

Memorandum

To: TPA Employees
From: Finance Team
Date: July 17, 2019
Re: PO Process

The Finance Team is formalizing the process in which purchase orders are requested. Going forward, all POs are to be requested in this manner:

1. Requestor goes to <http://www.tradepointatlantic.com/purchase-order-form>
 - a. This site is password protected: 3100Acres
2. Choose whether the request is for a *Capital Project* or an *Item or Service* for business operations.
3. Fill out all the required fields*
4. Attach all proposals, quotes and necessary support documents.
5. Click Submit
 - a. an e-mail will go to purchasing@tradepointatlantic.com where the PO will be entered for final approval
 - b. a copy of the e-mail request will be sent to the e-mail address entered in the 'requested by' field
6. The PO request will go through the Yardi approval workflow.**
7. The Requestor will be notified of approval status. When approved, the requestor will be issued a PO number and a copy of the corresponding purchase order.

*Items of note for required fields:

- Capital project requests will require corresponding budgeted line items e.g. Design & Engineering, Geotech, Utilities, etc. If there is no budget or capacity for the request, a budget revision must be made prior to PO approval.
- If an item or service request contains an itemized proposal or quote, you may simply enter a total and refer to the attached document.

**Yardi PO Approval workflow:

- purchasing@tradepointatlantic.com enters PO into Yardi and sends to appropriate Manager
- Manager reviews and approves PO in Yardi, then sends to Finance for approval
- Finance approves PO