

# Global 3000 Service Pack Note

# **POP Order Approval**

Author	DCP	
Project	ZM60_000587.docx	
Version	1.0	1 of 9

### INTRODUCTION

This service pack updates Purchase Order Processing to improve the order approval process.

Prior to this service pack the order approval process within Purchase Order Processing (POP) was incredibly basic. This service pack addresses this problem by using the existing Creditors Ledger approvers within POP.

The changes are as follows.

Creditors Ledger maintain approvers has been updated to allow POP specific options to be defined for each approver. In addition, each approver has a new setting which determines whether they can be used for CL transactions, POP orders or both.

Supplier accounts have been updated to hold a default approver for use in POP (per company).

POP order entry has been updated to hold the approver to which the order is assigned. This can be blank to leave the order unassigned. This signals that the order can be authorised by any approver.

POP order entry has been updated to (where available) automatically email an approver when a purchase order is created and assigned to them.

POP order approval has been completely rewritten so that once an approver has been selected a list of unapproved orders is shown from which individual orders can be approved.

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#### **DOCUMENTATION CHANGES**

Global-Dev-	VM - P2 - Maintain Approver Deta —	×	
<u>File Run Sett</u>	ings <u>O</u> ptions <u>H</u> elp		
Approver		κ.	
Approver	Name		
BS	Barry Soames	I	
JLW	Jill Wilson	÷	
POP1	POP Orders upto 1000	Ĥ	
		L.	
		-	
		Ŧ	
		Ţ	
Details			
licado	Roth Creditors Lodger and D.O.D.		
Usage	Both Creditors Ledger and P.O.P.		
Phone No			
POP Settings Amend Apply Close			
Partition 2 Com	puter 1D		

### **CL – Maintain Approvers Window**

The additional prompt is:

**Approver usage** Select from the following:

Only use in Creditors Ledger.

Only use in Purchase Order Processing.

Can be used in both Creditors Ledger and Purchase Order Processing.

### The additional button is:

**POP Settings** (Only if Global 3000 Purchase Order Processing is in use. Not available if the approver usage is set to 'Creditors Ledger only'). Press this to maintain the settings that apply when the current approver is used to authorise orders within Purchase Order Processing.

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# **CL – Maintain Approvers – POP Settings Window**

【 Global-Dev-VM - P2 - Maintain A	prover Details	Company: A1 Perio	od: 5/2005	—		×
<u>File Run Settings Options Hel</u>	)					
Purchase Order Processing Setti	ngs					×
Approver Approver BS - Barr	Soames					
Settings						
Approval limit	10000	.00				
Approver's password						
Restrict to location	MID 🔻 North o	f England		]		
Email address	dan.penfold@kerri	dgecs.com				
Search				ОК	<u>C</u> ancel	
Partition 2 Computer 1D 11:43:51 dcp CL540/W2 E			Ε:			

**Purpose** This window enables you to maintain the settings that apply when the current approver is used to authorise orders within Purchase Order Processing.

The prompts are:

- **Approval limit** This is the order value up to which the approver can authorise. Leave this set to zero if the approver can authorise orders of any value.
  - Approver's<br/>passwordThis is the password used by the approver when authorising purchase orders.<br/>Leave this blank if no password is required.
- **Restrict to location** Set this if you wish to restrict the approver to purchase orders from a specific location, if not leave it blank to allow the approver to authorise orders from all locations. A search is available.
  - **Approver's email** address Set this to the approvers email address if you wish the system to email the approver to notify them when a purchase order is raised that requires their authorisation. Leave this blank if email notification of orders requiring authorisation is not required.

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# CL Supplier Maintenance – Company Details Window

Global-Dev-VM - P2 - Supplier Maintenance Com	pany: A1 Period: 5/2005		_	
Company Details for ANT015 (Antec (UK) Ltd )				×
Co Name	Credit Limit (GBP)	Payment Method	Auto-pay	ment?
A1 Standext Systems Ltd	0	С	V.	
				H
				<u> </u>
				=
Account Details	·	Agency Details		
Default approver		Paid via an ag	2001	
			ency	
		Agent		
Remittance advices required?		Agent		
Email remittance advices?		Agency reference		
Email	More	Agency reference		
	ingress.			
General Ledger				
Default profit centre	<ul> <li>Default account</li> </ul>			-
Control profit centre	<ul> <li>Control account</li> </ul>			<b>-</b>
Autopost profit centre modifier	Autopost account	modifier		
Purchase Details				
Price list	Email purchase orders?			
Default POP approver POP1	Email		• M	o <u>r</u> e
Search		Amond	Apply	Close
Currencies Bank Details		Amend		Close
Partition 2 Computer 1D	12:5	8:51 dcp CL410Y	//W6 MNT	NUM

#### Default POP approver

(Only if Global 3000 Purchase Order Processing is in use). This is the default approver for purchase orders. It can be left blank if no default is required (or order approval is not in use). A search is available.

