Digital Purchase Order

User Manual

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Getting Started with DPO and a PO Book

What is DPO?

DPO, formally known as Digital Purchase Order, is an online application for creating, viewing, approving, editing, and sending purchase orders.

You can access DPO by going to its website or download the app onto your mobile device from your available app store (Google play and App Store).

With DPO, you can simply request, approve, and track everything on the go!

What is a PO Book?

A PO (Purchase Order) Book is what you will need to create in order to start using DPO. Each book has its own users, suppliers, and approval chain.

A PO Book should be set up per company, per production. When a PO Book has been created for your production, you'll receive an email with a link to log in and view your book(s) that you have access to. Below is an example of what you will see when you log in to DPO and is a view of all the PO Books you have created and have access to.
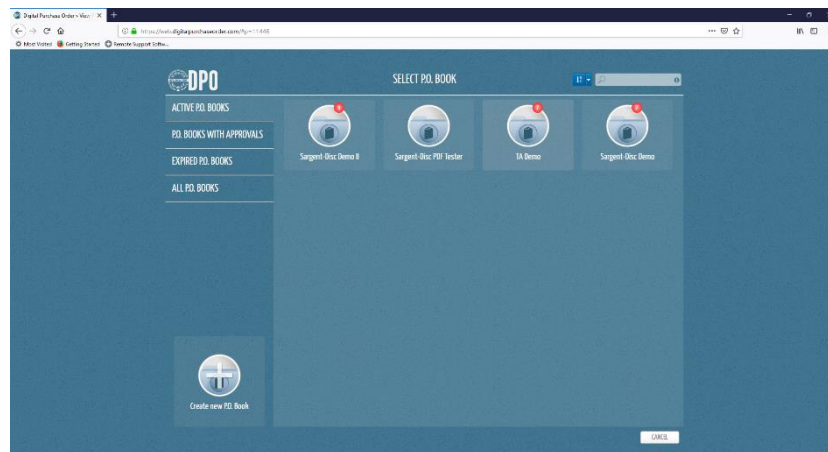
How to Create a Purchase Order (PO)

1. Log in to DPO and click into your PO Book.
2. Click on the **Create New P.O.** tab in the navigation bar.

3. Choose your department and supplier. The selections that appear in the dropdown have been created and saved by an administrator on your production **>** Click **Next**.
4. If you have the component section set up when creating a PO, this will need to be completed **>** Click **Next**.
5. Add the items/detail of your PO by clicking +**Add Item.**

6. Next, enter the name of the item, expenditure type, quantity, and net price.
7. These list of types that appear in the dropdown for Expenditure Type have been created and saved by an administrator.
8. Next, you can choose from 3 options at this point: **Save** the PO as a "DRAFT", "TEMPLATE" or **Create a new P.O.**
9. A PO number will only be generated when the PO has been created.

How to view and filter your POs

You can view all POs that have been created in the "View P.O.'s" tab in the top navigation bar.

POs can be sorted by:

- Least & Most Recent
- Highest & Lowest PO Number
- Approved & Pending
- All
- Amended
- And more

By default, POs will be sorted by Most Recent and Approved & Pending.

They can also be sorted down the left-hand side of the page by:

- Budget
- Department
- Supplier
- Expenditure Type
- Currency

You can also filter your view by "My Purchase Orders" or "All Purchase Orders." By default, the view will show "All Purchase Orders."
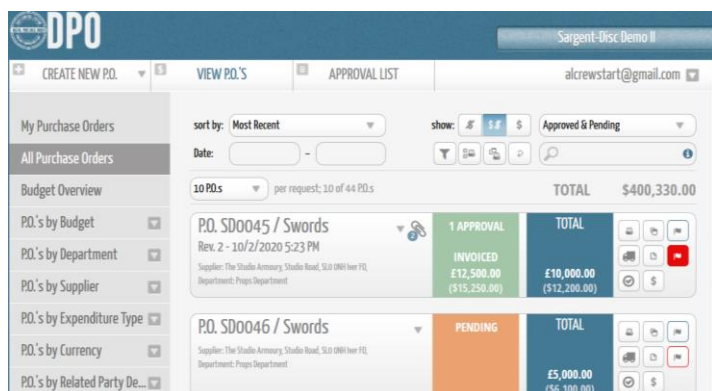
Find a Specific PO with an Advanced Search

To find a particular PO, you can perform an advanced search.

