



eProc Requisitioner Manual

Version 17.03.1.0

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Chapter 1: About this Guide

1.1 Purpose

This user guide enables the users of eProc to get acquainted with the application and use it effectively for the following:

- Searching catalog and punchout items
- Adding items to cart
- Requesting catalog and punchout items
- Ordering free-text items
- Bookmarking items
- Tracking requisitions approval status
- Tracking purchase orders against a requisition
- Creating receipts against a requisition

1.2 Audience Profile

The intended audiences for this guide are the people who are interested in requisitioning and ordering of goods.

This user guide has been divided into the following chapters:

- **Chapter 1: About this Guide** - This chapter gives a description about the user guide and how it is organized.
- **Chapter 2: Welcome to eProc** - This chapter gives an overview of the eProc application. It also discusses the key features and benefits of eProc.
- **Chapter 3: Accessing eProc** - This chapter describes how to log on to the application.
- **Chapter 4: Managing your Profile** - This chapter describes how to manage your profile, set preferences, and change password.
- **Chapter 5: Creating Requisitions** - This chapter describes how to search an item, add items to cart, and create a purchase request.
- **Chapter 6: Tracking My Requisitions** - This chapter describes how to track requisition status and search requisitions by applying filters

- **Chapter 7: Create Favorites & Baskets** - This chapter describes how to create favorites and baskets.
- **Chapter 8: Approving Requisitions** - This chapter describes how to approve and reject requisitions.
- **Chapter 9: Creating Receipt** - This chapter describes how to create a receipt for the received items against a requisition.

1.3 Typographical Conventions

Typefaces: The following typefaces are used throughout in this user guide:

Typeface	Description
<i>Italic</i>	<i>This typeface is used to represent cross-references within the user guide. It also represents important and useful information in the form of Notes, Tips, and Warnings.</i>
Bold	This typeface is used to represent screen elements of the eProc application.
CAPS	This typeface is used to represent the keys on the keyboard.
<u>Blue text</u>	This indicates a hyperlink.

Chapter 2: Welcome to eProc

2.1 Introduction

Zycus eProc is an easy-to-use, flexible, and highly configurable tool that is used to request, purchase, and issue payment for goods and services in an effort to reduce supplier's effort and drive continuous improvement.

The eProc application helps you manage supplier orders efficiently to increase competitiveness by reducing turnaround time and inventory levels. Additionally, the application enables suppliers to place an order for the products they are looking for but are not available currently in the catalog (free text items) which in turn helps organizations and suppliers take better decisions.

2.2 Overview of eProc

Zycus E-Procurement application (eProc) is a web 2.0 based procure to pay (P2P) solution that controls the maverick spending by ensuring proper approvals for organization wide spend, realizes tactical savings by automating and standardizing procurement process, and increases compliance to contracted suppliers and visibility of contracted vendors across the organization. It automates the entire process from requesting items to order to payment and provides innovative ways to gather supplier content /catalogs to automate and reduce time and effort for supplier content management.

Zycus eProc provides an intuitive Amazon-like interface for requisitioning, thereby increasing adoption. Unlike other Vendors, application has automated classification of catalog content, integrated search capabilities to search across local catalogs and punch-out catalogs, and guided procurement to easily navigate buyers through buying process for category. It is completely integrated with other spend management solutions like sourcing, contract management to enable a stronger spend compliance process and supports formats like cXML, OCI, Oracle catalog format.

2.3 Key Benefits

These are some of the key benefits that your organization can gain through eProc:

- Comprehensive procure-to-pay solution
- Quick-setup and Easy-to-use
- Strong approval workflow
- Builds a supplier portal
- Leverages existing products in SRM Suite
- APIs for integration with customer's source systems

Chapter 3: Accessing eProc

3.1 Introduction

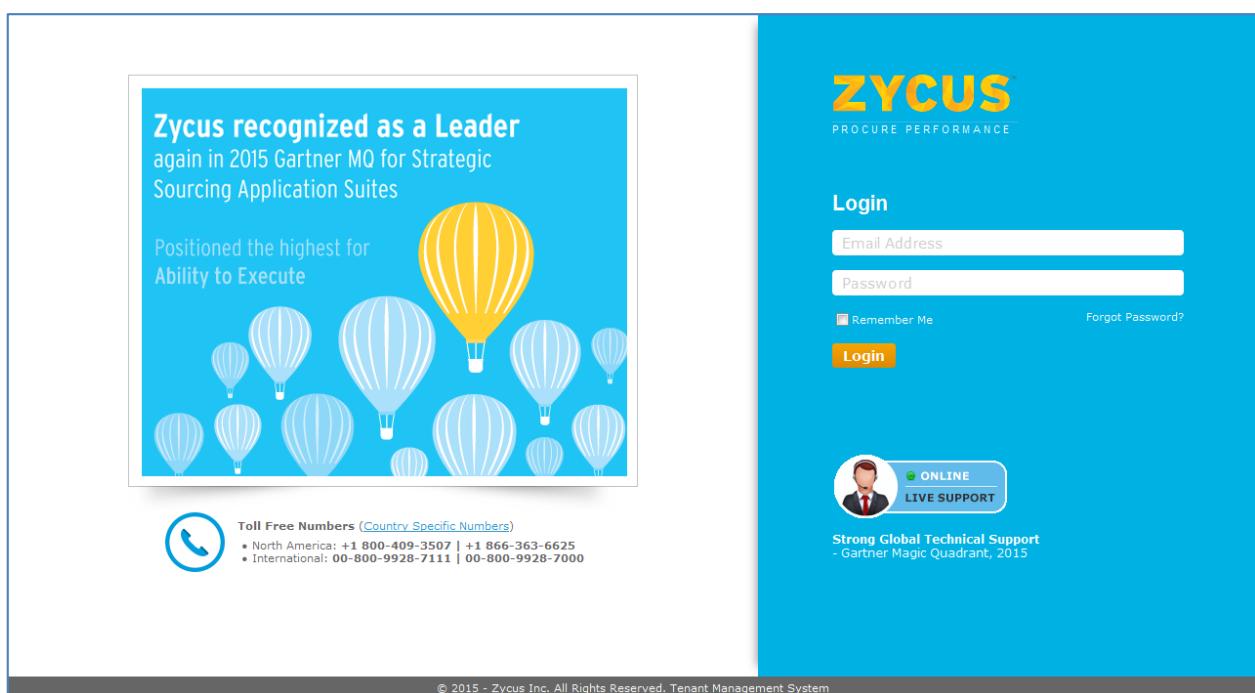
eProc is available in Software as a Service (SaaS) mode over the internet which makes it easier for the user to access it through your organizations intranet.

3.2 Accessing eProc

To access eProc:

1. Open the internet explorer, type the URL in the Address bar box, and click **Go** or press ENTER. The Login page opens.

Note: *The URL is specific to your company name and is provided by Zycus.*



Note: *All the Zycus Suite applications can now be accessed using single login credentials.*

2. Type your email id and password in the **Email Address** and **Password** fields respectively and click **Sign In** or press the ENTER key. The Product Selection page is displayed.



3. Select **eProc** to start using the application.

Note: If you do not see the Product Selection page, but instead see the Login page again, please verify the email id and password you typed and try again.

Note: Email Address and Password fields are case sensitive. Also, please contact your organization's IT team to get details of the URL, email id, and password for eProc.

3.3 Logging Out

To logout from eProc:

- Click the **Logout** link located at the upper-right corner of the window. The **Login** page is displayed.

Note: eProc has a configurable time out period. You are automatically logged out from eProc if you do not use eProc for the configured time out period (For example, 30 minutes).

Note: Closing the browser window is not an appropriate method to exit from eProc.

Chapter 4: Managing your Profile

4.1 Introduction

eProc enables users to manage their profile, set their preferences, and change password.

4.2 Setting your preferences

The **User Profile** page allows you to modify, add, and update personal information.

To update personal details:

1. Log on to the eProc application. The following page is displayed.



2. On the top right corner, click on settings link and select **Manage Profile**. The **User Profile** page is displayed.

Following are the description of the various fields on the User Profile page:

Fields	Description
User Details	
User Name	Displays the name of the logged in user. Note: <i>Details of this field cannot be edited and is displayed only for viewing.</i>
Display Name	Enter the user name to be displayed in the application. Note: <i>Details for this field is mandatory and cannot be left blank.</i>
E-mail	Displays the email-id of the logged in user. Note: <i>Details of this field cannot be edited and is displayed only for viewing.</i>
Change Password	Click on this button to change the password. For more details see " Changing Password "
Location Details	
Location Name	Specify/Displays the location of the logged in user. Note: <i>Details for this field is mandatory and cannot be left blank.</i>
City	Specify/Displays the city of the logged in user.
State	Specify/Displays the state of the logged in user.
Telephone Number	Specify/Displays the telephone number of the logged in user.
Extension	Specify/Displays the extension of the logged in user.
Alternate Telephone No	Specify/Displays the alternate telephone no of the logged in user.
Preference Details	
Time Zone	Select the applicable time zone from the drop down menu. Note: <i>This field is not applicable to eProc but might be applicable to the other products of the Zycus Spend Management suite.</i>
Number Format	Select the applicable number format from the following options: <ul style="list-style-type: none"> • US Format: (#,###,###.##) • European Format: (#.###.###,##)
Date Format	Select the applicable date format from the following options: <ul style="list-style-type: none"> • yyyy/MM/dd • dd/MM/yy • MM/dd/yy Note: <i>This field is not applicable to eProc but might be applicable to the other products of the Zycus Spend Management suite.</i>
Time Format	Select the desired time format from the following options: <ul style="list-style-type: none"> • 12 Horus • 24 Hours

Fields	Description
Currency	Select the applicable currency format from the drop down menu. Note: This field is not applicable to eProc but might be applicable to the other products of the Zycus Spend Management suite.
<u>Locale</u>	Select the applicable locale format from the drop down menu.
Decimal Precision	Select the applicable decimal precision from the drop down menu.

4.2.1 List of Supported Languages

eProc currently supports following languages:

- Arabic
- Chinese
- Danish
- Dutch
- English
- Finnish
- French
- German
- Hungarian
- Italian
- Japanese
- Norwegian
- Polish
- Portuguese
- Russian
- Spanish

4.3 Changing Password

eProc provides you with a feature to change your password in the **User Profile** page provided within the application under **Settings**.

Note: It is recommended to change your password when you login for the first time. Password must contain minimum eight characters.

To change your password:

1. On the **User Profile** page, click **Change Password**. The **Change Password** page is displayed.

Change Password

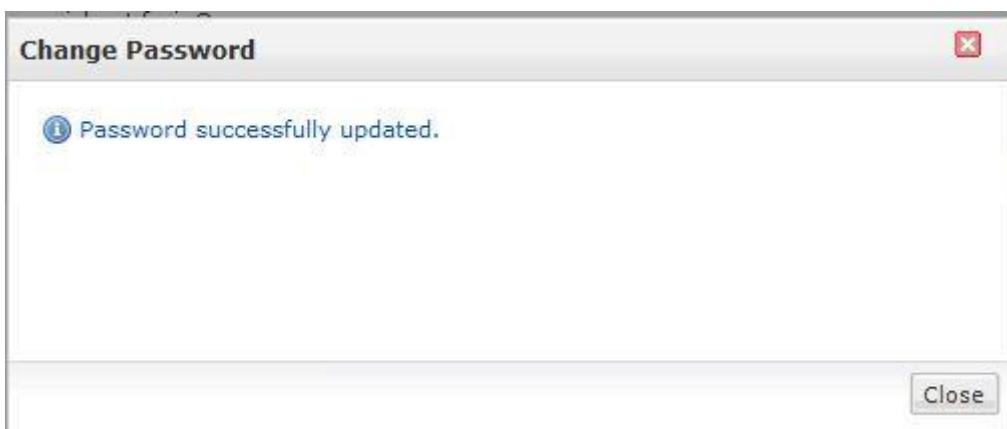
Password : Minimum length 8 and Maximum length 32 characters.