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## **POP Order Entry – Order Details Window**

Global-Dev-VM - P2 - Purchase Order Entry -			
<u>File Run Settings Opt</u>	ions <u>H</u> elp		
Order Details			
Supplier		Order Addre	ISS
Supplier ANT	015 💌	Address	Antec (UK) Ltd
Ant	ec (UK) Ltd		Unit 38-40
Currency GBP			Purley Way Industrial Estate
			Purley Way
Ship via Landed Cos	ts?		Croydon
Details from		Country	Great Britain
		Postcode	CR6 8JK
Details			
Reference	Order Reference: 9985563A	Entered by	DCP
Order date	01/05/2005	Approver	BS 🔽
Due date	31/05/2005	Approved b	by BS on 01/06/2021
Last delivery	None	Ordered va	lue 1000.00
Terms     3M     Due 90 Days     Delivered value     0.00		alue 0.00	
Acknowledgment	on	Invoiced va	lue 0.00
<u>S</u> earch	Order Address Exchange Rate	Attac <u>h</u> ments	Apply <u>C</u> ancel
Partition 2 Computer 1D 13:02:27 dcp PO110H/W3 EDT CAPS NUM			

**Approver** (Only if order approval is in use). Set this to the approver id of the person responsible for authorising this purchase order. Leave it blank to leave the order 'unassigned' which means that it can be authorised by any approver (subject to their order approval limit). It defaults to the suppliers' default POP approver (if one has been specified). A search is available.

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【 Global-Dev-	VM - P2 - POP Order Appr —	×			
<u>F</u> ile <u>R</u> un <u>S</u> ett	tings <u>O</u> ptions <u>H</u> elp				
Select Approver					
Approver	Name				
BS	Barry Soames	×			
POP1	POP Orders upto 1000	ź			
		. H			
		Ĥ			
		÷			
Dataila					
Details					
Usage	Purchase Order Processing				
	<u>Select</u> <u>Cancel</u>				
Partition 2 Com	puter 1D				

# **POP Approval – Select Approver**

**Purpose** This window enables you to select the approver that will be authorising purchase orders.

### The prompts are:

Approver	(Display Only). The approvers id.
Name	(Display Only). The approvers name
The buttons are:	

**Select** Select the currently hi-lighted approver and continue to the list of orders requiring authorisation. If the approver is configured with a password, you will be prompted for it before you can proceed.

**Cancel** Returns to the preceding menu.

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# **POP Approval – Unapproved Orders List**

Global-Dev-Vl	M - P2 - POP Or	der Approval Help									_		×
Unapproved (	Orders List												x
Selected Appr	rover				_				_			_	
Approver POP1 POP Orders up to 1000				Approval limit				1000.00					
Order Supplier			Location	Location Order Date			tered By Order Total						
PON00045	ANT015	Antec (U	() Ltd		NTH	30/0	6/2005	DCP			1001.00	GBP	
POS00030	AVPG005	AVP Victo	or Optik Gmbh		STH	31/0	5/2005	MPH			475.00	GBP	.   ▲
													. 1
													- H
													- 4
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													Ξ.
													- 1
,													
Order Details													
Delivery due		30/06/2005	;	Am	endment	1	Terms co	de 2	М	Due 60 Days			
Order referen	ce			Dire	ect order	No	Order app	prover	I	POP1			
Inclu	ide Unassigned	t	<u>U</u> n-author	ise an Order		Re-assign Order Aut			Authori	se			
	<u>F</u> ilters		Other App	rovers Order	s	Enquiry < Back			k				
artition 2 Comp	uter 1D						1	3:06:36 de		PO120/W1	DSP (		

**Purpose** This window lists orders that require authorisation. Initially it limits the list to orders for the selected approver however an option to include unassigned orders is available.

### The prompts are:

Order	(Display Only). The order number.
Supplier	(Display Only). The supplier and name.
Location	(Display Only). The order location.
Order Date	(Display Only). The order date.
Entered by	(Display Only). The id of the operator that entered the order.
Order Total	( <i>Display Only</i> ). The order total. This is hi-lighted if the order total exceeds the current approvers order approval limit. This can be corrected by re-assigning the order to another approver.
Other	( <i>Display Only</i> ). Various other items from the order (e.g. order reference) are shown in the lower portion of the window.

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### The buttons are:

Include/Exclude Unassigned	Press this to toggle between including and excluding unassigned orders.			
Re-assign Order	Press this to re-assign the current order to another approver. If the new approver has an email defined the system will generate an email to notify them that the order now requires their authorisation.			
Un-authorise an Order	Press this to select a previously authorised order and change its status to un- authorised. This can only be done for orders that have not been printed or had any stock received.			
Other Approvers Orders	Press this to list orders assigned to another (selected) approver, these can then be re-assigned to the current approver (subject to the order approval limit).			
Enquiry	Press this to enquire on the current order.			
Filter	Press this to filter the list of orders. The available filter options include (but are not limited to) the supplier, order date, order value or location.			
Authorise	Press this to authorise the current order.			
< Back	Returns to the approver selection window.			

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