Within the advanced search, you can filter by filters shown below, and also by "PO date created from-to," and by "PO date approved from-to."
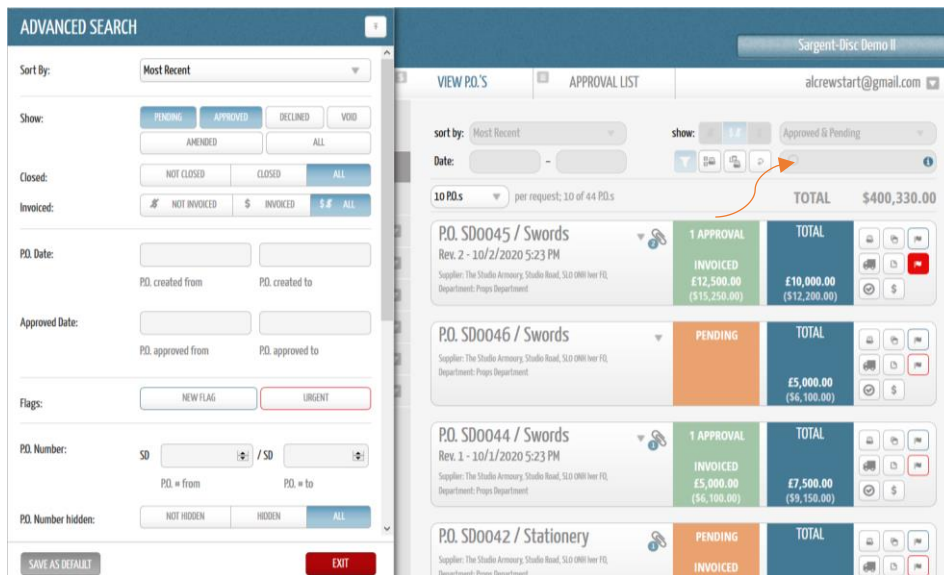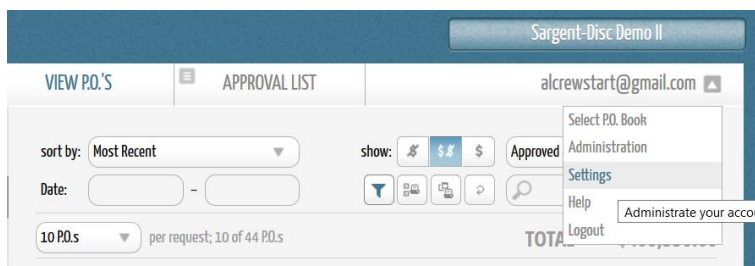
If you know the PO number you are looking for you can type this in the search bar found above the the "Total" column on the right side of the page.

How to Manage Your Email Notifications.

Each user, no matter what role you have been assigned, can manage your email notifications to determine which ones you'll receive by email.

1. To do this, click on your email in the top right side of the screen.
2. Select **Settings.**

3. Click **Settings** again on the screen below.

You can select and unselect the relevant boxes to determine which notifications you would like to receive by email. You can also choose your default language, region, and currency.

How to Open Your Purchase Order as a PDF

1. On the "View PO" screen, find and click on the PO you would like to open as a PDF.
2. In the toolbar at the top right of the screen, click the first icon (📄).

3. You can choose from two options: **Download the PDF** or **Open the PDF**.
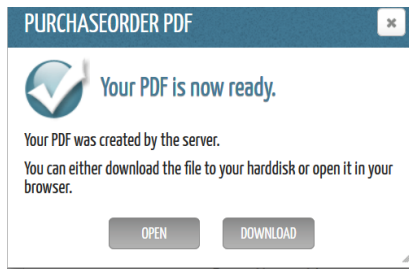
How to Add Invoice Information

To add invoice information to a PO, click the second icon ($) in the toolbar at the top of the "View PO" screen. Here you can add an invoice number, an invoice date, and an order number, which is usually your PO number.