Current Password :

New Password : **Password Strength**

Confirm Password :

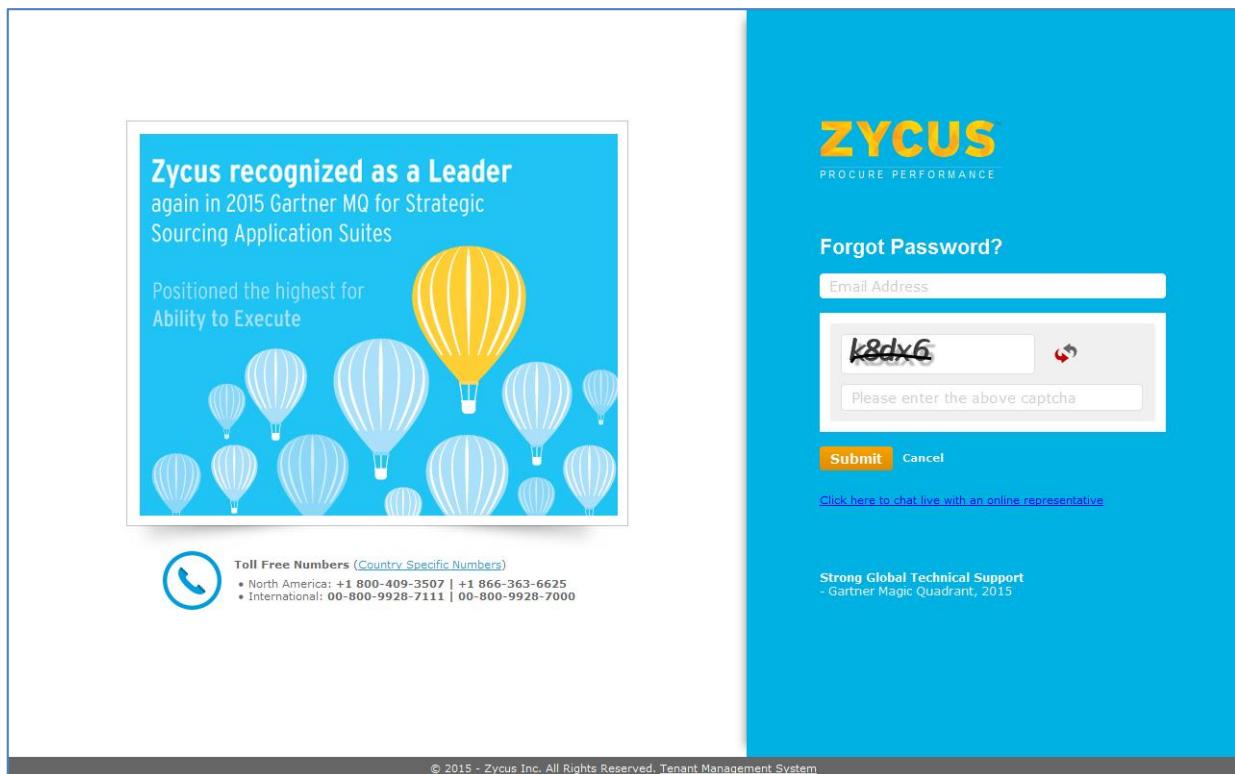
2. Type your current password in the **Current Password** field.
3. Type your new password in the **New Password** field.
4. Type your new password again in the **Confirm Password** field for confirmation.
5. Click **Change Password**. The password gets saved and the following message is displayed.



4.4 Recovering Password

To recover your password:

1. Click on the **Forgot Password?** link in the login page. The Forgot Password page is displayed.



2. Type your official email address in the **Email Address** field.
3. Enter the code, displayed in the **Enter the above code** field and click **Submit**. An email is sent to your email account with your login id and password.

Note: Click  to refresh the code.

4.5 Need More Help

This feature makes it easier for you to understand, get self-trained to use eProc with ease. The **Help** options provides you with access to the user manuals, FAQs, Online Videos for suppliers which have been created to give you step by step explanation of different event level activities. In case, you have problems with the application you can chat with customer support and have your problems solved.

To use the help option:

1. On the top right corner of the page, click on  **Help** link.



Option	Description
What's New	Gives you access to Release Notes & Release Specific Videos for the latest release.
Self-Training Material	Gives you access to Help Videos, Online Help & User Manuals for eProc.
FAQs	Gives you detailed information of all the important features
Manuals	Gives you step-by-step information to help you carry out various functions. This section provides customer specific help documents Zycus Knowledge Hub of eProc as shown in the following figure.
Online Videos	Provides a list of videos depicting the functionality of the various features
Report an issue	Gives users an option to contact Zycus Technical Support team
Check Bandwidth	Checks if the bandwidth being used is suitable to use eProc
Live Support	Provides live support via chat
About eProc	Gives all the version details of eProc

You are now using Release R15.04.1.0

Configure Budget by GL Account dimension

Learn more or Check later

Click on Learn More button above to download Release Notes. To see this view again later navigate via Help(?) > What's New

1 / 5

Click ⏪ and ⏩ arrow to slide through release notes or click **Learn more** to download the Release Notes in PDF format.

The screenshot shows the Zycus Knowledge Hub interface. At the top left, there's a dropdown menu labeled "I am a" with options: User, Requester, Buyer, Administrator, Approver, and Catalog Manager. The "User" option is currently selected. At the top right, it says "Hi Sean M | Logout". Below the header, there's a search bar with the placeholder "Search" and a magnifying glass icon. To the right of the search bar is a "Show me:" dropdown with options: Videos, Manuals, FAQs, and HTML. A vertical blue sidebar on the right has a "FEEDBACK" button.

Document Type	Title	File Type	Size
Training Cheatsheet	Training Cheatsheet – Requisitioner	PDF	1.77 mb
Training Cheatsheet	Training Cheatsheet – Approver	PDF	0.97 mb
Training Cheatsheet	Training Cheatsheet – Buyer	PDF	1.46 mb
Training Cheatsheet	Training Cheatsheet – Invoice Manager	PDF	1.07 mb
Requester's Guide	Requester's Guide	PDF	4.84 mb
Administrator's Guide	Administrator's Guide	PDF	5.10 mb
Buyer Guide	Buyer Guide	PDF	4.47 mb

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Feedback directs to a link to provide feedback for **Knowledge Hub**.

Chapter 5: Creating Requisitions

5.1 Introduction

eProc allows you to create a request for the list of items you would like to purchase and place an order. You can select items from the supplier's catalog, punchouts or can create a request for free text items. Catalog contains a pre-packaged list of items provided by the supplier and punchouts are the supplier's portals. Additionally, you can also place an order for the items (free text items) you could not find in the catalog or punchouts by filling a category specific form.

The screenshot shows the eProc Online store interface. On the left, there is a sidebar with 'CATEGORIES' including 'Paper & Pens', 'Office Stationery', 'Other Office Equipment & ...', 'Office Furniture', and 'Computers & Accessories'. Below this is a 'Need Help?' section with 'Online Demo' and 'Requisition FAQs'. The main area is titled 'Online store' with a search bar containing 'Type product description, supplier name, part no, etc.' and a 'Search' button. It shows '3 Items | INR 7,367.00' and a 'Checkout' button. Below the search bar is a 'Examples' section with 'laptop, smartphones, printers, chairs, cabinets, cleaning services'. There are three buttons: 'Punchouts' (View All), 'Guided Procurement' (View All), and 'Lunch Box'. At the bottom, there is a 'QuickSource' section with the heading 'Easiest way to get quotes from vendors even before you raise a Requisition.' It includes a 'View My Quick Source Event' button, icons for 'FASTER' (Post in less than 1 min, Get Quotes within days), 'EFFECTIVE' (Get help from Buyers, Collaborate with vendors), 'MOVE AHEAD' (Track responses, Compare bids, Flip best Quote to a Requisition), and a 'QUICK SOURCE' button with 'Start Now >'.

Note: A single requisition can contain a catalog item, a free text item, and also a punchout item.

5.1.1 Access to QuickSource

eProc provides you a functionality to create and access QuickSource events from the landing page itself.

1. To view QuickSource events, click the highlighted link:

The screenshot shows the eProc 17.03.1.0 interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. A dropdown menu shows 'Hi, Shadab QS'. Below the navigation is a header bar with 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', 'All Requisitions', and 'View Orders'. On the left, a sidebar lists 'CATEGORIES' such as Paper & Pens, Office Stationery, Other Office Equipment & ..., Office Furniture, and Computers & Accessories. A 'Need Help?' section contains 'Online Demo' and 'Requisition FAQs'. The main content area has a search bar with placeholder 'Type product description, supplier name, part no, etc.' and a button 'Search'. Below it, there's a section titled 'You can also order using' with 'Punchouts' (View All), 'Guided Procurement' (View All), and 'Lunch Box'. At the bottom, a 'QuickSource' section highlights 'FASTER', 'EFFECTIVE', and 'MOVE AHEAD' with descriptions and a 'Start Now >' button.

2. You will land on the following page:

The screenshot shows the 'Latest Quick Source' list page. The top navigation bar is identical to the previous screenshot. The main content is a table titled 'Latest Quick Source' with the following columns: Status, Event Name, Event Creator, Supplier Response Status, Time Ticker, and Actions. The table lists 111 records. Each row contains a small icon, the event name, the creator's name, the response status (e.g., 0/1 (Supplier Responded / Invited)), the time ticker (e.g., Closed 1 day(s) back), and an 'Actions' button. At the bottom, there are buttons for 'Show 10 records per page' and 'Showing page 1 of 12'.

3. To create QuickSource events, click on the highlighted link **Start Now** shown in the image below:

4. You will land on the following page:

5.2 Searching Items

All items from a catalog or punchout are classified into a standard category. When a description for a particular item is entered, the Autoclass artificial intelligent engine integrated with the system gets the category for that item based on the entered text and system displays all available items from catalog and punchouts for the category.

To search for an item:

- Click **Requisition** tab. Enter an item description in the search box. Click **Search**.

The screenshot shows the eProc Requisitioner interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. Below the navigation bar, there's a header for 'Online store' with tabs for My Requisitions, My Favorites, Shopping Basket, All Requisitions, and View Orders. A search bar is present with placeholder text 'Type product description, supplier name, part no, etc.' and a 'Search' button. To the right of the search bar, it says '1 Items | STD 4,535,99592' and has a 'Checkout' button. On the left, there's a sidebar titled 'CATEGORIES' with sections for Paper & Pens, Office Stationery, Other Office Equipment & ..., Office Furniture, and Computers & Accessories. Below the categories, there's a 'Need Help?' section with 'Online Demo' and 'Requisition FAQs'. In the center, there's a 'QuickSource' section with a sub-section for 'Punchouts' which is highlighted. To the right of 'QuickSource', there are three arrows pointing right labeled 'FASTER', 'EFFECTIVE', and 'MOVE AHEAD' with corresponding descriptions: 'Post in less than 1 min. Get Quotes within days', 'Get help from Buyers. Collaborate with vendors', and 'Track responses, Compare bids. Flip best Quote to a Requisition'. At the bottom, it says '© 2017 - Zycus Inc., All Rights Reserved' and 'empowered by ZYCUS'.

- The following page is displayed.

