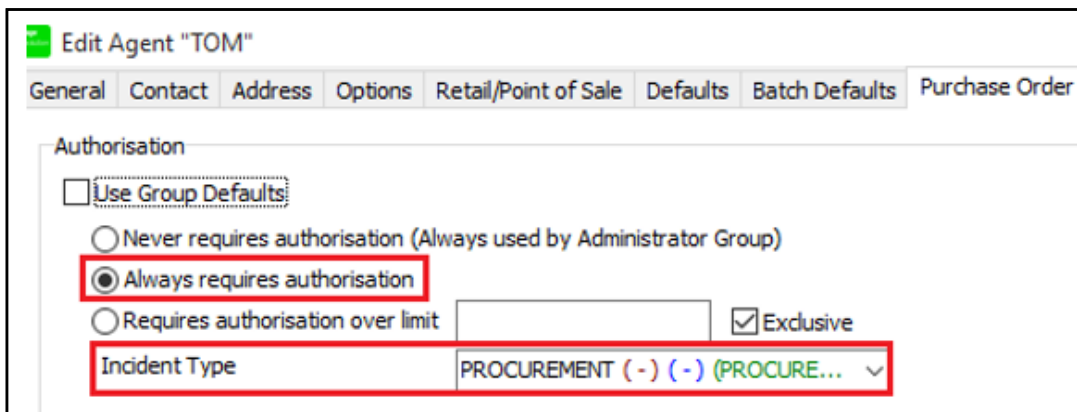
- Agent TOM (or the relevant responsible agent), even if not part of workflow, needs to initialize the workflow process.
- Go to **Procurement | Transactions | Purchase Order | Open**



3. Select the **Request Approval** button.



4. Note above the **Receive Stock** and **Process Invoice** buttons are both inactive, and only **Request Approval** button is active for TOM, as per his agent profile.



5. Select the option to print the Purchase Order if needed.

**Purchase Order** Page 1 of 1

COMPTRIB2016 Tax Registration  
Telephone  
Fax

To:  
AB  
AB

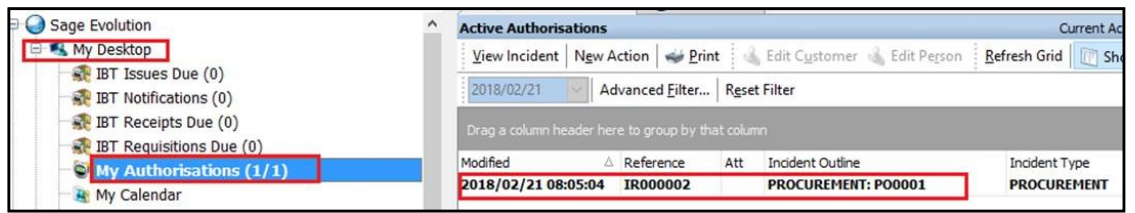
Account	Date	Order No
AB	2018/02/21	PO0001

Item Code	Item Description	Ordered	Prev	Quantity	Unit	Price (In)	Disc %	Tax	Total (Incl)
AAA	AAA	1.00	0.00	0.00		114.00		14.00	114.00
BBB	BBB	1.00	0.00	0.00		228.00		28.00	228.00
CCC	CCC	1.00	0.00	0.00		399.00		49.00	399.00
DDD	DDD	1.00	0.00	0.00		456.00		56.00	456.00
EEE	EEE	1.00	0.00	0.00		570.00		70.00	570.00
Total (Excl)									1,550.00
Tax									217.00
Total (Incl)									<b>1,767.00</b>
Discount									0.00
Total (Incl)									<b>1,767.00</b>

