

SUBJECT	Date
YARDI VOYAGER PROCEDURES MANUAL USING THE PO DASHBOARD	08-01-23

From Roles – Select PO Dashboard

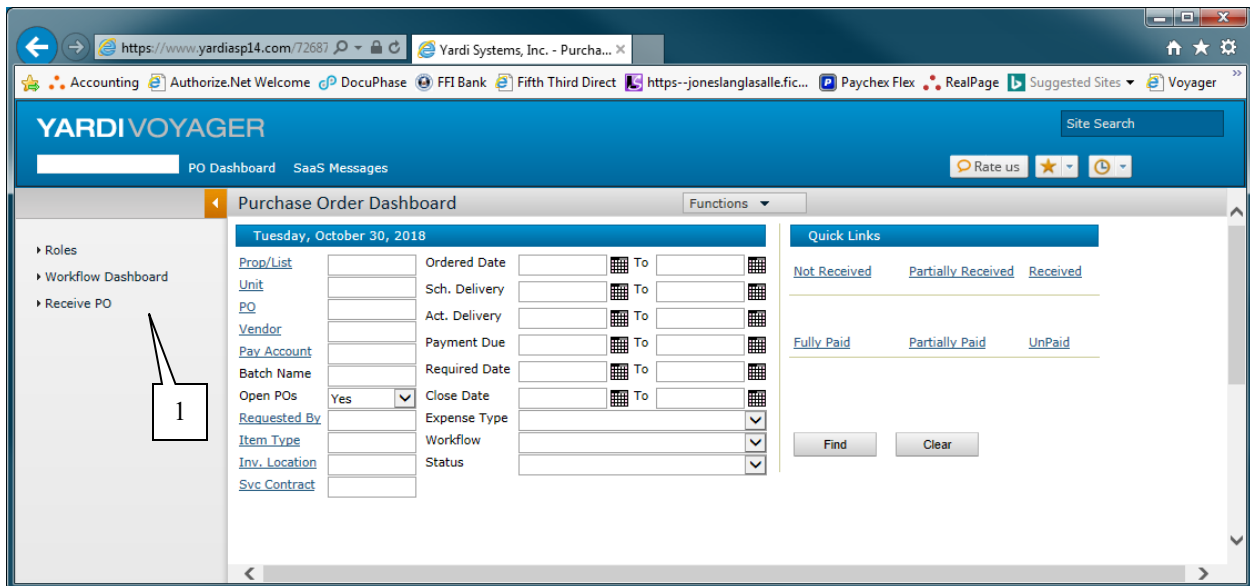
The screenshot shows the Yardi Voyager web application interface. On the left, a navigation menu is visible with the 'Roles' section expanded. An arrow points from the text 'From Roles – Select PO Dashboard' to the 'Roles' menu item. Another arrow points from the same text to the 'PO Dashboard' option within the 'Roles' menu. The main content area displays the 'Community Manager Dashboard - Oakbrook Villas' with various data tables and a calendar for October 2018.

Total Units	42
Leased Units	31 97.62%
Occupied Units	32 88.10%
Available Units	1 2.38%
Model/Down/Admin	0 0%
On Hold Units	0 0%
Unit Transfers	0

Traffic	0
Prospect Pipeline	0
Today's Showings	0
Risk Waiting Lists	0
Pending Applications	0

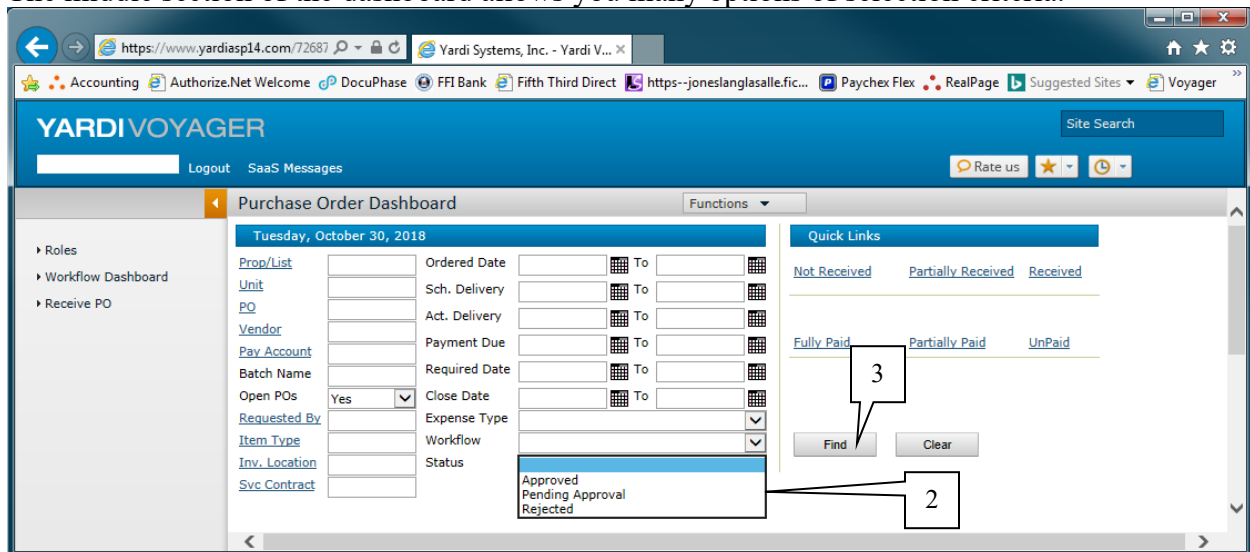
Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
October 29	30	31	November 1	2	3
					4
5	6	7	8	9	10
					11

