



# Global 3000 Service Pack Note POP Order Approval

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| <b>Author</b>  | DCP              |        |
| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 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).

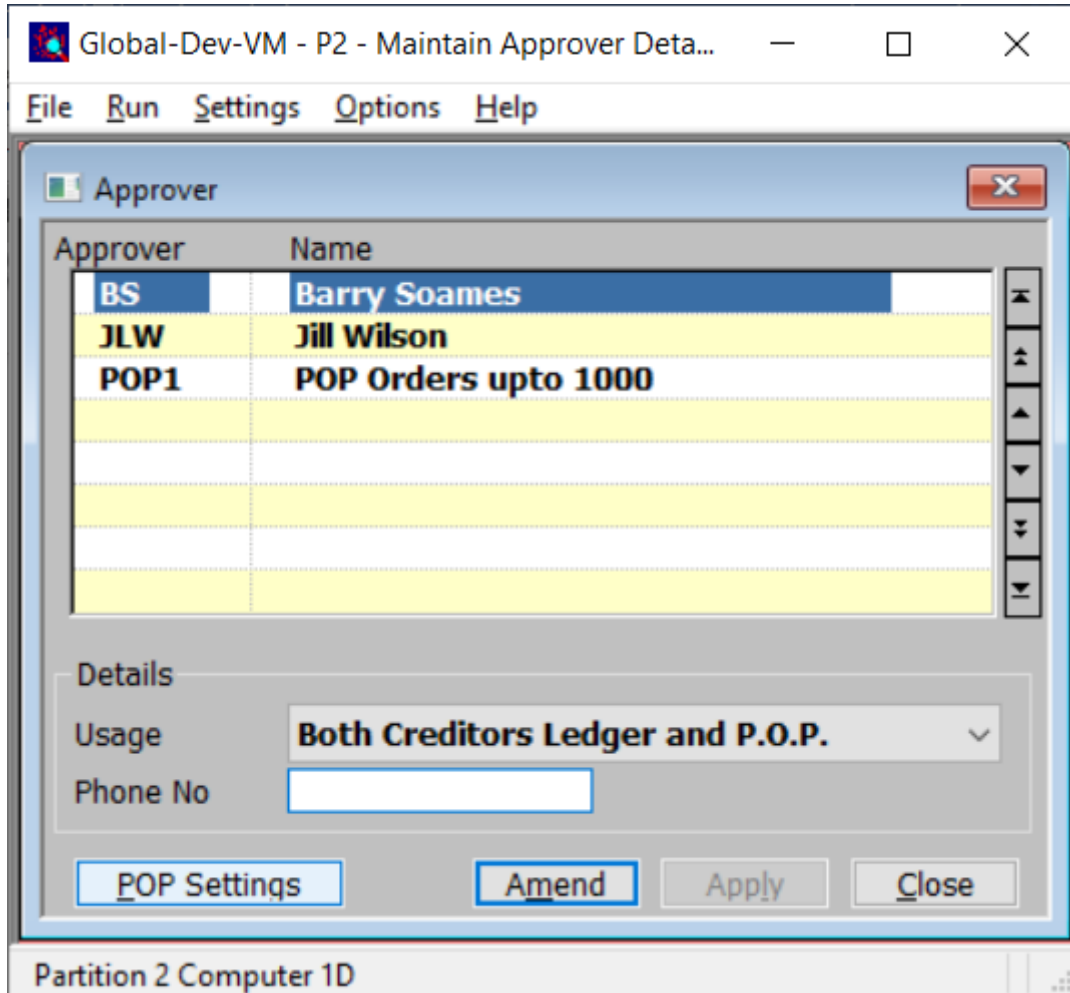
POP order entry has been updated to hold the approver to which the order is assigned. This can be blank to leave the order unassigned. This signals that the order can be authorised by any approver.