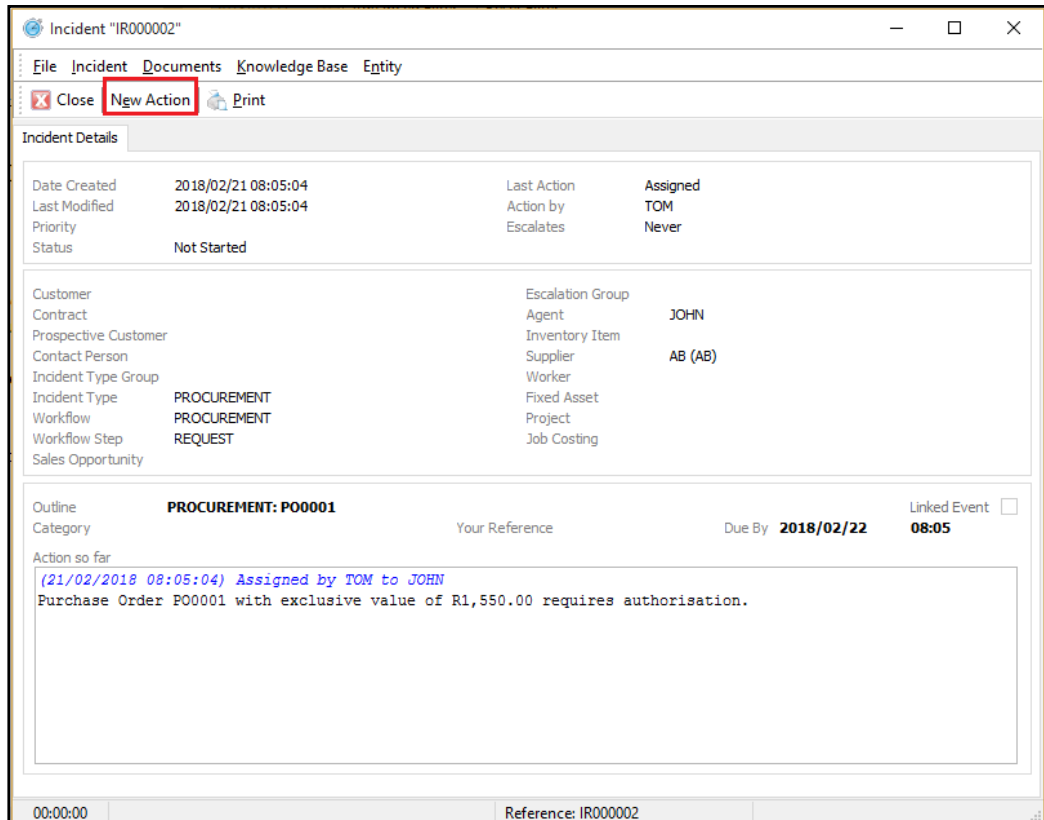
Received by \_\_\_\_\_  
Date \_\_\_\_\_  
Signed \_\_\_\_\_

## STEP 5: Approve the PO: My Authorizations for first agent in workflow

1. Agent John, first in the authorizations' workflow, logs onto the company, find and open the authorization incident as below.



2. Click the **New Action** button below.



3. Notice the landing page below.

The screenshot shows a web application window titled "New Action for Incident 'IR000002'". The interface includes a menu bar with "File", "Incident", "Documents", "Knowledge Base", "Entity", "E-mail", and "Options". Below the menu is a toolbar with buttons for "Close", "Post Action", "View Purchase Order", "Approve", "Reject", and "Link Knowledge Base Articles...". The main content area is divided into sections: "Incident" and "Incident Details". The "Incident Details" section contains a grid of dropdown menus for fields such as Customer, Contract, Prospective Customer, Contact Person, Incident Type Group, Incident Type, Workflow, Workflow Step, Sales Opportunity, Escalation Group, Assigned Agent, Inventory Item, Supplier, Worker, Fixed Asset, Project, and Job Costing. A note below the grid states: "'Approve' will change to workflow step 'REQUEST CHECK' and assign to agent 'ROBERT'". Below this is an "Outline" section with a text input field containing "PROCUREMENT: PO0001" and a "Linked Event" checkbox. The "Category" section includes a dropdown menu, a "Your Reference" input field, a "Due By" date field set to "2018/02/22", and a time field set to "08:05". The status bar at the bottom shows "00:00:42" and "Reference: IR000002".

4. Initially the **Approve** button is inactive (greyed out) above

5. Therefore, click the **View Purchase Order** button first.

This screenshot is identical to the one above, but with a red rectangular box highlighting the "View Purchase Order" button in the toolbar. The rest of the interface, including the dropdown menus, the note about the "Approve" button, and the form fields, remains the same.

- Agent John can now reprint the PO and change line quantity values below as relevant. Click the **Close** button when done

Also note that the **Receive GRV** and **Process Invoice** buttons are inactive.

Editing Purchase Order (PO0001) (GRV0001\*) (Waiting for Approval)

File Edit View Line Order Foreign Currency Print

Close New Open... Save Receive Stock Process Invoice

Account: Supplier AB (AB)

Document: Order Number PO0001, External Order EXT-PO-345, Order Date 2018/02/21, Due Date 2018/02/21, Order Status Select an Order Status, Priority Normal

Line	Module	Item	Item Description	Description	Wareh	available	quantity	UOM	ssed Qty	rm Qty	ze (ind)	Tax T	ix Rate	Serial/Lot	Job	Disc %	je
1	ST	AAA	AAA	AAA	N/A	1,000.0	1.00		0.00	1.00	R114.0	1	14.00	N/A			R
2	ST	BBB	BBB	BBB	N/A	1,000.0	1.00		0.00	1.00	R228.0	1	14.00	N/A			R
3	ST	CCC	CCC	CCC	N/A	1,000.0	1.00		0.00	1.00	R399.0	1	14.00	N/A			R
4	ST	DDD	DDD	DDD	N/A	1,000.0	1.00		0.00	1.00	R456.0	1	14.00	N/A			R
5	ST	EEE	EEE	EEE	N/A	1,000.0	1.00		0.00	1.00	R570.0	1	14.00	N/A			R

- Back on the Incident screen, click on the **Approve** button which should now be available.

