End-User Course

Inventory and Order Management

Purchase Requisitions
2025 R1

Revision: 4/16/2025

Acumatica
The Cloud ERP

Contents

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How To Use This Course

This course provides a set of lessons that illustrate purchase requisition processes in a midsize company. These lessons guide you step by step through the examples and explanations of the configuration and business process flow in Acumatica ERP.

What Is in This Guide

The guide includes the *Company Story* topic, implementation activities, process activities, and *Additional Materials* topics. The *Company Story* topic explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements.

Each implementation activity of the course is dedicated to a particular implementation scenario and consists of steps that you complete.

Each process activity of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

> The activities are independent and can be completed in any order.

Which Training Environment You Should Use

All lessons of the course should be completed in an instance of Acumatica ERP 2025 R1 with the *U100* training dataset preloaded; this dataset provides the predefined settings and entities you will need as you complete the activities of this course.

You or your system administrator should prepare an instance of Acumatica ERP 2025 R1, as described in the *How to Create a Tenant with the U100 Dataset* section below.

What Is in a Configuration Lesson

A *configuration lesson*—that is, a lesson dedicated to the configuration of system settings and entities—provides a brief overview of the required system configuration and a description of other settings that could affect the configuration workflow.

Each configuration lesson includes at least one implementation activity that you have to complete in your Acumatica ERP instance to configure the core system settings or to prepare system entities.

What Is in a Process Lesson

A *process lesson*—that is, a lesson dedicated to the performing of a particular business process—includes a brief user scenario and a description of the process workflow. It can also include process diagrams that illustrate the user scenario supported by this process. The lesson also provides a brief overview of the settings that need to be specified and the entities that need to be prepared in the system before you start to perform this business process.

Each process lesson includes at least one process activity that you have to complete in your Acumatica ERP instance to learn how to perform the described business process.

What the Documentation Resources Are

The complete Acumatica ERP documentation is available on https://help.acumatica.com/ and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane of the Acumatica ERP screen to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related information and activities and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the U100 Dataset

Before you complete this course, you need to add a tenant with the *U100* dataset to an existing Acumatica ERP instance. You will then prepare the tenant for completing the activities. To complete this preparation, perform the following instructions:

1. Go to *Amazon Storage*.
2. Open the folder that corresponds to the version of your Acumatica ERP instance.
3. In this folder, open the `Snapshots` folder and download the `u100.zip` file.
4. Launch the Acumatica ERP instance and sign in.
5. Open the *Tenants* (SM203520) form and click **Add New Record** on the form toolbar.
6. In the **Login Name** box, type the name to be used for the tenant.
7. On the form toolbar, click **Save**.

   When you create a system tenant, you may be signed out after its creation, depending on how many non-System tenants your Acumatica ERP instance already had:

   - If you started with one non-System tenant (to which you are signed in) and you create a new one, the system signs you out to switch from single-tenant mode to multitenant mode.
   - If the instance had multiple non-System tenants and you create another, it is already in multitenant mode. Instead of being signed out, you wait until the system completes the operation and then proceed.

8. On the **Snapshots** tab, click **Import Snapshot**.
9. In the **Upload Snapshot Package** dialog box, select the `u100.zip` file, which you have downloaded, and click **Upload**.

   The system uploads the snapshot and lists it on the **Snapshots** tab of the *Tenants* form.
10. Open the *Apply Updates* (SM203510) form and click **Schedule Lockout**.
11. In the **Schedule Lockout** dialog box, click **OK**.
12. Open the *Tenants* form again.
13. On the form toolbar, click **Restore Snapshot**.
14. If the **Warning** dialog box appears, click **Yes**.
15. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded and click **OK**. The system will restore the snapshot and sign you out.
16. Sign in to the tenant that you have just created.
17. Open the *Apply Updates* form again.
18. On the form toolbar, click **Stop Lockout.**

Which Credentials You Should Use

To complete the lessons, sign in as the following users:

1. Lesson 1: *parker*
2. Lesson 2: *parker* and *mueller*

The password for each user is *123*.

Which License You Should Use

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available features. For the production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP licensing policy for details.

Company Story

This topic explains the organizational structure and operational activity of the company you will work with during this training.

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- SweetLife Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Operational Activity

The company has been operating starting in the *01-2024* financial period. In November 2024, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. The equipment center began its operations in *01-2025* in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- SweetLife Service and Equipment Sales Center: This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors.

The company also purchases juicers and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Lesson 1: Configuring Purchase Requisition Functionality

This lesson describes the minimum configuration of the purchase requisitions functionality that is required for Acumatica ERP users to process requisitions. A purchase requisition may be based on customer or employee purchase requests or may have no requests.

Purchase Requisition Configuration: General Information

By using purchase requisitions in Acumatica ERP, your company can optimize its purchasing process. With this functionality, you can purchase stock items from the most appropriate vendors at the best possible price and time and in the right quantities.

In a production environment, before you configure purchase requisitions, you need to perform broader Acumatica ERP implementation, which includes enabling features and specifying the basic settings for other basic functionality: the general ledger, cash management, accounts payable (including defining vendors), accounts receivable (including defining customers), and order management with inventory.

Learning Objectives

In this lesson, you will do the following:

- Become familiar with the general workflow of the purchase requisition setup
- Learn about request classes
- Create a request class
- Configure budget validation for purchase requests of a class

Applicable Scenario

You may need to learn how to configure purchase requisitions if your organization wants to optimize its purchasing processes.

Setup of Purchase Requisition Functionality

To use the functionality that supports purchase requisitions, you need to be sure that the *Purchase Requisitions* feature is enabled on the *Enable/Disable Features* (CS100000) form. You should also determine how your company will use the purchase requisition functionality, including the following factors:

- Whether your users will enter requests from customers and employees into the system. Requisitions can then be created based on these requests or entered directly.
- Which type of requests you expect to be entered most often: employee requests of stock items they need internally, or customer requests of stock items they want to purchase from your company.
- Whether approvals will be required (and under what conditions, if applicable) for requests and for requisitions.
- Whether you want to validate any requests against a budget defined in the system.

You use the following sections of the *Purchase Requisitions Preferences* (RQ101000) form to specify settings that determine how the functionality is used:

- **Request Settings** section: You specify the numbering sequence to be used for requests and the number of months they will be retained in the system. If your company will set up approval of requests, you also specify the assignment map that will be used to assign requests to approvers. (This map must be created in the system before you can specify it.)

- **Requisition Settings** section: You specify the numbering sequence to be used for requisitions and the number of months they will be kept in the system. If your company will set up approval of requisitions, you also specify the needed assignment map. (This map must be created in the system in advance.)

  If your users will enter purchase requests and later add stock items from requests to each requisition, you can select the **Merge Lines by Default** check box to have the system merge lines for the same stock items from all the requests in a particular requisition.

  For details about the workflow of processing these documents, see *Processing Purchase Requests and Requisitions*.
- **Requisition Order Settings** section: You specify the default sales order types that will be used for quotes and sales orders that can be created for a requisition. You can also indicate whether a purchase order created from a requisition has the *On Hold* status by default.
- **Other Settings** section: You specify the budget ledger that the system will use for budget validation and the time period for the calculation of the total cost of purchase requests.

  Also, you can specify the default request class to be inserted when a request is created on the *Requests* (RQ301000) form. This can be a request class defined for customer requests or for employee requests. (For details about request classes, see the following section.) When the default request class is inserted for a request, the system also inserts the default settings associated with the class. Specifying this default class may be useful if a particular request class is expected to be used far more than the others.

Creation of Request Classes

A request class is an entity in Acumatica ERP that contains the general settings of requests of a particular type. When you create a request class on the *Request Classes* (RQ201000) form, you can specify the following settings:

- What the promised lead time is: In the **Promised Lead Time (Days)** box (Summary area), you specify the number of days within which a request of the class should be fulfilled.
- Whether requests of the class are customer or employee: A customer request contains items requested by a particular customer of your organization. To indicate that the request class will be used for customer requests, you select the **Customer Request** check box in the Summary area. Employee requests contain items that employees need in their work.
- Whether the items from a request of the class can be divided among multiple vendors: If a request contains multiple items, you can order these items from multiple vendors if one vendor cannot fulfill the entire request or if another vendor has lower prices for particular items. You select the **Allow Multiple Vendors per Request** check box in the Summary area to indicate that the system can suggest multiple vendors to fulfill the request.
- Which items are available for ordering in requests of this class: You can restrict the list of items that users can add to the request during its creation to reduce the probability of users selecting the wrong items. To do this, you select the **Restrict Requested Items to the Specified List** check box in the Summary area, and you add the items to the list on the **Item List** tab.
- Whether the request must be validated against the budget: If you control expenses on particular items by using budgets, you can set up budget validation on the **GL Accounts** tab by selecting *Warning* or *Error* in the **Budget Validation** box (the default setting is *None*) and specifying an expense account in the **Expense Account** box (and the corresponding subaccount, if applicable, in the **Expense Sub.** box).

Workflow of the Purchase Requisition Configuration

To configure purchase requisitions in Acumatica ERP, you perform the following general steps:

1. On the *Enable/Disable Features* (CS100000) form, you enable the *Purchase Requisitions* feature.
2. Optional: On the *Request Classes* (RQ201000) form, create each needed request class for customer requests or employee requests. You create request classes if users will first add stock items to purchase requests on the *Requests* (RQ301000) form and then create a requisition based on these requests.

3. On the **General** tab of the *Purchase Requisitions Preferences* (RQ101000) form, you review (and modify, as needed) the numbering sequences and required settings and save these settings in the system.
4. Optional: Configure budget validation, as described in *Purchase Requisition Configuration: Setup of Budget Validation for Employee Requests*

Purchase Requisition Configuration: Setup of Budget Validation for Employee Requests

If your company uses purchase requests, you can set up budget validation of purchase requests. This validation helps your company prevent cost overruns of requested goods and services. Before you set up this validation, you should make sure that the budgets have been created and released on the *Budgets* (GL302010) form.

The setup of budget validation for purchase requests includes the following tasks:

1. Defining the way the system will calculate the costs of items included in a purchase request: On the *Purchase Requisitions Preferences* (RQ101000) form, in the **Budget Ledger** box of the **General** tab, you select the budget ledger that the system will use for verification. In the **Budget Calculation** box, you can also specify one of the following options:
   - *YTD Values*: Calculates the total cost of purchase requests created from the beginning of the financial year to the end of the current financial period
   - *PTD Values*: Calculates the total cost of purchase requests created from the beginning of the financial period
   - *Annual*: Calculates the total cost of purchase requests created for the current calendar year
2. Turning on budget validation in the settings of each needed purchase request class: On the *Request Classes* (RQ201000) form, you turn on budget validation by selecting one of the following options in the **Budget Validation** box of the **GL Accounts** tab:
   - *None* (default): No budget validation will be performed. This option might be selected for a customer request class, because internal budget validation is not applicable for these requests.
   - *Warning*: A user will be able to save a purchase request of this class even if the requested amount exceeds the budgeted amount. In this case, the system will display a warning.
   - *Error*: A user will not be able to save a purchase request of this class with an amount that exceeds the budgeted amount, and the system will display an error message.

