



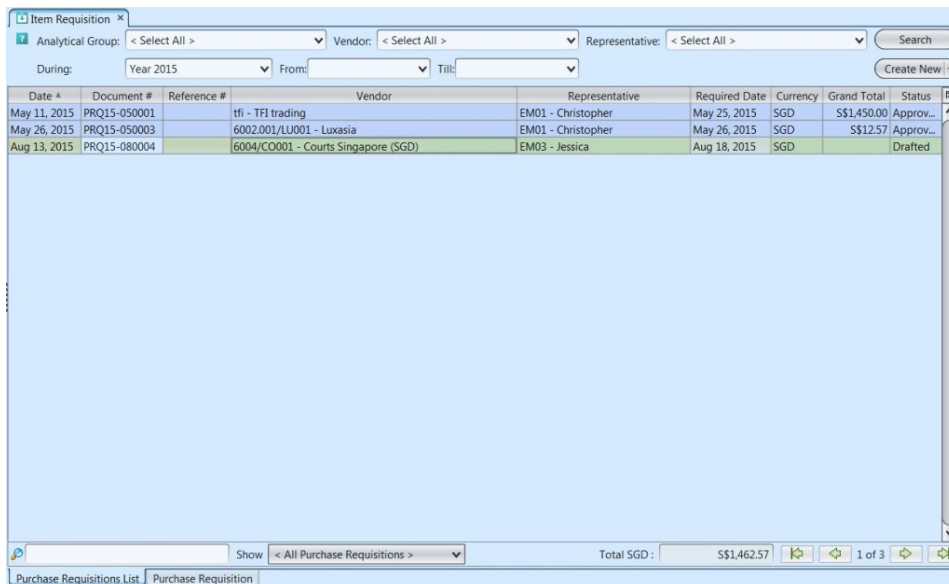


# Item Requisition

Item Requisition view allows the user to make request for item purchase requisition of inventorized items. After the Item Requisition is reviewed and approved, user can then create Purchase Order from it. Below are available actions for the user from Item Requisition view:

-  Create new item requisition
-  Update item requisition details
-  Delete item requisition
-  View and search item requisition details



Date	Document #	Reference #	Vendor	Representative	Required Date	Currency	Grand Total	Status
May 11, 2015	PRQ15-050001		tft - TFI trading	EM01 - Christopher	May 25, 2015	SGD	S\$1,450.00	Approv...
May 26, 2015	PRQ15-050003		6002.001/LU001 - Luxasia	EM01 - Christopher	May 26, 2015	SGD	S\$12.57	Approv...
Aug 13, 2015	PRQ15-080004		6004/CO001 - Courts Singapore (SGD)	EM03 - Jessica	Aug 18, 2015	SGD		Drafted

The screenshot shows the 'Item Requisition' form with the following fields and values:

- Document Date: 24/08/2015
- Document Number: <-AUTO-GENERATED->
- Reference Number: (empty)
- Branch: HQ - Head Office
- Vendor: (empty)
- Currency: (empty)
- Warehouse: TE01 - Main Warehouse
- Required Date: (empty)
- Vendor Location: (empty)
- Vendor Contact: (empty)
- Document Note: (empty)
- Payment Terms: (empty)
- Representative: (empty)

The table below the form is currently empty:

#	Product	Description	Uom	Quantity	Estimated Unit Cost	Total Amount
1				1		

At the bottom of the form, there are buttons for 'Generate Documents', 'Confirm Purchase Requisition', 'Create New', 'Save', 'Revert', and 'Delete'. The status bar shows 'Total [Qty: 0, Amount: (1)] Grand Total:'.

Field Name	Explanations	Mandatory Information
Document Date	Creation date of the document	Y
Document Number	Document number of the item requisition	Y
Reference Number	Code for easy reference search of the document	N
Branch	Name of company's branch which make the item requisition	Y
Vendor	The vendor of whom to make the purchase from	Y
Currency	Currency used by the vendor	Y
Vendor Location	The location of vendor	Y
Vendor Contact	The contact person of vendor	N
Payment Terms	Payment terms for the item requisition	Y
Representative	Name of staff to process the item requisition	Y
Warehouse	Receiving warehouse	Y
Required Date	Date to deliver the item requisition	Y
Document Note	Additional information in regard to the item requisition document	N
Product	Which product to purchase	Y
Description	Description of the product	N
Uom	Type of the product	Y
Quantity	Number of quantity of the product	Y
Estimated Unit Cost	Estimated cost per item	Y
Total Amount	Total cost for the item requisition	Y

