

SUBJECT	Date
YARDI VOYAGER PROCEDURES MANUAL PURCHASE ORDER & WORKFLOW DEFINITIONS	08-01-23

PURPOSE: Authorize Purchase of Goods/Services

PREPARED BY: SM or DM

WHEN PREPARED: **PRIOR to Service being provided or Goods being ordered**

Purchase Order Definition

Purchases Orders are a Managers request for authorization to make a purchase for an ESTIMATED amount of goods or services (Procedure V-410)

- A Purchase Order is to be completed & approved, **PRIOR** to actually ordering the goods or services.
 - Exceptions – Examples;
 - Emergencies
 - Picking up supplies at Lowes etc. and the items total under \$100.01

Include the amount of shipping and tax into your totals, whenever possible.

Once the Purchase Order has been approved, the goods and services can be ordered/requested from the Vendor.

Once the goods/services have been received from your Vendor, your Vendor will provide you with an invoice for the goods/services.

You will then complete the Receive PO function (SOP Procedure V-450) to validate the goods/services.

Purchase Orders are NEVER to be used to reimburse tenants. Standard check requests (Procedure 085) or Credit to Resident (SOP Procedure 621) are to be used to reimburse tenants.

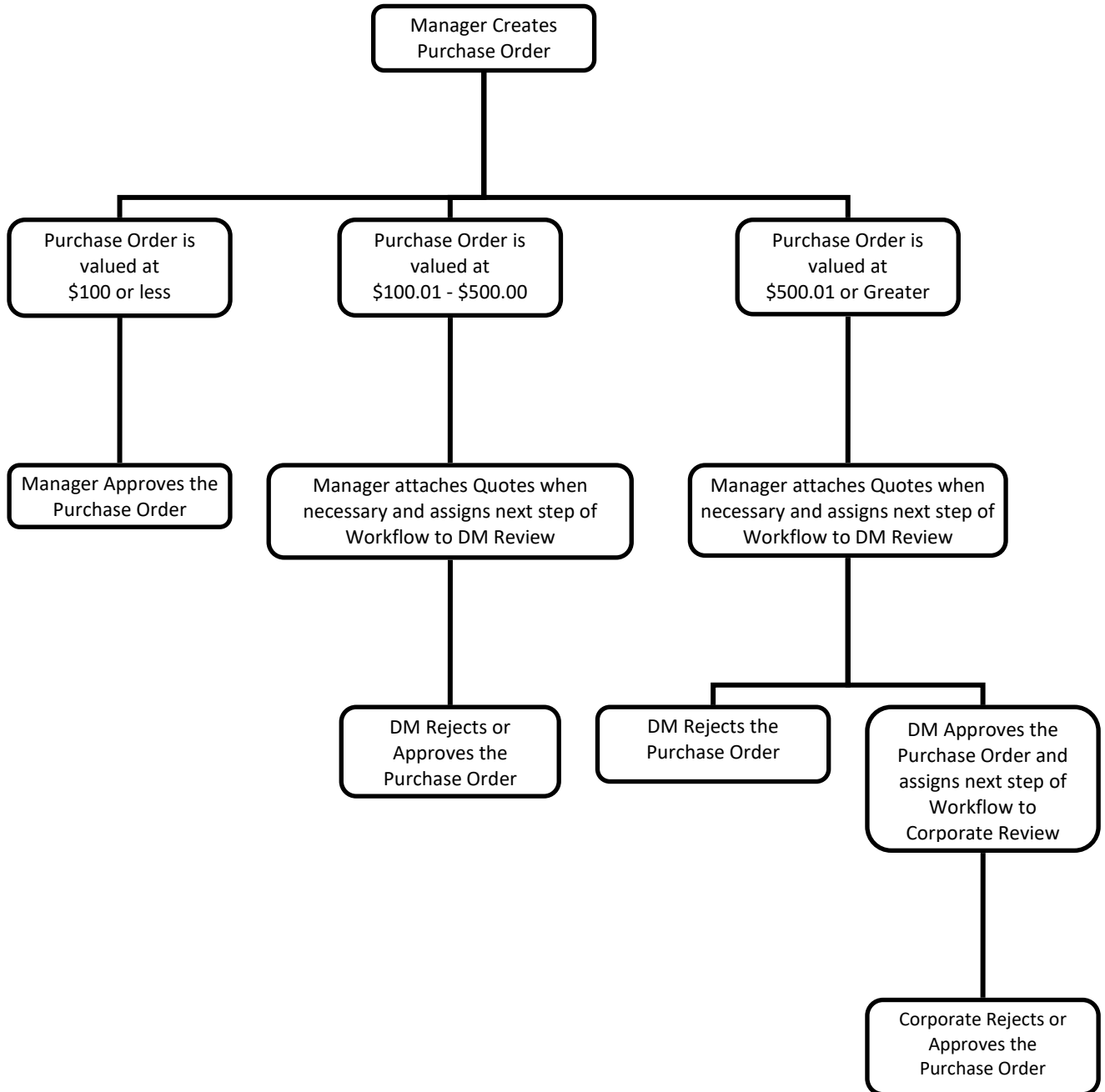
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Workflow Definition

