

Recurring Purchase Order Procedures

The Recurring Purchase Order process involves two steps:

- 1) Create the Recurring Purchase Order (one time procedure)
- 2) Run the Post Recurring PO job (monthly)

1) From the Voyager left side menu, select Purchasing > Add Recurring PO.
The following screen appears.

The screenshot shows the 'Recurring Purchase Order' form. It includes the following fields and sections:

- Code:** (new)
- Display Type:** Standard PO Display Type
- Vendor:** [Empty field]
- Vendor Info:** [Empty area]
- Expense Type:** [Dropdown menu]
- Description:** [Empty text area]
- RPO Info:** Section containing Post Code, Total Amount, and Inactive checkbox.
- Scheduling Pattern:** Section containing a Scheduling Pattern field.
- Approvals:** Section containing Workflow, Status, Current Step, Next Step, and Notes fields.

At the bottom, there is a 'Details' tab and a table with the following columns: Property, Unit, Item Type, Description, GL Account, GL Account Description, Qty Ord, Unit Price, and Del. The table currently contains three empty rows.

This screen is very similar to the Purchase Order screen that most users are already familiar with, so we will focus on the four areas unique to Recurring PO's.

- **Post Code** – this is a required field that will be used to select which PO's are created when the monthly Post Recurring PO job is run (step 2). The same code can be used on multiple Recurring Purchase Orders. Michelson recommends using the property's initials as the first two characters followed by the frequency of the bill. For example, AMMONTHLY would be the code and would be used for setting up all recurring PO's that get processed on a monthly basis.
- **Total Amount** – The total amount of the recurring purchase order (PO). Voyager automatically updates the amount as you add detail lines below.
- **Inactive Status** – Option to inactivate the recurring PO if no longer needed.

- **Scheduling Pattern** – When and how often the PO is posted. (This only becomes available after saving the recurring PO for the 1st time and then the Scheduling Pattern becomes a link.)

Recurring Schedule

Schedule Time

Start Time	Duration (minutes)	End Time	First Sched. Time	Last Sched. Time
8:00 AM	30	8:30 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Recurrence Pattern

Daily Day of every month(s)
 Weekly The of every month(s)
 Monthly Last business day of every month(s) plus day(s)
 Yearly First business day of every month(s) plus day(s)
 Last calendar day of every month(s) plus day(s)

Range of Recurrence

Start Date:
 End After: occurrences
 End By:
 No End Date

- 2) Once all the recurring PO's are setup, you simply run the Post Recurring Purchase Order, located on the left side menu under Purchasing > Post Recurring PO, process each month/week/day as needed, to create the actual PO's.

NOTE: The PO's are created in an unapproved status, so the dollar amount can be edited after the PO is created. If using recurring PO's for invoices where the dollar amount changes each month, it is recommended the dollar amount on the Recurring PO be set to \$1.00 and then adjusted on the created PO once the actual amount is known. This helps eliminate confusion for the Approver who will see the \$1.00 total and know this PO is still awaiting an actual dollar amount and know not to approve it yet.

Post Recurring POs

- Complete the filter and hit submit
 - Property and Due Date are required with every post.
 - The Post Code can be left blank to create all recurring PO's at one time, or it can be filled in to create a specific recurring PO. Examples could include Monthly or Weekly, or a specific Vendor.
- After the job is submitted, the system will pull up a list recurring PO's that meet the criteria

Post Recurring POs

680

 01/01/2026

Recurring POs

Recurring PO	Vendor	Property	Expense Type	Recur Code	Last Posted Date	Posted POs	Select
1288	APARTMENTS.COM	680	Standard	1288	05/01/2021		<input type="checkbox"/>
1289	ARAMARK REFRESHMENT SERVICE	680	Standard	1289	05/01/2021		<input type="checkbox"/>
1290	CHARTER COMMUNICATIONS HOLDINGS LLC	680	Standard	1290	05/01/2021		<input type="checkbox"/>
1291	ESI HOSTED SERVICES LLC	680	Standard	1291	05/01/2021		<input type="checkbox"/>
1292	FIRST ADVANTAGE RESIDENT SOLUTIONS	680	Standard	1292	05/01/2021		<input type="checkbox"/>
1294	SCENTAIR TECHNOLOGIES LLC	680	Standard	1294	05/01/2021		<input type="checkbox"/>
1307	SPHEREXX.COM	680	Standard	1307	05/01/2021		<input type="checkbox"/>

- Use the Select check box for the Recurring POs to preview – once selections are made, the **Preview** button becomes available
- Review and check the Select box for the Recurring POs to post – Make sure to review Scheduled Date and only select the check box next to the appropriate ones for the month(s) you want posted, the others will drop off. Once items are selected, the **Post** button will become available.
- Click Post button- Yardi lists the POs created