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(1) Shortcut to the Workflow Dashboard & Receive PO Function

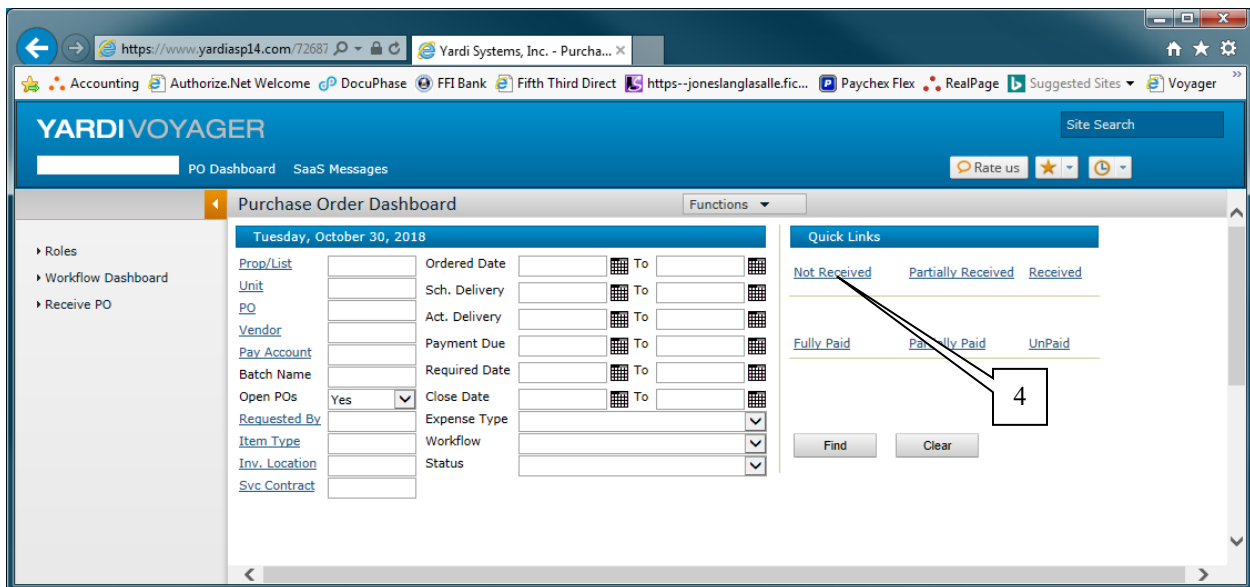
The middle section of the dashboard allows you many options of selection criteria.



You can select the status of Pending Approval **(2)** then click on **(3)** **Find** to display all of your Open PO's that are currently not Approved.

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Don't know what the Purchase Order number is or if it is available to be received?



From the PO Dashboard click on **(4)** Not Received hyperlink.

Not Received; Will display all of your Open Purchase Orders that have not yet been received.