New Action for Incident "IR000002"

File Incident Documents Knowledge Base Entity E-mail Options

Close Post Action View Purchase Order Approve Reject Link Knowledge Base Articles...

Incident Incident Details

Customer: Select a Customer

Contract: Select a Contract

Prospective Customer: Select a Prospect

Contact Person: Select a Person

Incident Type Group: Select an Incident Type Group

Incident Type: PROCUREMENT (-) (-) (PROCUREMENT)

Workflow: PROCUREMENT (PROCUREMENT)

Workflow Step: REQUEST (REQUEST)

Sales Opportunity: Select an Opportunity

Escalation Group: Select an Escalation Group

Assigned Agent: JOHN (JOHN) (-)

Inventory Item: Select an Inventory Item

Supplier: AB (AB)

Worker: Select a Worker

Fixed Asset: Select a Fixed Asset

Project: Select a Project

Job Costing: Select a Job

'Approve' will change to workflow step 'REQUEST CHECK' and assign to agent 'ROBERT'

Outline: PROCUREMENT: PO0001

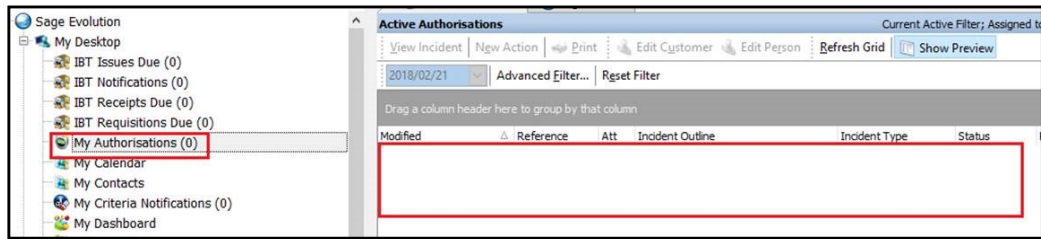
Category: Select an Incident Category

Your Reference: [ ] Due By: 2018/02/22 08:05

Agent John is approving this under condition that the Z-X component also gets delivered

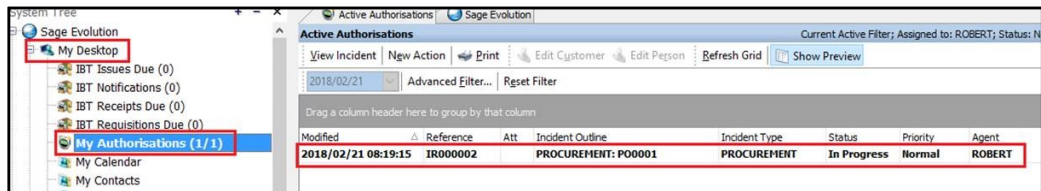
00:05:57 Reference: IR000002

- Notice the **My Authorisations | Active Authorisations** screen for agent JOHN is now blank / record removed

