

PO Setup Options for Document Approval

Last Modified on 01/15/2025 8:48 am EST

PO Setup Options for Document Approval

Use Purchase Order Approval: Activates the use of approvals with Purchase Orders.

Require "Send to Reviewer" comment: Optional setting for require comment.

Auto-post once approved: Controls if Purchase Orders are automatically posted upon final approval.

Allow Reviewers to change: Set restrictions for changes made by Reviewers.

- **All PO information:** Changes may be made to any PO information (Header: vendor ID, date, description, etc. GL distributions: GL accounts, amounts, comments, etc.)
- **All PO information except total PO amount:** Changes may be made to the PO header and GL distribution information, but not the total PO amount. If a PO's total amount does not match the amount when the PO was assigned to the Reviewer, changes may not be saved, and the PO may not be submitted.
- **Only GL distribution accounts and amounts:** Changes may be made only to GL distributions (accounts, amounts, comments, etc.). All other fields are locked to entry.
- **Only GL distribution accounts and amounts but not total PO amount:** Changes may be made only to GL distributions (accounts, amounts, comments, etc.). All other fields are locked to entry. If a PO's total amount does not match the amount when the PO was assigned to the Reviewer, changes may not be saved, and the PO may not be submitted.

System Notifications

Notify submit user:

- **When invoice(s) associated with purchase order are paid:** A notification is sent to the submitter when an Invoice associated with their Purchase Order has a payment issued.
- **When purchase order manually closed:** A notification is sent to the submitter when a Purchase Order is manually closed.
- **When purchase order disapproved:** A notification is sent to the submitter when a Purchase Order is disapproved. The notification email contains the reason provided for disapproval.
- **When purchase order fully approved:** A notification is sent to the submitter when a Purchase Order is fully approved.
- **When purchase order deleted:** A notification is sent to the submitter when a Purchase Order is deleted, regardless of the Purchase Order's approval status.

Notify administrator when submitted is only approver and purchase order is auto-approved: If the final approval table created for a Purchase Order contains only the submitter, it is auto-approved. When this happens, a notification is sent to the system administrator(s).

Notify user(s) when purchase order ready to be posted (comma separated): A notification is sent to the specified email addresses when a Purchase Order is eligible to be posted.

Include attachment(s) with all system notifications: All system notifications described above will include the Purchase Order's attachments.
