

Working with purchase requests

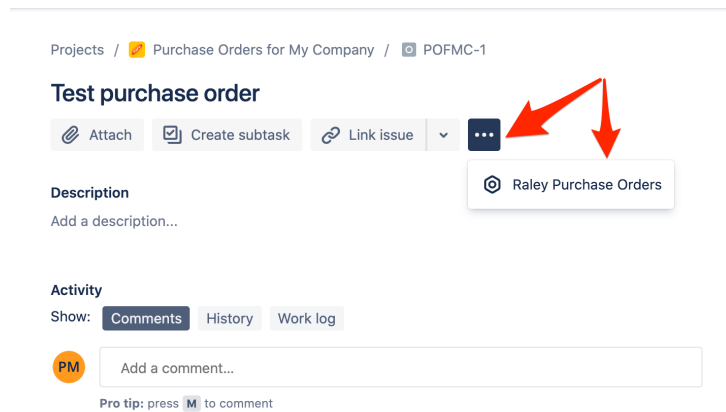
This tutorial is aimed at users in your Jira who will be creating Purchase requests and send them for approvals. To create and modify purchase requests you need to have a **Team Member** role in Raley PO.

We assume that:

- a) All your Purchase Orders will be living in Jira project called **Purchase Orders for My Company** (POFMC)
- b) All Purchase orders are represented by Jira issues of type **Purchase Order**

In your own Jira environment, most likely, those will be different. Please contact your Jira administrator to figure out what is the correct Project name and Issue type that you should use for creating Purchase Orders in Raley.

To create a new purchase order simply create a new Jira ticket of type **Purchase Order** in project **POFMC**. Assign it a summary that's meaningful for you and then open the ticket you've just created again. If you cannot see Raley Purchase Order issue content, then open it as demonstrated on the screenshot below:



Your issue screen should now look like the following:

Test purchase order

 Attach  Create subtask  Link issue  

Description

Add a description...

Raley Purchase Orders

Department*

Choose department

Supplier*



Choose supplier

Add new order line

Description	Budget	Unit Price (USD)	Qty	Tax	Total (USD)
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If you see a screen like the one below:

Test purchase order

 Attach  Create subtask  Link issue  

Description

Add a description...

Raley Purchase Orders

No Purchase order is available. To create a new purchase order you have to be in role "Team Member"

then you should ask your Jira administrator to add you to a Raley Purchase Orders **Team Member** role.

If a Team Member is connected with several departments, then he or she should choose the department in **Department** combo-box to which this Purchase Order will be connected. If there's exactly one department then it will be pre-populated. Same applies to Suppliers - if there's more than one Supplier is configured then you need to choose one of them, otherwise a single supplier will be selected.

When you have your Department and Supplier in place, click on the **Add new order line** button to create an order line in your purchase order:

Raley Purchase Orders ...

Department Test Department

Supplier* Test supplier

Add new order line

Description	Budget	Unit Price (USD)	Qty	Tax	Total (USD)

Approvals

Activity

Show: **Comments** History Work log

The **Add new order line** popup window will appear inviting you to provide data for a new order line. You either use products already configured for **Test supplier** or add new ones. When you type, the Raley PO will try to autosuggest you existing products for currently chosen supplier:

Add new order line

Autosuggested values for products ×

Description* Prod

Budget Product 1

Unit Price* Product 2

Quantity* 1

Tax* VAT (20.0 %)

Total USD 0.00

Save Cancel

If you click on one of the autosuggested product then system will use Unit price and Tax values configured for it to pre-populate your order line form. By default, quantity value 1 will be used.

You can either accept them or correct as you like. The correction of Unit price or Tax will not affect the configured Unit price and Tax in Product registry.

If you choose to provide a description which cannot be matched against an existing product, then the system will request you to provide a valid Unit price. By default quantity value 1 and default tax will be applied. The example below illustrates the case when you add a new order line with a product that does not exist yet in products registry:

Add new order line



Description* Product 3 - new stuff

Budget Test budget

Unit Price*

Quantity*

Tax* VAT (20.0 %)

Total USD 384.00

Save Cancel

Note, that the Unit Price here is Net price to which specific Tax will apply. After clicking on **Save** button, the new order line will be added to both, the current Purchase Order as well as to Products registry of supplier **Test supplier**.

On the screenshot below you can see a Purchase Order with 2 order lines and the summary which shows Net amount, Tax amount and Order total (Gross amount).

Raley Purchase Orders ...

Department Test Department

Supplier* Test supplier

Add new order line

Description	Budget	Unit Price (USD)	Qnt	Tax	Total (USD)	
Product 2	Test budget	500.00	1	20%	600.00	
Product 3 - new stuff	Test budget	80.00	4	20%	384.00	

Net amount (USD): 820.00

Tax amount (USD): 164.00

Gross amount (USD): **984.00**

Activity

Show: **Comments** History Work log

Scroll down the Purchase Order frame and you'll see **Approvals** section which currently looks like this:

Raley Purchase Orders							...
Product 1 - new stuff	Test budget	80.00	4	20%	384.00	⬇️	
Product 3 - new stuff	Test budget	80.00	4	20%	384.00	✖️	
				Net amount (USD):	820.00		
				Tax amount (USD):	164.00		
				Gross amount (USD):	984.00		
Approvals							
Name	Approved		Approval limit				
PO Approver	N/A		USD 50,000.00				

This means that the order must be approved by user **PO Approver** who has approval limit USD 50000 and currently the order is not approved yet (N/A). Approvers are assigned automatically based on selected Budget values in Purchase Order lines. Here's how it works:

- 1) Every configured Budget has exactly 1 Approver
- 2) When a Team Member is adding a purchase order line, he or she needs to provide a valid Budget value. If there's only one budget available for the Department in which current Purchase Order is defined then it will be automatically selected. Otherwise, the user has to choose to which budget this Purchase Order Line will be attributed.
- 3) Raley PO will determine which Approver applies to specific budget and show this approver in the list of **Approvals**

Every time a Purchase Order line is added, changed or deleted, Raley will re-calculate **Approvals** so, that the list of Approvals will correspond to the Budgets used in Purchase Order lines.

When a Team Member is finished with the creating of Purchase Order, he or she will need to click on Jira status transition button to send the Purchase order for approval.

Transitioning a Purchase Order for approval means that user must transition it to status "Submitted for Approval status". The screenshot below illustrates this:

Raley Purchase Orders

Department Test Department

Supplier* Test supplier

Add new order line

Description	Budget	Unit Price (USD)	Qty	Tax	Total (USD)	
Product 2	Test budget	500.00	1	20%	600.00	✗
Product 3 - new stuff	Test budget	80.00	4	20%	384.00	✗

Net amount (USD): 820.00
Tax amount (USD): 164.00
Gross amount (USD): **984.00**

Approvals

Name	Approved	Approval limit
PO Approver	N/A	USD 50,000.00

PM

Add a comment...

Pro tip: press **M** to comment

  1  ...

PO Draft

Sent for approval → **PO PENDING APPROVAL**

View workflow

Reporter

 PO Team Member

Due date

None

Priority

↑ Medium

Amount

None

Vendor

None

Account

None

Raley Notifications

Open Raley Notifications

Click to send the
**Purchase Order for
approval**

You can read more about Purchase Order statuses [here](#)

Once the transition is done, the Purchase Order screen is locked for modification by the Team Member and it is waiting for the Approval decision of Approver(s).