You can then record how much of the PO has been invoiced and add any notes.

If you have the additional invoice feature set up, you can attach the invoice itself to an existing PO by clicking **Manage Attachments** and then either **Save** or **Save & Send for Approval.**

- Choosing **Save** allows you to save the invoice detail and attachment for the PO.
- Choosing **Save & Send for Approval** allows you to send the invoice detail and attachment through the approval chain for approval. The invoice will then go through the same approval chain as the PO.

Note: Although the PO and invoice go through the same approval chain, they do not have to be approved together. Instead, they can be approved separately and go through the approval chain at different stages.

Once the invoice detail has been added to the PO, it will appear in the PO detail when you open the PO, as shown below.

You can add more than one invoice to a PO.

You can click on the invoice detail shown in yellow to view its details, which shows the status of approval, the approval chain on the left-hand side, and any approval comments.

You can delete the invoice information at any time without affecting the PO.

How to Change the Account Code On a PO

Account codes on POs can be changed at any time.

1. Find and click on the PO you would like to edit on the "View PO" screen.
2. Click in the "edit" box to make your changes.
   a. If you are unable to perform this action, you may not have the right permissions within DPO. This is something an administrator can change in the administration section under "Users."

How to Add Delivery Detail to a PO

1. Find and click on the PO you would like to add delivery info for on the "View PO" screen.
2. Click on the third icon on the toolbar (🚚) to "Add New Delivery."

3. Add your order number and date of delivery.
4. You can also input how much of the PO has been delivered and add any comments or notes.

How to Manage/Add an Attachment to a PO

1. Find and click on the PO you would like to edit on the "View PO" screen.
2. Click on the fourth icon on the toolbar (✎) to "Add New Delivery."

3. On the "Manage Appended Attachments" screen, you can manage the existing attachments or add a new attachment by clicking **+Add Attachment(s)** or drag files in the box to automatically upload.
4. Click **OK** when you're done.

How to temporarily Close and Reopen a Purchase Order (PO)

1. Find and click on the PO you would like to edit on the "View PO" screen.
2. Click on the eighth icon on the toolbar (**!**).

3. This will allow you to temporarily close and reopen the purchase order, without affecting the status of the PO.

How to Amend a Purchase Order (PO)

1. Find and click on the PO you would like to edit on the "View PO" screen.
2. Click on the sixth icon on the toolbar (⊕).
3. You will see a message box appear asking if you'd like to "Amend Purchase Order?"
4. Click **Yes, Amend this P.O.**

5. DPO will bring up the details of this purchase order, which you can then amend.
6. If the quantity or price is amended, DPO will redo the calculation.

7. If you have the red **Amendment Comment** box set up in your DPO book, you must write a comment in this box before amending the PO. You will not be able to amend the PO without a comment.

8. Once finalized, the amendment comment will appear on the PO detail screen in a blue box.

How to VOID a Purchase Order (PO)

1. Find and click on the PO you would like to void on the "View PO" screen.
2. Click on the seventh icon on the toolbar (⊗).
3. Next, then click **Yes, Void Purchase Order.**
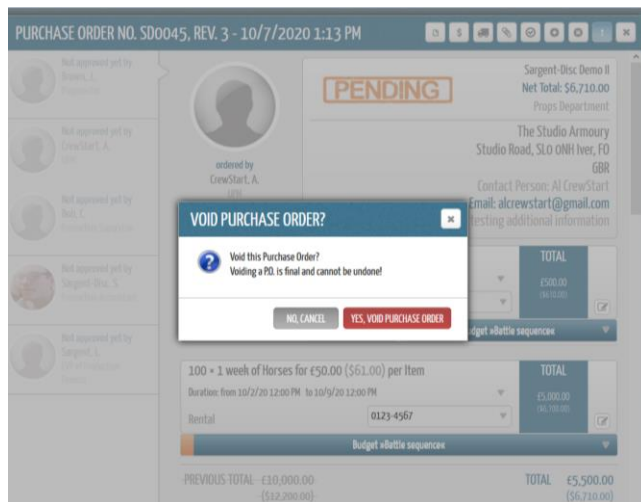
4. The purchase order will then appear in DPO as VOID.
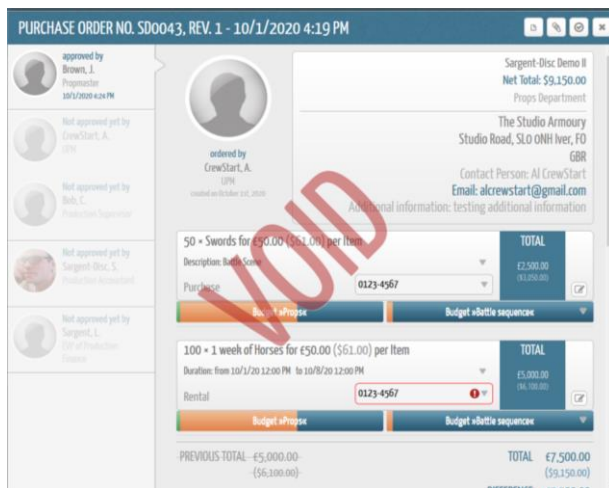
Note: When a PO has been VOID, you can copy the Voided PO to create a new "open PO" based on the same detail with a new PO number.