Purchase Requisition Configuration: To Create Customer Request Class

In the following implementation activity, you will create a request class designed for customer requests—that is, requests for items that are needed by customers.

Story

Suppose that the SweetLife Fruits & Jams company has a few customers who want to order exotic fruits for their restaurants. SweetLife does not often receive orders for these fruits from its customers, but it has vendors who can sell these fruits, so it can satisfy customer requests for the fruits. Acting as purchasing manager Matt Parker, you need to create a customer request class to provide default settings for requests for exotic fruits. You will then create a request to see how the class settings affect the class.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Purchase Requisitions* feature has been enabled.
- On the *Purchase Requisitions Preferences* (RQ101000) form, the required settings have been specified.
- On the *Customers* (AR303000) form, the *GOODFOOD* customer has been created.
- On the *Stock Items* (IN202500) form, the following stock items have been created: *DRAGONFR*, *COCONUTS*, and *MANGOES*.

Process Overview

In this activity, you will do the following:

1. On the *Request Classes* (RQ201000) form, create a customer request class.
2. On the *Requests* (RQ301000) form, create a customer purchase request of the class.

System Preparation

Before you start creating a purchase request class for customer requests, you should launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You sign in as purchasing manager Matt Parker by using the *parker* username and the *123* password.

Step 1: Creating the Customer Request Class

To create a customer purchase request class for requests for exotic fruit, do the following:

1. On the *Request Classes* (RQ201000) form, add a new record.
2. In the Summary area, specify the following settings:
   a. **Request Class**: `EXOTICFR`
   b. **Description**: `Customer requests for exotic fruits`
   c. **Promised Lead Time (Days)**: `2`
   d. **Customer Request**: Selected.
   e. **Allow Multiple Vendors per Request**: Selected
   f. **Restrict Requested Items to the Specified List**: Selected
3. On the **Item List** tab, add rows for items with the following inventory IDs:
   - *DRAGONFR*
   - *COCONUTS*
   - *MANGOES*
4. On the form toolbar, click **Save**.

Step 2: Creating a Purchase Request of the Class

To create a purchase request of the `EXOTICFR` class, do the following:

1. On the *Requests* (RQ301000) form, add a new record.
2. In the Summary area, specify the following settings:
   a. **Request Class**: *EXOTICFR*
   b. **Requested By**: *GOODFOOD*

      Because a customer request class was selected, the customers defined in the system are available for selection in this box, and you can select the customer that requested the items.

   c. **Description**: `Order for mangoes`
3. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. In the **Inventory** column, select *MANGOES*. Notice that only three stock items are available for selection in the lookup table because only these items are listed on the *Request Classes* (RQ201000) form for the *EXOTICFR* request class.
   c. In the **Order Qty.** box, specify `10`.
   d. In the **Est. Unit Cost** box, specify `4.2`.
4. On the form toolbar, click **Save**.

You have created a purchase request of the *EXOTICFR* class for the *GOODFOOD* customer.

Purchase Requisition Configuration: To Set Up Budget Validation for Employee Requests

In the following implementation activity, you will configure budget validation for purchase requests of an employee request class.

Story

Suppose that the SweetLife Fruits & Jams company needs computers and computer accessories for its employees. The company has a budget limitation of $5000 per month for computers and accessories from which only $1500 have not been spent.

Acting as purchasing manager Matt Parker, you need to create an employee request class and include a limited number of stock items in the class. Also, you need to set up budget validation for the requests of the class. You will then create an employee purchase request of the class and validate it against the budget.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Purchase Requisitions* feature has been enabled.
- On the *Budgets* (GL302010) form, the budget has been created and released.
- On the *Purchase Requisitions Preferences* (RQ101000) form, the required settings, budget ledger, and budget calculation settings have been specified.
- On the *Employees* (EP203000) form, the *Matt Parker* employee has been created and associated with the *parker* user account.

Process Overview

In this activity, you will do the following:

1. On the *Request Classes* (RQ201000) form, create an employee purchase request class.
2. On the *Requests* (RQ301000) form, create an employee purchase request of the class.

Step 1: Creating the Employee Purchase Request Class

To create the employee purchase request class for the requests for computers and accessories, do the following:

1. On the *Request Classes* (RQ201000) form, add a new record.
2. In the Summary area, specify the following settings:
   a. **Request Class**: *INTCOMP*
   b. **Description**: `Employee requests for computers and accessories`
   c. **Promised Lead Time (Days)**: `3`
   d. **Customer Request**: Cleared

      You leave this check box cleared because you are creating an employee request class.
   e. **Allow Multiple Vendors per Request**: Selected
   f. **Restrict Requested Items to the Specified List**: Selected
3. On the **Item List** tab, add rows for items with the following inventory IDs:
   - *LAPTOP15*
   - *MONITOR24*
   - *KEYBOARD*
4. On the form toolbar, click **Save**.

Step 2: Configuring Budget Validation for the Request Class

To configure budget validation for the employee purchase request class, do the following:

1. While you are still viewing the *INTCOMP* purchase request class on the *Request Classes* (RQ201000) form, on the **GL Accounts** tab, specify the following settings:
   a. **Budget Validation**: *Warning*
   b. **Use Expense Account From**: *Request Class*
   c. **Expense Account:** *60000 - Purchase Expense*
2. On the form toolbar, click **Save**.

Step 3: Creating a Purchase Request and Validating It Against the Budget

To create an employee purchase request of the *INTCOMP* class, do the following:

1. On the *Requests* (RQ301000) form, add a new record.
2. In the Summary area, specify the following settings:
   a. **Request Class**: *INTCOMP*

      Notice that when you select this class, the **Requested By** box is filled in with *EP0000056 - Matt Parker*, the employee ID associated with the *parker* user account. Because an employee request class was selected, the company's employees are available for selection in the **Requested By** box, and if the signed-in user is associated with an employee account, the employee ID is selected by default.
   b. **Description**: `Request for a laptop and a monitor`
3. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. Specify the following settings in the added row:
      - **Inventory ID**: *LAPTOP15*.

        Notice that only three stock items are available for selection in the lookup table because only these items are listed on the *Request Classes* (RQ201000) form for the *INTCOMP* request class.
      - **Order Qty.**: `1`.

c. On the table toolbar, click **Add Row**.
d. Specify the following settings in the added row:
   - **Inventory ID**: *MONITOR24*
   - **Order Qty.**: `1`
e. On the form toolbar, click **Save**.

   On the **Budget** tab, notice that a warning has appeared next to the tab's title and in the **Budget Amount** box. This means that the total amount of the request has exceeded the budget in the current month. A user can save a request with this warning, but according to the company's business processes, the request may not be fulfilled.

You have configured budget validation for purchase requests of the class.

Lesson 2: Processing Purchase Requests and Requisitions

This lesson explains how you can create and process purchase requisitions based on customer requests and employee requests for goods and services and prevent cost overruns. In this lesson, you will also learn how you can use budget validation for employee requests and process bids from multiple vendors for a particular requisition.

Purchase Requests and Requisitions: General Information

In Acumatica ERP, you can create purchase requisitions directly on the *Requisitions* (RQ302000) form or first create purchase requests on the *Requests* (RQ301000) form. Each request is associated with the specific customer or employee that wants the item, so requests are described as *customer requests* or *employee requests*.

You can create customer purchase requests, create purchase requisitions based on these requests, and solicit bids from multiple vendors so that you can select the best bid. You can also create employee purchase requests, validate requests against the budget, create purchase requisitions based on these requests, and solicit bids from multiple vendors so that you can select the best bid.

Learning Objectives

In this lesson, you will do the following:

- Become familiar with the general workflow of the purchase requisition functionality based on customer requests and employee requests
- Learn about budget validation
- Learn about the selection and acceptance of vendor bids
- Process a purchase requisition based on customer requests
- Process a purchase requisition based on employee requests
- Process a purchase requisition that is not based on requests

Applicable Scenarios

You process a purchase requisition in the following cases:

- You are reselling hard-to-find products, such as exotic products or products that are not produced in your country.
- You offer products directly from manufacturers.
- You purchase products by using invitations to bid.

Creation of Purchase Requests

A purchase request on the *Requests* (RQ301000) form has the list of stock items to be purchased on the **Details** tab. After you have created the requests, you can create a requisition document based on them.

If you want to purchase stock items from a vendor and then sell to a customer, you create a customer request. In the **Request Class** box, you select a customer request class. For such a request class, the **Customer Request** check box is selected on the *Request Classes* (RQ201000) form. You create a purchase requisition based on any number of customer requests. You can manually select the vendor to purchase items from, or you can request vendor bids and then select the best offers for the items. For details, see *Purchase Requests and Requisitions: To Process Customer Requests*.

If you want to purchase stock items from a vendor for employee needs, you create an employee request. In the **Request Class** box, you select a request class that defines requests as used for employee needs. For such a class, the **Customer Request** check box is cleared on the *Request Classes* form. For details, see *Purchase Requests and Requisitions: To Process Employee Requests*.

If employees of your company order low-cost items, such as office supplies, you can create any number of employee requests and create a purchase requisition based on these requests. You can configure employee requests to require approval or budget verification—or use both of these controls to keep costs in check.

If you already work with a vendor that gives your company the best prices and discounts for these items (that is, if no bidding should occur for the items), you can manually specify the vendor from which you want to purchase items. If you know that all items will be purchased from the same vendor, you can specify that vendor on the **Vendor Info** tab of the *Requests* form. The system will populate the selected vendor for each item in the **Vendor** column (hidden by default) of the **Details** tab.

If a default vendor is selected on the *Stock Items* (IN202500) form for a stock item added to a request, the system populates the **Vendor** and **Alternate ID** (hidden by default) columns on the **Details** tab of the *Requests* form.

Budget Validation

If your organization allocates budgets for internal purchases, you can use budget validation for employee requests to prevent cost overruns of requested goods and services. Before you can use budget validation, you should make sure that the budgets have been created and released in the system on the *Budgets* (GL302010) form.

On the **Budget** tab of the *Requests* (RQ301000) form, you can see if the cost of the stock items included in a request complies with the budget. If the cost exceeds the budget, you can edit the list of items in the request, reject the request, or process it in the next financial period.

Creation of a Purchase Requisition

On the *Requisitions* (RQ302000) form, you add items for purchase and select the vendors from which the items will be purchased. The process of creating a requisition can begin differently depending on whether you have already created purchase requests on the *Requests* (RQ301000) form for the items to be included in the requisition:

- If you have not first entered requests for the items, you use the *Requisitions* form as a starting point. You add the items directly on the **Details** tab by clicking **Add Items** on the table toolbar for each item to be added. For details, see *Purchase Requests and Requisitions: To Process a Requisition Without Requests*.
- If you have already entered the requests to be included in the requisition, you start the creation of the requisition on one of the following forms:
    - *Create Requisitions* (RQ504000): You can use this form as a starting point to create a requisition based on requests that have been created in the system. You can enter any needed selection criteria and view the list of requests that meet this criteria. You can then process—that is, include in the purchase requisition the system will create—all listed requests or only those you select. You can include multiple requests in one requisition if the stock items in these requests will be ordered from the same vendor or set of vendors. After you process requests on this form, you use the *Requisitions* form for all future processing of the created requisition. You can create multiple requisitions by repeating the steps of including the needed requests and clicking **Process** on the form toolbar.
    - *Requisitions*: On the **Details** tab of this form, you can click **Add Requested Items** on the table toolbar to add items in purchase requests. You can include additional stock items in a requisition by clicking **Add Items** on the table toolbar.

