Purchase Requisition Inbox

Module Guide: Purchase Requisition Inbox

Module Location

Purchasing > Purchase Requisition > Purchase Requisition Inbox

Module Objective

The **Purchase Requisition Inbox** module serves as the approval center for all **Purchase Requisition (PR)** documents that have been submitted by various departments. This module is used by a superior or manager who is authorized to conduct a review and provide approval before a purchase request can be actioned by the Purchasing (Procurement) department.

1. Main View (Request List)

The main page of this module is an "inbox" that displays all Purchase Requisitions requiring your action.



View Explanation & Filters

This page provides a summary of all PRs that are awaiting approval.

- **Filters**: You can search for a specific PR by **Document Number**, **Item Category**, or a date range (**Date to / Date from**).

- **Request List**: The table below will display all PRs awaiting action. The table currently shows "...No Record...".

Column Explanation

- **Document Number**: The unique number of the Purchase Requisition document.
- **Purchase Request Date**: The date the request was created.
- **Requested By**: The name of the requestor or the submitting department.
- **Purchase Requisition Status / Document Approval**: Icons that indicate the document's status and the approval process status.

Button Functions

- **Approve**: The main action button to approve one or more selected Purchase Requisitions.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Purchase Requisition Inbox** module to see the list of PRs that require approval.

Step 2: Review the Requisition Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input,

such as the details of the requested items, the quantity, and the reason for the purchase.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted request:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more PR rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval.

3. Workflow & Integrated Business Process

1. **Submission**: A user from any department creates a document in the **Purchase Requisition** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed PR automatically enters the queue in this **Purchase Requisition Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Procurement Process**: After approval, the PR becomes a valid request and the basis for the **Procurement team to begin the procurement process**, either by creating a Purchase RFQ or directly creating a Purchase Order.

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