To copy a PO, it means you are creating a new PO based on the one you are copying.
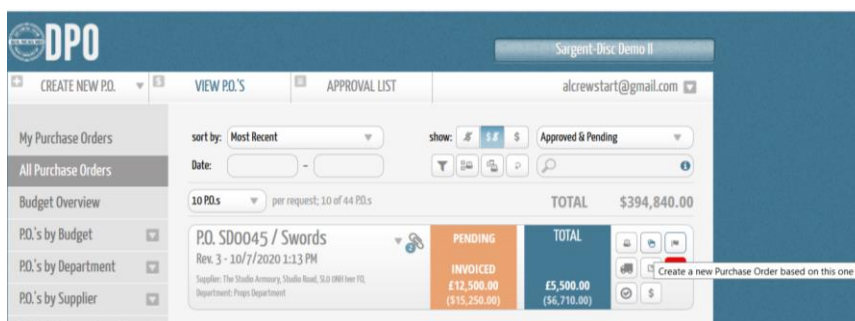
How to Approve or Decline a Purchase Order (PO)

When a PO is created, the first person in the approval chain will receive an email notification that a new PO has been created and awaiting their approval. They can log in to DPO via the web or use the mobile application to view and accept or decline the PO.

When you, the approver, log in to DPO, you will automatically land on the "View PO" screen like any other user. Any POs waiting for your approval will be found in the "Approval List" tab.

The POs within this section awaiting approval will show oldest to newest, with the oldest PO at the top and newest PO at the bottom of the page. Unfortunately, you can't change the view on this screen, but you can search by PO number within the search bar.
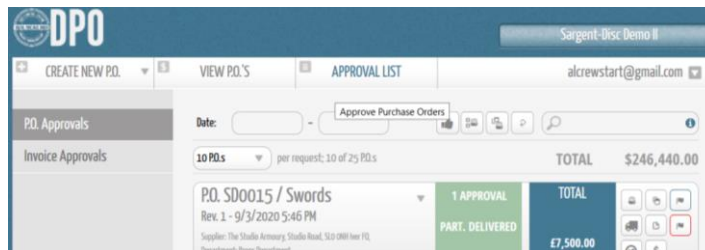
On the Approval List screen, you can approve invoices if you are using the invoice feature within your DPO book.

There are two separate sections within the "Approval List" tab: "PO Approvals" & "Invoice Approvals."

