# **Purchase Orders**

Last Modified on 15/04/2025 4:46 pm EDT

**A Cross Rental** – (aka Sub Rental) is a rental from an outside source to temporarily supplement your inventory during an internal shortage.

Purchase Order - is a purchase of equipment that is to be added to your inventory count.

Both Cross Rentals and Purchase Orders display on the Purchase Order Grid, and may be referred to as a Cross Rental PO or a PO respectively

## The Purchase Order Grid



The Purchase Order Grid displays all Cross Rental and Standard Purchase Orders within the filter details. See below for an explanation of the grid features

#### 1. Filters

Use the filter icon

T

to control the scope of the items you would like to see in the grid

		Purchase Orders Filters			
		Sort Sequence		Look At	
		Primary Sequence		<ul> <li>Current Data</li> </ul>	
Filters		Code		✓ ○ Archive Data	
		Secondary Sequence	9		
T	Ordered Date V	Vendor		<b>~</b>	
New 📝	Open 🔒 Print 🔅 V	Vork			
	<ul> <li>✓ entries</li> </ul>	Scope		Invoiced Status	
	• enuies	Month Year Filter	March 2023	<ul> <li>All</li> </ul>	
Code	Vendor	🗢 D 🗹 Sub rentals	Purchases	O Not Invoiced	
TR100	Technical Revolution	2023 • All	O Not Posted	O Partly Invoiced	
VA	Audrey Daly	2023 O Not Approved	O Not Received	O Fully Invoiced	
VA2	add tech	2023		<ul> <li>Closed without Invoice</li> </ul>	
Dhawina da					
snowing T	to 3 of 3 entries	Region		Location	
•		0 - EAST	~	0 - Main 🗸	
		I All			

### 2. Menu

Access the	menu options via	≡ .	or right clie	ck or from the to	op of	the gr	id window			
≡ Renta	al <i>Point3</i> DB [12.0.2	0.4] Rev [46	612]							
1							Pi	urcha	se Orders	3
▼≡	Ordered Date	2023	3-03-16	2023-03-27	C	+	0 - EAST	~	0 - Main	~ <b>(</b>
		Work 👁	View 💠 A	dmin 🚽						
Show 10	<ul> <li>✓ entries</li> </ul>									
Code	Vendor	Date	♦ P.O.#	# 🔶 P.O. Amour	nt	Appr	oved 🔶 Po	sted	Received	÷ Pr
TR100	Technical Revolution	2023/03/1	16 196	200.00 CAD		No	Yes		No	
VA	Audrey Daly	2023/03	Open	•		Yes	Yes		Yes	
VA2	add tech	2023/03/	log Open	,		No	Yes		No	
Showing 1 t	to 3 of 3 entries	-	View	•						
•			🔅 Work	•						
			🕸 Admin	•						
			🔒 Print	•						

### 3. Date Range

Set the grid to either show entries based on Ordered Date or the date the ordered item is expected to arrive.

≡ R	Rental	IPoint3 DB [12.0.2	0.4] Rev [4612]							
							Purc	cha	se Orders	
T	≡	Ordered Date	2023-03-16	2023-03-27	C	+	0 - EAST	~	0 - Main 🗸	
New	ß	Ordered Date Expected Date	prk 💿 View 💠 🛱	dmin						
Show	10 🗸	entries								

#### 4. Quick Add

Use this option to quickly add a Purchase Order

	Purchase Orders
▼         Ξ         Ordered Date         ~         2023-03-16         2023-03-27         2         +	0 - EAST 🗸 0 - Main 🗸 🏟
New C Open → Print ↔ Work  View  Admin Show 10  entries	

#### 5. Region & Location

۲ Select the region and location to work within OR click for all locations (needs multi location license) RentalPoint3 DB [12.0.20.4] Rev [4612] hase Orders Choose Region ≡ Ordered Date 2023-03-16 2023-03-27 C + 0 - EAST 0 - Main ۲ T ~ ~ 0 - EAST 🖹 New 🕼 Open 🛛 🔒 Print : Work 🏟 Admin View WEST 1 2 - SOUTH - E Show 10 v entries 3 - NORTH

#### 6. Search

Enter the details you wish to search for and the software will narrow the display to items that match the search