The screenshot shows the search results for 'laptop'. The search bar at the top contains 'laptop'. Below the search bar, it says 'Showing results for "laptop"' and 'Available Online Stores'. It also shows 'Punchouts: 5'. The main area displays a list of 149 items found, sorted by relevance. Each item listing includes a thumbnail, the item name, a brief description, the supplier, availability, price, and quantity selection buttons. The first few items are: 'laptop' (Lenovo laptop Core 2 duo 220gb HDD, Price: STD 111,00000), 'laptop' (Supplier: EBAY OFFICE SUPPLIES | Availability: N/A, Price: XCD 12,00000), 'laptop 1' (Supplier: ITR 85 SIM G | Availability: N/A, Price: USD 10,000,00000), 'laptop 11' (Supplier: LAMBORGHINI | Availability: N/A, Price: USD 10,000,00000), and 'Laptop' (Supplier: EBAY OFFICE SUPPLIES | Availability: N/A, Price: USD 12,00000).

The **Punchouts** shows that there are punchouts available for the item searched. For more details, see [Accessing Supplier Punchouts](#).

Roll over on the **Related Categories** button to view items from other category.

Roll over on the **Sorted by** button and select an option from the list to sort the items in the list.

Click **Switch to Grid View**  to view the items as grid.

 Scotch Thermal Laminator 15.5 Inches x 6.75 Inches D13S147009341365 USD 80.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 45 days <input type="checkbox"/> EA 	 Fellowes Saturn SL 125 Home & Office Laminator D13S88205607911 USD 200.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 24 days <input type="checkbox"/> EA 	 Fellowes Star Manual Comb Binding Machine (52173) D13S110257015599 USD 100.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 25 days <input type="checkbox"/> EA 
 Gen Binding Combind C55 Manual Binding System, 90 D13S441028043872 USD 170.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 46 days <input type="checkbox"/> EA 	 Fellowes Starlet Personal Comb Binder, Gray (Starlet) D13S220514023963 USD 100.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 27 days <input type="checkbox"/> EA 	 SircleBind WR-60 Wire Binding Machine D13S147009348935 USD 65.00 Rating: ★★★★☆ Supplier: OFFICEDEPOT Availability: 19 days <input type="checkbox"/> EA 

Select an item using the check box next to it and select either of the following options:

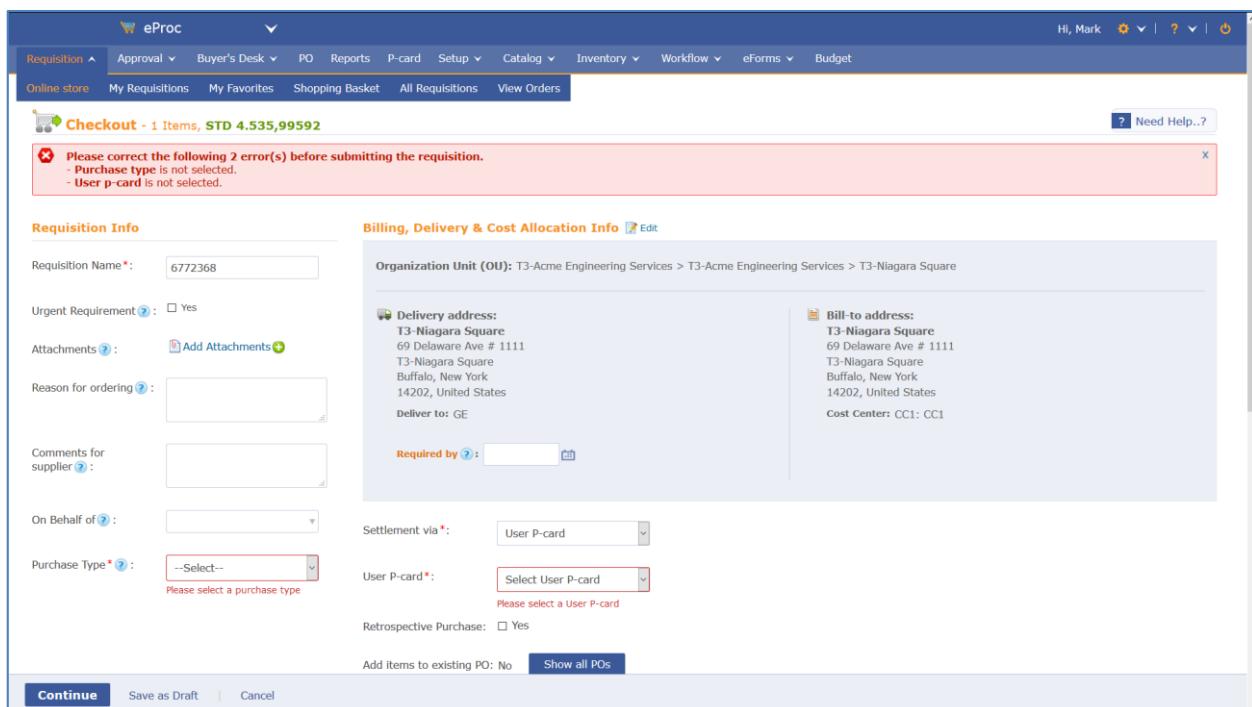


- **Compare** – Select this option to compare items within search result. For more information see, [Comparing Items](#).
- **Add to Cart** – Select this option if you wish to buy the item. For more information, see [Adding Items to Cart](#).

- **Add to Basket** – Select this item if you wish to add the item to your shopping basket and wish to buy it in the future. The items would then appear under the **My Baskets** sub-tab. For more information, see [Shopping Baskets](#).
- **Add to Favorites** – Select this option if you wish to add the item to your favorites list. The items would then appear in the **My Favorites** sub-tab. For more information, see [Favorites](#).
- Click **Add to Cart** to add the items to the cart. For more information, see [Adding Items to Cart](#).

- Click **Checkout**  [Checkout](#) to create a purchase request for items. For more information, see [Submitting your Order \(Check-Out\)](#).

If the mandatory fields are left blank, the corresponding error messages are displayed at the top as well as below respective fields as shown below.



The screenshot shows the eProc Requisition screen. At the top, there is a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. Below the navigation bar, there are tabs for Online store, My Requisitions, My Favorites, Shopping Basket, All Requisitions, and View Orders. The main area is titled "Checkout - 1 Items, STD 4.535,99592". A red error message box contains the text: "Please correct the following 2 error(s) before submitting the requisition." followed by "- Purchase type is not selected." and "- User p-card is not selected." To the right of the error message is a "Need Help..?" link. The form is divided into two sections: "Requisition Info" and "Billing, Delivery & Cost Allocation Info". In the "Requisition Info" section, there are fields for Requisition Name (7772368), Urgent Requirement (checkbox), Attachments (button), Reason for ordering (text area), Comments for supplier (text area), On behalf of (dropdown), and Purchase Type (dropdown with error message "Please select a purchase type"). In the "Billing, Delivery & Cost Allocation Info" section, there are fields for Delivery address (T3-Niagara Square, 69 Delaware Ave # 1111, T3-Niagara Square, Buffalo, New York, 14202, United States) and Bill-to address (T3-Niagara Square, 69 Delaware Ave # 1111, T3-Niagara Square, Buffalo, New York, 14202, United States). Settlement via is set to "User P-card". User P-card is also a dropdown field with an error message "Please select a User P-card". Retrospective Purchase is a checkbox. At the bottom, there are buttons for Continue, Save as Draft, and Cancel.

Click the item name under the **Items in your Cart** section to view the **Item Details**.

Item Details



High-end Laptop
S280507688466
USD 117.0000 DZN

Add to favorites Add to Basket

DZN

Details	Specifications	Attachments
Description: Laptop with High-end specification		
Manufacturer: LAIZOLART INC		
Category: Computer or notebook stands		
SPSC Code: 43211613		
Supplier: EOFFICE SUPPLIERS		
Supplier Contact: Sean Marshal		
Delivery Lead Time (days): 10 days		
Contract No: 4864321		

Click the image to view a bigger and clearer picture.

Note: If the item you search for is not found, you need to create a free text item. For more information see, [Ordering Free-Text Items](#).

Note: If the item in a catalog/punchout item the icon is displayed next to the supplier name that displays a small preview of the supplier information.

Note: Incase the item you're searching for is a Virtual Item, it is denoted with the icon on the Search Listing page.

Note: Incase the item you're searching for is a Contractual Item, it is denoted with the icon on the Search Listing page.

5.2.1 Check Stock Availability

This feature will help you to check the stock availability of the items you are looking for. When you are searching for items from the catalog, against each item from **item master**, you will be able to view a link 'check stock availability'.

Items found: 47

iPad Cover		Item Master Inventory Item 1	Supplier: APPLE Availability: N/A	Price: INR 12.0	Check Stock Availability
<input type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="button" value="EA"/>	<input checked="" type="button" value="Cart"/>

Note: This option of checking availability of items will be applicable only to the items from **item master**.

- Click on **Check Stock Availability**, it will show following popup:

Item 10058603				
Total Records: 1				
Storage Location	Project Code	Unrestricted	On Order	Stock In Transit
C01	-	39	0	0

- Here you will be able to track the stock available in the inventory.

5.3 Filtering Items

To filter items:

- On the search result page, in the **Filter Search Results** pane, enter your filtering criteria.

Showing results for 'Item master'
No Related categories found.
Punchouts: 5 •

Filter Search Results		Items found: 47	Sorted by: Relevance
<input type="checkbox"/> Description	<input type="text" value="iPad Cover"/>	iPad Cover	Price: INR 12.0
<input type="checkbox"/> Price	<input type="text" value="0"/> to <input type="text" value="445"/>	Item Master Inventory Item 1	Check Stock Availability
<input type="checkbox"/> Currencies		Supplier: APPLE Availability: N/A	<input type="checkbox"/> EA <input checked="" type="checkbox"/>
Select: All None			
<input type="checkbox"/> GBP (22)			
<input type="checkbox"/> INR (20)			
<input type="checkbox"/> RUB (2)			
<input type="checkbox"/> USD (3)			
<input type="checkbox"/> Manufacturers			
Select: All None			
<input type="checkbox"/> "GCRUPPI-ALERT" ... (1)			
<input type="checkbox"/> AT-A-GLANCE (2)			
<input type="checkbox"/> DAY RUNNER (4)			
<input type="checkbox"/> DAY-TIMER (2)			
<input type="checkbox"/> FELLOWS (2)			
<input type="checkbox"/> FRANKLINCOVEY (6)			
<input type="checkbox"/> HON (2)			
<input type="checkbox"/> NONE (24)			
<input type="checkbox"/> PLIZOLSR2 INC (2)			
<input type="checkbox"/> ROLODEX (2)			
<input type="checkbox"/> Suppliers			
<input type="checkbox"/> Categories			
<input type="checkbox"/> Others			
		Still can't find what you are looking for?	

- In the **Description** field, enter a description to filter your result.
- In the **Price** field, you can slide through the price range along the horizontal bar.

4. In the **Suppliers** and **Manufacturers** field, select the suppliers and manufacturers to filter your result respectively.
5. Click **Clear Filters** to clear all filters from your results.

5.4 Comparing Items

eProc enables the user to compare between two or more items within the search results. The items can be from different suppliers and catalogs.

Note: Maximum 4 items can be selected for comparison.

