

Purchase Order Routings and Approvals

Force management approval of Purchase Orders Requisitions over a certain amount

You want to give your team the tools it needs to succeed, while making sure you take part in significant investment decisions. With Purchase Order Routings and Approvals for TRAVERSE, you can provide your purchasers the freedom they need while limiting who can make requisitions and at what monetary point you must be consulted.



Setup Requirements at the Company Level

- Set thresholds by monetary amount on which requisitions need to be approved
- Choose whether to use the option to check General Ledger Budgets against requested expense
- Decide which personnel are required to approve Purchase Order Requisitions
 - Unlimited number of people can be setup as being required to approve a requisition
 - Establish if the approver can edit content of the Requisition
 - Setting up of approval proxy if someone is going to be out

Purchase Order Requisition Processing

- Requisition transaction initially entered with status set to “Unapproved” when requisition total is over the designated monetary amount threshold
- Print requests for requisition approval
- See the status of requisition approvals (including who has approved and who still needs to)
- Easily generate a Purchase Order from the requisition upon final approval.

Purchase Order Processing

- Lock down approved Purchase Order settings so no changes can be made that would alter the Items Ordered or the value of the Purchase Order to differ from the approved Requisition.



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