

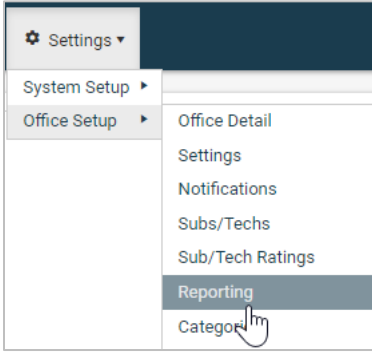


Purchase Order Approval - Setup

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).


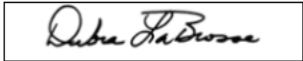
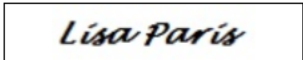
To setup the Purchase Order Approval in Restoration Manager go to Settings→ Office Setup→ Reporting

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.

Purchase Order Approval Settings

	First Name - Last Name	Title	Email Address	Range Start	Range End	Signature (225 x 45 pixels or 5:1 ratio)
I:	Dawn		dbryant@verisk.com	0.01	1,000.00	
II:	Deb		dbryant@verisk.com	1,001.00	5,000.00	
III:	Lisa		dbryant@verisk.com	5,001.00	10,000.00	
Acct:	Accounting Rep		dbryant@verisk.com			

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



Purchase Order Approval - Setup

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.

Employee | Personal Information | **Permissions** | Reports Permissions | Certifications

PERMISSIONS
 Toggle All

Charges <input checked="" type="checkbox"/>	Dashboard <input type="checkbox"/>	Integrations <input type="checkbox"/>	Correspondence <input type="checkbox"/>	Utilities <input type="checkbox"/>	Documents <input type="checkbox"/>	Merge Templates <input type="checkbox"/>
<input checked="" type="checkbox"/> Re-open Charges	<input type="checkbox"/> Allow GP Graph View	<input type="checkbox"/> Create Xactimate® Project	<input type="checkbox"/> Delete <input type="checkbox"/> Edit	<input type="checkbox"/> Re-assign Job EST/PM <input type="checkbox"/> Re-assign WO EST	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit
Inspections <input type="checkbox"/>	XA <input type="checkbox"/>	Manager's Dashboard <input type="checkbox"/>	Enterprise Accounts <input type="checkbox"/>	National Accounts <input type="checkbox"/>	Preferred Accounts <input type="checkbox"/>	
<input type="checkbox"/> Allow Review <input type="checkbox"/> Edit On Hold <input type="checkbox"/> Re-open Template	<input type="checkbox"/> Enable Send Correspondence to XA <input type="checkbox"/> Enable Send Documents & Pics to XA <input type="checkbox"/> Enable XA Trans ID Entry	<input type="checkbox"/> Job Summary By Employee <input type="checkbox"/> Project Management Summary <input type="checkbox"/> Sales/Estimates By Employee <input type="checkbox"/> Task Performance Analytics	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	
Prospect Accounts <input type="checkbox"/>	Tasks <input type="checkbox"/>	Subs/Techs <input type="checkbox"/>	Loss <input checked="" type="checkbox"/>	Companies <input type="checkbox"/>	Consumables <input type="checkbox"/>	Jobs <input type="checkbox"/>
<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Request Completed Task Notification	<input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Close <input type="checkbox"/> Delete <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Sign Off	<input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<input type="checkbox"/> Inv. Adjustment <input type="checkbox"/> Issue P.O. <input type="checkbox"/> Receive P.O. <input type="checkbox"/> Set Trigger <input type="checkbox"/> Transfer Stock <input type="checkbox"/> Void P.O.	<input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Edit Employees <input type="checkbox"/> Move Jobs Between Sites
WOs <input checked="" type="checkbox"/>	Report Printing <input type="checkbox"/>	Job Costs <input type="checkbox"/>				
<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Change Date Completed <input checked="" type="checkbox"/> Change Date Due <input checked="" type="checkbox"/> Change Date of Loss <input checked="" type="checkbox"/> Change Date Received <input checked="" type="checkbox"/> Close <input type="checkbox"/> Delete <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Require Action Taken Field <input type="checkbox"/> Require Area Field <input type="checkbox"/> Require Determination Field <input checked="" type="checkbox"/> Sign Off	<input type="checkbox"/> Companies <input type="checkbox"/> Contacts <input type="checkbox"/> Dashboard <input type="checkbox"/> Equipment/Consumables <input type="checkbox"/> Job Contacts <input type="checkbox"/> Jobs <input type="checkbox"/> Losses <input type="checkbox"/> Sales Route <input type="checkbox"/> Schedules <input type="checkbox"/> Sub/Tech <input type="checkbox"/> Sub/Tech Contacts <input type="checkbox"/> Tasks	Actual: <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Budget: <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Collections: <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Estimates: <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Invoiced: <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Viewable				

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