Item Description	Price
Grey Ultra Thin Cover iPad 2 3 & 4	AUD 14.00
Sky Blue Ultra Thin Cover iPad Mini...	AUD 15.00
Green Ultra Thin Cover iPad Mini 1 ...	AUD 16.00

To compare items:

1. Select the items using the checkbox next to them and click **Compare**. The **Product Comparison** page is displayed.

Sheet Description	ARM CHAIR-ALL WOOD S280507618882	CHAIR-WOOD S140253761992	ERGOSTACK CHAIR-16 & 18 S140253764663	ARM CHAIR-ALL WOOD S280507618882
Unit Price	USD 377.00000	USD 1,212.00000	USD 237.00000	USD 377.00000
Availability	9 days	5 days	12 days	9 days
Supplier	EBAY OFFICE SUPPLIERS	EBAY OFFICE SUPPLIERS	EBAY OFFICE SUPPLIERS	EBAY OFFICE SUPPLIERS
Supplier Part ID	S280507618882	S140253761992	S140253764663	S280507618882
Market Price	USD 404.00000	USD 1,236.00000	USD 243.00000	USD 404.00000
Manufacturer Name	ARIZOLODOO INC	CHIZOLODOO INC	ERIZOL 18 INC	ARIZOLODOO INC
Manufacturer Part Id	AR330634535146	CH095271127779	ER431530060219	AR330634535146
Description	ARM CHAIR-ALL WOOD	CHAIR-WOOD	ERGOSTACK CHAIR-16 & 18	ARM CHAIR-ALL WOOD
Attachment	N/A	N/A	N/A	N/A

Place your cursor over an item and click **Actions ▾** to view other options.

Enter the quantity in the box provided below.

Click **Add to Cart** icon to add the item to cart.

5.5 Browsing Catalogs by Category

eProc displays commonly used categories in the **Categories** pane.

The screenshot shows the eProc interface with the 'Categories' pane open. The pane contains a list of categories such as Pens & Markers, Pencils, Erasers & Correction Pens, Printing Papers, and Writing papers, each with a list of sub-items. The 'Categories' pane is highlighted in yellow, indicating it is active. The main search bar at the top right shows '0 Items | AUD 0.00' and a 'Search' button. A sidebar on the left provides links for Online Demo and Requisition FAQs.

1. Click a particular category to view the items from the catalog configured under that category.

The screenshot shows the eProc interface displaying search results for 'tablet'. The search bar at the top shows 'Showing results for "tablet"'. The results list three items: 'Grey Ultra Thin Cover iPad 2 3 & 4' (Price: AUD 14.00), 'Sky Blue Ultra Thin Cover iPad Mini...' (Price: AUD 15.00), and 'Green Ultra Thin Cover iPad Mini 1 ...' (Price: AUD 16.00). Each item has a thumbnail, name, description, price, and a 'View Details' button. The left sidebar includes filters for Description, Price, Currencies, Manufacturers, Suppliers, Categories, and Others.

Click the listed punchout to view punchouts available for a particular category. For more information, see [Accessing Supplier Punchouts](#).

Note: When the item you have searched for is not found, you are guided to order free-text item. For more information, see [Ordering Free-Text Items](#).

5.6 Accessing Supplier Punchouts

A punchout is a technology that allows a buyer to shop on the supplier's e-commerce site but add the products to the shopping cart in their e-Procurement system. It's better than a catalogue because it allows a supplier to maintain one version of a master catalogue for all of their buyers (as the buyer's system can store discounts), but falls short in that a buyer cannot compare products across suppliers side by side.

Note: Every site may differ depending on the supplier punchout.

To access Supplier Punchouts:

1. On the **Requisition** page, the **Supplier Punchouts** are displayed.

The screenshot shows the ZYCUS eProc interface. At the top, there are navigation tabs: 'Requisition' (selected), 'Approval', 'Online store' (highlighted in blue), 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. The user is logged in as 'Hi, John A.' with a dropdown menu. In the top right corner, there are icons for search, refresh, and help.

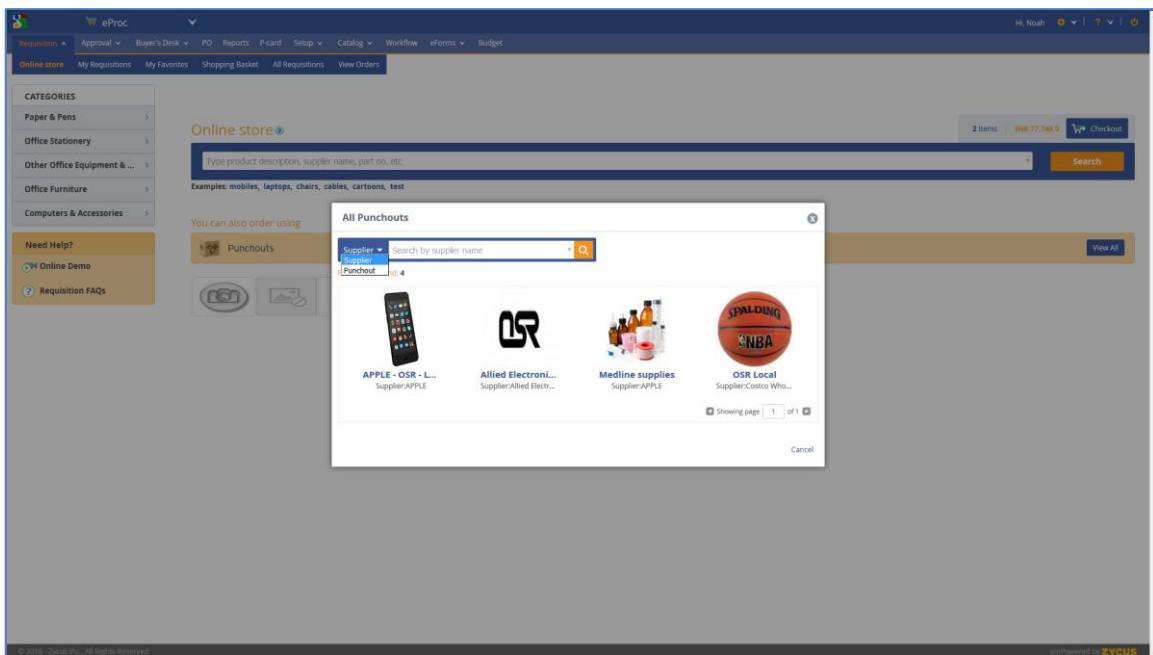
The main content area is titled 'Online store' with a search bar containing 'Type product description, supplier name, part no, etc.' and a 'Search' button. Below the search bar is a note: 'Examples: laptop, tablet, printers, chairs, cabinets, cleaning services'. To the right of the search bar is a shopping cart icon showing '0 Items | AUD 0.00'.

On the left, there's a sidebar with 'Categories' (Paper & Pens, Office Stationery, Other Office Equipment & ...), 'Need Help?' (Online Demo, Requisition FAQs), and a 'CDW' logo with a red border around the 'Punchouts' link.

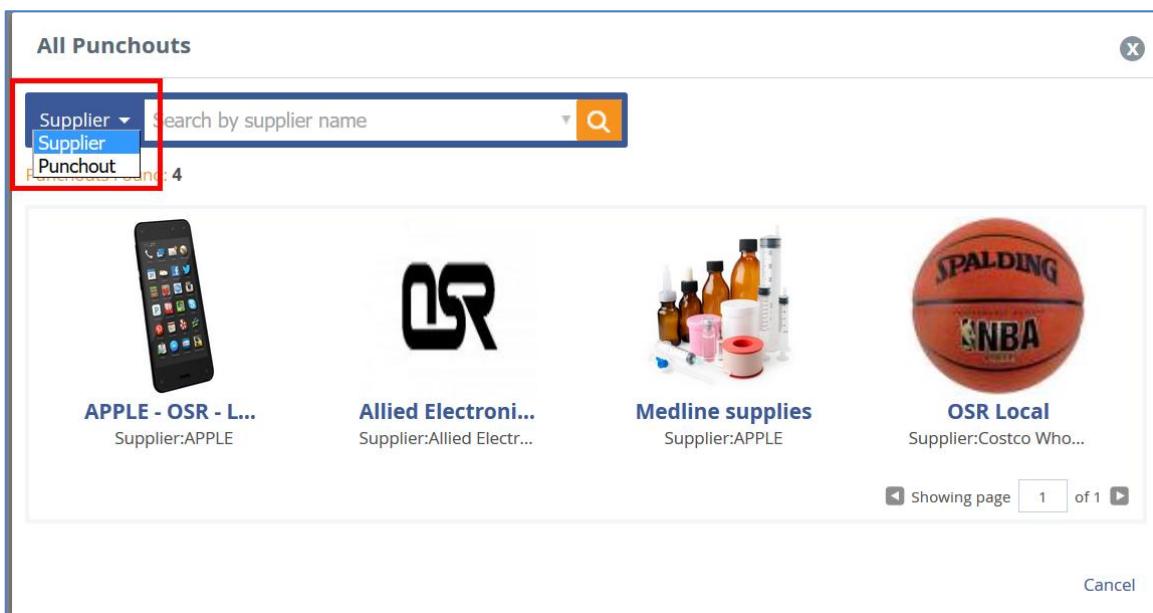
On the right, there are links for 'View All' under 'Punchouts' (highlighted with a red box) and 'Guided Procurement'. Below these are sections for 'Recruitment Services' (with a note: 'Order recruitment services for permanent or temporary professionals as per your requi...').

At the bottom left, there's a copyright notice: '© 2015 - Zycus Inc. All Rights Reserved'. At the bottom right, it says 'empowered by **ZYCUS**'.

2. Click **View All** to see all the Punchouts.



3. You can choose to search for the **Punchouts** by **Supplier Name** or **Punchout Name**.



4. On the search results page, the punchouts configured for a particular category that matches your search description is displayed.

The screenshot shows the Zycus eProc interface. At the top, there are tabs for 'Requisition' and 'Approval'. Below the tabs, there are links for 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. A search bar contains the text 'tablet'. To the right of the search bar is a 'Search' button and a 'Need Help...?' link. On the left, there is a sidebar with various filters: 'Description', 'Price' (set between 14 and 16), 'Currencies' (AUD selected), 'Manufacturers' (STAPLES selected), 'Suppliers', 'Categories', and 'Others'. The main area displays search results for 'tablet' under 'Available Online Stores' and 'Punchouts: 1'. It shows three items: 'Grey Ultra Thin Cover iPad 2 3 & 4' (Price: AUD 14.00), 'Sky Blue Ultra Thin Cover iPad Mini...' (Price: AUD 15.00), and 'Green Ultra Thin Cover iPad Mini 1 ...' (Price: AUD 16.00). Each item has a small image, a brief description, and a 'View Details' link. At the bottom of the page, there is a message 'Still can't find what you are looking for?' and a footer with '© 2015 © Zycus Inc. All Rights Reserved' and 'Powered by ZYCUS'.

5. Click on a supplier punchout, you will be directed to the supplier site.
6. Select and add items to the cart.

Note: In the punchout cart, you will see items added during that punchout visit along with punchout items added earlier or other items.

7. Click the **Checkout** button on the punchout site to return to Zycus eProc. For more information, see [Submitting your Order \(Check - Out\)](#).

Note: Punchout quantity can be edited depending upon the '**Allow requesters to edit quantity of items requested from punchout**' setting in the catalog settings under the **Setup** tab.

5.7 Ordering Free-Text Items

When no catalog items or punchouts are found, you can request for a free text item by filling a category specific form.