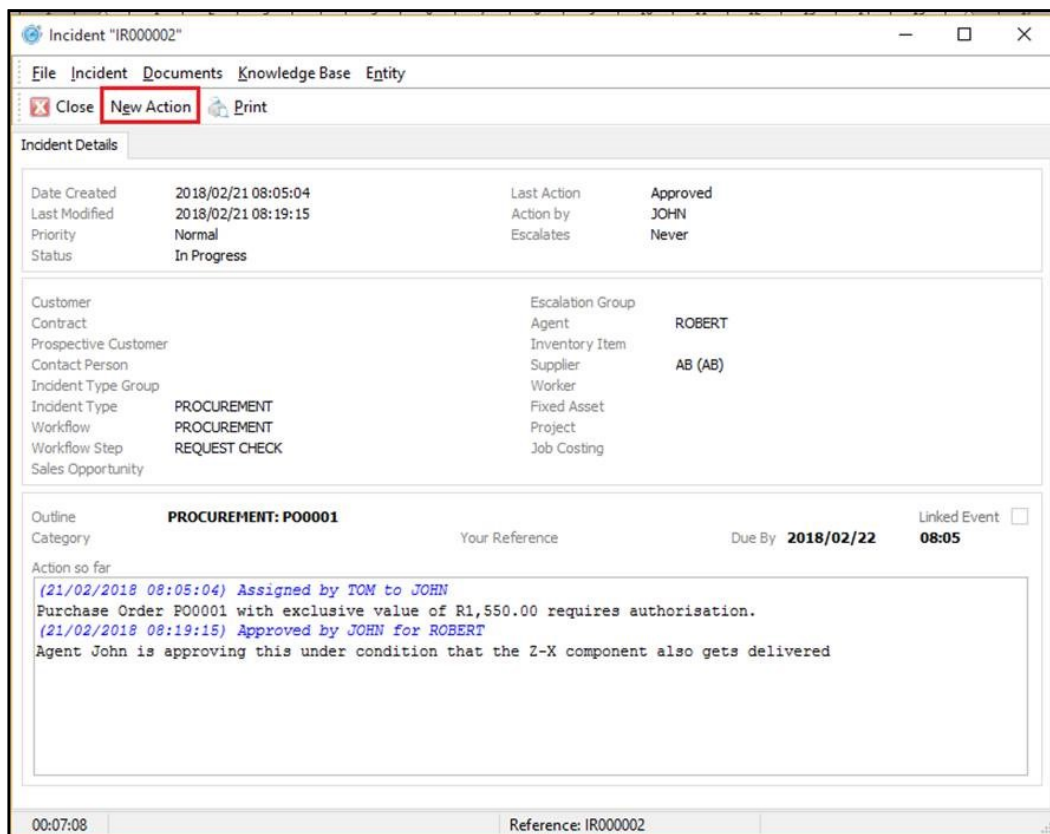


**STEP 6: Approve the PO: My Authorisations for second agent in workflow: ROBERT**

- When agent John selected the Approve button above, it moved the incident to agent Robert, because John has a limit of only approving PO's up to R1.00
- Log in as agent Robert and go to **My Desktop | My Authorisations**
- Find the authorization incident waiting below and open it.



- Click the **New Action** button.



- Notice the **Approve** and **Reject** buttons are inactive. Click on the **View Purchase Orders** button

The screenshot shows a window titled "New Action for Incident 'IR000002'". The menu bar includes File, Incident, Documents, Knowledge Base, Entity, E-mail, and Options. The toolbar contains buttons for Close, Post Action, View Purchase Order (highlighted with a red box), Approve, Reject, and Link Knowledge Base Articles... Below the toolbar, there are tabs for Incident and Incident Details. The main area contains a grid of dropdown menus for various fields: Customer, Contract, Prospective Customer, Contact Person, Incident Type Group, Incident Type (set to PROCUREMENT), Workflow (set to PROCUREMENT), Workflow Step (set to REQUEST CHECK), Sales Opportunity, Escalation Group, Assigned Agent (set to ROBERT), Inventory Item, Supplier (set to AB), Worker, Fixed Asset, Project, and Job Costing. A note at the bottom states: "'Approve' will change to workflow step 'APPROVAL' and assign to agent 'MARK'". Below the grid, there are fields for Outline (PROCUREMENT: PO0001), Category, Your Reference, Due By (2018/02/22), and 08:05. The status bar at the bottom shows 00:07:12 and Reference: IR000002.

- For additional insight, set the last line's quantity to zero, and notice the difference between **Ordered** and **Confirmed** values at the bottom right of the PO

The screenshot shows a window titled "Editing Purchase Order (PO0001) (GRV0001\*) (Waiting for Approval)". The menu bar includes File, Edit, View, Line, Order, Foreign Currency, and Print. The toolbar contains buttons for Close, New, Open..., Save, Receive Stock, and Process Invoice. The main area is divided into sections for Account (Supplier: AB), Address, and Document (Order Number: PO0001, Order Date: 2018/02/21, etc.). Below these is a table of lines with columns: Line, Module, Item, Item Descriptor, Description, Warehouse, available, quantity, UOM, issued Qty, firm Qty, size (inc), Tax Ty, size Rate, Serial/Lot, Job, Disc %, der Tax, Line Tax, Total (inc), e Total (inc). Line 5 has a quantity of 0.00. At the bottom right, a summary table shows:

Home Totals	
Ordered	Confirmed
Exclusive Total	R 1,550.00
Tax Amount	R 217.00
Inclusive Total	R 1,767.00
	R 1,050.00
	R 147.00
	R 1,197.00

The status bar at the bottom shows Tax Inclusive(Line), Pending, Modified, and Editing.

- If needed, print the PO and when done, close the preview and transaction screen.