You use the *Requisitions* form to fully process a requisition from creation to release. The form also lists the purchase orders and sales orders created for the requisition, with links you can use to quickly open these orders.

On the *Requisitions* form, you can merge lines on the **Details** tab with the same stock item into one line. These lines can be merged if the stock item was requested by the same requester (a customer or an employee), has the same estimated unit cost specified in the **Est. Unit Cost** column, and the same expense account in the **Account** column.

If you create a requisition from requests by using the *Create Requisitions* form, you can select the **Merge Lines** check box in the Selection area of the form to merge the lines of all the requests included in the requisition that contain the same stock item with the same **Line Source**, **Inventory ID**, **UOM**, and **Account** (expense account) settings. The state of the **Merge Lines by Default** check box on the *Purchase Requisitions Preferences* (RQ101000) form also determines the default state of the **Merge Lines** check box on the *Create Requisitions* form.

In an existing requisition, you can merge lines manually on the **Details** tab of the *Requisitions* form by selecting the Included check box for the lines in the list and clicking **Merge Lines** on the table toolbar.

Requesting of Bids

If you will be obtaining bids from vendors and choosing the best offers, you send requests for proposal to vendors once the requisition contains all the needed information. On the form toolbar of the *Requisitions* (RQ302000) form, you click **Send Requests for Proposal**. The system creates a PDF file that contains a request for proposal, generates an email to each vendor listed on the **Bidding** tab of the form, attaches the file to the email, and adds the email to the outgoing mail. If a schedule has been configured in the system, the email will be sent automatically the next time this schedule is executed. Alternatively, you can send a request to a particular vendor. On the **Bidding** tab, you select a vendor in the **Bidding Vendors** table and click **Send Request** on the table toolbar.

Selection and Acceptance of Bids

If you have requested bids from multiple vendors for a requisition, you can process these bids from multiple vendors to select the best offers with the lowest prices. You start the selection process by entering these responses into the system on the *Bidding Responses* (RQ303000) form.

You process the bids for a particular requisition by using the *Complete Bidding* (RQ503000) form, where you select the reference number of the requisition in the Summary area. To run automatic bidding, you click **Update Result** on the form toolbar. The system selects a vendor or multiple vendors for each stock item automatically based on the offered price and any quantity limitations from vendor responses. In the **Bidding Details** table of the **Bidding Results** tab, the price is shown in the **Bid Unit Cost** column and the quantity is shown in the **Bid Qty.** column. You can view the bidding results and manually correct them if you want to change the automatically selected vendors.

If any vendor response has been changed or withdrawn after the system selected vendors for a requisition, you enter new responses on the *Bidding Responses* form by editing the existing responses. Then if you want to again begin vendor selection, you go back to the *Complete Bidding* form, click **Clear Result** on the form toolbar to clear the selected vendors for all lines of the requisition, and click **Update Result** again.

When you analyze the bidding responses, you can select the bids manually. You may want to take into account the lowest price, the number of days needed to deliver the order, the vendor shipping terms, and any special offers from a vendor. You can select a vendor with a better bid by using the *Requisitions* (RQ302000) form as follows: You click the vendor line in the **Bidding Vendors** table on the **Bidding** tab and click **Choose Vendor** on the table toolbar. You can select only one vendor per requisition on the *Requisitions* form.

After you have analyzed and corrected the bidding results, you accept the results by clicking **Complete Bidding** on the form toolbar. You can view the selected vendors as follows:

- If one vendor is selected for a requisition, you can view the vendor's settings on the **Vendor Info** tab of the *Requisitions* form.
- If more than one vendor is selected for a requisition, you can click **View Bidding** on the More menu (which opens the *Complete Bidding* form) and view the selected vendors on the **Bidding Results** tab.

Processing of Purchase Requisitions

To process a purchase requisition, you perform the following general steps:

1. Optional: Create a purchase request or multiple requests on the *Requests* (RQ301000) form. For an employee purchase request, you can use validation against the budget before you add the request to the

purchase requisition. For details, see *Purchase Requisition Configuration: Setup of Budget Validation for Employee Requests*.

2. Create a requisition as follows: You create a requisition that is not based on requests on the *Requisitions* (RQ302000) form. If a requisition is based on requests, you can use the *Create Requisitions* (RQ504000) form as a starting point.
3. Prepare a purchase requisition for the bidding. On the *Requisitions* form, you can edit a requisition that was created by using the *Create Requisitions* form or created from scratch. You can use buttons on the **Details** tab to add stock items for purchase and to add customer or employee requests that have been entered.

   If you will be requesting bids from vendors, you add the vendors to the **Bidding Vendors** table on the **Bidding** tab to specify which vendors will be considered for this requisition. (The next step describes the continuation of requesting and processing bids.) To manually select a vendor for the requisition, you specify it in the unlabeled area of the tab (above the **Bidding Vendors** table) and leave the table blank.
4. Optional: Send requests for proposal (RFPs) to vendors. On the *Requisitions* form, you can send requests for proposal as follows:
   - To a specific vendor listed in the **Bidding Vendors** table by clicking the vendor and then clicking **Send Request** on the table toolbar
   - To all the vendors listed on the **Bidding** tab by clicking **Send Requests for Proposal** on the form toolbar

   When a request for proposal has been sent, the system selects the check box in the **Request Sent** column in the **Bidding Vendors** table of the **Bidding** tab.
5. Enter bids from vendors into the system on the *Bidding Responses* (RQ303000) form.
6. Optional: For a requisition that has stock items that have been requested by customers, you may need to generate a sales quote for the customer and reach agreement on the requisition with the customer. On the *Requisitions* form, you create a sales quote by clicking **Create Quote** on the More menu. This creates an order with the *Quote* behavior of the type specified on the *Purchase Requisitions Preferences* (RQ101000) form. When the quote has been approved by the customer, you can proceed with the sale of the stock items, as described in Step 9.
7. Process bidding responses and select a vendor for the requisition. If you have run automatic bidding, you analyze and correct the automatic bidding results by using the *Complete Bidding* (RQ503000) form. Also, you can use this form to select multiple vendors.

   When you know which vendor you wanted to select for the requisition and do not initiate the bidding process, you manually select the vendor on the **Bidding** tab of the *Requisitions* form.
8. Create purchase orders (and sales orders for customer requests, see the following step). On the *Requisitions* form, you click **Create Orders**, which creates a purchase order or multiple purchase orders for the vendor or vendors on the *Purchase Orders* (PO301000) form.
9. Create sales orders for customer requests. On the *Requisitions* form, you click **Create Orders**, which creates a sales order or multiple sales orders for the customer or customers on the *Sales Orders* (SO301000) form. A sales order has the *Sales Order* automation behavior and the type specified on the *Purchase Requisitions Preferences* form.

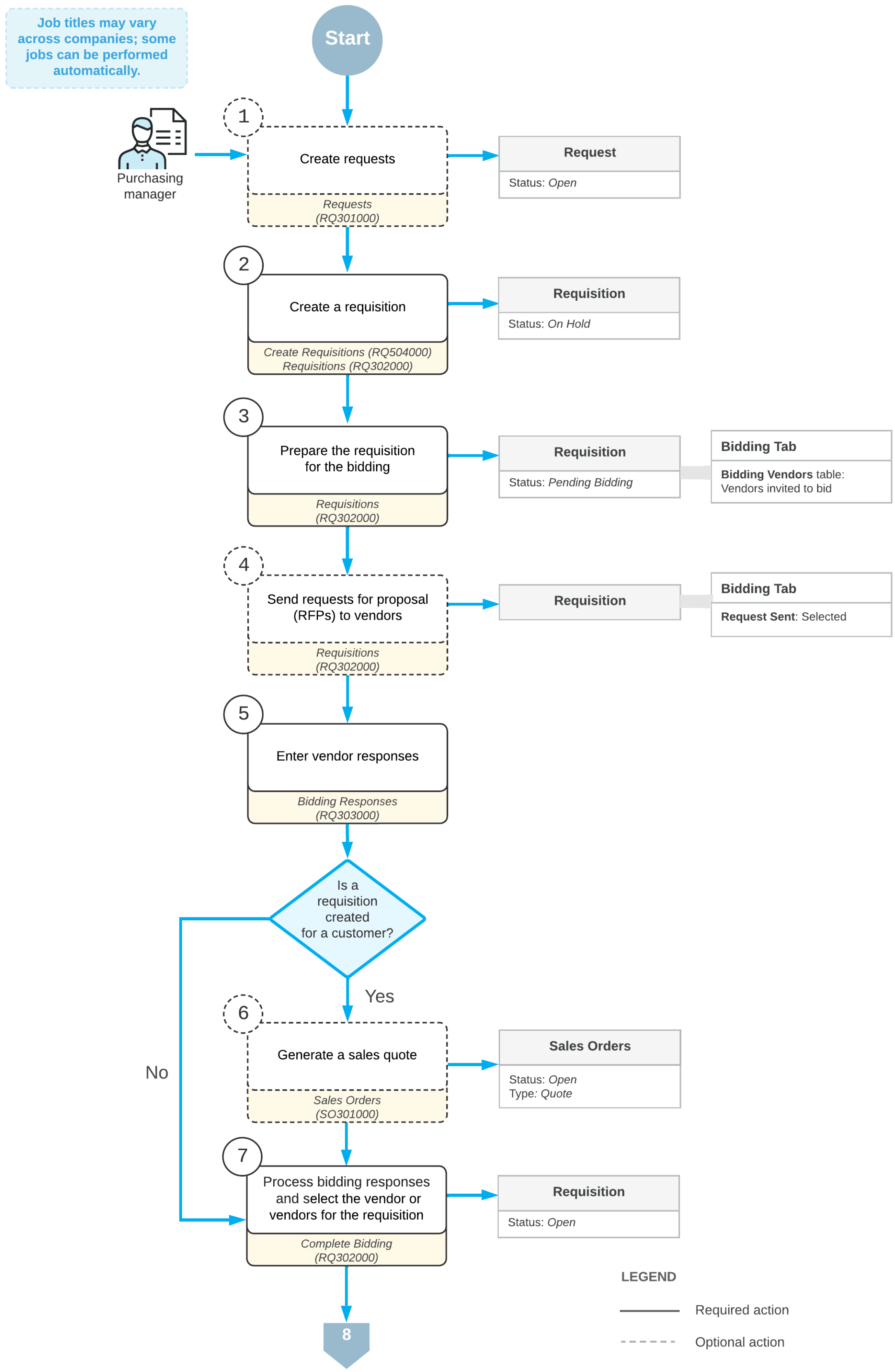
   The lines of the created sales order on the *Sales Orders* form have the **Mark for PO** check box selected and are linked to the corresponding lines of the created purchase orders.
10. Send the purchase order or orders to each vendor. On the *Purchase Orders* form, you click **Email Purchase Order** on the More menu to send the created purchase order to the vendor or vendors selected to fulfill the requisition.
11. Receive the stock items in a warehouse: You create and process the documents related to the stock items being received in a warehouse by using the *Purchase Receipts* (PO302000) and *Receipts* (IN301000) forms.
12. Provide items to the customers. You use the *Sales Orders* form to create the shipment and the *Shipments* (SO302000) form to create and process the documents for shipping stock items to customers.