5.7.1 Guided Procurement Process(Using predefined guided procurement)

Guided Procurement can be performed with the following process:

- a. Fill a category specific form to provide details of your requirement.
- b. Select a supplier from the list of contracted suppliers
- c. Suggest your suppliers and checkout

1. Under the **Guided Procurement** section, click on **View All**.

The screenshot shows the eProc 17.03.1.0 software interface. At the top, there's a navigation bar with various menu items like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. Below the navigation bar, the main content area is titled 'Online store'. It features a search bar with placeholder text 'Type product description, supplier name, part no, etc.' and a 'Search' button. To the right of the search bar, it says '2 Items | INR 0.00000' and has a 'Checkout' button. On the left, there's a sidebar with 'CATEGORIES' listing 'Paper & Pens', 'Office Stationery', 'Other Office Equipment & ...', 'Office Furniture', and 'Computers & Accessories'. Below this is a 'Need Help?' section with links for 'Online Demo' and 'Requisition FAQs'. In the center, there's a section titled 'You can also order using' with two buttons: 'Punchouts' and 'Guided Procurement'. The 'Guided Procurement' button is highlighted with a red box. Below these buttons, there are icons for 'cheking eFor -displyName' and 'cheking eForm'. At the bottom, there's a 'QuickSource' section with a sub-section for 'FASTER' (Post in less than 1 min. Get Quotes within days), 'EFFECTIVE' (Get help from Buyers. Collaborate with vendors), 'MOVE AHEAD' (Track responses, Compare bids. Flip best Quote to a Requisition), and a 'QUICK SOURCE' button with a 'Start Now >' link.

Search and select any eForm as required.

All eForms

Search an eForm

eForms found: 220

 Bearings_EU	 Plant setup service_Lundbeck	 Elevator Maintenance Service-UK
 Elevator Maintenance Service	 Bearings	 Cleaning & Janitorial Services-UK
 Recycling Service	 Refuse Disposal & Treatment	 Petroleum Refining plant
 Venue Rental Service	 Courier Service-UK	 Print Advertising Service-UK
 Brochure Printing Service-UK	 Packaging service-UK	 Business Card Printing-UK

Cancel

The **Create a free-text item for category** is displayed.

ZYCUS eProc

Requisition Approval

Online store My Requisitions My Favorites Shopping Basket All Requisitions

Enter Item Description Search 1 Items USD 0.34 Checkout Need Help? X

Create a free-text item for category : Environmental Services (Change Category)

This Category already has 32 catalog items and 7 punchouts

Item Details

Short Description*:	Product Category:	Environmental Services (Change Category)
Part number:	Quantity*:	
Long description:	UOM*:	EA EACH
	Price*:	
	<input type="checkbox"/> Zero Price Item	
Item Type*:	Sourcing Status*:	Quoted by supplier Estimated price
Receive/Bill by*:	Currency*:	USD
<input checked="" type="radio"/> Goods <input type="radio"/> Services	Attachments*:	Add Attachments
<input checked="" type="radio"/> Quantity <input type="radio"/> Amount <input type="radio"/> No Receipt		

Show extra fields like manufacturer details, specifications, etc.

Requirement Details

Supplier Information

Recently Ordered Free-text Items

Add to Cart Add to Basket Cancel

Enter the required details in the **Item Details** frame. For the **Sourcing Status** field, select one of the following options as required:

- A. **Quoted by supplier:** This option states that the requester negotiate a price without involving the buyer. The requisition will remain on the buyer's desk and will be converted to PO post buyer review. This option requires a supplier to be selected.
- B. **Estimated Price:** The estimated price will be used for approval, after which the item will be sent to the buyer for sourcing.
- C. **Need a Quote:** When selected, the item will be first sent to the buyer. The buyer can enter a **Budgetary price** or a **Buyer negotiated price**, after which the requisition will be sent for approval.

Note: When the '**Need a Quote**' option is selected, **Price** field is non-mandatory.

Note: Check the **Zero Price Item** in order to add an item with no price or zero price to the Free-Text Requisition.

To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.

The screenshot shows a user interface for managing supplier information. At the top right, there is a text input field labeled "Paste Attachment url" and a blue "Add" button. Below this, a red box highlights a link "Show extra fields like manufacturer details, specifications, etc.". Underneath, there is a section titled "Supplier Information" with two options: "Select Preferred Suppliers" (radio button) and "Suggest a new Supplier for buyer review" (radio button). To the right of these options, it says "Show: All Suppliers" with a checkbox. The entire interface is contained within a light gray border.

Under the **Supplier Information** frame, select any one of the following options as required:

- Place the order with an existing supplier
- Suggest supplier(s) for buyer's review

Supplier Information

(Place the order with an existing supplier
 Suggest supplier(s) for buyer's review

System Suggested Supplier(s) (?)

Type	Supplier Name	Address	View Contract(s)	Actions
There is no supplier suggestion. Please add new/search for existing supplier by clicking on the appropriate links				

Add Supplier

[Select Existing Supplier](#) [Add new supplier](#)

Requester Selected Supplier(s)

Supplier Name	Address	Supplier Contact	Contract/Order Number	Actions
There is no selected supplier. Please add new/search for existing supplier by clicking on the appropriate links				

D. Suggest supplier(s) for Buyer's review

(Suggest supplier(s) for buyer's review

System Suggested Suppliers (?)

Type	Supplier Name	Address	View Contracts	Actions
There is no supplier suggestion. Please add new/search for existing supplier by clicking on the appropriate links				

Add Supplier

[Select Existing Supplier](#) [Add new supplier](#)

Supplier Name*:
Supplier Contact:
Phone:
Other Details:

Address*:
Supplier Email Id:
Contract/Order Number:

Requester Suggested Suppliers

Supplier Name	Address	Supplier Contact	Contract/Order Number	Actions
EBAY OFFICE SUPPLIES	NY	Yuti Shah	-	

Add to Cart [Add to Basket](#) [Cancel](#)

System suggested supplier(s) displays all the contracted, preferred and suppliers that are associated with the selected category. You will be able to view maximum of 10 (last used) system suggested suppliers.

If the required supplier is not found in the list, click **Select Existing Supplier** or **Add new Supplier**.

Select Existing Supplier

Add Supplier

[Select Existing Supplier](#) [Add new supplier](#)

Supplier Name* :	Supplier Contact:	Other Details:
Address* :	Supplier Email Id:	
Contract/Order Number:	Phone:	
Show all		
Add Supplier Reset		

- i. Enter and select the **Supplier Name** from the auto suggested suppliers list from the drop down list.
- ii. Select the **Address** from the drop down options. These options are auto populated from the suppliers details.
- iii. Supplier Contact and Email ID fields are auto populated as per the **Address** selected.
- iv. Enter the **Contact / OrderNumber**, **Phone** no. and **Other Details** in the respective fields. Click **Show All** to view all the Blanket POs and Contracts for the selected supplier.

Add new Supplier

Add Supplier

[Select Existing Supplier](#) [Add new supplier](#)

Supplier Name* :	Supplier Contact:	Other Details:
Address* :	Supplier Email Id:	
Contract/Order Number:	Phone:	
Show all		
Add Supplier Reset		

All the fields for **Add new Supplier** are same as **Select Existing Supplier**; except that none of the fields are auto populated.

Once you add a new or existing supplier, it will be listed under the section of **Requester Suggested Suppliers** as shown below:

Requester Suggested Suppliers

Supplier Name	Address	Supplier Contact	Contract/Order Number	Actions
EBAY OFFICE SUPPLIES	NY	Yuti Shah	-	

Recently Ordered Free-text Items

Add to Cart Add to Basket Cancel

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E. Place the order with an existing supplier

Supplier Information

Place the order with an existing supplier

Supplier Name*: EBAY OFFICE SUPPLIES Supplier Contact: EBAY OFFICE SUPPLIES Other Details:

Address*: Corporate KP Office Supplier Email Id: james.p@zycus.com

Contract/Order Number: Phone: [Show all](#)

- i. Enter and select the **Supplier Name** from the auto suggested suppliers list from the drop down list.
- ii. Select the **Address** from the drop down options. These options are auto populated from the suppliers details.
- iii. Supplier Contact and Email ID fields are auto populated as per the **Address** selected.
- iv. Enter the **Contact / Order Number**, **Phone** no. and **Other Details** in the respective fields. Click **Show All** to view all the Blanket POs and Contracts for the selected supplier.

Contracts & Blanket orders

Showing all blanket orders & contracts for the supplier **EBAY OFFICE SUPPLIERS**. Please select one.

Blanket orders Contracts

Found **10** records.

PO Number	PO Name	Created By	Valid until	Balance amount
PO- 714 -T3-Acme Semiconductors-T3-Pitts	jay_BPO111	disha	01/01/2015	USD 247,421.01080
QQQ\$temp1394	Blanket PO	<H1>BUG</H1>	12/31/2014	USD 0.06275
ACMENG 13 860	Lawn maintenance services	Prashant	11/04/2014	AUD 8,150.00000
PO- 827 ... Sequence number	test BPO	Tushar	10/31/2014	AUD 31,496.25000
ACMENG/13/195	Blanket PO	Sunil kumar	09/02/2014	USD 937.51640

Showing Page 1 of 128

Select Close

v. Search for the blanket order, select it and click on the **Select** button.

Click on **Add to Cart** to add the item to the cart. A new dialog box will appear displaying the details of the free-text created.

To add another free-text item, click on **Add another item** and repeat the above procedure.

OR

Click **Checkout** to submit your order. For more information see, [Submitting your Order \(Check - Out\)](#).

Free text item - laptop

Item was added to the shopping cart. Click [here](#) to view 8 item(s) in cart.

 **laptop** 
123
100 EA @ **USD N/A**

Category: Notebook computers
SPSC Code: 43211503
Recommended Suppliers: - GALAXY CORP
- DELL INC

Checkout | Add another item | View 8 item(s) in cart

5.7.2 Guided Procurement Process(Using Guide Me)

Guided Procurement can be performed with the following process:

- a. Search for the item. If not found, create a free-text item.
 - b. Fill the create a free-text item form to provide details of your requirement.
 - c. Select a supplier from the list of contracted suppliers
 - d. Suggest your suppliers and checkout
1. Enter the description of the item or services in the **Search Box**.

The screenshot shows the ZYCUS eProc interface. At the top, there's a navigation bar with 'Requisition' and 'Approval' dropdowns, and links for 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. A user 'Hi, John A.' is logged in. On the left, there's a sidebar with 'Categories' (Paper & Pens, Office Stationery, Other Office Equipment, Office Furniture, Computers & Accessories) and 'Need Help?' (Online Demo, Requisition FAQs). The main area is titled 'Online store' with a search bar containing 'Type product description, supplier name, part no, etc' and a 'Search' button. Below the search bar, it says 'Examples: laptop, tablet, printers, chairs, cabinets, cleaning services'. There are sections for 'You can also order using' (Punchouts, Guided Procurement), 'Recruitment Services' (Order recruitment services for permanent or temporary professionals as per your requi.), and a footer with '© 2015 Zycus Inc. All Rights Reserved' and 'Powered by ZYCUS'.

When you enter an item description, system displays categories related to that description in a dropdown list.

The screenshot shows a dropdown list for searching items. The input field at the top contains 'table'. Below it, a message says 'Pick a category or search "table" in all items'. A list of results follows, including 'Drafting tables', 'Tables', 'Conferencing tables', 'Table risers', 'Mobile tables', 'Specialty exam tables and related products', 'Clinical procedure and examination tables', 'Computer support work surfaces', 'Pulse oximeters', 'Milling machines', and 'Table base'. The entire list is framed by a red border.

You can either select a category or search for the desired item in the list of all items by clicking on the link on top of the list of items.

Search for the desired item. If not found click on the **Still can't find what you are looking for?** and click on the **Guide Me** button.



Click **Change Category** to select a category. Enter the name of the category in the textbox and select one of the desired category.



Enter the required details in the **Item Details** frame. To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.



Under the **Supplier Information** frame, select any one of the following options as required:

A. Select Preferred Supplier:

- Search for the desired supplier from the suggested suppliers.
- Click **Select** in the **Action** tab of that supplier.