## Create New Item Requisition:

1. Click on **"Create New"** at the top right of screen of **"Purchase Requisitions List"** tab, it will open **"Purchase Requisition"** tab with empty form

Date	Document #	Reference #	Vendor	Representative	Required Date	Currency	Grand Total	Status
May 11, 2015	PRQ15-050001		tfl - TFI trading	EM01 - Christopher	May 25, 2015	SGD	\$51,450.00	Approv...
May 26, 2015	PRQ15-050003		6002.001/LU001 - Luxasia	EM01 - Christopher	May 26, 2015	SGD	\$512.57	Approv...
Aug 13, 2015	PRQ15-080004		6004/CO001 - Courts Singapore (SGD)	EM03 - Jessica	Aug 18, 2015	SGD		Drafted

2. Select a vendor from the **“Vendor”** drop-down list on top left side of screen. It will fill up the form with the vendor’s info

3. Fill up item requisition’s information on the top half of screen

The screenshot shows the 'Item Requisition' form with the following details:

- Document Date:** 24/08/2015
- Document Number:** <-AUTO-GENERATED->
- Reference Number:** (empty)
- Branch:** HQ - Head Office
- Vendor:** (empty)
- Currency:** (empty)
- Warehouse:** TE01 - Main Warehouse
- Required Date:** (empty)
- Vendor Location:** (empty)
- Vendor Contact:** (empty)
- Document Note:** (empty text area)
- Payment Terms:** (empty)
- Representative:** (empty)

**Requisition Items Table:**

#	Product	Description	Uom	Quantity	Estimated Unit Cost	Total Amount
1	< Select All >			1		

**Bottom Buttons:** Generate Documents, Confirm Purchase Requisition, Create New, Save, Revert, Delete.

4. Click **“Save”** button at the bottom right side of screen

5. Add an item into the item requisition by selecting a product from the **“Product”** drop-down list in the table on **“Requisition Items”** tab, user can filter the list by selecting a brand from **“Product Brand”** list

6. Enter the product’s info and click **“+”** button to add the product into the item requisition

This close-up shows the 'Requisition Items' table with the following state:

- Product Brand:** < Select All >
- Filter:** (empty)
- Table Row 1:** Product (selected), Description, Uom, Quantity: 1, Estimated Unit Cost, Total Amount.
- Buttons:** A red box highlights the '+' button at the end of the row.

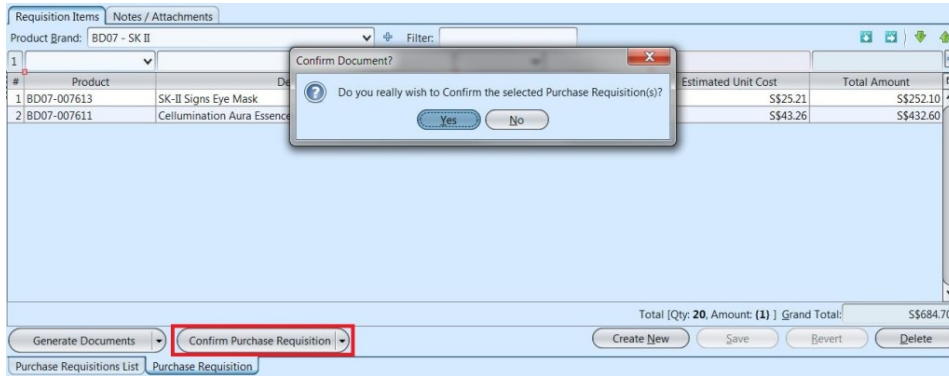
7. Repeat steps 5-6 to add more products into the item requisition