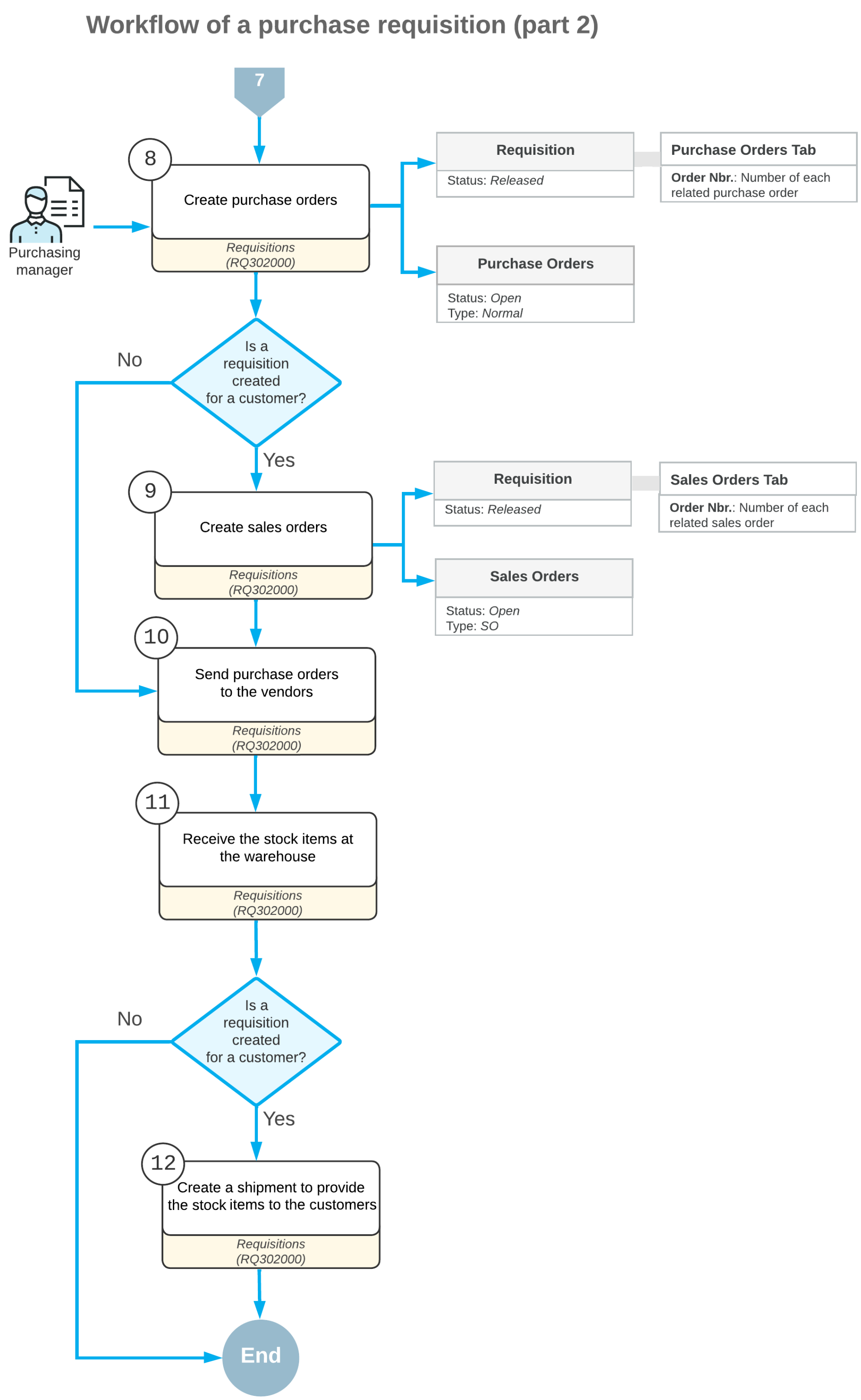
> If you are instead providing the stock items to employees, you create and process inventory transactions for issuing the items to the employees of your organization by using the *Issues* (IN302000) form.

Workflow of a Purchase Requisition

The following diagrams illustrate the workflow of a purchase requisition, which may or may not be based on requests.

Workflow of a purchase requisition (part 1)




Workflow of a purchase requisition (part 2)
7
8
Create purchase orders
Requisitions (RQ302000)
Purchasing manager
Requisition
Status: Released
Purchase Orders Tab
Order Nbr.: Number of each related purchase order
Purchase Orders
Status: Open
Type: Normal
No
Is a requisition created for a customer?
Yes
9
Create sales orders
Requisitions (RQ302000)
Requisition
Status: Released
Sales Orders Tab
Order Nbr.: Number of each related sales order
Sales Orders
Status: Open
Type: SO
10
Send purchase orders to the vendors
Requisitions (RQ302000)
11
Receive the stock items at the warehouse
Requisitions (RQ302000)
No
Is a requisition created for a customer?
Yes
12
Create a shipment to provide the stock items to the customers
Requisitions (RQ302000)
End

Purchase Requests and Requisitions: To Process Customer Requests

The following activity demonstrates how to process a purchase requisition that is based on customer requests.

Story

Suppose that you are Matt Parker, a purchasing manager in the *SweetLife Head Office and Wholesale Center* branch, and you are responsible for processing requests from customers who order fruit in your company. The company works with two fruit vendors: All Fruits Mall and Good Fruits. SweetLife's sales managers have received the following requests for fruit from the FourStar Coffee & Sweets Shop and HM's Bakery & Cafe customers:

- 30 pounds of tangerines and 43 pounds of lemons for a cocktail party from FourStar Coffee & Sweets Shop
- 200 pounds of oranges and 80 pounds of apples for a big birthday party from HM's Bakery & Cafe

You need to enter these requests into the system, create a purchase requisition, and request bids from the vendors. You will select the best vendors to fulfill the requests. The selected vendors will ship fruits to your company's warehouse. You will then process the needed documents to receive the fruits and ship them to the customers.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory*
  - *Purchase Requisitions*
- On the *Warehouses* (IN204000) form, the *WHOLESALE* warehouse has been created.
- On the *Request Classes* (RQ201000) form, the *CUSTOMER* request class has been created with the following settings:
  - **Customer Request**: Selected, which indicates that this class is used for requests received from customers
  - **Allow Multiple Vendors per Request**: Selected, which indicates that purchase orders can be split by multiple vendors
- On the *Stock Items* (IN202500) form, the following stock items have been created: *APPLES*, *LEMONS*, *ORANGES*, and *TANGERINES*.
- On the *Customers* (AR303000) form, the following customers have been created:
  - *HMBAKERY* (HM's Bakery & Cafe)
  - *COFFEESHOP* (FourStar Coffee & Sweets Shop)
- On the *Vendors* (AP303000) form, the following vendors have been created: *ALLFRUITS* and *GOODFRUITS*.
- On the *Purchase Requisitions Preferences* (RQ101000) form, the **Create Purchase Order on Hold** check box is cleared, which means that purchase orders are created in the *Open* status.

Process Overview

In this activity, you will do the following:

1. On the *Requests* (RQ301000) form, enter the customer requests into the system.
2. On the *Create Requisitions* (RQ504000) form, initiate the creation of a purchase requisition based on the customer requests. Then on the *Requisitions* (RQ302000) form, send the requisition to the vendors that may participate in bidding.
3. On the *Bidding Responses* (RQ303000) form, enter bids from vendors into the system.

4. On the *Complete Bidding* (RQ503000) form, initiate automatic bidding among the vendors and manually select a vendor.
5. On the *Requisitions* form, initiate the creation of the purchase orders for the selected vendors.
6. On the *Purchase Orders* (PO301000) and *Purchase Receipts* (PO302000) forms, prepare and process the purchase receipts for the ordered stock items.
7. On the *Sales Orders* (SO301000) form, prepare the sales order and the related shipment of the stock items to the customer.

System Preparation

Before you start performing the steps of this activity, do the following:

1. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.
2. On the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, make sure the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Creating the Customer Requests in the System

To create the customer requests from the *COFFEESHOP* and *HMBAKERY* customers, do the following:

1. On the *Requests* (RQ301000) form, add a new record.
2. In the Summary area, do the following:
   a. In the **Request Class** box, make sure that *CUSTOMER* is selected.
   b. In the **Requested By** box, select *COFFEESHOP*.
   c. In the **Description** box, type `Order for tangerines and lemons`.
3. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. In the row, specify the following settings:
      - **Inventory**: *TANGERINES*
      - **Order Qty.**: `30`
   c. On the table toolbar, click **Add Row**.
   d. In the row, specify the following settings:
      - **Inventory**: *LEMONS*
      - **Order Qty.**: `43`
4. On the form toolbar, click **Remove Hold**. The system saves the request and assigns the request the *Open* status.
5. While you are still on the *Requests* form, add another new record.
6. In the Summary area, do the following:
   a. In the **Request Class** box, make sure that *CUSTOMER* is selected.
   b. In the **Requested By** box, select *HMBAKERY*.
   c. In the **Description** box, type `Order for oranges and apples`.
7. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.

b. In the row, specify the following settings:
    - **Inventory**: *ORANGES*
    - **Order Qty.**: 200
c. On the table toolbar, click **Add Row**.
d. In the row, specify the following settings:
    - **Inventory**: *APPLES*
    - **Order Qty.**: 80

8. On the form toolbar, click **Remove Hold**. The system saves the request and assigns it the *Open* status.

Step 2: Creating a Purchase Requisition

To create a combined requisition for the customers' requests that you have created in the previous step, do the following:

1. On the *Create Requisitions* (RQ504000) form, make sure that all four request lines are displayed in the table.
2. On the form toolbar, click **Process All**.
3. In the **Confirmation** dialog box, which opens, click **Yes**. On the *Requisitions* (RQ302000) form, the system opens the requisition that it has created based on the requests.
4. On the **Bidding** tab, in the **Bidding Vendors** table, make sure that *ALLFRUITS* is specified.
5. Add the *GOODFRUITS* vendor as follows:
    a. On the table toolbar, click **Add Row**.
    b. In the **Vendor** column, select *GOODFRUITS*.

    The *ALLFRUITS* and *GOODFRUITS* vendors will be invited to take part in bidding.
6. On the form toolbar, click **Remove Hold**. The system saves the requisition and assigns it the *Pending Bidding* status.