Supplier Information			
<input checked="" type="radio"/> Suggest a pre-approved supplier from the below list or <input type="radio"/> another new/existing supplier for buyer review ?		Show: All Suppliers <input type="button" value="▼"/>	
Name	Address	Type	Actions
sdf	-	Suggested	<input type="button" value="Select"/>
asdfsfs	-	Suggested	<input type="button" value="Select"/>
sfg	-	Suggested	<input type="button" value="Select"/>
ASD	hji	Suggested (View all contracts)	<input type="button" value="Select"/>

B. Suggest a new Supplier:

- i. Click on the **Suggest a new Supplier** link under the **Supplier Information** section.
- ii. The **Suggest new Supplier** dialog box will appear. Enter the required information and click on the **Suggest** button.

Suggest new Supplier

If you have a supplier in mind, you can suggest it to the buyer

Enter Supplier Name: Infotech Ltd.

Create new supplier

Provide Supplier's details so that they can be contacted

Supplier Name*:	Infotech Ltd.
Location:	Peru
Contact Person:	Sean Marshal
Email:	sean.marshall@infotech.com
Phone:	+911234567
Other Details:	Company Dealership

Suggest **Cancel**

C. Place the order with an existing supplier:

(a) Place the order with an existing supplier [?](#)

Supplier Name*:	EBAY OFFICE SUPPLIERS	Supplier Contact:	EBAY OFFICE SUPPLIERS	Contract/Order Number:	7813210320
Address*:	LAND OF FIRE	Supplier Email Id:	sean.marshall@zycus.com		
	LAND OF FIRE KONOHA VLG HOKAGE CHAMBERS LEAF LAND OF FIRE, MA 12345, US 9874563210, 12-23-345-56-76		Show all		

- i. Enter the name of the supplier in the **Supplier Name** textbox.
- ii. Enter the contract/order number in the **Contract/Order Number** textbox.
- iii. Click the **Show all** button. The **Contracts & Blanket orders** frame will appear.
- iv. Search for the blanket order, select it and click on the **Select** button.

Contracts & Blanket orders

Showing all blanket orders & contracts for the supplier **EBAY OFFICE SUPPLIERS**. Please select one.

Blanket orders **Contracts**

Found **10** records.

PO Number	PO Name	Created By	Valid until	Balance amount
PO- 714 -T3-Acme Semiconductors-T3-Pitts	jay_BPO111	disha	01/01/2015	USD 247,421.01080
QQQ\$temp1394	Blanket PO	<H1>BUG</H1>	12/31/2014	USD 0.06275
ACMENG 13 860	Lawn maintenance services	Prashant	11/04/2014	AUD 8,150.00000
PO- 827 -.. Sequence number	test BPO	Tushar	10/31/2014	AUD 31,496.25000
ACMENG/13/195	Blanket PO	Sunil kumar	09/02/2014	USD 937.51640

Showing Page **1** of 128 **Next** **Previous**

Select **Close**

Click on **Add to Cart** to add the item to the cart. A new dialog box will appear displaying the details of the free-text created.

To add another free-text item, click on **Add another item** and repeat the above procedure.

OR

Click **Checkout** to submit your order. For more information see, [Submitting your Order \(Check - Out\)](#).

Free text item - laptop

Item was added to the shopping cart. Click [here](#) to view 8 item(s) in cart.

laptop

123

100 EA @ **USD N/A**

Category: Notebook computers

SPSC Code: 43211503

Recommended Suppliers: - GALAXY CORP
- DELL INC

Checkout **Add another item** | **View 8 item(s) in cart**

5.8 Adding Items using Item Master

1. Search for an item in the search box. Click **Search**.

The screenshot shows the eProc Online store interface. In the top navigation bar, 'Requisition' is selected. Below it, the 'Online store' tab is active. On the left, there's a sidebar with categories like 'Paper & Pens', 'Office Stationery', 'Other Office Equipment & ...', 'Office Furniture', 'Computers & Accessories', and 'Need Help?' which includes 'Online Demo' and 'Requisition FAQs'. The main content area is titled 'Online store' and shows a search result for 'Hardware'. It displays a list of hardware items with columns for 'Image', 'Description', 'Supplier', 'Availability', and 'Price'. A shopping cart icon at the top right shows '2 Items | USD 601.40009'.

2. You will find all the matching items listed.

This screenshot shows the eProc search results for the term 'Mae Jack'. The search bar at the top contains 'Enter Item Description' with 'Search' button. The results page lists several items, each with a thumbnail, name, supplier, availability, and price. The first item is 'Books' from EBAY OFFICE SUPPLIES. Other items include 'Item Master Hardware' (2 results), 'Pendaflex Poly File Jackets, 5 Pack...', 'Smead Letter Size Manila File Jacket...', 'BlueRigger High speed HDMI Cable 6...', 'Brownline 2011 Weekly Planner, Twin...', 'Waterman Phileas Blue Medium Point ...', and 'Kodak EasyShare C182 Digital Camera...'. A sidebar on the left provides filtering options for 'Description', 'Price' (0 to 155400), 'Currencies' (AUD, EUR, INR, USD), 'Manufacturers' (2:ZOLITY INC, ACER, BLIZZTOP INC, BILLERIGER, CROWN, FELLOWS, FILESEC), 'Suppliers' (EBAY OFFICE SUPPLIES), 'Categories', and 'Others'.

3. On the listing page, if  icon is placed after a listed item, it denotes item master.
4. Click on the **item name** to view the **item details**. Following popup will be displayed:

Item Details



Item Master Inventory Item 1 

Item Master Inventory Item 1
INR 12.0 EA

EA 

 Add to favorites

Details **Specifications** **Attachments**

Description:	Item Master Inventory Item 1
Manufacturer:	-
Manufacturer Part Id:	-
Category:	Protest movements
SPSC Code:	93111503
Supplier:	APPLE
Delivery Lead Time (days):	N/A
Contract No:	-
ERP Part No:	12345
Asset numbering required:	No

Note: In this popup, **Asset numbering required** will inform if asset numbering is required or not.

- When you select an item which belongs to item master, then you are required to provide certain details by click on **+Add Details** against that item master. Following popup will be displayed:

Item Details

Item Image



Select File
or
[upload/laptop.PNG5941.png](#)

Item Details

Standard Fields

Sourcing Status*: Quoted by supplier  Need a Quote 

Supplier Name*: 
iSupplier ID: 629902

Supplier Part ID:

Short Description*:

Item Description:

Add to Cart **Add to Basket** **Cancel**

6. Details like quantity, sourcing status are required before adding the item to the cart.
7. If the supplier is not specified in the item master, select the **Sourcing Status** as **Need a Quote**.
8. The buyer will then provide with supplier details and price.
9. If you do not want the supplier to provide with supplier details, then you will have to provide a supplier name.

5.9 Adding Items using Inventory Item Master

1. On the **eProc**, landing page, **Online Store**, search for your required item. For example, **Keyboards**.

The screenshot shows the eProc Online Store interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. Below the navigation bar, there's a sub-menu for 'Online store' with options: My Requisitions, My Favorites, Shopping Basket, and All Requisitions. A sidebar on the left lists categories: GPS Trackers, Electronics, Computer, Surveillance Equipments, DIY tools, Kitchen Appliances, and Self Help Tools. Another sidebar titled 'Need Help?' includes 'Online Demo' and 'Requisition FAQs'. The main content area is titled 'Online store' and has a search bar with the term 'Keyboards' entered. It also shows a message 'Pick a category or search "Keyboards" in all items'. Below the search bar, there's a section titled 'You can also order using' with two buttons: 'Punchouts' and 'Guided Procurement'. At the bottom of the page, there's a footer with copyright information: '© 2016 - Zycus Inc., All Rights Reserved' and 'Powered by ZYCUS'.

2. Click **Search**. You will be navigated to the items listing page based on keyword search **Keyboards**.

5.9.1 How to Identify an Inventory Item?

- Inventory item can be identified as an item master denoted by the  icon.
- Inventory item's **Price** is always **N/A** because that item is already purchased from supplier and is stored in buyer's warehouse.

Showing results for 'Keyboards'
No Related categories found.

Items found: 30

Filter Search Results

- Clear Filters
- Description
- Price: 25 to 90
- Currencies
- Select: All | None
- USD (30)
- Manufacturers
- Select: All | None
- 3M (1)
- CONNECTLAND (1)
- FELLOWES (2)
- INGRAM MICRO D (1)
- KEDCOILS INC (4)
- LOGITECH INC. (6)
- MICROSOFT CORPO... (12)
- NONE (2)
- UNZOLWER INC (1)
- Suppliers
- Categories
- Others

1 Items | USD 0.00 Checkout

Sorted by: Relevance

Item	Supplier	Availability	Price	Quantity
keyboard	N/A	N/A	N/A	67 EA
KEYBOARD,W/OPT MOUSE,WRLS	EBAY OFFICE SUPPLIES	Delivery in 13 day(s)	USD 66.00	EA
KEYBOARD,W/OPT MOUSE,WRLS	EBAY OFFICE SUPPLIES	Delivery in 13 day(s)	USD 66.00	EA
KEYBOARD,W/OPT MOUSE,WRLS	EBAY OFFICE SUPPLIES	Delivery in 13 day(s)	USD 60.00	EA
KEYBOARD,W/OPT MOUSE,WRLS	EBAY OFFICE SUPPLIES	Delivery in 13 day(s)	USD 66.00	EA

Still can't find what you are looking for?

- Based on the above image of search results, the first and second entry is an inventory item master's item.

4. Add the quantity you want and click **Add to Cart** icon.

5. Proceed to **Checkout**, you will be navigated to the following page:

Requisition Info

Requisition Name*: Steffy/8171292/02/05/16

Urgent Requirement?: Yes

Attachments?:

Reason for ordering?:

On Behalf of?:

Purchase Type?: GENERAL

Billing, Delivery & Cost Allocation Info

Organization Unit (OU): TATA > TATA_BU > Hiranandani

Delivery address:
Lokhandwala
Lokhandwala
Andheri
Mumbai, Maharashtra
400080, India

Bill-to address:
Lokhandwala
Lokhandwala
Andheri
Mumbai, Maharashtra
400080, India

Deliver to:
Cost Center: TATA_CC: 111

Required by*: 06/05/2016

Items in your Cart - 1 Item(s)

Line No.	Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	keyboard	N/A	N/A	67 EA	N/A	

Amount: **USD 0.00**

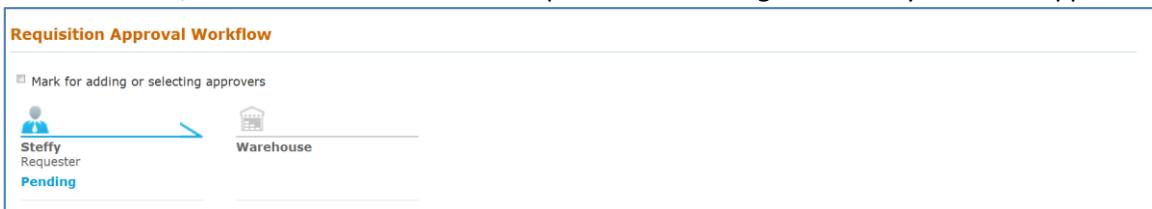
I'm Done | Save as Draft | Cancel

- Requisition raised to using inventory items is called **Issue Requisition**.
- There will be no fields to capture supplier details since the items are already bought from the suppliers and stored in the buyer warehouse.