						Purcha	ase Orders						
▼ ≡	Ordered Date	2023-0	3-16	2023-03-27	<b>+</b> 0-E	AST 🗸	0 - Main	•				1	
	Open 🖶 Print ↔ V ✓ entries	Work 👁 Vie	w 🕸 Admi	in								Search: tec	
		Work    Vie  Date	w 🌣 Admi	P.O. Amount	Approved	Posted	Received	Project	Archived	¢ CR	Assigned To	Search: tec	Date Expecte
how 10	<ul> <li>✓ entries</li> </ul>		♦ P.O. #		Approved No	Posted Yes	Received	Project	Archived No	CR Yes	Assigned To 300100013		Date Expecte

### 7. Sort

Use the arrows to the left of each cell tag to sort the grid in ascending/descending order

Renta	alPoint3 DB [12.0.2	0.4] Rev [4612]										&	mandy@rentp.com
									Tests 🝷	Test Dat	tes - Reports -	Assets - Setup -	Others - Help -
						Purcha	ase Orders						
▼ ≡	Ordered Date	2023-03	3-16	2023-03-27	<b>+</b> 0-E	AST 🗸	• 0 - Main	•					
🖹 New 🛛 🗭	Open 🔒 Print 🗇 V	Work   View	w 🕸 Adm	nin									
Show 10	✓ entries		/	1								Search: tec	
0 Code	Vendor	Date	♦ P.O. #	P.O. Amount	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice Status	Date Expected
VA2	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
TR100	Technical Revolution	2023/03/16	196	200.00 CAD	No	Yes	No		No	Yes	300100013	Not Involced	2023/03/16
Showing 1 t	to 2 of 2 entries (filtere	ed from 3 tota	l entries)									Previ	ious 1 Nex

#### 8. Pages

Move through pages of the grid via Previous, Page Number and Next options.

Select how many entries you would like to see on the grid via the **Show** 10 items per page.

Show 10 v entries	option, default is
-------------------	--------------------

									Tests -	Test Dat	es - Reports -	Assets - Setup -	Others - Help
						Purcha	ase Orders						
	Ordered Date ~	2023-03	3-16	2023-03-27	<b>; +</b> 0-E	AST 🗸	0 - Main	• <b>(</b>					
w 🖻	Open 🔒 Print 🗇 V	Vork 👁 Vie	w 🕸 Adm	in									
w 10	✓ entries	_										Search: tec	
<b>co</b> 20 30	Vendor	Date	♦ P.O. #	P.O. Amount	Approved	Posted	Received	Project	+ Archived	¢CR	Assigned To	Invoice Status	Date Expecte
2 50	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
100 All	Technical Revolution	2023/03/16	196	200.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16

Create/Edit a Purchase Order

### Create/Edit

To create a new purchase order, right click in the PO grid, then click New or use the top menu icon.

To modify an existing purchase order, right click on the PO grid, then click Open or use the top menu icon

Rental Point	RentalPoint3 DB [12.0.21.4] Rev [4738]	
🕜 Dashboard		
🚍 Bookings		Purchase Orders
🗠 Shortages	▼	0 - EAST 🗸 0 - Main 🗸 🌐
💄 Card file		
📜 Products 🖌 🖌	New      Copen      Print      Work      Ovew      Copen     Over      Copen     Over      Over     Over     Over      Over     Over      Over      Over      Ov	
🏛 Venues		
🗰 Schedule	Code Vendor Date P.O. # P.O. Amount Approved	Posted     Received     Project
わ Crew Planner		
E Purchase Orders	Showing 0 to 0 of 0 entries	
✓Ξ Action Lists <	4	
J Contacts		

Once the PO is saved, click

to see the PO on the grid

					1	Pu	rchase Ord	ers						
▼ ≡	Ordered Date	e 🖌 20	)23-04-26	2023-05-03	<b>2</b> +	0 - EAST	✓ 0 - Mai	n 🗸 🌐						
	Open Print	Work</th <th>View \$\$</th> <th>Admin</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>Search:</th> <th></th> <th></th>	View \$\$	Admin								Search:		
Code	Vendor	Date	♦ P.O. #	+ P.O. Amount	+ Approved	Posted	+ Received	Project	+ Archived	¢CR	Assigned To	+ Invoice Status	Date Expected	
		2023/04/26	AB204	4000.00 CAD	No	No	No		No	No		Not Invoiced	2023/05/03	

### Details

The details tab contains information about the operator and the vendor that are involved in the order. Each operator has a PO limit, which is defined in the operator properties. This prevents operators from creating POs that exceed the acceptable amount.

The PO # will be assigned on save.

#### Status

- 1. A purchase order must be Approved before it can be posted or received, check the box in the status window to approve the PO
- 2. The Invoice Status field offers four options for recording the invoice status of a purchase order. Users would manually set the invoice status from within the Details tab of the Purchase Order.

