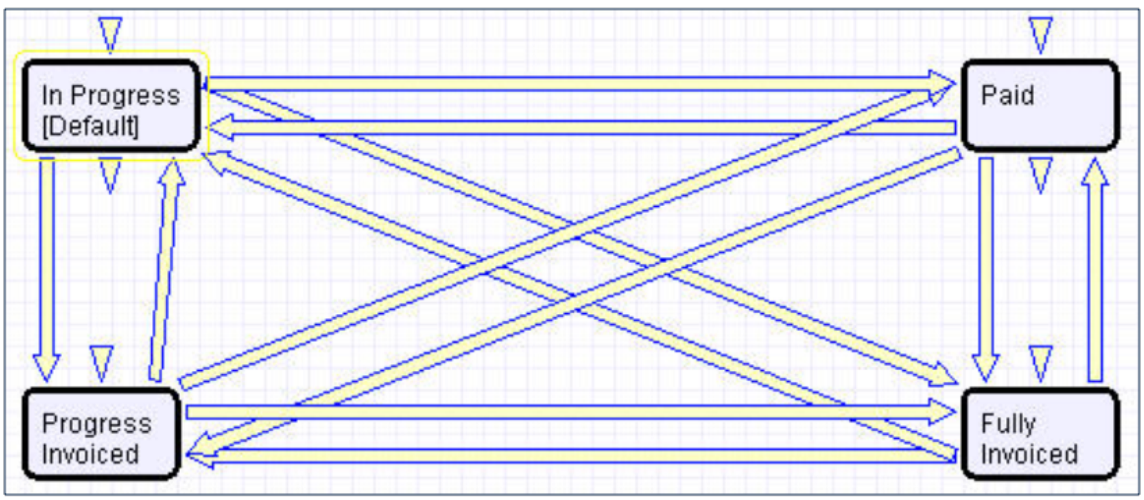
Purchase Orders (PO) Table

The Purchase Order table tracks authorized billable hours for a project. It is shown as a related table within the Project table. It could easily be linked to Support Cases or Quotes or other tables within the system.

Use Case

PO records are creatable manually via the web form, from within Project records in the related table, or via mass import. Only members of the Project Manager, Marketing, Sales and admin Groups may create or import records. PO records are creatable in any workflow state.

Only members of the Project Manager, Marketing, Sales and admin Groups may edit records, but Support Staff may view all PO records.



Ownership

Purchase Orders (PO) records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Automation

In the standard system demo, the Purchase Orders (PO) Table contains one active rule. This rules can be accessed by expanding the Purchase Orders (PO) table in the left pane, selecting Setup Purchase Orders (PO), and then selecting the Rules tab:

- **TB Demo Data Update: Update date fields by one month each month so reports have data:** This time-based rule runs once every month, updates Demo Date fields, and deletes History. It consists of two actions: "U: Update Demo Dates' and "D: Delete History for TB: Demo Data Update." "U: Update Demo Dates" is an Update action that replaces the Date Created, Date Updated, Original Start Date, and Reference As Of fields with a date one month in the future. "D: Delete History for TB: Demo Data Update" is a Delete action that deletes history entries that are created after "U: Update Demo Dates" updates the designated fields.