- Workflows are the **approval process** for your Purchase Order.
- A workflow is required to be **assigned** to every Purchase Order. Four workflows have been created for each unique approval process.
 - Standard (default)
 - Contract
 - Reimburse
 - NMA (default for properties with no Manager approval)
- The designated workflow will determine if
 - Can the manager approve this Purchase Order?
 - Does the Purchase Order require approval from the District Manger?
 - Can the District Manager approve the Purchase Order or does the Purchase Order need to go to Corporate for final approval?

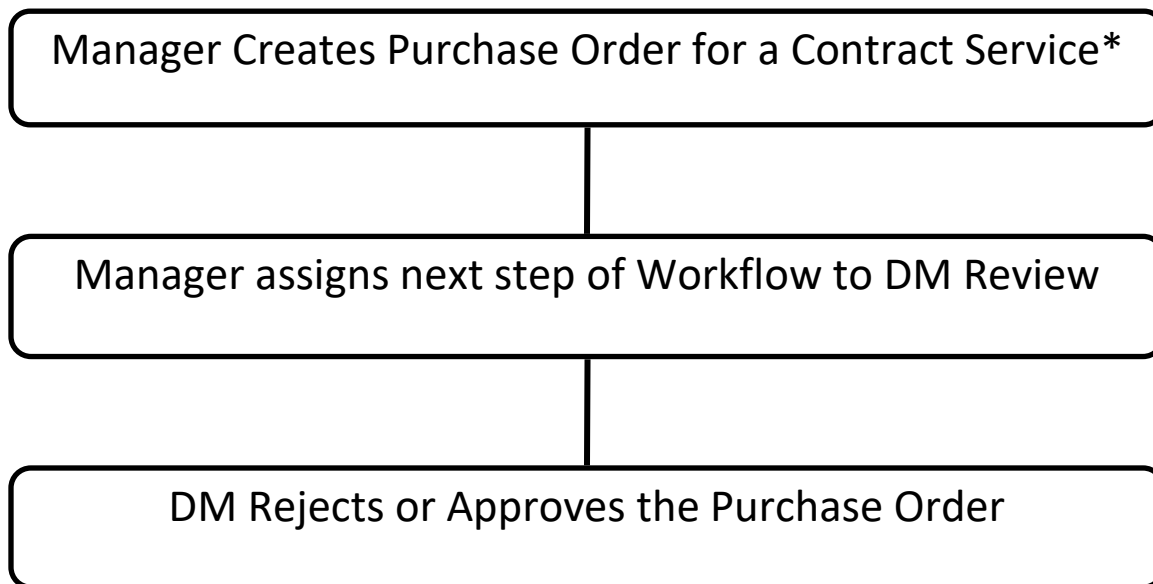
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Standard Workflow; Defaulting Workflow on all Purchase Orders (N/A for NMA Properties)



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Contract Workflow: Used for Contract Services (N/A for NMA Properties)



*A Contract Service is a service that has already been approved by Corporate.

Corporate has already signed an agreement with the Vendor. Contract Service Purchase Orders require District Manager approval for all amounts.

