

Approving purchase orders

When a Purchase Request is transitioned to "Submitted for Approval status" then all the **Approvals** listed in the bottom part of PO screen will receive an email notification from notifications@raleypapps.com that looks like the following:

POFMC-1 - Purchasing approval is requested

Yahoo/Inbox

RN

Raley notifications

<notifications@raleypapps.com>

To: poaprover@yahoo.com

Wed, Aug 19 at 11:03 AM

Hello,

PO Team Member has requested your approval on the following Purchase request: [POFMC-1](#)

Best regards,

Raley Purchase Orders

Reply, Reply All or Forward

PO Approver can click on the link attached and it will navigate to the Jira issue detail view. If you don't see the Approve and Reject buttons you might need to scroll to the very end

of the Raley Purchase Orders frame.

Projects / Live Purchase Order / LPO-15

test purchase order

Attach

Link issue

Description

Add a description...

Raley Purchase Orders

Approvals

Name	Approved	Approval type	Approval limit
PO Legal Reviewer	Pending	PRODUCT	USD 50,000.00
PO IT Reviewr	Pending	PRODUCT	USD 50,000.00
PO Approver	Pending	BUDGET	USD 50,000.00
PO Controller	Pending	TIER	USD 50,000.00
PO Director test	Pending	TIER	

Approve Purchase Order

Reject Purchase Order

As you can see on the screenshot above it shows all the approvers assigned to this purchase request with their current voting status and approval type. An approver has two options: **Approve Purchase Order** or **Reject Purchase Order**.

Clicking on Approve Purchase Order will:

- Add Approver's vote YEA for the current Purchase order
- If he or she is the only approver of the current Purchase Order, then the order will become Approved, i.e. transitioned to status "Order approved status"

- If there're more approvers who haven't voted yet, then the Purchase Order continues to stay in "Submitted for Approval status" until every Approver votes YEA or at least one of the Approvers will vote Nay. In the latter case, the order will be immediately transitioned to "Order Rejected status".

Clicking on Reject Purchase Order will:

- Add Approver's vote NAY for the current Purchase Order
- Transition the order immediately to "Order Rejected Status"

In other words, for a given Purchase Request to be approved, all the approvers must vote YEA. And if at least one of the approvers will vote NAY then the order is Rejected.

When a Purchase Order is approved, the system will show it like following (note, the value in **Approved** column in Approvals section):

I need washing machine

[Attach](#) [Link issue](#) [▼](#) [...](#)

Description

Add a description...

Raley Purchase Orders

Item 2	Marketing budget	50.00	1	10%	55.00
			Net amount (USD): 300.00 Tax amount (USD): 30.00 Gross amount (USD): 330.00		
All approvals voted YES					
Approvals					
Name	Approved	Approval type		Approval limit	
PO Approver	Yes	BUDGET		USD 50,000.00	

All approvals voted YES

As you can see, the fact that the Purchase Order got approved effectively results in its transition to status "Order approved status". At the same time, a PDF document representing current purchase order is generated and attached

as file to current Jira ticket. You can download it to send to your supplier via email.

If PO Approver voted NAY then the system will record the vote and transition Purchase Order to "Order rejected status" as shown below:

Test 8

 Attach

 [Link issue](#)

...

Description

Add a description...

Raley Purchase Orders

Description	Budget	Unit Price (USD)	Qnt	Tax	Total (USD)
Benzin	Marketing budget	14.00	1	10%	15.40
				Net amount (USD):	14.00
				Tax amount (USD):	1.40
				Gross amount (USD):	15.40
Purchase request is marked as rejected					
Approvals					
Name	Approved	Approval type	Approval limit		
PO Approver	Yes	BUDGET	USD 50,000.00		
PO Finance	No	BUDGET	USD 15,000.00		

Once the purchase order is approved, Raley PO will generate a attachment to the ticket that contains current purchase order data in PDF format. You can download it as a regular Jira ticket attachment.

Custom Purchase order number

By default, a purchase order number is equal to the Jira ticket key, for example, PRDA-819. However, it is often the case that the actual purchase order number is coming from a third-party system, like an accounting software or similar.

To keep the things well aligned, you can provide a custom purchase order number in Raley PO that later will be reflected in the generated PDF printout of purchase order.

To add a custom purchase order you must be in role **FINANCE** and the order has to be in **APPROVED** state. On the Raley PO screen you will see the following input:

Raley Purchase Orders

Purchase Order #

2222222

Save PO#

Department

blummm

Supplier*

Hello supplier CC

You provide your own value for the purchase order and click on button **Save PO#**. After that the system will save the newly added PO#, generate a new version of PO PDF file and adds it as a Jira attachment.

For the other users, the Purchase Order # will be visible both in the Raley PO screen as well as in the attached PDF file.

NB! It is also possible to have an automatic assignment of custom purchase numbers. Please refer to [this article](#) for details