1. To approve a PO, select the PO you would like to approve. This will bring up the details of the PO, including the approval chain on the left-hand side.
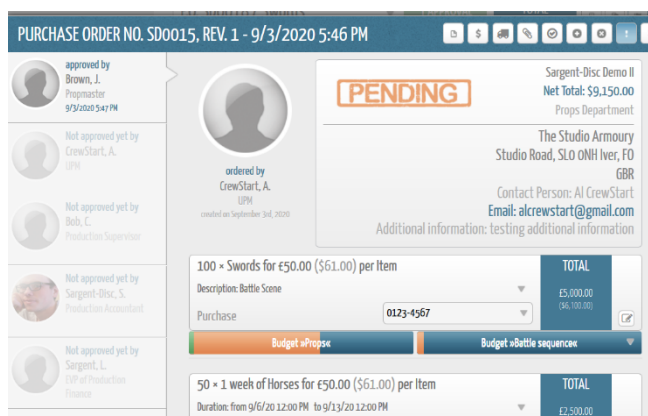
2. As you scroll down the page, you will see an option to **Approve** or **Decline** underneath the comment box.
3. You can add a comment relating to the option you choose in the comment box.
4. At this point, you can see any user comments in a blue box on the screen, and you can also see any previous approval comments (if someone approved before you).
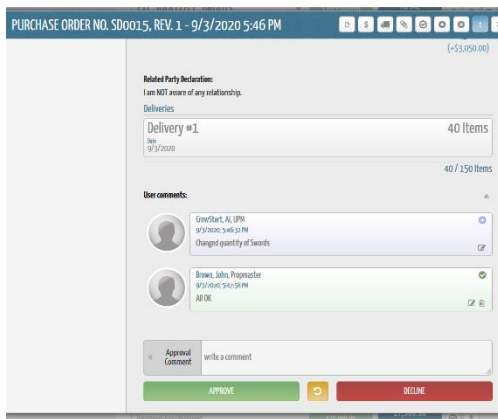
Understanding the Administration Section of DPO

If you have an administrator role in DPO, you will be able to see the "Administration" section if you click on your email in the top right corner of the screen.

What is the Administration Section?

The administration section in DPO is where those with the administrator role can make changes to the DPO book, add suppliers, departments, create and amend users, determine what rights and responsibilities each user has within DPO, and much more.

P.O. Book Information

P.O. Book Information is the first section in the Administration screen.

Within this section you can see all your P.O book information such as:

- Book Name
- PO Book Duration
- Invoice address
- PO Book Limits

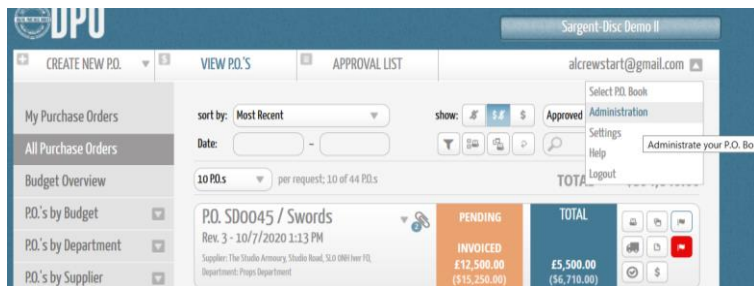Your PO Book Duration and Limits is something is discussed with our sales team when you first set up your DPO Book. These can both be extended if and when needed.

Languages
You can set up your preferred languages in the "Languages" section.

There are 3 languages available in DPO: English, German, and French.

Currencies

You can set up your preferred currencies and determine your base, or default, currency in the "Currencies" section. To choose your base currency:

1. Click on the **star** next to the currency once it has been added.
2. In the example below, the base/default currency is USD Dollar, which is why it's bolded.
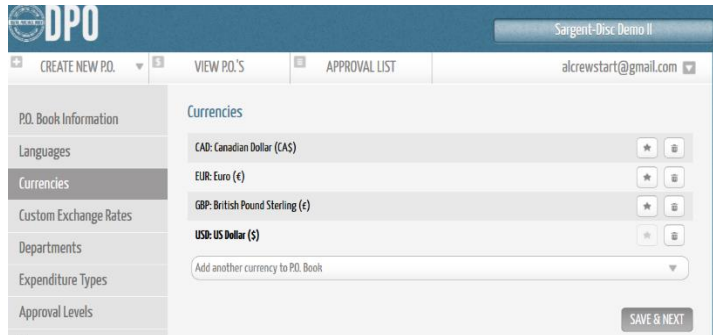
Custom Exchange Rates