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.

|                |                  |        |
|----------------|------------------|--------|
| <b>Author</b>  | DCP              |        |
| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 2 of 9 |

## 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.

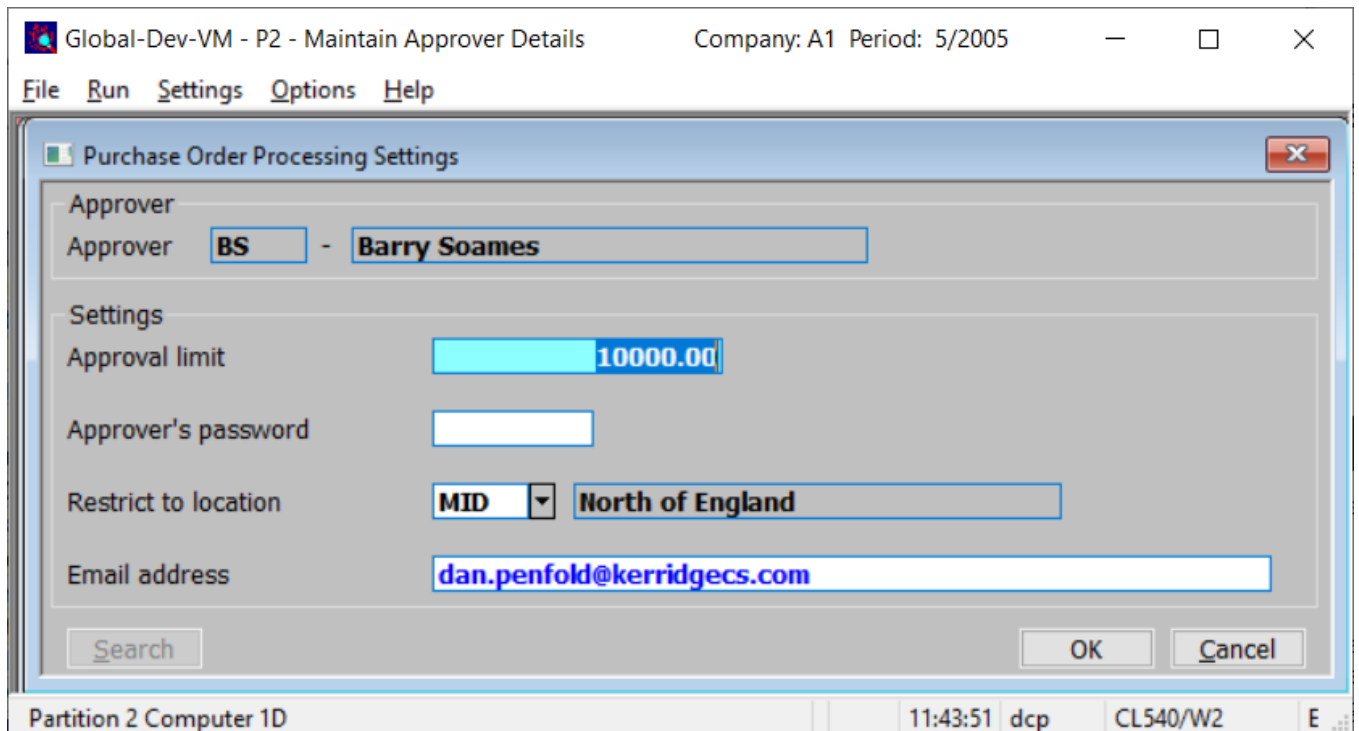
Can be used in both Creditors Ledger and Purchase Order Processing.

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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|----------------|------------------|--|--------|
| <b>Author</b>  | DCP              |  |        |
| <b>Project</b> | ZM60_000587.docx |  |        |
| <b>Version</b> | 1.0              |  | 3 of 9 |

# CL – Maintain Approvers – POP Settings Window



**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 password** This is the password used by the approver when authorising purchase orders. 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.

|                |                  |        |
|----------------|------------------|--------|
| <b>Author</b>  | DCP              |        |
| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 4 of 9 |

# CL Supplier Maintenance – Company Details Window

Global-Dev-VM - P2 - Supplier Maintenance Company: A1 Period: 5/2005

File Run Settings Options Help

Company Details for ANT015 (Antec (UK) Ltd)

| Co | Name                 | Credit Limit (GBP) | Payment Method | Auto-payment?                       |
|----|----------------------|--------------------|----------------|-------------------------------------|
| A1 | Standext Systems Ltd | 0                  | C              | <input checked="" type="checkbox"/> |
|    |                      |                    |                |                                     |
|    |                      |                    |                |                                     |
|    |                      |                    |                |                                     |

**Account Details**

Trading terms: 3M Due 90 Days  
 Default approver: JLW Jill Wilson

Key supplier?  
 Held?  
 Remittance advices required?  
 Email remittance advices?  
 Email:  More...