8. Click on **“Notes / Attachments”** tab at the middle

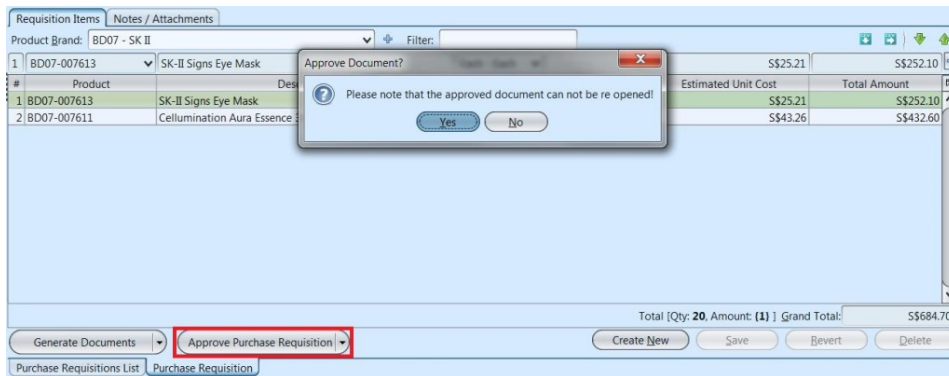
of screen to add notes or files attachment for the item requisition.

9. Click on **“Save”** button at the bottom right of screen when completed

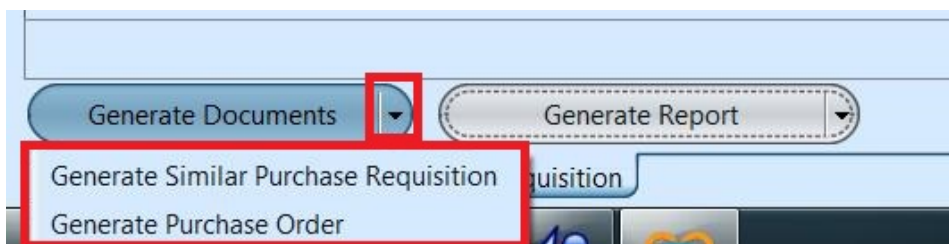
10. Click on **“Confirm Purchase Requisition”** button at the bottom of screen to confirm the item requisition



11. Click on **“Approve Requisition”** button at the bottom of screen to approve the item requisition



12. Click arrow on **Generate Documents** button at the bottom left of screen and select **“Generate Purchase Order”** option to generate a new Purchase Order.



13. Click **“OK”** button on the pop-up window to create the Purchase Order document. It will generate and open up the Purchase Order document with the Item

## Requisition details.

**Create Purchase Order from Item Requisition**  
Generates the Purchase Order from Item Requisition with the same set of products.

Document Number: <-AUTO-GENERATED->      Document Date: 24/08/2015

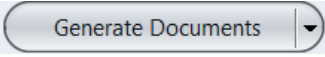
Reference Number: PRQ15-080005      Document Status: **Drafted**

Warehouse: TE01 - Main Warehouse

Product #	Description	UOM	Requisition Qty	Ordered Qty	Open Qty	Suggested Qty
BD07-007611	Cellumination Aura Essence 30ml	Each	10	0	0	10
BD07-007613	SK-II Signs Eye Mask	Each	10	0	0	10

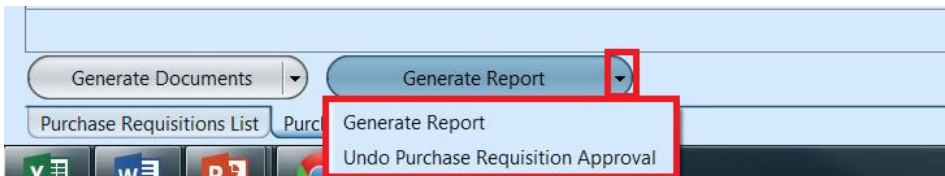
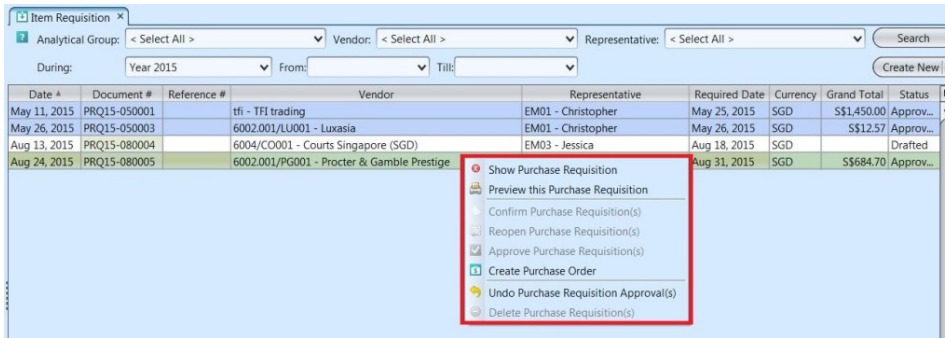
Open the new Purchase Order Document