This section is where you can add and customize your own exchange rates for currency conversion.
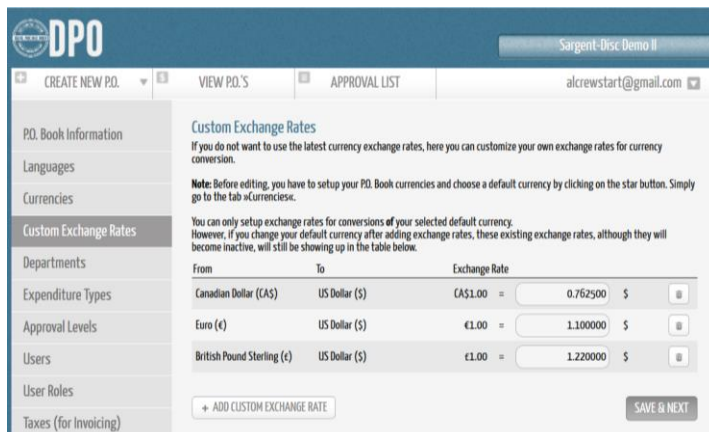
Departments

This section is where you can add departments that can then be used when creating a PO and assigning user's to specific departments.

Expenditure Types

This section is where you can add Expenditure Types, such as Rental and Purchase.

Users must fill out Expenditure Type when creating a PO.

Approval Levels

This section is where you can create your approval levels for your approval chain.

You can create as many levels as needed and determine what each level is required to do. For example, Level 1 could be "Apply to ALL PO's" and Level 3 could be "If the PO net total is => than 10,000 GBP."

Users

This section is where you can add/invite new users, edit existing users' visibility and rights in DPO, and assign them an approval level that has been created in the "Approval Levels" section.

There are two things that cannot be edited:

- The user's name
- The user's email address

If these are wrong, the user will need to be deleted and re-added.

1. To **edit** a user, click on the pencil icon (✏) next to their detail.
2. To **delete** a user, click the trash can icon (🗑)

User Roles

This section is where you can create and save user roles, such as User and Administrator, which are assigned to each user in the "Users" section.

Chart of Accounts

This section is where you can add and save your chart of accounts, also known as your account codes.
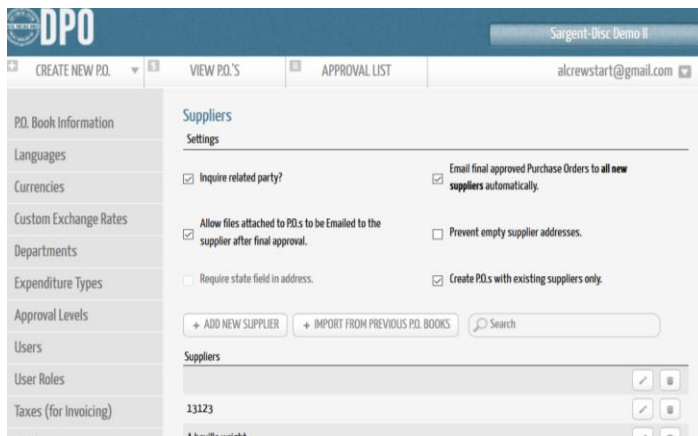
You will need to create the **account name** and then the **account code** when setting up.

Suppliers

This section is where you can add suppliers or amend and delete existing suppliers.

You can determine whether users can create a PO with existing suppliers only or create a PO with a supplier that does not exist.
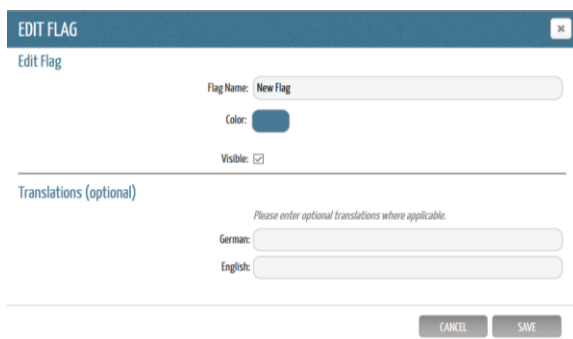
When creating a PO, a supplier will need to be added.

Flags

In DPO, you have the option to create colored flags and name them whatever you would like.

In this section, you can create a flag by choosing a flag name and a color. If you want the flag to be visible to users so they can use it, select the box next to "Visible." If you leave this unchecked, this flag will only be visible to you.