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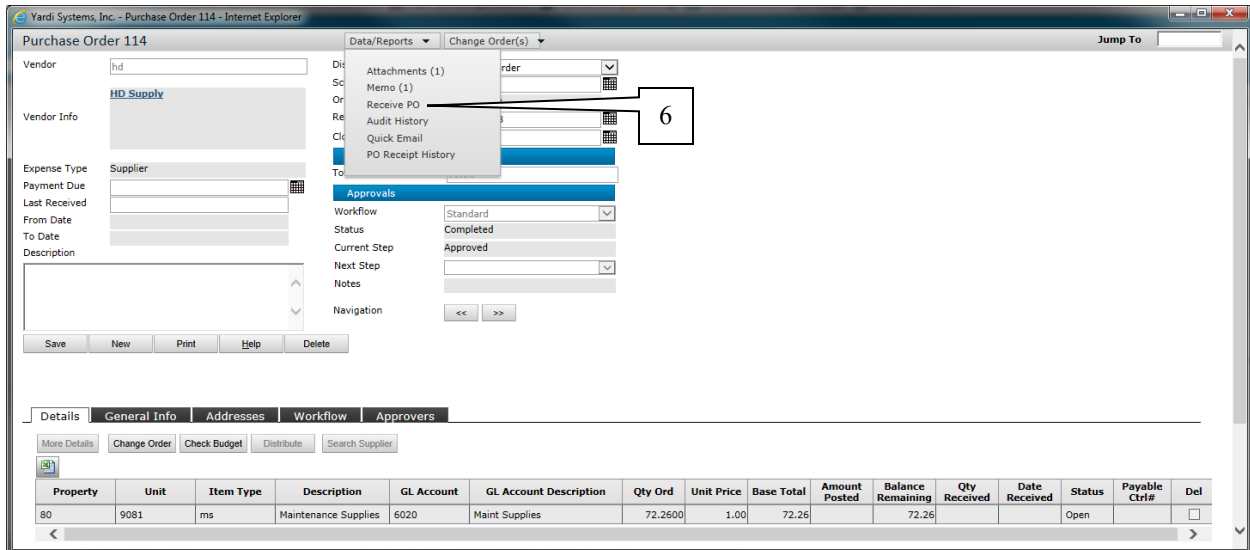
The screenshot shows the Yardi Voyager Purchase Order Dashboard for Tuesday, October 30, 2018. The dashboard includes a search bar, navigation tabs for 'PO Dashboard' and 'SaaS Messages', and a 'Quick Links' section with buttons for 'Not Received', 'Partially Received', 'Received', 'Fully Paid', 'Partially Paid', and 'UnPaid'. Below these is a table of 'Not Received (14)' POs. A callout box with the number 5 points to the first row of the table, which has PO# 115.

PO#	Vendor	Total Amount	Date Ordered	Expense Type	Requestor	Description
115	hd - HD Supply	13.10	10/30/2018	Supplier	kkelber	Toilet Flanges
114	hd - HD Supply	72.26	10/26/2018	Supplier	kkelber	
111	hd - HD Supply	625.00	10/08/2018	Supplier	kkelber	
110	mnr - Mop, Mow and Roll Se	100.00	10/05/2018	On Site	kkelber	
108	hd - HD Supply	753.50	10/05/2018	Supplier	kkelber	
107	iaa - Indoff - Allied Appl	1,056.67	10/05/2018	Reserves	kkelber	
105	ahac - Aldon's Heating & Ai	400.00	10/05/2018	On Site	kkelber	
104	kk - Kim Kelber	284.85	10/05/2018	Expense	kkelber	
103	low - Lowe's	639.00	10/05/2018	Supplier	kkelber	
16	mnr - Mop, Mow and Roll Se	150.00	08/29/2018	Contract	kkelber	
15	ppc - Paul's Pest Control	154.42	08/29/2018	Contract	kkelber	
14	iaa - Indoff - Allied Appl	1,465.63	08/29/2018	Reserves	kkelber	
13	hd - HD Supply	13.85	08/29/2018	Supplier	kkelber	
12	hd - HD Supply	800.00	08/29/2018	Supplier	kkelber	Expect total to not

Locate the Purchase Order you need to Receive

(5) Click on the PO# Hyperlink to open the Purchase Order

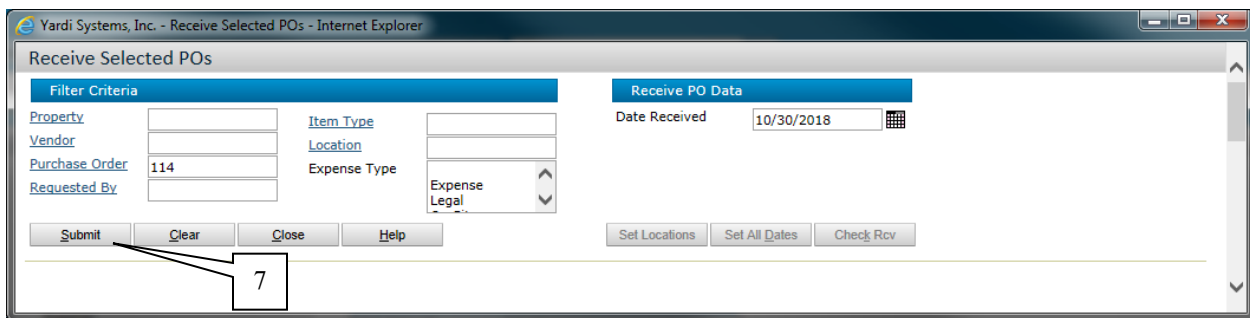
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With the Purchase Order open on your screen, go to **(6)** Data Reports and select Receive PO

This will open the same screen shortcut on the PO Dashboard – Receive PO

With the Purchase Order number selected, click on **(7)** Submit



If your purchase order total amount ends up being greater than the actual goods or services, and you have added a memo noting the invoice is less than the purchase order, the purchase order will be manually closed by accounting.

Accounting will only manually close purchase orders when you have set the type to be final invoice.