Purchase			Operator Max: 6,000.00 Approved Amount: 0.00 Vendor minimum: 0		Total 0.00	×
Details Dates	Equipment Delivery Address Notes					
Vendor	VMCC 😋			Assigned to		
	Marcel Crosby			enter booking #	t)	×
P.O. #						
Region	0 - EAST			enter project #		÷)
Location	0 - Main ~					
Description				Status		
Air bill #			1.	Approved		
Ordered by	RP	€ <b>1</b>	2 -	Invoiced		
Requested by	Request by	¢.	-	Not Invoiced		<b>~</b>
Month year filter	April, 2023			Partly Invoiced Fully Invoiced		
				Closed Without Invoice		
						0

#### Dates

The dates tab contains the delivery method and times of when equipment should be in the warehouse.

Check the box to include the PO arrival date on the delivery and return schedule if needed.

Purchase	Operator Max: 5,000.00 Approved Amount: 0.00 Vendor minimum: 0	Total 0.00	×
Details     Dates     Equipment     Delivery Address     Notes       Ordered     2023-04-26			
	13:00 <b>O</b>		
Other	Their number 🗸		
Include on delivery/return schedule			
		<b>1</b>	

### Equipment

This tab contains all the equipment that you will be purchasing. As you enter equipment into the grid, RentalPoint will add up the cost from the cost price in the sales tab of the product properties.

#### Glossary



Remove the highlighted item from the grid



Add a Sundry item

	Show sh	nortages for	the higl	hlighted iten	n								
	Plot the	highlighted	product	:									
<i>ż</i> ŗ	Display F	Running Bala	ance for	the highligh	nted produ	uct							
	Display	Availability (	Calenda	r for the high	hlighted p	oroc	duct						
Purch	ase				Operator Max: 6,000.00 Approved Amount: 0.00 Vendor minimum: 0							Tota 4,000.00	
Details	Dates Equip	ment Delivery Address	Notes										
Pricing												Canadian I	Dollars 🗸
	Net days		0				Sub t	otal		4000.00			
	Discount %	0.00					Exer	npt		0.00			
	Equipment	4000.	00				Exer	npt		0.00			
	Freight	0.	00				T	otal		4000.00			
+	<b>z -</b> (*)	<b>~</b> ] (#) (#)											
	Code		Part No.	Description	G	Qty	Unit/M	Unit rate	% Disc		Price	Qty Received	GL code
	AAAD80			d&b D80 amplifier		1	1	1,000		0.00	1,000.00		
	BDRK			Beyer Opus Drum Mic Kit		1	1	3,000	0.00	0.00	3,000.00	0	

**Delivery Address** 

Add product

The default delivery address comes from the customer record or location for multi location systems.

Clear the address to complete it manually.

+

#### Glossary

**1** 

Ship to Contact



Ship to Venue



Copy Address from Booking



Ship to Warehouse Location

< Clear address

Purchase			Operator Max: 6,000. Approved Amount: 0.0 Vendor minimum: 0				Total 4,000.00	
Details Dates Equipment	Delivery Address Notes							
Delivery to				<u>~</u>				
Rentals r Us								
Address	15 Curtis Ave							
	Paris							
City	Brant				State	ON		
Country	Canada			Zip Code		N3L 3W1		
Contact								
Phone 1	Country	Area		Number			Ext.	
Fax								

### Notes

Any extra information pertaining to the PO can be added here. Check the box to include PO notes on the printed purchase order.

Purchase	Operator Max: 6,000.00 Approved Anount: 6.00 Vendor minimum: 0	Total 4,000.00	×
Details Dates Equipment Delivery Address Notes			
Wed Apr 26 2023 16:39:02 GMT-0400 (Eastern Daylight Time) by: RP			
Enter PO Notes here			
Stamp			
			1

## Print a Purchase Order

An option to print the Purchase Order is provided on save

You can also print any highlighted PO from the Print menu

= Renta	al <i>Point3</i> db [	[12.0.21.4] Re	ev [4738]								
							Pu	rchas	se Ord	ers	
▼ ≡	Ordered Date	e 🗸 2	2023-04-26	2023-05-03	C	+	0 - EAST	~	0 - Mair	n 🗸	(
	Open ⊖ Print → entr ⊖ P	: Work	View \$\$	Admin							
Code	Vendor	🔶 Date	♦ P.O.#	P.O. Amount	🔶 Ap	proved	Posted	Re	ceived	∳ Pr	roje
VMCC	Marcel Crosby	2023/04/26	AB204	4000.00 CAD	No		No	No			
Showing 1 t	o 1 of 1 entries	1 row sele	cted								