Suppose that you have sent the requisition to these vendors by email. In a system where email functionality has been configured, you would click **Send Requests for Proposal** on the table toolbar of the *Requisitions* form to send all the requests to the vendors or send each request by clicking the vendor on the **Bidding** tab and clicking **Send Request** on the table toolbar.

Step 3: Entering the Vendor Responses into the System

Suppose that you have received bids from both vendors. The *ALLFRUITS* vendor can deliver only 150 pounds of oranges, and a minimum of 50 pounds must be purchased from this vendor. This vendor does not have tangerines in stock but can provide the requested quantity of lemons and apples. Also, this vendor provides you a discount if you purchase more than two items in one order.

The *GOODFRUITS* vendor can deliver the requested quantity of oranges but at a higher price than the one offered by *ALLFRUITS*. The *GOODFRUITS* vendor has tangerines in stock and can deliver the requested quantity of lemons and apples.

To add the responses from the vendors to the system, do the following:

1. Open the *Bidding Responses* (RQ303000) form.
2. In the Summary area, do the following:
    a. In the **Requisition** box, select the identifier of the only requisition with the *Pending Bidding* status.
    b. In the **Vendor** box, select *ALLFRUITS*.
3. On the **Bidding Details** tab, specify the listed settings in the following table rows:
    - The row with *TANGERINES* in the **Inventory ID** column:

    - **Min. Qty.**: `0.00`

      This is the minimum quantity of the item that the vendor can supply.
    - **Bid Qty.**: `0.00`

      This is the total quantity of items that the vendor can supply, according to the bidding response.
    - **Bid Unit Cost**: `0.00`

      This is the total cost of items that the vendor can supply, according to the bidding response.
  - The row with *LEMONS* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `43.00`
    - **Bid Unit Cost**: `2.60`
  - The row with *ORANGES* in the **Inventory ID** column:
    - **Min. Qty.**: `50.00`
    - **Bid Qty.**: `150.00`
    - **Bid Unit Cost**: `2.00`
  - The row with *APPLES* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `80.00`
    - **Bid Unit Cost**: `2.20`
4. On the form toolbar, click **Save**.
5. In the **Vendor** box of the Summary area, select *GOODFRUITS*.
6. On the **Bidding Details** tab, specify the listed settings in the following table rows:
  - The row with *TANGERINES* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `30.00`
    - **Bid Unit Cost**: `1.60`
  - The row with *LEMONS* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `43.00`
    - **Bid Unit Cost**: `2.55`
  - The row with *ORANGES* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `200.00`
    - **Bid Unit Cost**: `2.20`
  - The row with *APPLES* in the **Inventory ID** column:
    - **Min. Qty.**: `0.00`
    - **Bid Qty.**: `80.00`
    - **Bid Unit Cost**: `2.30`
7. On the form toolbar, click **Save**.

Step 4: Selecting the Best Bids from Vendors

To perform automatic bidding and then correct the bidding results manually, do the following:

1. On the *Complete Bidding* (RQ503000) form, in the **Ref. Nbr.** box, select the reference number of the only requisition with the *Pending Bidding* status.

2. On the form toolbar, click **Update Result**. The system selects vendors automatically and updates the information on the **Bidding Results** tab.

   Notice that in the Selection area, the **Splittable** check box is selected because the **Allow Multiple Vendors per Request** check box has been selected on the *Request Classes* (RQ201000) form for the class of the request based on which the requisition has been created. This setting means that the system can split the order between multiple vendors.

3. On the form toolbar, click **Save**.
4. On the **Bidding Results** tab, analyze the results of the automatic bidding as follows:
   a. In the **Requisition Details** table, click the *TANGERINES* row.

      In the **Bidding Details** table, the *GOODFRUITS* vendor is selected because only this vendor can supply tangerines.

   b. In the **Requisition Details** table, click the *ORANGES* row.

      In the **Bidding Details** table, in the unlabeled column, the check boxes for both vendors are selected. This means that the quantity of the oranges is split between these two vendors. The *ALLFRUITS* vendor offered the best price for the oranges, but the vendor can provide only 150 pounds of oranges, whereas the needed quantity is 200 pounds. Thus, you will order another 50 pounds of oranges from the *GOODFRUIT* vendor at a higher cost.

   c. In the **Requisition Details** table, click the *APPLES* row.

      In the **Bidding Details** table, in the unlabeled column, the check box for the row with the *ALLFRUITS* vendor is selected because this vendor offered a lower price and can provide the required amount of apples.

   d. In the **Requisition Details** table, click the *LEMONS* row.

      In the **Bidding Details** table, in the unlabeled column, the row with the *GOODFRUITS* vendor is selected because this vendor offered a lower price. However, the *ALLFRUITS* vendor provides you a discount if you purchase more than two items in one order.

5. In the **Bidding Details** table, select the *ALLFRUITS* vendor for the *LEMONS* stock item as follows:
   a. Clear the unlabeled check box for the *GOODFRUITS* vendor.
   b. On the form toolbar, click **Save**.
   c. Select the unlabeled check box for the *ALLFRUITS* vendor.
   d. On the form toolbar, click **Save**.
6. On the form toolbar, click **Complete Bidding**. The status of the requisition is changed to *Open*.

Now that you have selected the vendors, you can create the needed purchase orders to be sent to the vendors.

Step 5: Creating the Purchase Orders

To create the purchase orders for the vendors, do the following:

1. On the *Requisitions* (RQ302000) form, open the requisition with the *Open* status that you have earlier created in this activity.
2. On the More menu, click **Create Orders**. The system creates purchase orders for the *ALLFRUITS* and *GOODFRUITS* vendors. Because the requisition is based on customer requests of these items, the system also creates sales orders for the *HMBAKERY* and *COFFESHOP* customers. Also, the requisition is assigned the *Released* status.
3. On the **Purchase Orders** tab, make sure that purchase orders with the *Open* status are listed for the *ALLFRUITS* and *GOODFRUITS* vendors, as shown in the following screenshot.

> If your system has a different set of purchase and sales documents than those in the initial *U100* dataset, you may see different values in the screenshots.

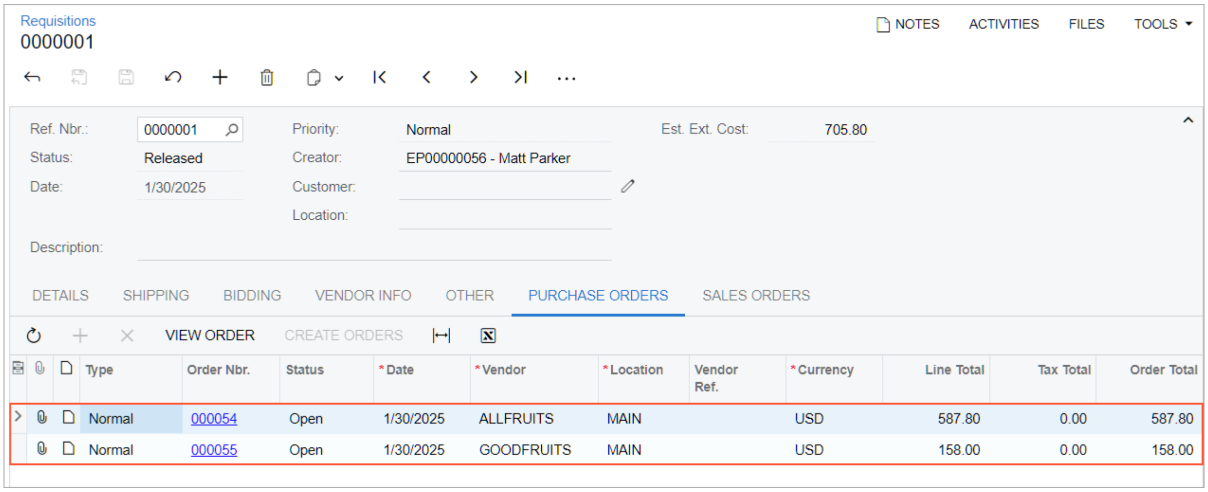


Figure: The purchase orders for the vendors

4. On the **Sales Orders** tab, make sure that sales orders with the *Open* status are listed for the *COFFEESHOP* and *HMBAKERY* customers, as shown in the following screenshot.

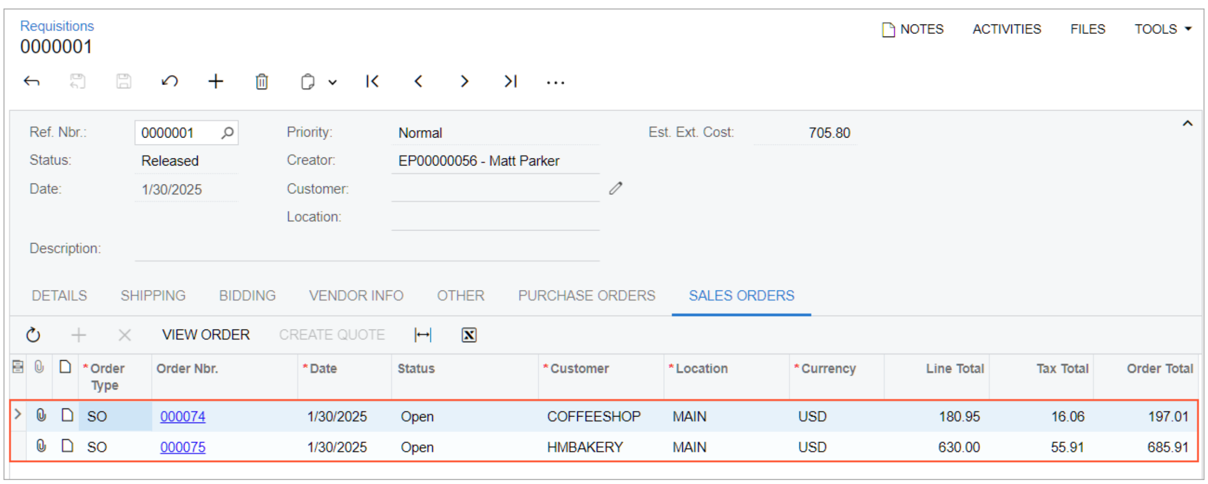


Figure: The sales orders for the customers

You have created purchase orders for both vendors. Suppose that you have emailed the purchase orders to the vendors.

Step 6: Receiving the Items from the Vendors

Suppose that the vendors have delivered the ordered fruits to the *WHOLESALE* warehouse. To create the documents that reflect the receipt of the items in the warehouse, do the following:

1. On the *Purchase Orders* (PO301000) form, open the purchase order for the *ALLFRUITS* vendor that you have prepared earlier. (The purchase order contains the *ORANGES*, *APPLES*, and *LEMONS* stock items.)
2. On the form toolbar, click **Enter PO Receipt**. The system opens the *Purchase Receipts* (PO302000) form with the new receipt. Notice that the receipt has the *Balanced* status and the data copied from the linked purchase order.

