How to Create Item Requisition

The video will show the user how to create Item Requisition

Navigate to Purchase, Item Requisition, New Entry.
Fill in document date, vendor, and required date.
Click Confirm and Approve.

STEP-BY-STEP:
1. Go to Purchase menu
2. Select Item Requisition
3. Click Create New
4. Fill in the header info, i.e. document date, vendor, required date, and representative.
(mandatory fields in red color or marked with red x)
5. Click Save button
6. Add requisition items in the table below.
User can filter the products list by brand, by selecting a brand in the Product Brand drop down list.
Fill in the line info, i.e. Product, UOM, Qty, and Estimated Unit Cost.
Click + button or press ENTER to save the line entry.
7. User able to move the entered line up or down to change the order, by clicking on the arrow Up or Down on the top right of the table.
8. User able to export the requisition lines data as csv file.
9. Right click on one of the line item to show options, like Show Product Details.
10. In the Notes/Attachments tab, user can add notes and attachment files for the Item Requisition document
11. Click Confirm Purchase Requisition when done editing
12. Click Approve Purchase Requisition button to approve the requisition.
13. Click Generate Report button to preview or print the document
14. Click on the arrow next to Generate Documents button, user able to Generate Similar Purchase Requisition.
It will generate a copy of the Item Requisition document.

15. Click on the arrow next to Generate Documents button, user able to Generate Purchase Order.
It will generate a Purchase Order document based on the Item Requisition document.
16. Go to the List View and select one of the line. Right click to see options available, like to Preview the document.