Highlight the template you would like to use, then check/uncheck template options as needed and click *contemplate* to proceed



Save or send to printer

ioose template	Close						
	Q						
MY TEST Com 1623 Maria St Burbank CA 91 Phone: 818 56 Fax:	eet 504			Eav	<b>*</b>		
	PURCHAS	E ORDER # AB2	04				
	From:		Ship To:				
Contact:	Marcel Crosby	Deliver To:	Rentals	r Us			
Company: Address:	Marcel Crosby 344 Norway Drive	Address:	15 Curti Paris Brant Ni				
Phone: Fax:	Franklin 06001	Contact: Delivery by: Via:		-May-2023 1:0	00 PM		
E-mail:	add@eee.com						
	Wed, 26-Apr-2023	Assigned To:					
Order Date:	t No Description d&b D80 amplifier		Quantity 1	Unit Price	Disc 0.00	<b>Total</b> 1,000.00	
Code Par			1	1,000.00 3,000.00	0.00	3,000.00	
C <mark>ode Par</mark> AAAD80	Bever Opus Drum Mic Kit		1	N/C	0.00	N/C	
Code Par AAAD80	Beyer Opus Drum Mic Kit Sundry item				CAN	4,000.00	
Code Par AAAD80		Equip	pment Tota	1:		CAN 0.00	
C <mark>ode Par</mark> AAAD80			oment Tota ount @ 0%	l:		CAN 0.00	
Code Par AAAD80 BDRK Wed Apr 26	Sundry item 2023 16:39:02 GMT-0400 (Eastern	Disco				4,000.00	
Code Par AAAD80 3DRK Wed Apr 26	Sundry item	Disco	ount @ 0%		CAN		
AAAD80 BDRK Wed Apr 26	Sundry item 2023 16:39:02 GMT-0400 (Eastern	Disco	ount @ 0% inc discour		CAN	4,000.00	

## Approve a Purchase Order

There are several status levels for a purchase order:

- Approved the purchase order has been reviewed and approved by the appropriate people.
- **Posted** the purchase order is ready to be ordered from the supplying company.
- Received the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Approved status open the purchase order and click the 'Approved' checkbox. Permissions can be set to prevent unauthorized users from approving purchase orders. PO limits are set on a

#### per operator basis that determine how much a given operator is allowed to order.

Purchase 204			Operator Max: 6,000.00 Approved Amount: 4,000.00 Vendor minimum: 0	4,0	Total 100.00	×
Details Dates	Equipment Delivery Address Notes					
Vendor	VMCC Su			Assigned to		
	Marcel Crosby			enter booking #	Û	x
P.O. #	AB 204					
Region	0 - EAST ~			enter project #		÷)
Location	0 - Main 🗸					
Description				Status		
Air bill #				Approved By RP On 2023-04-26 5:21 PM		
Ordered by	RP	€ <b>1</b>		Invoiced		
Requested by	Request by	€1		Not Invoiced		~
Month year filter	April, 2023					
					1	$\otimes$

## Post a Purchase Order

There are several status levels for a purchase order:

- Approved the purchase order has been reviewed and approved by the appropriate people.
- Posted the purchase order is ready to be ordered from the supplying company.
- Received the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into *Posted* status, the purchase order may need to be approved (depending on the setting for operational parameter #159)

Post/UnPost the highlighted PO from the Purchase Order Grid Work menu

							Tes	sts <del>-</del> Tes	t Dates 🝷 Reports	- Assets - Set	up ▼ Others ▼ Help
				Pu	rchase Ord	ers			n Datob - Hopona	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
▼ ≡ Ordered Date	✓ 2023-04-26	2023-05-03	<b>2</b> +	0 - EAST	✓ 0 - Mai	n ~ 🌐					
🖹 New 😰 Open 🔒 Print	🗘 Work 💿 View 📢	🗘 Admin									
Show 10 v entries	→ Post 🗡									Search:	
	· · · · · · · · · · · · · · · · · · ·		Approved	Posted	Received	Project	Archived	CR	Assigned To	Invoice Status	Date Expected
Code Vendor	🗲 Unpost 🦰	P.O. Amount	Approved						· •		· Dute Experied

### **Receive a Purchase Order**

There are several status levels for a purchase order:

- Approved the purchase order has been reviewed and approved by the appropriate people.
- Posted the purchase order is ready to be ordered from the supplying company.