OK      Cancel

14. Click arrow on  button and select ***“Generate Similar Purchase Requisition”*** option to generate a new copy of the item requisition form

## Update Item Requisition Details:

1. Click on ***“Purchase Requisitions List”*** tab at the bottom of screen
2. Double click on item requisition to be updated, it will bring up the details on ***“Purchase Requisition”*** tab for the selected order. If an item requisition’s status is ***“Confirmed”*** or ***“Approved”***, right click on the order and reopen / undo approval of the order first. User can do so from the document as well by clicking the arrow on ***“Generate Report”*** button at the bottom left of the document screen



3. Make change(s) on the item requisition information

4. Click on **“Save”** button at the bottom right of screen when done

5. Click on **“Revert”** button at the bottom right of screen or refresh icon at the top of the screen to roll back the changes

6. Click on **“Confirm Requisition”** button at the bottom of screen to confirm the item requisition

7. Click on **“Approve Requisition”** button at the bottom of screen to approve the item requisition

## Delete Item Requisition:

1. Click on **“Purchase Requisitions List”** tab at the bottom of screen

2. Double click on item requisition to be deleted, it will bring up the details on **“Purchase Requisition”** tab for the selected order. If an item requisition’s status is **“Confirmed”** or **“Approved”**, right click on the order and reopen / undo approval of the order first

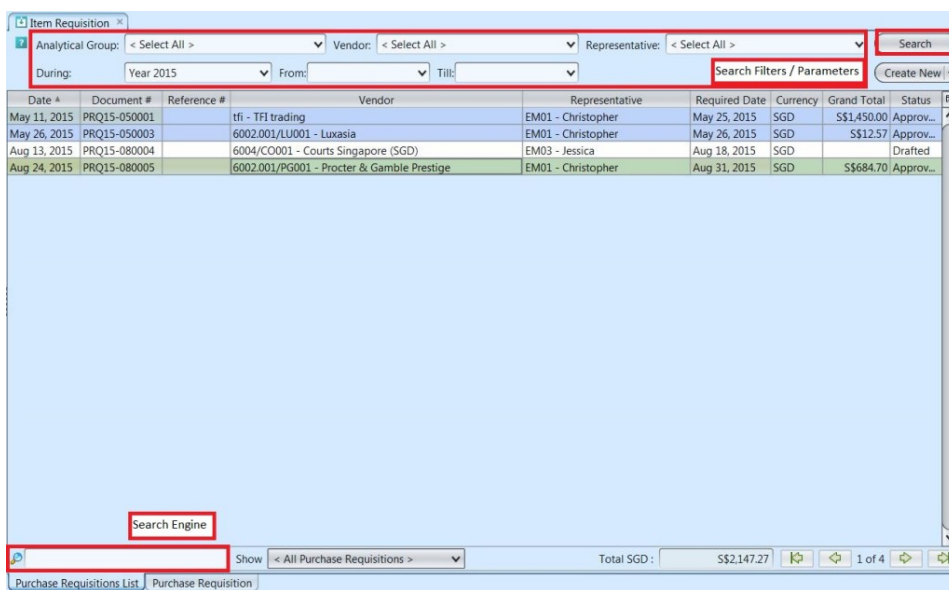
3. Click on **“Delete”** button at the bottom right side of screen

4. Click on **“Yes”** button on the pop-up window to

confirm item requisition deletion.

## View and Search for Item Requisition Details:

1. Click on **“Purchase Requisitions List”** tab at the bottom of screen
2. Enter search parameter to filter the result, i.e. type in which vendor to search for in the **“Vendor”** text field box or select from drop-down list



3. Result can be sorted alphabetically by clicking the fields' columns
4. Double click on item requisition to view full details of the order, it will bring up the details on **“Purchase Requisition”** tab for the selected order