

Entering Purchase Requisition

What you need to know:

- a) A purchase requisition is used for stock parts only.

PROCEDURE

- 1. In the Purchasing folder, open the Purchase Requisition form.

Purchase Requisition Form – Header Section

The screenshot shows the 'Purchase Requisition' form. The 'Header Section' is highlighted with a red box and contains the following fields: 'PREQ Number' (value: **ASSIGN**), 'Requested By', 'Next Approver', and a 'Print?' checkbox. Below this is the 'PREQ Information' section with 'Purchase Type' (value: INVENTORY), 'Status' (value: APPROVED), 'Drop Ship', and 'Agreement No'. To the right is a 'Deliver To' section with a list box. At the bottom is a 'Line Items' table with columns for Line, Part Number, Description, Status, QuantityUop, and Amount. The table is currently empty. At the bottom of the form are buttons for 'Add Line...', 'View...', 'Reject', and a 'Total' field.

- a) In the header section on the Purchase Requisition form, complete the following:
 - i) PREQ Number – (read only/required) Will be assigned by FAMIS when record is saved.
 - ii) PREQ Description – (required – unlabeled field) Enter the description of the purchase requisition in this unlabeled field. Refer to business rules for format.
 - iii) Requested By – (read only) The 5-digit employee ID, name, and phone number of the enter user will be populated in these fields.
 - iv) Next Approver – (read only) Not used.
 - v) Print? Checkbox – Uncheck this box if you do not want a printed copy of the Purchase Requisition when the record is saved.

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Purchase Requisition Form – PREQ Information Section

The screenshot shows the 'Purchase Requisition' window. The 'PREQ Information' section is highlighted with a red box. It contains the following fields:

- Purchase Type: INVENTORY (dropdown menu)
- Status: APPROVED (dropdown menu)
- Drop Ship: (text field)
- Agreement No.: (text field)
- Deliver To: (text field)

Other fields in the window include PREQ Number (**ASSIGN**), Requested By, Next Approver, and a Print checkbox. A table of Line Items is visible below the PREQ Information section, with columns for Line, Part Number, Description, Status, QuantityUop, and Amount. Buttons for 'Add Line...', 'View...', 'Reject', and 'Total' are located at the bottom of the window.

- b) In the PREQ Information section on the Purchase Requisition form, complete the following:
- Purchase Type – (required) Defaults to INVENTORY; do not change.
 - Status – (required) Defaults to APPROVED; do not change.
 - Drop Ship – (not used)
 - Agreement No. – (not used)
 - Deliver To – (not used)

Purchase Requisition Form – Button Section

The screenshot shows the 'Purchase Requisition' window. The 'Button Section' is highlighted with a red box. It contains the following buttons:

- Add Line...
- View...
- Reject

The rest of the window is identical to the previous screenshot, showing the PREQ Information section and the Line Items table.

- c) Click on add line button to open the Line Item form.

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Line Item Form – Line Information Section

The screenshot shows the 'Line Item' form with the 'Line Information' section highlighted by a red box. The 'Line Information' section contains the following fields: 'Line / Status' with a value of '1' and 'REQUESTED', 'Date Required' (empty), 'WO Number' (empty), and an 'Advise' checkbox (unchecked). Other sections visible include 'Part Information' (Warehouse: 10, Part Number, Commodity, Urgent checkbox), 'Suggested Vendor' (Vendor No, Vendor P/N, Buyer), 'Manufacturer' (MFR, Mfr Part Number, Mfr Brand, Substitution checkbox), 'Description' (empty text area), and 'Quantity & Estimated Price' (Uop dropdown, Quantity, Unit Price, Amount). Buttons at the bottom include 'Dates...', 'POs...', 'Accounts...', 'OK', and 'Cancel'.

