

Purchase Order – Routing and Approvals

Require management approval of Purchase Order 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.

Set up Requirements at the Company Level

- Set thresholds at monetary amount by which requisitions need to be approved.
- Choose whether to use the option to check General Ledger budgets against requested expenses.

Decide which personnel are required to approve Purchase Order requisitions

- Unlimited number of people can be established as required to approve a requisition.
- Determine if the approver can edit content of the requisition.
- Set up an approval proxy if approver is unavailable.

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.

Remote Accessibility

- Email notification including an option to approve by email.
- Web-based requesting and approving for users not in the office via the PO Routings and Approval portal.

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.