Page 1 of 1

## Purchase Order

COMPTRIB2016 Tax Registration  
Telephone  
Fax

To:  
AB  
AB

Account	Date	Order No
AB	2018/02/21	PO0001

Item Code	Item Description	Ordered	Prev	Quantity	Unit	Price (In)	Disc %	Tax	Total (Incl)
AAA	AAA	1.00	0.00	0.00		114.00		14.00	114.00
BBB	BBB	1.00	0.00	0.00		228.00		28.00	228.00
CCC	CCC	1.00	0.00	0.00		399.00		49.00	399.00
DDD	DDD	1.00	0.00	0.00		456.00		56.00	456.00
EEE	EEE	1.00	0.00	0.00		570.00		70.00	570.00
								Total (Excl)	1,550.00
								Tax	217.00
								<b>Total (Incl)</b>	<b>1,767.00</b>
								Discount	0.00
								<b>Total (Incl)</b>	<b>1,767.00</b>

Received by \_\_\_\_\_  
Date \_\_\_\_\_  
Signed \_\_\_\_\_

- Back on the incident screen below, enter relevant comments and click the **Approve** button.

New Action for Incident "IR000002"

File Incident Documents Knowledge Base Entity E-mail Options

Close Post Action View Purchase Order **Approve** Reject Link Knowledge Base Articles...

**Incident** Incident Details

Customer	Select a Customer		
Contract	Select a Contract	Escalation Group	Select an Escalation Group
Prospective Customer	Select a Prospect	Assigned Agent	ROBERT (ROBERT) (-)
Contact Person	Select a Person	Inventory Item	Select an Inventory Item
Incident Type Group	Select an Incident Type Group	Supplier	AB (AB)
Incident Type	PROCUREMENT (-) (-) (PROCUREMENT)	Worker	Select a Worker
Workflow	PROCUREMENT (PROCUREMENT)	Fixed Asset	Select a Fixed Asset
Workflow Step	REQUEST CHECK (REQUEST CHECK)	Project	Select a Project
Sales Opportunity	Select an Opportunity	Job Costing	Select a Job

'Approve' will change to workflow step 'APPROVAL' and assign to agent 'MARK'

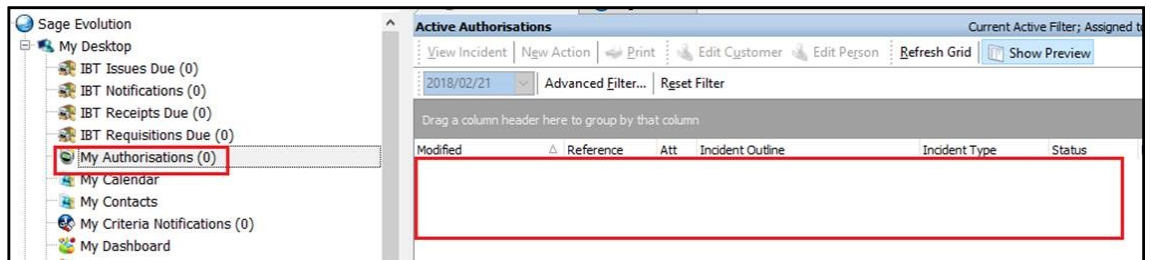
Outline: PROCUREMENT: PO0001 Linked Event

Category: Select an Incident Category Your Reference Due By: 2018/02/22 08:05

Z-X component is delivered as confirmed by Mr Gardner

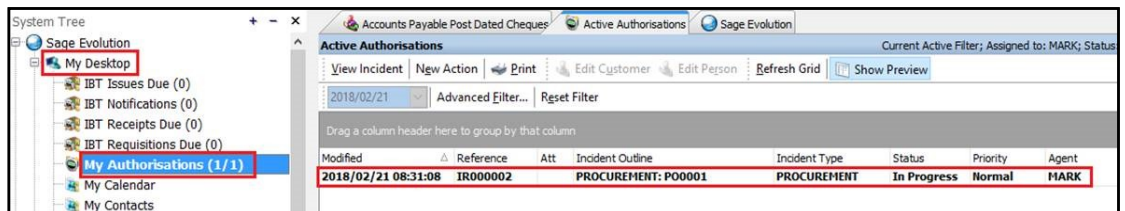
00:12:00 View Purchase Order Reference: IR000002

- Notice the **My Authorisations | Active Authorizations** screen for agent JOHN is now blank / record removed. If still there, click F5 on the keyboard and this record should be removed.