- d) In the Line Information section on the Line Item form, complete the following:
- Line/Status** – (Read only) Automatically populates with line item and default status; do not change.
 - Date Required** – Enter the date item required, if applicable.
 - WO Number** – (Read only)
 - Advise** – (Not used)

Line Item Form – Part Information Section

The screenshot shows the 'Line Item' form with the 'Part Information' section highlighted by a red box. The 'Part Information' section contains the following fields: 'Warehouse' with a value of '10', 'Part Number' (empty), 'Commodity' (empty), and an 'Urgent' checkbox (unchecked). Other sections visible include 'Line Information' (Line / Status: 1, Date Required, WO Number, Advise checkbox), 'Suggested Vendor' (Vendor No, Vendor P/N, Buyer), 'Manufacturer' (MFR, Mfr Part Number, Mfr Brand, Substitution checkbox), 'Description' (empty text area), and 'Quantity & Estimated Price' (Uop dropdown, Quantity, Unit Price, Amount). Buttons at the bottom include 'Dates...', 'POs...', 'Accounts...', 'OK', and 'Cancel'.

- e) In the Part Information section on the Line Item form, complete the following:
- Warehouse** – (required) Automatically defaults to the enter user's warehouse.
 - Part Number** – (required) Enter part # on line item screen and tab out of the field. Note: Tab action automatically populates commodity, description, manufacturer information (if available), suggested vendor (if available), unit of purchase (UOP), and unit price.
 - Commodity** – (Not used)

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iv) Urgent – (Not used)

Line Item Form – Suggested Vendor & Manufacturer Sections

The screenshot shows the 'Line Item' form with several sections. The 'Suggested Vendor' and 'Manufacturer' sections are highlighted with a red rectangular box. The 'Suggested Vendor' section includes fields for 'Vendor No', 'Vendor P/N', and 'Buyer'. The 'Manufacturer' section includes fields for 'MFR', 'Mfr Part Number', 'Mfr Brand', and a 'Substitution' checkbox. Other sections include 'Line Information' (Line / Status: 1 REQUESTED, Date Required, VPO Number, Advise checkbox), 'Part Information' (Warehouse: 10, Part Number, Commodity, Urgent checkbox), 'Description' (a large text area), and 'Quantity & Estimated Price' (Uop, Quantity, Unit Price, Amount, View Conversion... button). At the bottom are buttons for 'Dates...', 'POs...', 'Accounts...', 'OK', and 'Cancel'.

f) Suggested Vendor & Manufacturer sections on the Line Item form are not used.

Line Item Form – Description Section

This screenshot is similar to the previous one, but the 'Description' section is highlighted with a red rectangular box. The 'Description' field is currently empty and highlighted in yellow. All other sections and fields are the same as in the previous screenshot.

- g) In the Description section on the Line Item form, complete the following:
- i) **Description** - Automatically loads the description associated with the part number. Do no change.

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Line Item Form – Quantity & Estimated Price Section

The screenshot shows a software interface for entering purchase requisition line items. The 'Quantity & Estimated Price' section is highlighted with a red border. It contains the following fields:

- Uop**: A dropdown menu with a 'View Conversion...' button next to it.
- Quantity**: A text input field with a yellow background.
- Unit Price**: A text input field.
- Amount**: A text input field.

Other sections visible in the form include:

- Line Information**: Line / Status (1 REQUESTED), Date Required, WO Number, Advise checkbox.
- Part Information**: Warehouse (10), Part Number, Commodity, Urgent checkbox.
- Suggested Vendor**: Vendor No, Vendor P/N, Buyer.
- Manufacturer**: MFR, Mfr Part Number, Mfr Brand, Substitution checkbox.
- Description**: A large text area.

Buttons at the bottom include 'Dates...', 'POs...', 'Accounts...', 'OK', and 'Cancel'.

- h) In the Quantity & Estimated Price section on the Line Item form, complete the following:
 - i) **UOP** – (read only) Automatically loads the unit of purchase associated with the part number.
 - ii) **Quantity** - Enter quantity.
 - iii) **Unit Price** – (read only) Automatically loads the unit price associated with the part number.
 - iv) **Amount** – (read only) Value loaded after quantity entered.
- i) Click the OK button to close the line item form.
- j) Repeat steps d - i until all lines are entered.
- k) Close the Purchase Requisition form when finished adding all line items.
 - i) Daily PO download will be checked for deletions. Refer to business rules.