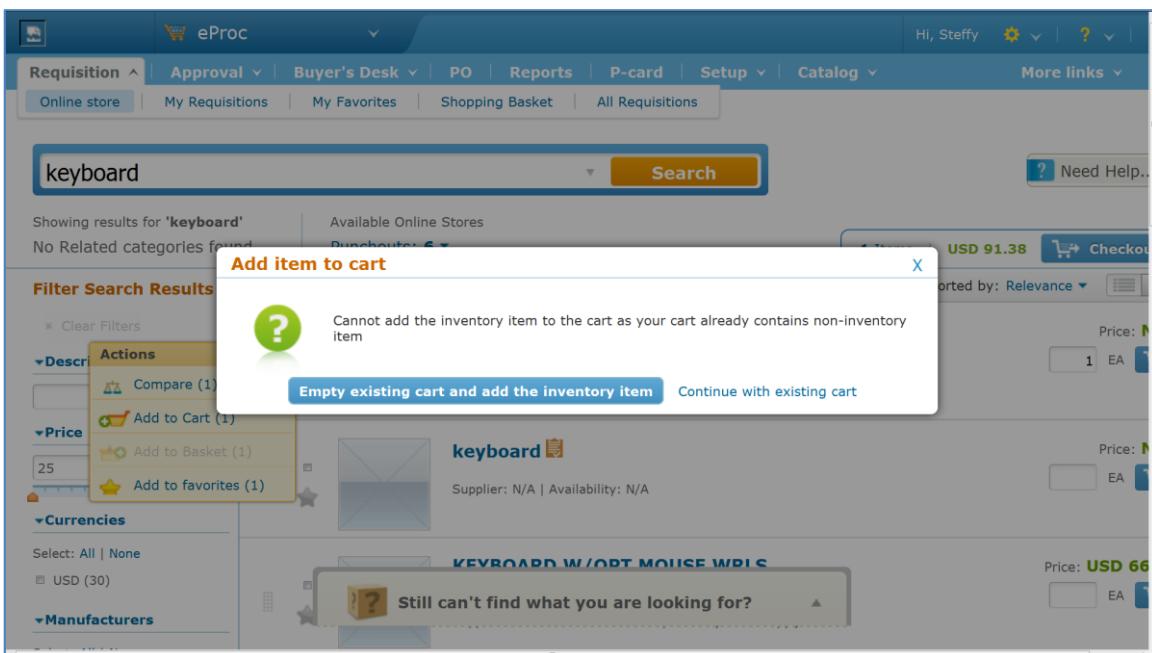
- Items in the requisition will be appended to the symbol .
- Total amount for the requisition will be zero.

10. Inventory item's requisition cannot be tagged to a budget since the goods is already purchased and stored in buyers warehouse.
11. Comments for supplier, send PO to supplier, Add items to existing PO, these fields will not be available for an **Issue Requisition**.
12. An Issue Requisition cannot be settled using an Invoice.
13. Once an Issue Requisition is approved, it is moved to the Released state as a Requisition with Inventory items does not go to the buyer nor is it converted into a Purchase Order.
14. Required By date is mandatorily to be filled in by the Requester.
15. Workflow for a Requisition will be applicable for an Issue Requisition; there need not be a separate workflow for the same.
16. As shown below, the workflow for an Issue Requisition does not go to the Buyer or the Supplier:



NOTE: You cannot add an inventory and non-inventory items in the cart together.

17. If you have added inventory and non-inventory items in the cart together, then the tool will give you following popup:



NOTE: An Inventory item is not available for ordering through a **Standard Purchase Order** or a **Blanket Purchase Order**.

5.10 Adding Items to Cart

To add items to cart:

1. Enter the quantity you wish to buy in the text box on the search result page or the supplier site and click **Add to Cart**.

OR

2. Enter the quantity you wish to buy in the text box and drag and drop the item onto the **Checkout** button.

Your shopping cart X							
Item Id	Item Name & Supplier Name	Availability	Unit Price	Qty	Total Price	Actions	
C55D-A5240NR	Toshiba Satellite C55D-A5240NR 15.6-Inch Laptop (Satin Black in Trax Horizon Supplier: COMPTON LAB SUPPLIES	N/A	USD 100.00	<input type="text" value="1"/> EA Update	USD 100.00		
LG667EA	HP EliteBook 2560p i5-2540m Supplier: TIMBERLAND	N/A	USD 1,692.67	<input type="text" value="1"/> EA Update	USD 1,692.67		
WJ683AW	HP EliteBook 8440p i5-520M 14 Supplier: TIMBERLAND	N/A	USD 1,655.96	<input type="text" value="1"/> EA Update	USD 1,655.96		

Total Price: USD 3,448.63

[Checkout](#) [Continue Shopping](#)

Click on the **Items** link (displays the number of items added in the cart) adjacent to the **Checkout** button. **Your shopping cart** is displayed.

The screenshot shows the Zycus eProc interface for a shopping cart. The search bar at the top contains the word 'tablet'. Below the search bar, there are filter options for 'Description', 'Price' (set between 14 and 16), and 'Currencies' (AUD). The main area displays three items found:

- Grey Ultra Thin Cover iPad 2 3 & 4**: Price AUD 14.00
- Sky Blue Ultra Thin Cover iPad Mini...**: Price AUD 15.00
- Green Ultra Thin Cover iPad Mini 1 ...**: Price AUD 16.00

At the bottom of the page, there is a message: "Still can't find what you are looking for?" followed by a magnifying glass icon.

Note: Shopping cart is saved across sessions. So if you do not checkout, the items can still be found in the cart when you login again.

Enter the quantity in the text box and click **Update** to update the quantity of items.

3. Click to delete an item from your cart.
4. Click **Continue Shopping** if you wish to shop more.
5. Click **Checkout** if you are done with the shopping and wish to place the order. For more information, see [Submitting your Order \(Check - Out\)](#).

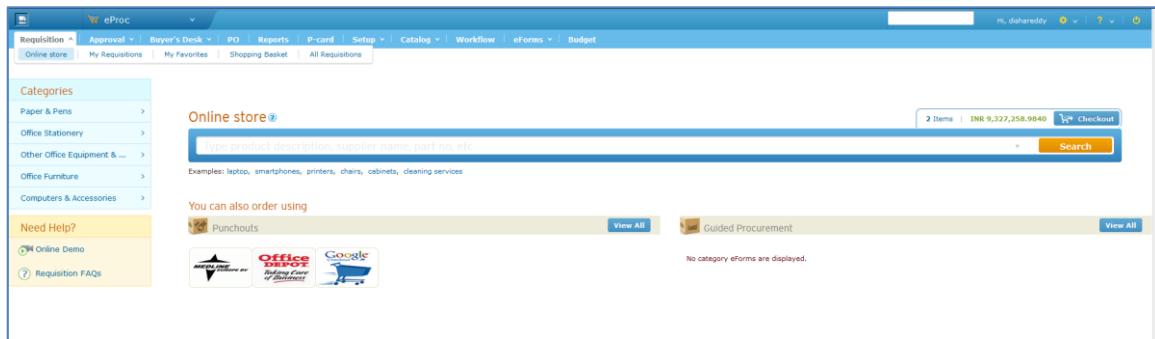
Note: If the mandatory fields are left blank, the corresponding error messages are displayed at the top as well as below respective fields.

6. Click **Empty Cart** if you wish to delete all the items in the cart.
7. Click **Save cart as basket** if you wish to save your shopping cart as a basket. For more information, see [Shopping Baskets](#).

5.10.1 Adding Virtual Items

To add a Virtual Item to the cart:

1. Search for the required Virtual Item using the Search bar on the **Online store** page



Note: Virtual Item(s) are denoted with the  icon on the Search Listing page.

2. On Search Results Listing page, look for the required Virtual Item and click on the **+ Add Details** button corresponding to it

3. Enter the required details about the Virtual Item and perform any one of the following:
 - a. **Add to Cart:** Add the Virtual Item to the cart for immediate use
 - b. **Add to Basket:** Add the Virtual Item to the cart for future use

5.10.2 Asset Tagging

1. You can tag an item to an asset number. Click **edit** for a line item.

Item Summary

laptops
NIKE CHANGED MAX 40 CHARS NIKE CHANGED MRR

ARS 122 × 1 EA = **USD 28.28002**

Create asset tag(s) for this item ?

↑ Use delivery information from the requisition summary

 Delivery address: Bug test 1 2B, north street 3rd block Michigan 34234, United States	Deliver to: Steffy dev2 Required by: -
---	---

 Deliver items to multiple persons or locations

OK **Cancel**

18. Check the box against **Create asset tag(s) for this item**.

Item Summary

laptops
NIKE CHANGED MAX 40 CHARS NIKE CHANGED MRR

ARS 122 × 1 EA = **USD 28.28002**

Create asset tag(s) for this item ?

↑ Use delivery information from the requisition summary

 Delivery address: Bug test 1 2B, north street 3rd block Michigan 34234, United States	Deliver to: Steffy dev2 Required by: -
---	---

 **Tag Asset(s)** !

 Deliver items to multiple persons or locations

OK **Cancel**

19. **Tag Asset(s)** link will appear. Click on the link.

Item Summary

laptops
NIKE CHANGED MAX 40 CHARS NIKE CHANGED MRR.

ARS 122 × 1 EA = **USD 28.28002**

Delivery and Asset Tagging ! Cost Allocation Attachments / Comments Miscellaneous

Create asset tag(s) for this item ?

! Use delivery information from the requisition summary

Delivery address: Bug test
1
2B, north street
3rd block
Michigan
34234, United States

Deliver to: Steffy dev2
Required by: -

Tag Asset(s) !

Sr No.	Asset No.*	Manufacturer Sr No.	Notes
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>

! ! Deliver items to multiple persons or locations

OK **Cancel**

20. Asset field will be populated. The number of asset fields will depend upon the quantity of a line item.
So if the quantity of a single line item is ten, then ten asset tags will be populated.
21. The **Asset No.** field will be mandatory. The asset number will not be auto-generated. You can put the number of your choice.
22. Click **OK**.
23. The line item will be tagged with an asset number. It is useful to track an item during delivery using this feature of asset numbering.
24. Under the Delivery and Asset Tagging, if you select **Deliver items to multiple persons or locations**, you can also perform asset tagging for the item numbers.

Item Summary

laptops
NIKE CHANGED MAX 40 CHARS NIKE CHANGED MRR.

ARS 122 × 5 EA = **USD 141.40009**

Delivery and Asset Tagging Cost Allocation Attachments / Comments Miscellaneous

Create asset tag(s) for this item ?

↑ Use delivery information from the requisition summary

📦 Deliver items to multiple persons or locations

+ Expand Asset Tag(s) | - Collapse Asset Tag(s)

Deliver to	Address (Location)	Delivery date/duration <small>?</small>	Ordered Qty/Amt	Asset Tagging	Amount
Steffy dev2	Bug test (T3-Niagara Squa! 🚗)	<input type="text"/> <small>calendar</small>	5 EA	<small>QR</small> Tag Asset(s)	USD 141.40009 <small>+</small>

Sr No.	Asset No.*	Manufacturer Sr No.	Notes
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK **Cancel**

25. You can also split the ordered quantity and tag the asset number for each lot.

5.11 Submitting your requisition (Check - Out)

To submit your requisition:

1. Click **Checkout** 🛒 Checkout button on the upper right corner of the item listing page. The **Checkout** page will be displayed.

The screenshot shows the eProc Requisitioner Manual interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. Below the navigation bar, there's a sub-navigation bar with links for Online store, My Requisitions, My Favorites, Shopping Basket, All Requisitions, and View Orders. A search bar and a user profile 'Hi, disha' are also at the top.

