

Requisition

- [Introduction](#)
- [Tabs](#)
 - [Requisition Header](#)
 - [Requisition Lines](#)
 - [Custom Column](#)
- [Document Actions](#)
 - [Validations](#)
 - [Actions](#)
- [Process](#)
 - [Requisition Process](#)
- [Video](#)
 - [Requisition Video](#)
- [Reports](#)
- [Preceding and Succeeding Window](#)
 - [Requisition Connected Window](#)

Introduction

Overview

A purchase requisition is an internal document that authorizes the Purchasing department to buy items or services. After a purchase requisition is approved, it can be used to generate a purchase order.

Business case

A purchase requisition is a request from an employee or department to buy goods or services. After internal review and approval it is used to create a purchase order that is sent to a supplier.

Business Needs of Requisition.

1. Creates a clear process for employees.
2. Makes purchasing more transparent.
3. Streamlines procurement.
4. Controls costs.
5. Deters or detects fraud.
6. Aligns with purchasing guidelines.
7. Prevents duplicate orders.
8. Increases accountability.
9. Provides documentation for financial audits.

Tabs

Requisition Header

The screenshot shows the 'Requisition Header' form in a software application. The form is titled 'Requisition' and has tabs for 'Home (40)', 'Summary', and '*Requisition *'. The form contains various fields for requisition details, including Client, Organization, Document No, Manufacturing Order, Document Type, User/Contact, Description, Comment/Help, Priority, Material Indent Line, Date Required, Document Date, Warehouse, and Project. There are also checkboxes for 'Approved', 'Processed', 'Approved Level 1', and 'Approved Level 2'. A 'Document Action' button is at the bottom.

Critical Fields

1. User/Contact: He is the contact person in that particular vendor side.
2. Date Required: Estimated delivery date of the product.
3. Warehouse: Product storage purpose, Select a warehouse where the final product is stored.
4. Price List: The price list will be selected in the product master once we select the product price list will display automatically and the user also select manually.

Critical & one-time setup field

1. Organization: This field is used to select the organization.
 2. Document Type: This Field is used to select the type of document that you are going to process.
-

Non-Critical Fields

1. Manufacturing Order: This Field was utilized when we needed a requisition against a specific manufacturing order or when we wanted to generate a requisition with reference to a manufacturing order.
 2. Description: Used to describe specifics about a requisition document or any other note, information, or data, for example.
 3. Comment/Help: Used to describe specifics about a requisition document or any other note, information, or data, for example.
 4. Priority: According to importance we can set priority for that Requisition (High, Low, Medium, Minor, Urgent).
 5. Project: If this Requisition is processed against a project user can tag the project for tracking.
-

Zoom condition's

1. MRP
-

Validation

1. Save: It will not allow to save document if Mandatory fields are missing.

Critical Fields

- ## Critical & one-time setup fields

Non-Critical Fields

1. Description: Used to describe specifics about a requisition document or any other note, information, or data, for example.
2. Project: If this Requisition is processed against a project user can tag the project for tracking.
3. Material indent line: its update automatically when indent against requisition created by using create lines from option we can choose material indent document number

Configuration:

Tool tip - It's helpful to display alternative products when purchasing the material.

Tabs

Custom Column

Home (64) Summary *Requisition: 900321 ✕

Requisition > Custom Column

Inserted

Client * Konnect Demo

Organization * Food Industry

Sequence 10

Requisition * 900321_Harish Demo

Custom Columns *

Value Column

Description

☒ Active

Critical Fields

1. Custom Column: User can set custom details required with document and it is a master data. once master is uploaded user can select that custom columns for requisition.
- 2.Value Column: To note Values of column Manually.
3. Description: To note Specifics required with documents and to describe other important information.

Document Actions

Validations

1. Save

System will check all mandatory fields.

2. Delete

System will delete the order and its historical details.

Actions

Document action prepare

1. System will check the period details and master data checking
 2. If the payment schedule is not created, the system will automatically create a payment schedule based on the payment.
-

Document action complete

1. System will complete the document and keep the requisition ready for processing in the Purchase order.
 2. Once document action is complete, all fields are updated in read-only.
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Document action void/reverse correct actual

Void- system will reverse all the transaction data and change the document status to Void.

Document action close

The system will check whether all the activity for the document is completed and change the Document status to close.

Process

Process

Requisition Process

Create lines from

To Create New Requisition Create lines form will help you to copy Material indent Details in Requisition.

Video

Video

Requisition Video

Reports

Report is well Complied set of data according Scenario

Sr.no	Report Name	Report Purpose
1	Requisition	This report Contains details of Requisitions According to Organization and Business Partner.
2	Purchase Requisition	This report includes details on Requisitions by Organization, Business Partner, & Product.
3	PR to Invoice Report	This report provides information on Product From Requisition to Invoice and illustrates how the request flowed through Purchase order, Material receipt, Shipment/Receipt, and Invoice.
4	Open requisition Report	Organization, Warehouse & Product wise open Requisition details Which are pending.

Preceding and Succeeding Window

Requisition Connected Window

Preceding Window

Manufacturing Order :- [Manufacturing Order](#)

Production Queue :- [Production Queue](#)

Succeeding Window

Purchase Order :- [Purchase Order](#)

Create PO From Requisition (Manual) :- [Create PO From Requisition \(Manual\)](#)