Purchase Requisition

Module Guide: Purchase Requisition

Module Location

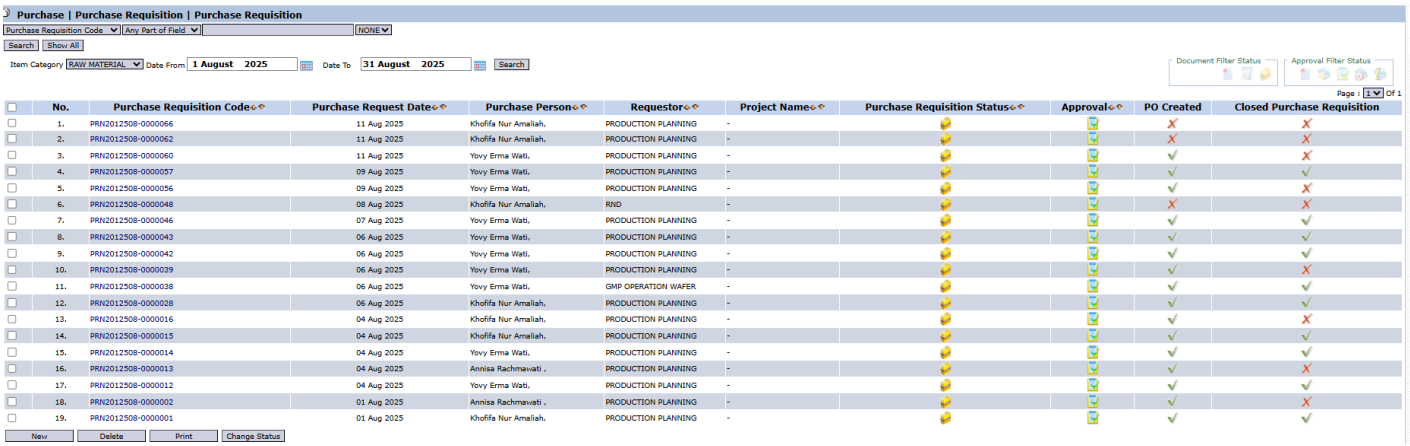
Purchasing > Purchase Requisition > Purchase Requisition

Module Objective

The **Purchase Requisition (PR)** module is the starting point of the entire procurement workflow for goods or services. This module is used by any department in the company to formally submit a purchase request. An approved PR document becomes the basis for the Purchasing (Procurement) department to follow up on the procurement process.

1. Main View (Purchase Requisition List)

The main page of this module displays a list of all Purchase Requisition (PR) documents that have been created.



View Explanation & Filters

This page is for viewing and managing all existing PRs.

- **Filters**: You can search for a specific PR by **Purchase Requisition Code**, **Item Category**, or a date range (**Date To / Date From**).

- **PR List**: The table below will display all PRs that match the filters, with columns such as **Purchase Requisition Code**, **Requestor**, **Purchase Requisition Status**, **Approval**, and **PO Created** (Whether a PO has been created).

Button Functions

- **New**: The primary button to create a new Purchase Requisition.

- **Delete**: To delete a selected PR.

- **Print**: To print the details of a selected PR.

- **Change Status**: To change the status of a selected PR.

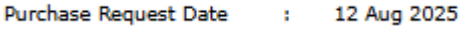
2. Steps to Create a Purchase Requisition

Step 1: Create a New Requisition

From the Main View, click the **New** button to open the **Add Purchase Requisition** form. 

Step 2: Fill in Header Information

On the form that appears, fill in the general request information:

- **Purchase Request Date**: Enter the date you are making the request.
  

- **Notes**: Provide a general note or explanation regarding this request.

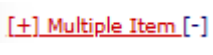


- **Creator Department**: Select your department as the requestor (e.g., ACCOUNTING).



Step 3: Detail the Required Items

In the detail table at the bottom:

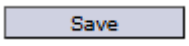
1. Click the **[+]** icon to add an item row. 

2. Enter the **Item Code** and **Qty** (Quantity) that you need.

3. Fill in the **Reason** column to explain why the item is needed and the **ETA** (Estimated Time of Arrival) if there is a specific date.

Step 4: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save**: To save the PR as a draft. 

- **Confirm**: To finalize the PR and send it into the approval workflow.



- **Cancel**: To cancel the entry. 

Workflow & Integrated Business Process

- A PR that has been **Confirmed** will go to the **Purchase Requisition Inbox** to be approved by a superior or authorized party.

- After approval, this PR becomes the basis for the Procurement team to create a **Purchase RFQ** (if sourcing for quotations is needed) or to directly create a **Purchase Order**.

Tips & Important Notes

- Always fill in the **Reason** column clearly so the approver understands the urgency and need for the purchase.

- Monitor the **PO Created** column on the main page to track whether your request has been actioned by the Procurement team.

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