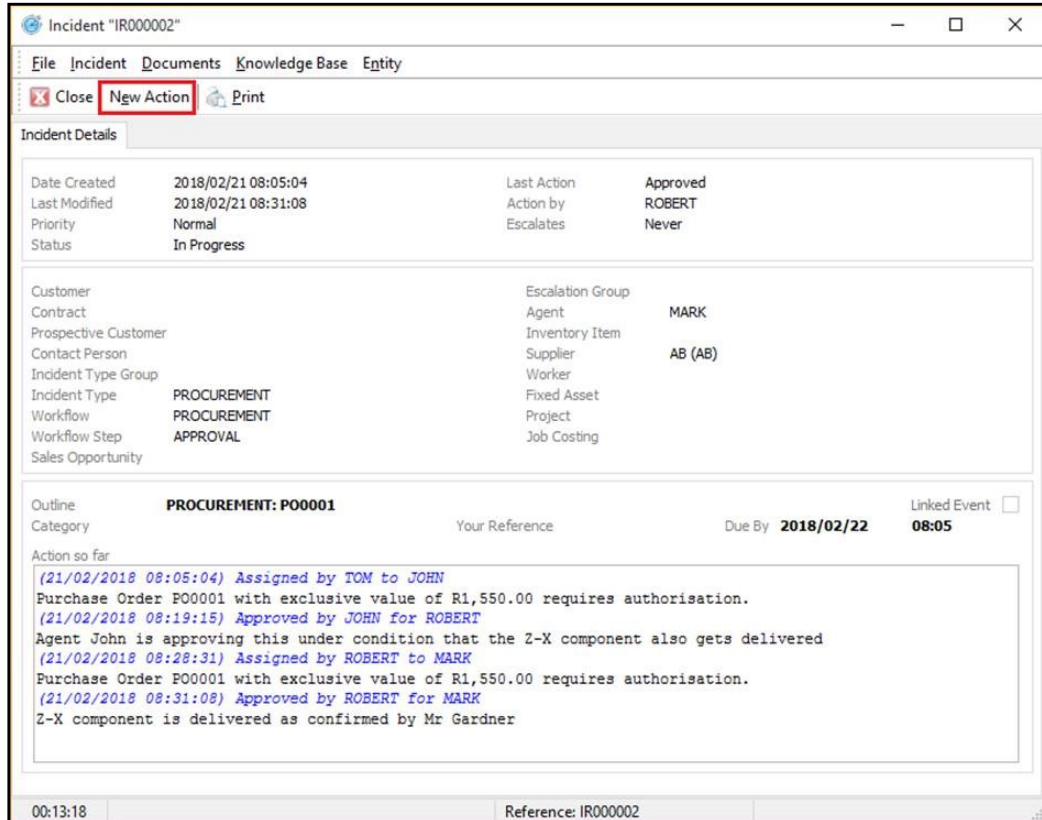


### STEP 7: Approve the PO: My Authorisations for third agent in workflow: MIKE

- Log in with agent MARK
- Go to My Desktop | My Authorisations, find the record and open it.



- Click the **New Action** button



- Click on the **View Purchase Order** button to open it.

The screenshot shows a window titled "New Action for Incident 'IR000002'". The menu bar includes File, Incident, Documents, Knowledge Base, Entity, E-mail, and Options. The toolbar contains buttons for Close, Post Action, View Purchase Order (highlighted in red), Approve, Reject, and Link Knowledge Base Articles... The main area is divided into "Incident" and "Incident Details" tabs. Under "Incident Details", there are several dropdown menus for Customer, Contract, Prospective Customer, Contact Person, Incident Type Group, Incident Type (set to PROCUREMENT), Workflow (set to PROCUREMENT), Workflow Step (set to APPROVAL), Sales Opportunity, Escalation Group, Assigned Agent (set to MARK), Inventory Item, Supplier (set to AB), Worker, Fixed Asset, Project, and Job Costing. A note at the bottom states "'Approve' will assign to original agent." Below this is an "Outline" section with a text field containing "PROCUREMENT: PO0001" and a "Linked Event" checkbox. A "Category" dropdown is also present. The status bar at the bottom shows the time "00:13:39" and the reference "Reference: IR000002".

- In here you can still amend the confirmed quantities and Print the PO.

- Close when done.

The screenshot shows a window titled "Editing Purchase Order (PO0001) (GRV0001\*) (Waiting for Approval)". The menu bar includes File, Edit, View, Line, Order, Foreign Currency, and Print (highlighted in red). The toolbar contains buttons for Close (highlighted in red), New, Open..., Save, Receive Stock, and Process Invoice. The window is divided into several sections: "Account" with a "Supplier" dropdown set to "AB (AB)"; "Document" with fields for Order Number (PO0001), External Order (EXT-PO-345), Order Date (2018/02/21), Due Date (2018/02/21), Order Status, and Priority; and another "Document" section with fields for Supplier Invoice (SINV001), GRV Number (GRV0001\*), GRV Date (2018/02/21), Project, Importation Split, and Settlement Terms. Below these is a table with columns: Line, Module, Item, Item Descriptor, Description, Wareh, available, quantity, UOM, ssed Qty, Confirm Qty, ze (ind), Tax T, ix Rate, Serial/Lot, Job, Disc %, er Tax, Line Tax, 'otal (nd), and Total (nd). The table contains 5 rows of data. Row 5 has a red box around the "ssed Qty" value of 0.00. At the bottom, there is a "Description" field set to "Purchase Order", a "Discount %" field, and an "Inclusive" checkbox. A "Messages" section shows "REQ0001". A "Home Totals" section displays a summary of totals: Exclusive Total (R 1,550.00), Tax Amount (R 217.00), Inclusive Total (R 1,767.00), Ordered (R 1,550.00), and Confirmed (R 1,050.00). The status bar at the bottom shows "Tax Inclusive(Line) Pending Editing".