 Received – the purchase order has been processed and received, equipment that was requested is now in stock.

Only Posted Purchase Orders can be received.

Highlight any posted purchase order, then click *Receive* from the <sup>Work</sup> menu.

The software will increment the inventory quantity of received items

= Renta	I <b>Point3</b> DB [	12.0.21.	[12.0.21.4] Rev [4738]							
ΥΞ	Ordered Date	• •	202	3-04-26	6	2023	8-05-03			
New 🕜	Open 🔒 Print	∴w	ork 💿	View	<b>\$</b> °	Admin				
Show 10	✓ entries	÷	Post							
🔶 Code	Vendor	÷	Unpos	st	_	P.O. A	mount			
VMCC	Marcel Crosby	C 🕈	Receiv	ve 🦰		4000.00	CAD			
Showing 1 to	o 1 of 1 entries	1 row	selecte	d	1					

### Duplicate a Purchase Order

To duplicate a Purchase Order or Cross Rental, click the duplicate option from the Admin menu

All information from the highlighted purchase order or cross rental will be copied to a new order.

See Purchase Order Operator Privileges if access id denied.

= Rental <i>Point3</i> DB [12.0.21.4] Rev [473	38]								
						Te	sts - Tes	st Dates 🝷 Report	s - Assets
			Pu	rchase Ord	ers				
▼ ≡ Ordered Date ~ 2023-	04-26 2023-05-03	<b>C</b> +	0 - EAST	✓ 0 - Mai	n 🗸 🏟				
🖹 New 📝 Open 🖶 Print 🗇 Work 👁 V	iew 🏟 Admin								
Show 10 v entries	Delete								Sea
♦ Code	P.O. : Duplicate	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice St
VMCC Marcel Crosby 2023/04/26 At	3204 Archive	No	No	No		No	No		Not Invoiced
Showing 1 to 1 of 1 entries 1 row selected	L Unlock								
•	-								

## Delete a Purchase Order

First highlight the purchase order, then click the delete option from the Admin menu.

The system will prompt you for confirmation. If confirmed the purchase order will be deleted.

Note that both normal purchase orders and cross rental purchase orders are contained within the Purchase Order grid. The system will prevent the operator from removing cross rentals from the purchase order area. To delete a cross rental the operator must delete the cross rental from the bookings area.

									Tes	sts 🔹 Tes	t Dates 🝷 Rep
						Ρι	irchase Ord	ers			
▼ ≡	Ordered Date	e 🗸 20	023-04-26	2023-05-03	<b>C</b> +	0 - EAST	✓ 0 - Mair	n 🗸 🌐			
New 📝	Open 🔒 Print	🗘 Work	View of a state of	Admin	-						
	v entries										
Show 10	churcs		1	Delete							
Show 10	Vendor	Date	♦ P.O. ;		Approved	Posted	Received	Project	+ Archived	¢CR	+ Assigned

## Archive a Purchase Order

Archiving is a tool designed to improve performance and remove the clutter of non-relevant or old items in the RentalPoint system database.

Archive a single received purchase order from the Purchase Order Grid via the Admin menu

							Pu	rcha	se Ord	ers	
▼ ≡	Ordered Date	✓ 20	)23-04-26	2023-05-03	C	+	0 - EAST	~	0 - Mai	n 🗸	۲
New 🕜 🗘		🔆 Work	View \$\$	Admin Delete							
Code	Vendor	Date	🔶 P.O. i	Duplicate	e App	proved	Posted	♦ Re	eceived	∳ Pro	oject
VMCC	Marcel Crosby	2023/04/26	AB204	Archive	No		No	No			
Showing 1 to	o 1 of 1 entries	1 row selec	ted 🔒	Unlock							

#### Archived POs are still visible on the archive grid

	Purchase Orders Filters			×
	Sort Sequence		Look At	
	Primary Sequence		<ul> <li>Current Data</li> </ul>	
Filters	Code	*	<ul> <li>Archive Data</li> </ul>	
	Secondary Sequence		4	
▼	Vendor	~	/	
New 🕑 Open 🔒 Print 🔅 Work				
show 10 - entries	Scope		Invoiced Status	
	O Month Year Filter	April 2023	All	
Code Vendor Date	Sub rentals	Purchases	O Not Invoiced	
		<ul> <li>Not Posted</li> </ul>	O Partly Invoiced	
VMCC Marcel Crosby 2023/04/26	<ul> <li>Not Approved</li> </ul>	<ul> <li>Not Posted</li> <li>Not Received</li> </ul>	O Fully Invoiced	
Showing 1 to 1 of 1 entries 1 row sele			Closed without Invoice	
(				
	Region		Location	
	0 - EAST	~	0 - Main 🗸	
	All			
	Qok			

### **Operator Privileges & Parameters**

### Purchase Order Group Privileges

Operator Privileges governing access to Purchase Order menu options can be found on the 'Products and POs' tab of the Operator Group.