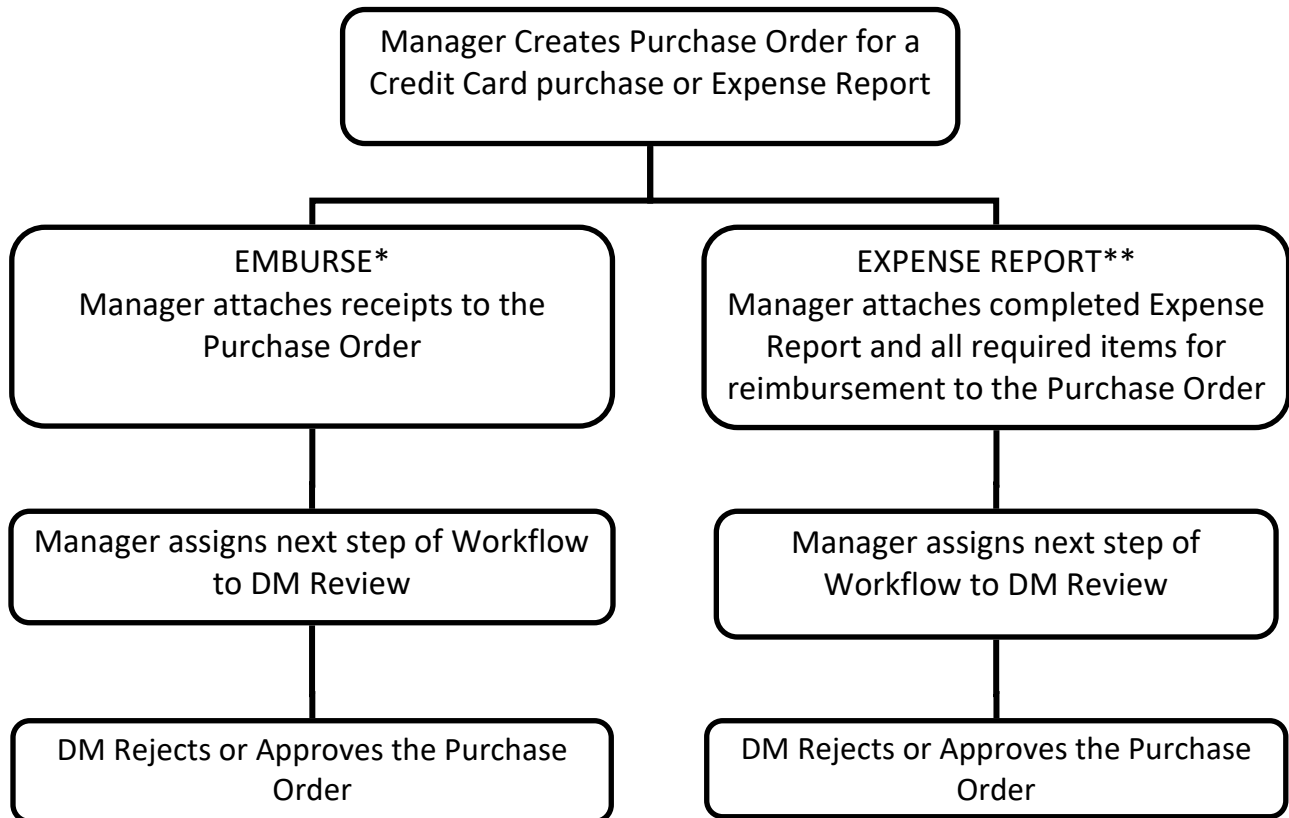
An example of a Contract Service is monthly Lawn Service.

Manager must change the defaulting Workflow of Standard to Contract for all Contract Service Purchase Orders.

It is recommended to create your contracted service PO's in the prior month, for next month's service. In January, create your Lawn Service PO for February noting in the description "February Service". As you know the service will be taking place, the PO is ready to be approved for the future service.

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Reimburse Workflow: Used for EMBURSE purchases (Corporate Credit Card) & Employee (Excludes District Managers) Expense Reports (N/A for NMA Properties)



***EMBURSE:** SOP Procedure 092 is to be followed. Procedure 092 outlines the details of the EMBURSE process and steps for creating the Purchase Order.

****EXPENSE REPORT:** SOP Procedure 090 is to be followed. Procedure 090 outlines the requirements of the Expense Report form and additional items necessary for reimbursement.

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NMA Workflow: Property does not have a Manager approval level. All Purchase Orders created by an NMA Property must be assigned the NMA Workflow.

Manager does not have authorization to approve a Purchase Order for any amount.

