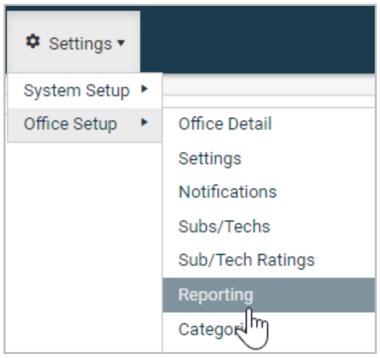
RestorationManager™

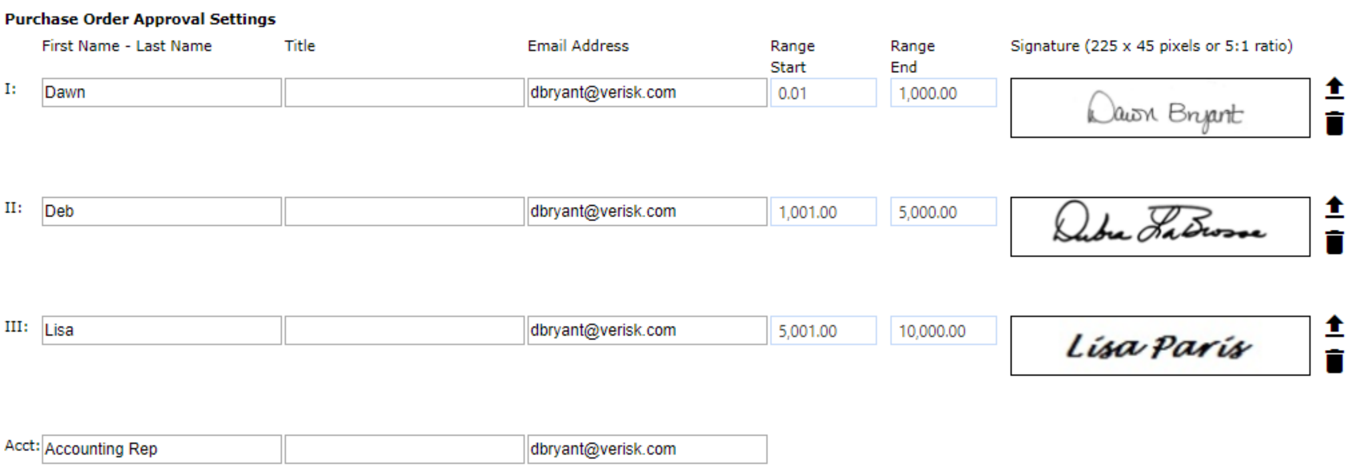
Purchase Order Approval - Setup

Purchase Order Approval is a feature that can be setup to generate an approval process that has been pre-assigned to different individuals which is also based off different ranges for a level I, II and III approval (if applicable).

To setup the Purchase Order Approval in Restoration Manager go to Settings→ Office Setup→ Reporting
Note: *The Purchase Order Approval is generated from a Work Order→ Budgets Tab→ PO*



After clicking on Reporting the Purchase Order Approval Settings are located towards the middle of the page. Apply the information of who will be responsible for Approval Level I with the Approval Range Start (dollar amount) and Approval Range End (dollar amount), along with uploading signatures. Continue with the same setup for who is responsible for Level II and III approval. Next apply the Accounting information.



After the setup is complete click save located to the bottom left of the page.