3. On the form toolbar, click **Release**. The system releases the purchase receipt; it also creates the corresponding inventory receipt and releases it. On the **Other** tab, in the **IN Ref. Nbr.** box, you can view the reference number of the inventory receipt. (The reference number is also a link that you can click to view the inventory receipt on the *Receipts* (IN301000) form.) On the **Orders** tab, notice that the listed purchase order now has the *Completed* status.
4. On the *Inventory Allocation Details* (IN402000) form, do the following:
    a. In the **Inventory ID** box of the Selection area, select *ORANGES*.
    b. In the **Warehouse** box, select *WHOLESALE*.
    c. On the **Qty by Plan Type** tab, on the toolbar of the **Deduction** table, select *All Records* in the filter box.
    d. Make sure that the quantity in the **SO Allocated** row is *150* (the quantity on unconfirmed shipments) and the quantity in the **SO to Purchase** row is *50* (the quantity included in open purchase orders created for sales orders, this quantity will come from the other vendor).
    e. In the **Inventory ID** box, select *APPLES*.
    f. In the **Deduction** table, make sure that the quantity in the **SO Allocated** row is *80*.
    g. In the **Inventory ID** box, select *LEMONS*.
    h. Make sure that the quantity in the **SO Allocated** row is *43*.
5. On the *Purchase Orders* form, open the purchase order for the *GOODFRUITS* vendor that you have prepared earlier. The purchase order has the *Open* status and contains the *ORANGES* and *TANGERINES* stock items.
6. On the form toolbar, click **Enter PO Receipt**. The system opens the *Purchase Receipts* form with the new receipt, which has the *Balanced* status and the data copied from the linked purchase order.
7. On the form toolbar, click **Release**. The system releases the purchase receipt; it also creates the corresponding inventory receipt and releases it. On the **Other** tab, in the **IN Ref. Nbr.** box, you can view the reference number of the inventory receipt. (The reference number is also a link that you can click to view the inventory receipt on the *Receipts* form). On the **Orders** tab, notice that the listed purchase order now has the *Completed* status.
8. On the *Inventory Allocation Details* form, do the following:
    a. In the **Inventory ID** box of the Selection area, select *ORANGES*.
    b. In the **Warehouse** box, select *WHOLESALE*.
    c. In the **Deduction** table of the **Qty by Plan Type** tab, make sure that the quantity in the **SO Allocated** row is *200* (which is now the full amount to fulfill the customer's order).
    d. In the **Inventory ID** box, select *TANGERINES*.
    e. In the **Deduction** table, make sure that the quantity in the **SO Allocated** row is *30*.

All fruits are allocated for sales orders, which means that these fruits are not available for other orders. Now you can prepare and process the documents for shipping the fruits to the customers, which you will do in the next step.

Step 7: Shipping the Fruits to the Customers

In this step, you will perform the needed actions to ship the fruits to the customers. You will process the sales orders, create and confirm shipments for them, create and release the related invoices, and generate the needed inventory transactions. Do the following:

1. On the *Sales Orders* (SO301000) form, open the sales order with the *Open* status for the *HMBAKERY* customer that the system prepared earlier in this activity. (The sales order contains the *ORANGES* and *APPLES* stock items.)
2. On the form toolbar, click **Quick Process**.
3. In the **Process Order** dialog box, which opens, do the following:
    a. In the **Warehouse ID** box, make sure that *WHOLESALE* is selected.

   b. In the **Shipment Date** section, make sure that *Custom* is selected and the date is *1/30/2025*.
   c. In the **Shipping** section, make sure that the following check boxes are selected:
      - **Create Shipment**
      - **Confirm Shipment**
      - **Update IN**

        With this check box selected, the system will generate the inventory transactions for confirmed shipments.
   d. In the **Invoicing** section, make sure that the **Prepare Invoice** check box is selected.
   e. Select the **Release Invoice** check box.
   f. Click **OK**. The system completes the sales order and creates and processes the documents related to the sales order. You can see the links to these documents in the **Processing Results** dialog box.
   g. Click **OK** to close the dialog box. Notice that the sales order now has the *Completed* status.
4. On the *Inventory Allocation Details* (IN402000) form, do the following:
   a. In the **Inventory ID** box of the Selection area, select *APPLES*.
   b. In the **Warehouse** box, select *WHOLESALE*.
   c. On the **Qty by Plan Type** tab, on the toolbar of the **Deduction** table, select *All Records* in the filter box.
   d. Make sure that the quantity in the **SO Allocated** row is *0*.
   e. In the **Inventory ID** box, select *ORANGES*.
   f. Make sure that the quantity in the **SO Allocated** row is *0*.
5. On the *Sales Orders* form, open the sales order with the *Open* status for the *COFFESHOP* customer that the system created earlier in this activity. (The sales order contains the *TANGERINES* and *LEMONS* stock items.)
6. On the form toolbar, click **Quick Process**.
7. In the **Process Order** dialog box, which opens, do the following:
   a. In the **Warehouse ID** box, make sure that *WHOLESALE* is selected.
   b. In the **Shipment Date** section, make sure that *Custom* is selected and the date is *1/30/2025*.
   c. In the **Shipping** section, make sure that the following check boxes are selected:
      - **Create Shipment**
      - **Confirm Shipment**
      - **Update IN**
   d. In the **Invoicing** section, make sure that the **Prepare Invoice** check box is selected.
   e. Select the **Release Invoice** check box.
   f. Click **OK**. The system completes the sales order and creates and processes the documents related to the sales order. You can see the links to the documents in the **Processing Results** dialog box.
   g. Click **OK** to close the dialog box. Notice that the sales order now has the *Completed* status.
8. On the *Inventory Allocation Details* form, do the following:
   a. In the **Inventory ID** box of the Selection area, select *TANGERINES*.
   b. In the **Warehouse** box, select *WHOLESALE*.
   c. On the **Qty by Plan Type** tab, on the toolbar of the **Deduction** table, select *All Records* in the filter box.
   d. Make sure that the quantity in the **SO Allocated** row is *0*.
   e. In the **Inventory ID** box, select *LEMONS*.
   f. Make sure that the quantity in the **SO Allocated** row is *0*.

You have performed the needed processing for shipping the ordered fruits to the customers.

Purchase Requests and Requisitions: To Process Employee Requests

The following activity demonstrates how to process a purchase requisition initiated by employee requests within the company. These requests do not require approval.

Story

Suppose that you are an office manager in the SweetLife Fruits & Jams company who orders office supplies for all departments of the company. These supplies are ordered from a single preferred vendor, the Spectra Stationery Office vendor, and bidding is not involved in the requisition process. The company orders these items based on requests that employees enter into the system. Employees can select only items from a predefined list. Office supplies do not require approval from department leads due to their relatively low value.

You need to add the requests that employees have submitted over the past week into one purchase requisition and send the related purchase order to the vendor. You will then process the receipt and issuing of these items.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory and Order Management*
  - *Inventory*
  - *Purchase Requisitions*
- On the *Warehouses* (IN204000) form, the *WHOLESALE* warehouse has been created.
- On the *Stock Items* (IN202500) form, the following stock items have been created: *PEN*, *PENCIL*, and *PAPER*.
- On the *Request Classes* (RQ201000) form, the *INTSUPPLY* request class has been created as follows:
  - The **Restrict Requested Items to the Specified List** check box has been selected, and the *PEN*, *PENCIL*, and *PAPER* items have been added to the **Item List** tab. Restricting the list of items in a request class reduces the probability of mistakes made during the data entry of requests of the class.
  - The **Allow Multiple Vendors per Request** check box has been cleared. Per the company's business practices, all of the items in requests of the class are purchased from one vendor.
- On the *Vendors* (AP303000) form, the *STATOFFICE* vendor has been created.

Process Overview

In this activity, you will do the following:

1. On the *Requests* (RQ301000) form, enter all employee requests into the system.
2. On the *Create Requisitions* (RQ504000) form, initiate the creation of a purchase requisition based on the employees' requests.
3. On the *Requisitions* (RQ302000) form, initiate the creation of a purchase order and send it to the selected vendor.
4. On the *Purchase Orders* (PO301000) and *Purchase Receipts* (PO302000) forms, prepare and process the purchase receipt for the ordered stock items.
5. On the *Issues* (IN302000) form, create the inventory issue to reflect the items being issued to the employees who requested the items.

System Preparation

Before you start processing a purchase requisition based on requests from employees, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in as office manager Joshua Mueller with the *mueller* username and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, make sure the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Creating the Employee Requests

Suppose that you have received requests for pens, paper, and pencils from the Sales department and the Operations department of the company. To enter these requests, do the following:

1. On the *Requests* (RQ301000) form, add a new record.
2. In the Summary area, do the following:
   a. In the **Request Class** box, select *INTSUPPLY*.
   b. In the **Requested By** box, notice that the employee ID and name that corresponds to your user account is automatically inserted.
   c. In the **Description** box, type `The Sales department's order for office supplies`.
3. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. In the row, specify the following settings:
      - **Inventory**: *PEN*
      - **Order Qty.**: `15`
   c. On the table toolbar, click **Add Row**.
   d. In the row, specify the following settings:
      - **Inventory**: *PAPER*
      - **Order Qty.**: `12`
   e. On the table toolbar, click **Add Row**.
   f. In the row, specify the following settings:
      - **Inventory**: *PENCIL*
      - **Order Qty.**: `10`
4. On the form toolbar, click **Remove Hold**. The system saves the request and changes the status of the request to *Open*.
5. While you are still on the *Requests* (RQ301000) form, add another new record.
6. In the Summary area, do the following:
   a. In the **Request Class** box of the Summary area, select *INTSUPPLY*.
   b. In the **Description** box, type `The Operations department's order for office supplies`.
7. On the **Details** tab, do the following:

a. On the table toolbar, click **Add Row**.
b. In the row, specify the following settings:
   - **Inventory**: *PEN*
   - **Order Qty.**: `25`
c. On the table toolbar, click **Add Row**.
d. In the row, specify the following settings:
   - **Inventory**: *PAPER*
   - **Order Qty.**: `15`
e. On the table toolbar, click **Add Row**.
f. In the row, specify the following settings:
   - **Inventory**: *PENCIL*
   - **Order Qty.**: `5`

8. On the form toolbar, click **Remove Hold**. The system saves the request and changes the status of the request to *Open*.

Step 2: Creating a Purchase Requisition

To create a requisition for the requests that you entered in the previous step, do the following:

1. On the *Create Requisitions* (RQ504000) form, make sure that all six lines with the requested items are listed.
2. In the **Vendor** box of the Summary area, select *STATOFFICE*. In this case, you will not request and process bids because you know that this vendor gives your company the best prices.
3. On the form toolbar, click **Process All**. On the *Requisitions* (RQ302000) form, the system opens the requisition that it has created based on the requests.
4. On the **Details** tab, do the following:
   a. For the two rows with the *PEN* inventory ID, select the check boxes in the unlabeled column.
   b. On the table toolbar, click **Merge Lines** to reduce the number of lines in the purchase documents.
   c. For the two rows with the *PAPER* inventory ID, select the check boxes in the unlabeled column.
   d. On the table toolbar, click **Merge Lines**.
   e. For the two rows with the *PENCIL* inventory ID, select the check boxes in the unlabeled column.
   f. On the table toolbar, click **Merge Lines**.

   Now the requisition contains three lines.
5. On the form toolbar, click **Remove Hold**. The system saves the requisition and changes its status to *Open*.

