

# Process from Item Requisition to Purchase Invoice

The video will show the user how to create the process from Item Requisition to Purchase Invoice

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. Click Confirm Purchase Requisition when done editing
10. Click Approve Purchase Requisition button to approve the requisition.
11. 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.
12. Verify the procurement lines data (Product, UOM, Qty, Unit Price, and Tax Rate)
13. Click Confirm Purchase Order when done editing
14. Click Approve Purchase Order button to approve the procurement.
15. Click on the arrow next to Generate Documents

- button, and select Generate Delivery Confirmation.  
Click OK button in the creation dialog window.  
It will generate a Delivery Confirmation document based on the Purchase Order document.
16. Verify the procurement lines data (Confirmed Qty, Unit Price etc).
  17. Click Accept Delivery Confirmation when done editing / verifying the data.
  18. Click on the arrow next to Generate Documents button, and select Generate Purchase Invoice.  
Click OK button in the creation dialog window.
  19. Verify the procurement lines data (Product, Qty, Unit Price etc).
  20. Click Confirm Purchase Invoice when done editing / verifying the data.
  21. Click Post To Accounts
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