First access Setup-->Lists, then find the Operator List and edit the Operator Group to modify privileges.



Reports Printing Options Setup and Utilities	Contact Management Access Other Crew and Activit	ties Booking Scope Group Name Bookings	
Cross Hires and Transfers Customers and Vendors	Products and PO's Checkout, Return and Maintenance	2	
Products	Assets	Purchase Orders	
Use Product Setup	Add / Edit Asset Records	✓ Add Purchase Orders	
Add / Edit / Delete Rental Products	Can Change Asset Disposal Type to 'Stolen'	Edit Purchase Orders	
Add / Edit / Delete Sales and Disposables	Can Change Asset Disposal Type to	<ul> <li>Delete Purchase Orders</li> <li>Post Purchase Orders</li> <li>Receive Purchase Orders</li> <li>Archive Purchase Orders</li> </ul>	
Add / Edit / Delete Labour products	'Lost/Missing'		
Add / Edit / Delete Technicians	Can Change Asset Disposal Type to 'Written Off'		
View Technician Rates	Can Set Assets to Active Status		
Edit Technician Rates	Financial details in Asset record	Set Invoice Status of a PO	
Edit Package / Macro Components or	Disposal details in Asset record	Change Prices After PO is Posted	
Qualified Technicians	Edit financial data before the stop date	Set Maximum Approved PO	
Edit Group Descriptions	Delete Asset Records	✓ Duplicate Purchase Orders	
Add / Edit / Delete Product Categories	Move Assets Record in Product Setup	Delete Unreceived Items from Posted PO	
Resequence Products	✓ Asset Listing	✓ Can edit partially received POs	
Add Stock	Racks		
Use Product Utilities	Ability to override discrepancies when	Purchase Orders and Cross Rentals	
Product Listing / Stock Report	packing a rack	Can Change Currency	
Add / Edit / Delete Vendor Rates			
All in tab Clear All in tab	1	1	

### Purchase Order Operator Privileges

Privileges for PO Approval Amount and mandatory assigning of PO to a booking are found in each operator record

Operator				
Operator Settings Multi I	Location Operator Groups Wo	orkflows	Auto Emailing	
Group ACCO	DUNTING		Default Region	0-EAST \$
First Name test			Default Location	2-City 🗢
Last Name			Default Division	÷ .
Group (default)		¢	Default Salesperson	т + х
RentalPoint3 Password	ACCOUNTING	•	Default Project Manager	ЈМ + ×
□ Access to Mobile Dashboar	rd only		Email Settings	Use Custom Email Setting 🔶
Must assign booking to PO before saving			Email Address	mandyfox.mk@gmail.com
Maximum PO Approval Amour			SMTP Address(Host)	
Maximum Cross Rental Appro	val Amount	0	SMTP Port	SSL/TLS Not User 🗢
Maximum Rental Discount %		0	My smtp server requires authors	entication
Maximum Sales Discount %		0	Send Test Email	r Store Password
			Copy from Company Email Settings	
			Copy from Location Email Settings	
			Web Language	English \$
			System Administrator	🗌 Disable Login
				8 오

### Purchase Order Parameter Settings

Parameters affecting Purchase Orders are outlined below



E Rental Point 3 DB [12.0.21.4] Rev [4738]			💄 mandy@r
		Tests 🝷 Test D	ates • Reports • Assets • Setup • Others •
Settings and preferences Control panel			
Company name	Accounts	Invoicing	Pricing setup
Operational setup	Custom Viewing	Terminology	Transfers
😩 Crew Structure	IIII Barcode Tracking	Cloud setup	

#### **Operational Parameters Numbers:**

- 19 Minimum Booking Status for New PO or Sub Rental
- 25 Set Next Purchase Order Number
- 75 Transport dates in Sub Rentals
- 159 Force PO Approval before allowing posting

If the above parameters are modified, ensure all users are logged out, then reload software settings to avail of the newly modified parameters

-	Reports - Assets - Setup -	Ot			
	Lists				
	Save instRec to Database				
	Settings and Preferences				
	Reload Software Settings				