Line	Module	Item	Item Descriptor	Description	Wareh	available	quantity	UOM	ssed Qty	Confirm Qty	ze (ind)	Tax T	ix Rate	Serial/Lot	Job	Disc %	er Tax	Line Tax	'otal (nd)	Total (nd)
1	AAA	AAA	AAA	AAA	N/A	1,000.0	1.00		0.00	1.00	R114.0	1	14.00	N/A			R14.00	R14.00	R114.00	R114.00
2	ST	BBB	CCC	BBB	N/A	1,000.0	1.00		0.00	1.00	R228.0	1	14.00	N/A			R28.00	R28.00	R228.00	R228.00
3	ST	CCC	CCC	CCC	N/A	1,000.0	1.00		0.00	1.00	R399.0	1	14.00	N/A			R49.00	R49.00	R399.00	R399.00
4	ST	DDD	DDD	DDD	N/A	1,000.0	1.00		0.00	1.00	R456.0	1	14.00	N/A			R56.00	R56.00	R456.00	R456.00
5	ST	EEE	EEE	EEE	N/A	1,000.0	1.00		0.00	1.00	R570.0	1	14.00	N/A			R70.00	R0.00	R570.00	R0.00

7. Enter the final relevant comments below and **Approve**. Remember that agent MARK can approve any amount (this PO amount = R1 197) and he is also the final agent in the workflow.

The screenshot shows a software window titled "New Action for Incident 'IR000002'". The window has a menu bar with "File", "Incident", "Documents", "Knowledge Base", "Entity", "E-mail", and "Options". Below the menu bar is a toolbar with buttons for "Close", "Post Action", "View Purchase Order", "Approve", "Reject", and "Link Knowledge Base Articles...". The "Approve" button is highlighted with a red box.

The main area is titled "Incident" and "Incident Details". It contains a grid of dropdown menus for various fields:

- Customer: Select a Customer
- Contract: Select a Contract
- Prospective Customer: Select a Prospect
- Contact Person: Select a Person
- Incident Type Group: Select an Incident Type Group
- Incident Type: PROCUREMENT (-) (-) (PROCUREMENT)
- Workflow: PROCUREMENT (PROCUREMENT)
- Workflow Step: APPROVAL (APPROVAL)
- Sales Opportunity: Select an Opportunity
- Escalation Group: Select an Escalation Group
- Assigned Agent: MARK (MARK) (-)
- Inventory Item: Select an Inventory Item
- Supplier: AB (AB)
- Worker: Select a Worker
- Fixed Asset: Select a Fixed Asset
- Project: Select a Project
- Job Costing: Select a Job

Below the grid, it says "'Approve' will assign to original agent." There is also an "Outline" field with the value "PROCUREMENT: PO0001" and a "Linked Event" checkbox.

A comment box contains the text: "Approve this PO and arranged for a new contract with supplier AB". This text is highlighted with a red box.

The status bar at the bottom shows "00:17:37" and "Reference: IR000002".

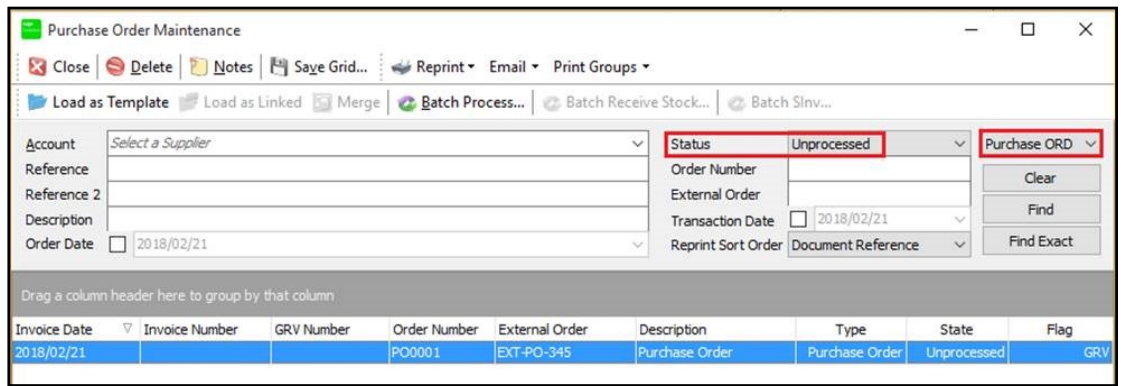
## STEP 8: Processing of approved PO

1. Login with agent TOM (or relevant responsible agent).
2. Go to Order Entry | Transactions | Purchase Order
3. Notice the **Request Approval** button is active at this stage. Ignore it for now and click on **Open** below.