Step 3: Creating the Purchase Order

To create the purchase order for the *STATOFFICE* vendor, do the following:

1. While you are still viewing the open requisition that you have created on the *Requisitions* (RQ302000) form, click **Create Orders** on the More menu. The system creates a purchase order for the requisition and assigns the requisition the *Released* status.
2. On the **Purchase Orders** tab, notice that the system has listed a purchase order with the *Open* status for the *STATOFFICE* vendor, as shown in the following screenshot.

   If your system has a different set of purchase and sales documents than those in the initial *U100* dataset, you may see different values in the screenshots.

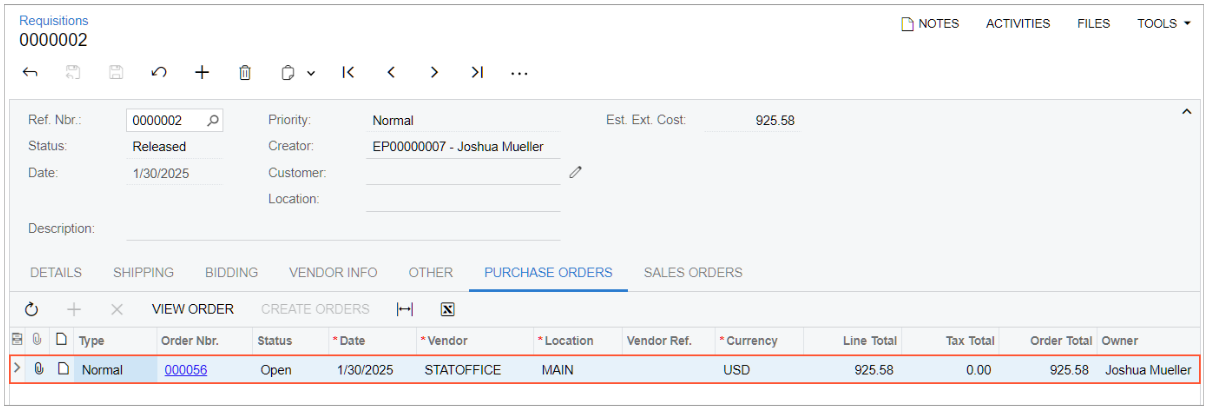


Figure: The purchase order for the vendor

You have created the purchase order for the vendor. Suppose that you have sent the purchase order to the vendor.

Step 4: Receiving the Items from the Vendor

Suppose that the Spectra Stationery Office vendor has delivered the ordered items to the *WHOLESALE* warehouse. To create the documents that reflect the receipt of the items in the warehouse, do the following:

1. While you are still viewing the **Purchase Orders** tab of the *Requisitions* (RQ302000) form for the requisition, click the link in the **Order Nbr.** column. The system opens the purchase order on the *Purchase Orders* (PO301000) form.
2. On the form toolbar, click **Enter PO Receipt**. The system opens the *Purchase Receipts* (PO302000) form with the new receipt. The receipt has the *Balanced* status and the data copied from the linked purchase order.
3. On the form toolbar, click **Release**. The system releases the purchase receipt; it also creates the corresponding inventory receipt and releases it. On the **Other** tab, you can view the reference number of the created inventory receipt. The reference number is also a link you can click to view the inventory receipt on the *Receipts* (IN301000) form.
4. On the *Inventory Allocation Details* (IN402000) form, do the following in the Selection area:
   a. In the **Inventory ID** box, select *PEN*.
   b. In the **Warehouse** box, select *WHOLESALE*.
   c. Make sure that the quantity in the **Available for Issue** box is *50*.
   d. In the **Inventory ID** box, select *PENCIL*.
   e. Make sure that the quantity in the **Available for Issue** box is *22*.
   f. In the **Inventory ID** box, select *PAPER*.
   g. Make sure that the quantity in the **Available for Issue** box is *62*.

You have received the office supplies in the warehouse, and now you can issue the items to the departments that ordered them.

Step 5: Issuing Inventory Items from a Warehouse

Suppose that you have provided the office supplies that you ordered to the applicable departments. To create and process the needed documents for issuing the items from the *WHOLESALE* warehouse, do the following:

1. On the *Issues* (IN302000) form, add a new record.
2. In the **Description** box of the Summary area, type `Issue of office supplies to the Sales and Operations departments`.

3. On the **Details** tab, click **Add Items** on the table toolbar.
4. In the Summary area of the **Inventory Lookup** dialog box, which opens, select *WHOLESALE* in the **Warehouse** box.
5. Make sure that the **Show Available Items Only** check box is selected.
6. To select the required items, do the following:
   a. In the **Inventory** box, type `pen` to filter the list of items.
   b. In the unlabeled column, select the check box for the row with the *PEN* item.
   c. In the **Qty. Selected** column of the same row, type `40`.
   d. In the unlabeled column, select the check box for the row with the *PENCIL* item.
   e. In the **Qty. Selected** column of the same row, type `15`.
   f. In the **Inventory** box, type `paper`.
   g. In the unlabeled column, select the check box for the row with the *PAPER* item.
   h. In the **Qty. Selected** column of the same row, type `27`.
7. Click **Add & Close** to add the selected items to the issue and close the dialog box.
8. On the form toolbar, click **Release**. The system changes the status of the issue to *Released*.
9. Open the *Inventory Allocation Details* (IN402000) form.
10. In the Selection area, do the following:
    a. In the **Inventory ID** box, select *PEN*.
    b. In the **Warehouse** box, select *WHOLESALE*.
    c. Make sure that the value of the **Available for Issue** box is *10*.
    d. In the **Inventory ID** box, select *PENCIL*.
    e. Make sure that the value of the **Available for Issue** box is *7*.
    f. In the **Inventory ID** box, select *PAPER*.
    g. Make sure that the value of the **Available for Issue** box is *35*.

You have issued the items from the *WHOLESALE* warehouse to the company's departments.

Purchase Requests and Requisitions: To Process a Requisition Without Requests

The following activity demonstrates how to process a purchase requisition that is not based on purchase requests.

Story

Suppose that you are Joshua Mueller, an office manager in the SweetLife Fruits & Jams company who orders office supplies and furniture. You need to order new computer chairs for your company's employees: 15 high-back computer chairs, and 20 high-back mesh computer chairs. You need to send the related requests for proposals to the Compulink and Co and Space Computers Ltd. vendors. When you have the vendor bids, you need to select the vendor or vendors the company will buy from. You also need to purchase the new computer chairs and process them through their issuing.

Process Overview

In this activity, you will do the following:

1. On the *Requisitions* (RQ302000) form, create a purchase requisition and send it to the vendors that will participate in bidding.
2. On the *Bidding Responses* (RQ303000) form, enter bids from vendors into the system.
3. On the *Complete Bidding* (RQ503000) form, initiate automatic bidding among the vendors and review the bidding results.
4. On the *Requisitions* form, initiate the creation of the purchase orders for the selected vendor.
5. On the *Purchase Orders* (PO301000) and the *Purchase Receipts* (PO302000) form, prepare and process the purchase receipt for the ordered stock items.
6. On the *Issues* (IN302000) form, create the inventory issue to reflect the items being issued to the employees who requested the items.

System Preparation

Before you start processing a purchase requisition without requests, do the following:

1. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.
2. On the Company and Branch Selection menu, in the top pane of the Acumatica ERP screen, make sure the *SweetLife Head Office and Wholesale Center* branch is selected.

Step 1: Creating a Purchase Requisition

To create a requisition, do the following:

1. On the *Requisitions* (RQ302000) form, add a new record.
2. In the **Description** box of the Summary area, type `Purchase of computer chairs for employees`.
3. On the **Details** tab, do the following:
   a. On the table toolbar, click **Add Row**.
   b. Specify the following settings for this row:
      a. **Inventory ID**: *COMPCHAIR*
      b. **Order Qty.**: `15`
      c. **Est. Unit Cost**: `139`
   c. On the table toolbar, click **Add Row**.
   d. Specify the following settings for this row:
      a. **Inventory ID**: *COMPCHAIRM*
      b. **Order Qty.**: `20`
      c. **Est. Unit Cost**: `99`
4. On the form toolbar, click **Save**.
5. On the **Bidding** tab, add the bidding vendors as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Vendor** column, select *SPACECOMP*
   c. On the table toolbar, click **Add Row**.
   d. In the **Vendor** column, select *COMPULINK*

6. On the form toolbar, click **Remove Hold**. The system saves the requisition and assigns the requisition the *Pending Bidding* status.
7. On the table toolbar, click **Send Requests for Proposal**. The system creates a PDF file that contains a request for proposal for each vendor, generates an email to each vendor, attaches the files to the emails, and adds the emails to the outgoing mail. If a schedule has been configured in the system, the emails will be sent automatically the next time this schedule is executed.

   > You could refresh the webpage and click **Activities** on the title bar of the *Requisitions* form. The system opens the **Tasks & Activities** dialog box, from which you can open the emails to the vendors.

You have created a purchase requisition and sent the requests for proposal to the vendors.

Step 2: Entering the Vendor Responses into the System

Suppose that you have received bids from both vendors. The *COMPULINK* vendor can provide the 15 computer chairs that you need, but at a higher price than that of the *SPACECOMP* vendor, and 10 mesh computer chairs (you need 20) at a lower price than that of *SPACECOMP*. The *SPACECOMP* vendor can provide the requested quantities of both kinds of chairs (15 computer chairs and 20 mesh computer chairs), but its price for mesh computer chairs is higher than that of *COMPULINK*.

To add the responses from the vendors to the system, do the following:

1. Open the *Bidding Responses* (RQ303000) form.
2. In the Summary area, do the following:
   a. In the **Requisition** box, select the identifier of the only requisition with the *Pending Bidding* status.
   b. In the **Vendor** box, select *COMPULINK*.
3. On the **Bidding Details** tab, specify the listed settings in the following table rows:
   - The row with *COMPCHAIR* in the **Inventory ID** column:
     - **Min. Qty.**: `0.00`
       This is the minimum quantity of the item that the vendor can supply.
     - **Bid Qty.**: `15.00`
       This is the total quantity of items that the vendor can supply, according to the bidding response.
     - **Bid Unit Cost**: `149.00`
       This is the unit cost of the item from this vendor, according to the bidding response.
   - The row with *COMPCHAIRM* in the **Inventory ID** column:
     - **Min. Qty.**: `0.00`
     - **Bid Qty.**: `10.00`
     - **Bid Unit Cost**: `99.00`
4. On the form toolbar, click **Save**.
5. In the **Vendor** box of the Summary area, select *SPACECOMP*.
6. On the **Bidding Details** tab, specify the listed settings in the following table rows:
   - The row with *COMPCHAIR* in the **Inventory ID** column:
     - **Min. Qty.**: `0.00`
     - **Bid Qty.**: `15.00`
     - **Bid Unit Cost**: `139.00`
   - The row with *COMPCHAIRM* in the **Inventory ID** column:
     - **Min. Qty.**: `0.00`

- **Bid Qty.**: `20.00`
- **Bid Unit Cost**: `119.00`

7. On the form toolbar, click **Save**.

Step 3: Selecting the Best Bids from Vendors

To perform automatic bidding and review the bidding results, do the following:

1. On the *Complete Bidding* (RQ503000) form, in the **Ref. Nbr.** box, select the reference number of the only requisition with the *Pending Bidding* status.
2. On the form toolbar, click **Update Result**. The system selects vendors automatically and updates the information on the **Bidding Results** tab.