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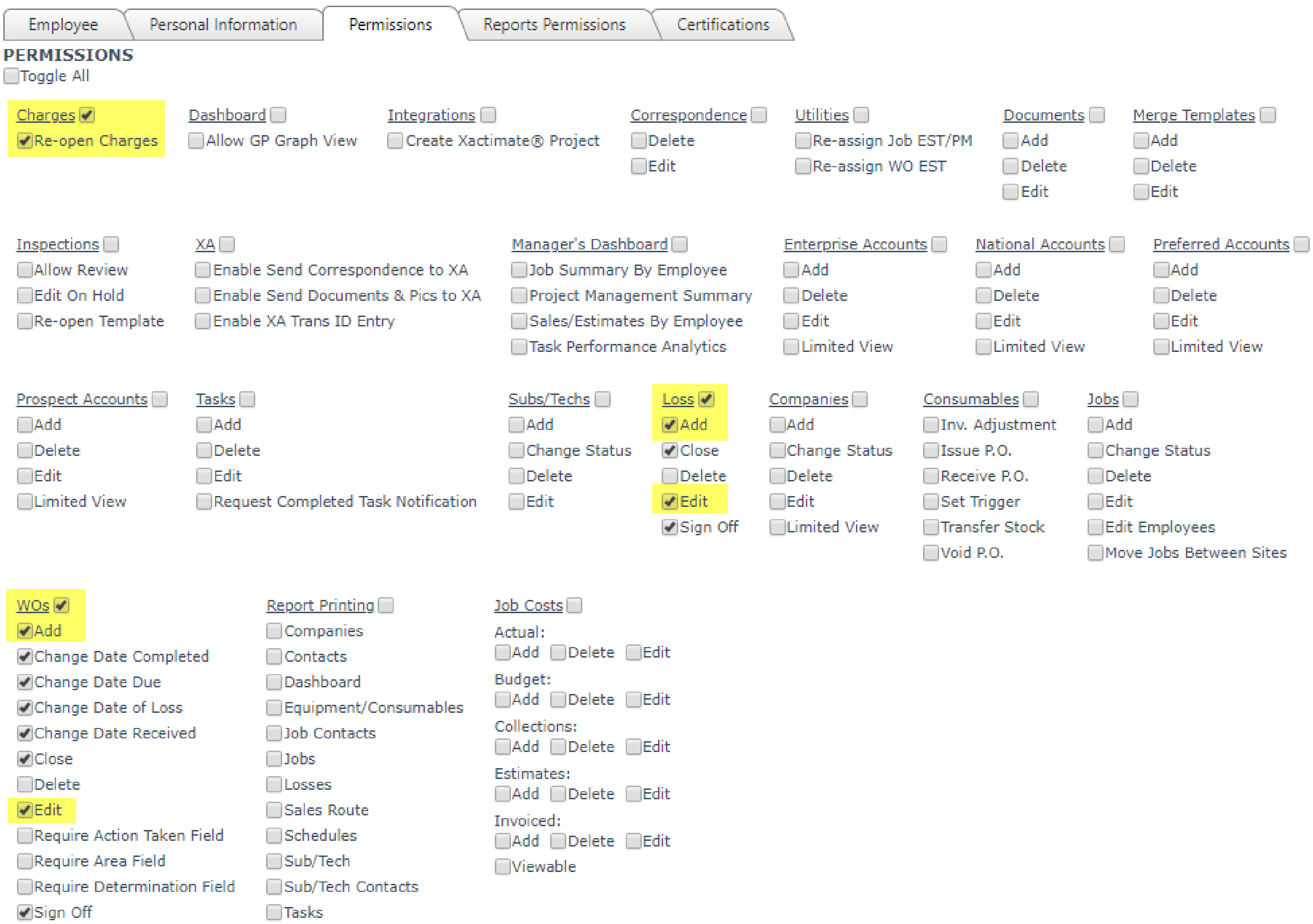
Important Employee Permission information:

Power Users and Users will only be able to manipulate the PO if they have the correct permissions setup in their employee record. Please ensure the following is selected; the ability to Add & Edit Losses and WOs. If the employee will need to delete and/or void a PO after it's created but before it's sent for approval, then please check Re-open Charges.

Example of the Permissions.



Note: *The Administrator has permission to Create, Change, Void, and Delete a PO. They can also manually override the approval process by adding a date in the field next to each approval level's name*