Your Takeaways

COMPLEAT

If our latest Lunch & Learn already feels like a lifetime ago, look no further. Here the main takeaways from **The Calm Before Month-End: Say Goodbye to Purchase Panic**.

Pick the right layout for every order

Multiple layouts let you request different information depending on what's being ordered. Choose a layout and the rest of the screen reacts, capturing only the fields that order needs.

Keep the wrong people out of the wrong codes

Security groups decide who can see a particular layout, and code restrictions mean users can only pick from an approved list. Less room for error, more consistency across the business.

Let the matching status do the routing for you

One workflow, multiple outcomes. Exact matches sail through, while overmatches or variances get automatically diverted to the right approver.

Create your own custom triggers

Create custom fields like "Area," add them to your layout, then use them as workflow criteria. That way, approvals can be routed by more than matching status alone.

Never lose track of why an order is on hold

Notes stamp who said what and when (handy for "awaiting price review" moments), and attachments keep quotes and supporting docs stuck to the transaction for good.

Duplicate repeat orders to save time

Do it straight from the grid view and get a fresh requisition ready to submit - no retyping needed.

Match invoices manually when details are incorrect

Wrong order number on an invoice? **Find a PO** lets you search and match by supplier yourself, with matching easy to undo if you need a re-do.

Let supplier defaults do the heavy lifting

Set tax codes, accounts and cost centres against a supplier once, and watch them carry across to every new order automatically — one less thing to remember.