   Notice that in the Selection area, the **Splittable** check box is selected, which means that the system can split the order between multiple vendors.
3. On the form toolbar, click **Save**.
4. On the **Bidding Results** tab, analyze the results of the automatic bidding as follows:
   a. In the **Requisition Details** table, click the *COMPCHAIR* row.

      In the **Bidding Details** table, in the unlabeled column, the check box for the *SPACECOMP* vendor is selected. The *SPACECOMP* vendor offered the best price for the *COMPCHAIR* item and can provide the entire needed quantity of this item. Thus, you will order these chairs from this vendor.

   b. In the **Requisition Details** table, click the *COMPCHAIRM* row.

      In the **Bidding Details** table, notice the following:

      - In the unlabeled column, the check boxes are selected for both vendors.
      - In the **Order Qty.** column, *10* is specified for both vendors.

      The *COMPULINK* vendor offered a lower price but can provide only 10 chairs. Thus, you will have to purchase the other 10 chairs from the *SPACECOMP* vendor.
5. On the form toolbar, click **Complete Bidding**. The status of the requisition is changed to *Open*.

Step 4: Creating the Purchase Orders

To create the purchase orders for the vendors, do the following:

1. On the *Requisitions* (RQ302000) form, open the requisition with the *Open* status that you have earlier created in this activity.
2. On the More menu, click **Create Orders**. The system creates purchase orders for the *COMPULINK* and *SPACECOMP* vendors and assigns the requisition the *Released* status.
3. On the **Purchase Orders** tab, make sure that purchase orders with the *Open* status are listed for the *COMPULINK* and *SPACECOMP* vendors, as shown in the following screenshot.

> If your system has a different set of purchase and sales documents than those in the initial *U100* dataset, you may see different values in the screenshots.

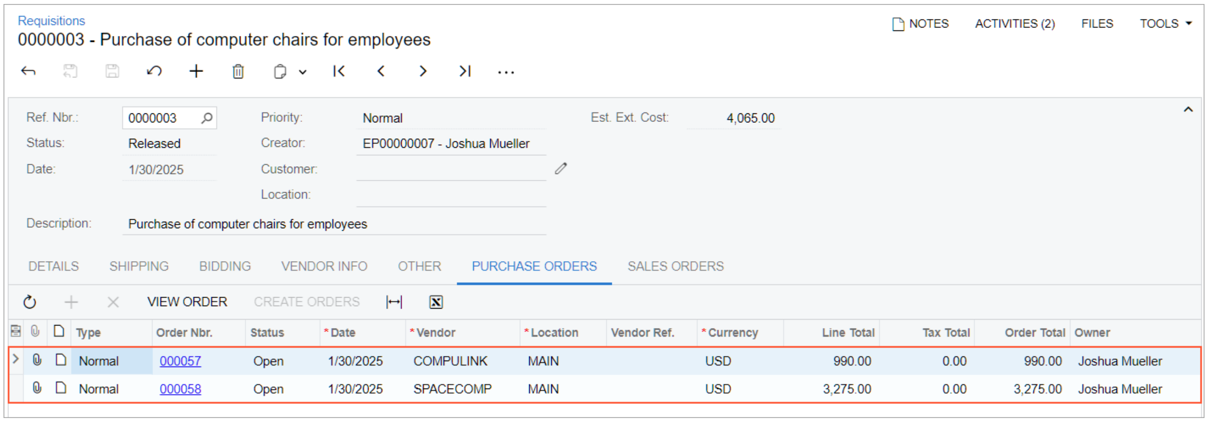


Figure: The purchase orders for the vendors

Suppose that you have emailed the purchase orders to the vendors.

Step 5: Receiving the Items from the Vendors

Suppose that the vendors have delivered the ordered chairs to the *WHOLESALE* warehouse. To create the documents that reflect the receipt of the items in the warehouse, do the following:

1. While you are still viewing the **Purchase Orders** tab of the *Requisitions* (RQ302000) form for the requisition, click the link in the **Order Nbr.** column in the row with the *COMPULINK* vendor. The system opens the purchase order on the *Purchase Orders* (PO301000) form in a new browser window.
2. On the form toolbar, click **Enter PO Receipt**. The system navigates to the *Purchase Receipts* (PO302000) form with the new receipt. Notice that the receipt has the *Balanced* status and the data copied from the linked purchase order.
3. On the form toolbar, click **Release**. The system releases the purchase receipt as well as creating the corresponding inventory receipt and releasing it. On the **Other** tab, you can view the reference number of the created inventory receipt. The reference number is also a link that you can click to view the inventory receipt on the *Receipts* (IN301000) form.
4. Close the browser window with the *Purchase Receipts* form.
5. On the **Purchase Orders** tab of the *Requisitions* form, in the row that has *SPACECOMP* in the **Vendor** column, click the link in the **Order Nbr.** column. The system opens a purchase order on the *Purchase Orders* form in a new browser window.
6. On the form toolbar, click **Enter PO Receipt**. The system opens the *Purchase Receipts* form with the new receipt. The receipt has the *Balanced* status and the data copied from the linked purchase order.
7. On the form toolbar, click **Release**. The system releases the purchase receipt; it also creates the inventory receipt and releases it. On the **Other** tab, you can view the reference number of the created inventory receipt. The reference number is also a link that you can click to view the inventory receipt on the *Receipts* form.
8. Close the browser window with the *Purchase Receipts* form.
9. On the *Inventory Allocation Details* (IN402000) form, do the following in the Selection area:
   a. In the **Inventory ID** box, select *COMPCHAIR*.
   b. In the **Warehouse** box, select *WHOLESALE*.
   c. Make sure that the quantity in the **Available for Issue** box is *15*.
   d. In the **Inventory ID** box, select *COMPCHAIRM*.
   e. Make sure that the quantity in the **Available for Issue** box is *20*.

You have received the computer chairs in the warehouse, and now you can issue the items to the employees that ordered them.

Step 6: Issuing Inventory Items from the Warehouse

Suppose that you have provided the chairs that you ordered to the employees. To create and process the needed documents for issuing the items from the *WHOLESALE* warehouse, do the following:

1. On the *Issues* (IN302000) form, add a new record.
2. In the **Description** box of the Summary area, type `Issue of computer chairs to employees`.
3. On the **Details** tab, click **Add Items** on the table toolbar.
4. In the Summary area of the **Inventory Lookup** dialog box, which opens, select *WHOLESALE* in the **Warehouse** box.
5. Make sure that the **Show Available Items Only** check box is selected.
6. To select the required items, do the following:
    a. In the **Inventory** box, type `chair` to filter the list of stock items.
    b. In the unlabeled column, select the check box in the row with the *COMPCHAIR* item.
    c. Copy the value in the **Qty. Available** column of the same row to the **Qty. Selected** column.
    d. In the unlabeled column, select the check box in the row with the *COMPCHAIRM* item.
    e. Copy the value in the **Qty. Available** column of the same row to the **Qty. Selected** column.
    f. Click **Add & Close** to add the selected items to the issue and close the dialog box.
7. On the form toolbar, click **Release**. The system changes the status of the issue to *Released*.
8. Open the *Inventory Allocation Details* (IN402000) form.
9. In the Selection area, do the following:
    a. In the **Inventory ID** box, select *COMPCHAIR*.
    b. In the **Warehouse** box, select *WHOLESALE*.
    c. Make sure that the value of the **Available for Issue** box is *0*.
    d. In the **Inventory ID** box, select *COMPCHAIRM*.
    e. Make sure that the value of the **Available for Issue** box is *0*.

You have issued the items from the *WHOLESALE* warehouse to the company's employees.

Additional Materials

This part has supplemental information about configuration and processing of purchase requisitions.

Optionally, you can review the information that will be useful to you in your work. You will not be tested on this information.

Appendix 1: Purchase Requisition Configuration

This appendix lists prerequisites for purchase requisition configuration.

Purchase Requisition Configuration: Configuration Prerequisites

Before you start configuring the purchase requisition functionality in Acumatica ERP, you should be sure that the needed features have been enabled, settings have been specified, and entities have been created, as described in the following sections.

Enabling the Needed Feature

On the *Enable/Disable Features* (CS100000) form, the *Purchase Requisitions* feature must be enabled.

Configuring the System

You need to make sure that the following tasks have been performed in Acumatica ERP before you begin to configure purchase requisitions:

- Basic company settings have been configured, as described in *Preparing an Instance for Implementation*.
- At least the minimum general ledger, cash management, accounts payable, and accounts receivable functionality has been implemented. These functional areas of Acumatica ERP do not require any change to their configuration when purchase requisition functionality is configured; however, this functionality should be implemented before the purchase requisition functionality. For details, see *Company Without Branches: General Information*.
- The basic configuration of order management with inventory has been performed, as described in *Order Management with Inventory*.

Appendix 2: Processing Purchase Requests and Requisitions

This appendix has the checklist with the settings to be specified and entities to be created before users start processing purchase requests and requisitions.

Purchase Requests and Requisitions: Implementation Checklist

The following sections provide details you can use to ensure that the system is configured properly for processing purchase requests and requisitions, and to understand (and change, if needed) the settings that affect the processing workflow.

Implementation Checklist

We recommend that before you start processing purchase requests and requisitions, you make sure the needed features have been enabled, settings have been specified, and entities have been created, as summarized in the following checklist.

Form	Criteria to Check
Enable/Disable Features (CS100000)	The following features have been enabled: • *Inventory and Order Management*: This group of features includes the features associated with the standard functionality of inventory and order management. • *Inventory*: Gives you the ability to maintain stock items using forms related to the inventory functionality and use the inventory and order management functionality for creating and processing documents that include stock items. • *Purchase Requisitions*: This feature gives users the ability to create purchase requests and requisitions, perform bidding to find the best prices, and control budget compliance.
Request Classes (RQ201000)	The needed request classes for purchase requests have been created, as shown in the *Purchase Requisition Configuration: To Create Customer Request Class* activity.

Other Settings That Affect the Workflow

You can affect the workflow of processing purchase requests by specifying additional settings. When you are preparing to create a purchase requisition from requests, you can select the **Merge Lines** check box in the Selection area of the *Create Requisitions* (RQ504000) form. This causes the system to merge the lines of all the requests included in a requisition and containing the same stock item with the same unit cost.

If a purchase requisition has already been created, you can merge lines manually on the **Details** tab of the *Requisitions* (RQ302000) form by selecting the Included check box for the lines to be merged and clicking **Merge Lines** on the table toolbar.

> With manual merging in this way, the system will merge lines even if they have different unit costs and requesters. For customer requests, we do not recommend that you merge items requested by different customers, because this may cause sales documents to be linked incorrectly to purchase requisitions.