These flags can then be assigned to POs on the "View POs" screen to flag them as **Urgent,** for example.
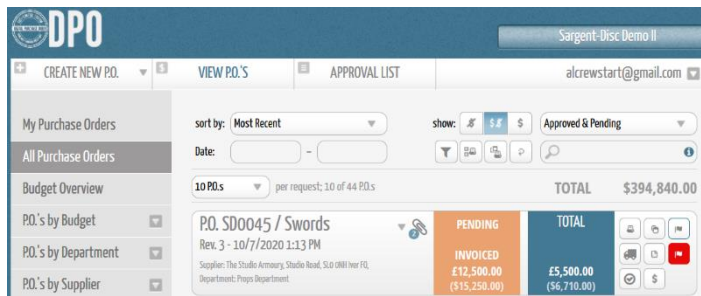
Extra Fields

This section is where you can enable up to three extra fields, which will appear as three extra text fields when creating a new PO.

The three extra fields can be named whatever you would like. For example: Asset, Episode, Tax Credit.

PO Settings

This section is where you can choose what the first PO number will be. You can choose how many digits you would like your POs to be and whether you would like a prefix before your PO number such as "SD."

You can also lock PO settings, such as Lock Purchase Orders after final approval or Lock Account Code after final approval (no amendments will be possible).

You can also create a "Special Flag" in this section with a unique name. If you turn this feature on, you will be able to flag PO's as "special."

PDF Settings

This section is where you can choose the language and time zone that will reflect the format of dates and times shown on a PDF.

You can also choose whether to include your invoice address on the PDF.

You can add a CC or CCS recipient for when the PDF gets sent to the supplier by email.
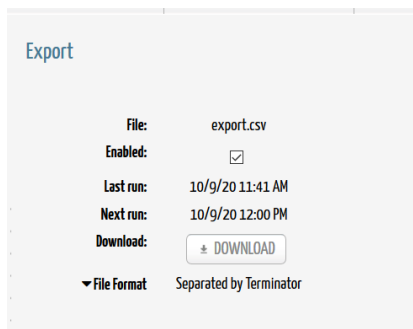
Import

This section is where you can download an imported document to complete, and then we (the DPO team) can import your data into your PO book.

We can import the following:

- Vendor List
- Catalogue Items
- Chart of Accounts
- Departments
- Budgets
- Users

Export

This section is where you can export the PO data into a CSV file, which can be viewable with spreadsheet applications like Excel and Google Docs.

Export PSL

This section is where you can download an exported file for fully approved POs and then export that file into PSL.

DPO creates a daily session which includes all the POs that are fully approved in that day.

1. Click **Download** on a session to create the exported file.
2. Once the export has been completed successfully, click the **Completed** box in green. It will show a date and a time the export was completed. This feature is also compatible with Global Vista.
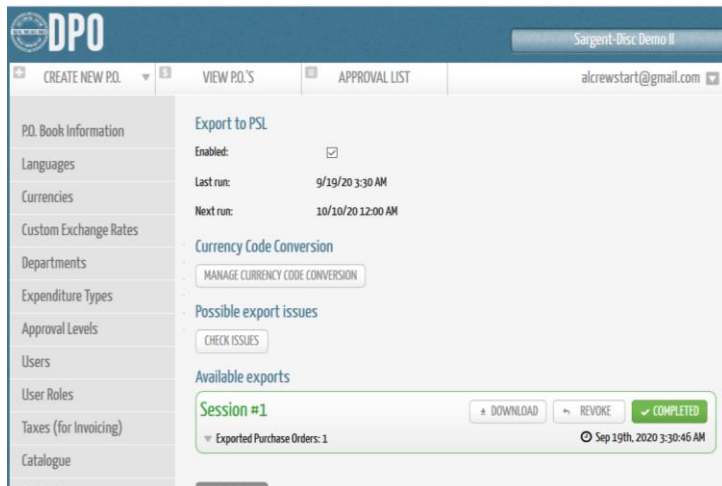
Video Tutorials

The last section within administration, is our video tutorials.

You can copy the links for each of these videos and send them to anyone who doesn't have access to the administration section. This will allow them to watch it the helpful vidoes YouTube.