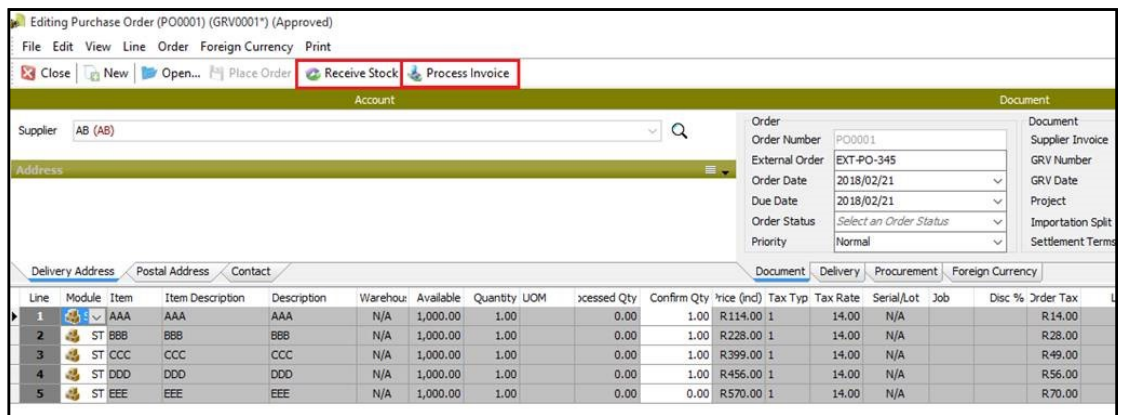
The screenshot shows a software window titled "New Purchase Order (PO0002\*) (GRV0001\*) (Require Authorisation)". The window has a menu bar with "File", "Edit", "View", "Line", "Order", "Foreign Currency", and "Print". Below the menu bar is a toolbar with buttons for "Close", "New", "Open...", "Request Approval", "Receive Stock", and "Process Invoice". The "Open..." and "Request Approval" buttons are highlighted with red boxes.

The main area is titled "Account" and contains a "Supplier" dropdown menu and an "Address" field.

4. Change the Status = **Unprocessed** and on the second dropdown = **Purchase ORD**



5. The Purchase Order's GRV and SINV can now be processed (and reprinted) as normal



**ALSO NOTE THE FOLLOWING:**

The above PO's transaction lines can't be changed by agent TOM

		Document	Delivery	Procurement	Foreign Cur	
Processed Qty	Confirm Qty	Price (inc)	Tax Ty	ax Rate	Serial/Lot	Job
0.00	1.00	R114.00	1	14.00	N/A	
0.00	1.00	R228.00	1	14.00	N/A	
0.00	1.00	R399.00	1	14.00	N/A	
0.00	1.00	R456.00	1	14.00	N/A	
0.00	0.00	R570.00	1	14.00	N/A	

## Reason:

The Agent Administration's Access permission for this agent is set as follow:

The option below is selected. Unselect it below,



to allow this against to change lines' prices on the above PO, if needed

The screenshot shows the 'Editing Purchase Order (PO0001) (GRV0001\*) (Approved)' window. The 'Document' tab is active, showing details for Order Number PO0001, External Order EXT-PO-345, Order Date 2018/02/21, Due Date 2018/02/21, Order Status 'Select an Order Status', and Priority 'Normal'. The 'Delivery Address' tab is also visible, showing fields for Supplier (AB (AB)), Address, and Contact. The main table displays the following data:

Line	Module	Item	Item Description	Description	Warehou	Available	Quantity	UOM	Processed Qty	Confirm Qty	Price (inc)	Tax Ty	ax Rate	Serial/Lot	Job	Disc %	der Tax	Line Tax	Total (in
1	ST	AAA	AAA	AAA	N/A	1,000.00	1.00		0.00	1.00	R114.00	1	14.00	N/A			R14.00	R14.00	R114.00
2	ST	BBB	BBB	BBB	N/A	1,000.00	1.00		0.00	1.00	R228.00	1	14.00	N/A			R28.00	R28.00	R228.00
3	ST	CCC	CCC	CCC	N/A	1,000.00	1.00		0.00	1.00	R399.00	1	14.00	N/A			R49.00	R49.00	R399.00
4	ST	DDD	DDD	DDD	N/A	1,000.00	1.00		0.00	1.00	R456.00	1	14.00	N/A			R56.00	R56.00	R456.00
5	ST	EEE	EEE	EEE	N/A	1,000.00	1.00		0.00	0.00	R570.00	1	14.00	N/A			R70.00	R0.00	R570.00

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