**Agency Details**

Paid via an agency  
 Agent  
 Agency reference

**General Ledger**

Default profit centre:  Default account:   
 Control profit centre:  Control account:   
 Autopost profit centre modifier:  Autopost account modifier:

**Purchase Details**

Price list:   Email purchase orders?  
 Default POP approver: POP1 Email:  More...

Buttons: Search, Details, Amend, Apply, Close, Currencies, Bank Details

Partition 2 Computer 1D 12:58:51 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.

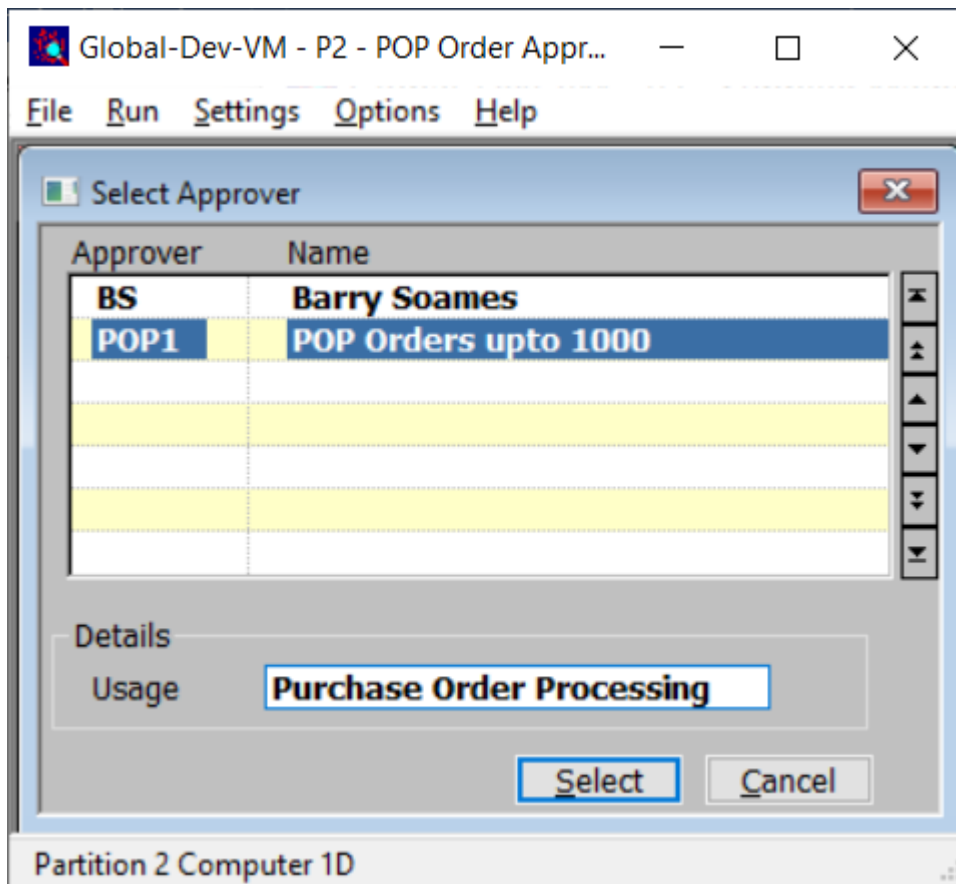
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|----------------|------------------|--------|
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| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 5 of 9 |

# POP Order Entry – Order Details Window

**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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|----------------|------------------|--------|
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| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 6 of 9 |

# POP Approval – Select Approver



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

The prompts are:

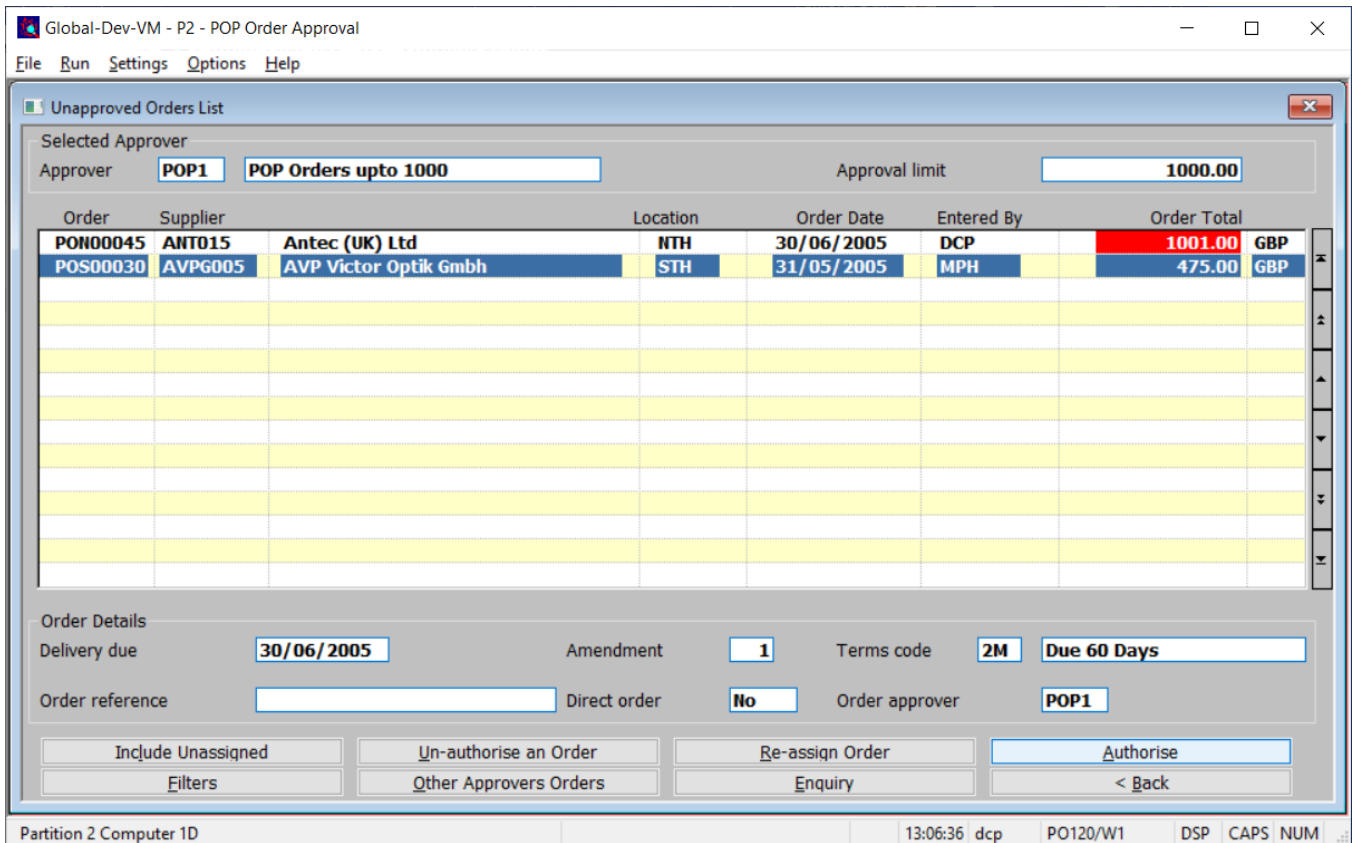
- Approver** (*Display Only*). The approvers id.
- Name** (*Display Only*). The approvers name

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.

|                |                  |        |
|----------------|------------------|--------|
| <b>Author</b>  | DCP              |        |
| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 7 of 9 |

# POP Approval – Unapproved Orders List



**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** *(Display Only)*. 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...** *(Display Only)*. Various other items from the order (e.g. order reference) are shown in the lower portion of the window.

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| <b>Project</b> | ZM60_000587.docx |        |
| <b>Version</b> | 1.0              | 8 of 9 |



*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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