The main content area has two main sections:

- Requisition Info:** This section contains fields for Requisition Name (T-PR by disha for 640561#), Urgent Requirement (checkbox Yes), Attachments (button Add Attachments), Reason for ordering (text input), Comments for supplier (text input), On Behalf of (dropdown), and Purchase Type (dropdown set to CAPITALS).
- Billing, Delivery & Cost Allocation Info:** This section includes fields for Organization Unit (OU) (Regression1 > Regression_bu > pit), Delivery address (T3-Acme Engineering Services, Mumbai, India), Bill-to address (multiple delivery address entries), and Cost Center (asdasd: 2). It also has fields for Required by (text input), Settlement via (dropdown set to Invoice), Retrospective Purchase (checkbox Yes), and Add items to existing PO (checkbox No, with a Show all POs button).

At the bottom of the form, there are buttons for Continue, Update draft, and Cancel.

Note: If the mandatory fields are left blank, the corresponding error messages are displayed at the top as well as below respective fields.

Note: Catalog items will be automatically flipped into purchase orders depending on configured settings.

WARNING: If the shopping cart total exceeds your spend limit, the following warning is displayed and the requisition will go for approval through configured workflow.



2. Click **Add more items** to edit your shopping cart.
3. If you remove items from your requisition, the line number at which the line item was present will be deleted.

Items in your Cart - 9 Item(s)							
<input type="checkbox"/> Expand All	<input type="checkbox"/> Collapse All	Actions					
Line No.	Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	
1	N/A	100 APPLE	N/A	USD 1.00000	100 EA	USD 100.00000	
2	1101	highBoost APPLE	N/A	INR 11.00000	1 EA	USD 0.21819	
3	14	Laptop APPLE	N/A	INR 11.00000	5 EA	USD 1.09095	
4	2593709	HP Wireless Elite v2 Keyboard - keyboard APPLE	N/A	USD 35.99000	4 EA	USD 143.96000	
5	1909960	Kensington Mouse-in-a-Box APPLE	N/A	USD 8.99000	10 EA	USD 89.00000	

Items in your Cart - 4 Item(s)							
<input type="checkbox"/> Expand All	<input type="checkbox"/> Collapse All	Actions					
Line No.	Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	
1	N/A	100 APPLE	N/A	USD 1.00000	100 EA	USD 100.00000	
2	1101	highBoost APPLE	N/A	INR 11.00000	1 EA	USD 0.21819	
4	2593709	HP Wireless Elite v2 Keyboard - keyboard APPLE	N/A	USD 35.99000	4 EA	USD 143.96000	
5	1909960	Kensington Mouse-in-a-Box APPLE	N/A	USD 8.99000	10 EA	USD 89.00000	

Amount: **USD 334.07819** (Currency-wise total)

4. As shown in the above set of images, line number 3 is deleted from the cart.
5. The line number will proceed with next available line number.

5.11.1 Requisition Information

1. Under **Requisition Info**, the **Requisition Name** field is auto-filled as per format configured. It can be edited. This is to enhance the requisition process and make it a single click event.

Requisition Info

Requisition Name * : T-PR by disha for 6073943

Urgent Requirement ? : Yes

Attachments ? : 

Reason for ordering ? :

Comments for supplier ? :

On Behalf of ? :

Purchase Type * ? : CAPITALS

2. You can also mark a request as urgent by checking the **Yes** checkbox next to **Urgent Requirement**.
3. Click **Add attachments** to upload attachments at the requisition level. You can also add attachments at the item level.
4. In the **Reason for ordering** field, specify a reason for your purchase. This will be visible to buyers.

5. In the **Comments for supplier** field, write desired comments if any. These comments will be sent to suppliers. Buyer can edit these comments.
6. In the **On behalf of** field, enter the name of the person on whose behalf you would like to request. The workflow related to the **On Behalf of** user will be triggered.
7. Select the **Settlement via** options as required; **Invoice, User P-Card or Disbursement**.
8. In the **Purchase Type** field, select the appropriate purchase type for your order.

5.11.2 Billing & Delivery Info

- On the **Checkout** page, the **Billing & Delivery Info** section displays the organization unit and both billing and delivery addresses.

Billing, Delivery & Cost Allocation Info 

Organization Unit (OU): Regression1 > Regression_bu > pit	
Delivery address: T3-Acme Engineering Services Road No - 41 Lane number-2 Sector 10 Andheri Est Mumbai Mumbai, Maharashtra India Deliver to: disha	Bill-to address: delivery address 1 delivery address 1 line 1 delivery address 1 line 2 delivery address 1 line 3 delivery address 1 line 4 East New Market, Maryland United States Cost Center: asdasd: 2
Required by *  : <input type="text"/> 	

- Under the **Organization Unit** sub-section, click **Edit** to edit the billing and delivery address. By default in a requisition Organization Unit/Address details are pre-filled based on users defaults.

Note: Addresses change on changing Organization Unit (OU)

Requisition Summary 

Billing	Delivery 	Cost Allocation
Currency *  : INR		
Select the organization unit to be billed for this order  :		
Company *:	<input type="text" value="TCS"/>	
Business Unit *:	<input type="text" value="TBU1"/>	
Location *:	<input type="text" value="T3-Niagara Square"/>	
Bill-to address  T3-Niagara Square 69 Delaware Ave # 1111 Buffalo 14202, Syria		
Send-to address  T3-Niagara Square 69 Delaware Ave # 1111 Buffalo 14202, Syria		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

3. Select the desired company, business unit and location.
4. Click on the **Delivery** tab.

Requisition Summary

Billing **Delivery** ! **Cost Allocation**

Deliver to*: ▼ Required by*: ? : Clear

Select a Delivery Address

Organization Unit Address Other Addresses My Addresses

T3-Niagara Square
69 Delaware Ave # 1111
Buffalo
14202, Syria

i To deliver an item to specific person or location, click button against an item.

OK **Cancel**

5. In the **Deliver to** field, enter the name of the person to deliver the goods.
6. In the **Required by** field, select a date for on which you want the items to be delivered.
7. Under **Select a Delivery Address**, select any option for delivery of items on that address:

- **OU Address:** This is the address of the selected organization unit.
- **Other Addresses:** Here, you can select an address from the drop down list of all addresses in the selected Business Unit. Here you will be able to view up to 50 addresses.
- **My Addresses:** Here, you can create a custom address which can also be used in other requisitions created by you. Here you will be able to view up to 50 addresses.
- Delivery Split can be done at item level. More details are covered below.

8. Click **Cost Allocation** tab.

Requisition Summary X

Billing **Delivery** **Cost Allocation**

Cost Booking

Assign purchase cost to work orders: Yes No

Allow budget utilization: Yes No

 Book cost to a single cost center

Cost Center*:

 Book cost to multiple cost centers

 Book cost at line item level

OK **Cancel**

NOTE: On hovering over the information icon, you will be able to view the short **project description** and other details as provided by your **eProc** admin.

9. For the **Allow Budget Utilization** option:

- A. Select **Yes**, if a particular Budget is to be used for the Requisition
- B. Select **No**, if no particular Budget is to be used for the Requisition

10. If **Yes** is selected for the **Allow Budget Utilization** option, select the **Budget** for the Requisition.

Requisition Summary

Billing **Delivery ** **Cost Allocation **

 Select cost-center before selecting a budget-line.

Cost Booking

Assign purchase cost to work orders: Yes No

Allow budget utilization: Yes No

 Book cost to a single cost center

Cost Center*:

Budget*:
Please select a budget line

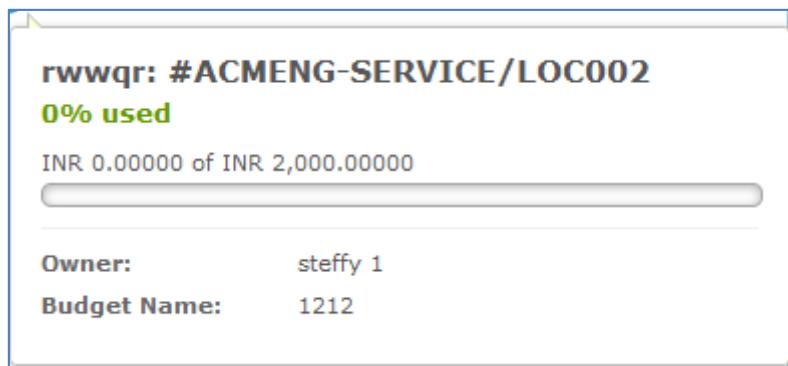
 Book cost to multiple cost centers

 Book cost at line item level

OK Cancel

Note: Cost allocation can be split for different items.

Note: After a budget has been selected, the  icon is displayed. Hovering over the icon displays the Budget Details as follows:



11. Select one of the following option as required:

A. **Book cost to a single cost center:**

- i. Enter the name of the center in the **Cost Center** textbox.
- ii. Select the desired center from the list.

B. Book cost to multiple cost centers:

- i. Enter the name of the center in the **Cost Center** textbox and select the desired center from the list.
- ii. Enter the percentage of cost allocation for the center in the **Percentage** textbox.

Note: To add new center to split the cost allocation click on the plus sign .

C. Book cost at line item level:

- i. Click **Save**. Expand all **Items in your Cart** in the requisition information.
- ii. Under **Cost Booking** tab for each item, click **Edit**.
- iii. Select **Percentage** or **Quantity**. Enter the **Budget** and **Percentage** or **Qty**, click **Save**.

12. Click on **Save** to save the requisition summery settings.

5.11.3 Items in your Cart

- On the **Checkout** page, the **Items in your Cart** section displays list of items in your cart. You can modify item quantity, delivery and cost booking details.

The screenshot shows a table titled 'Items in your Cart - 1 Item(s)'. The table has columns: Line No., Item No., Item and Supplier Name, Reference Contract, Availability, Unit Price, Qty/Amt, Total Price, and Actions. One item is listed: 'Drilling Machine' (Line No. 1, N/A). The total price is STD 2,834,997,480.0000. Action icons include expand (+), collapse (-), upload (document with arrow), comment (speech bubble), edit (pencil), and delete (trash bin).

- Click to expand an item in the list.
- Click to collapse an item in the list.
- Click to add any comments.
- Click to upload any attachments.
- Click to edit the item. The following **Item Summary** page is displayed.

Note: Split enables to deliver a single requisition to multiple persons at different locations.

The 'Item Summary' dialog box is open for a 'laptop' from 'EBAY OFFICE SUPPLIES'. The total price is INR 554,1500 × 1 ppm = **INR 554,1500**. The dialog has tabs: Delivery and Asset Tagging, Cost Allocation, Attachments / Comments, Assigned Buyers, and Miscellaneous. Under 'Delivery and Asset Tagging', there are checkboxes for 'Create asset tag(s) for this item' and 'Use delivery information from the requisition summary' (which is selected). The 'Delivery address' is listed as 'T3-Acme Engineering Services, Road No - 41, Lane number-2, Sector 10, Andheri Est Mumbai, Mumbai, Maharashtra, India'. The 'Deliver to' field shows 'disha' and 'Required by: 31/12/2016'. There is also an option to 'Deliver items to multiple persons or locations'. At the bottom right are 'OK' and 'Cancel' buttons.

5.11.3.1 Add Item to Requisition

1. eProc allows you to modify your current cart and add extra items while it retains the existing items.
2. On clicking **Add Item**, you will be navigated to the **online store** where you can search for the items and add them to cart.

The screenshot shows a shopping cart interface with two items listed:

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	
2	N/A	naq items AVNISH TEST SUPPLIER	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	

Item-level taxes sub-total: INR 0.00000
Amount: INR 90,132.00000

5.11.3.2 Add Cart Items to PO

You can link the items from your cart to an existing **PO** of type **Standard** or **Released**.

1. To add the items click **Add Items to PO** as shown below:

The screenshot shows the same shopping cart interface as above, but the 'Add Items to PO' button is highlighted with a red box.

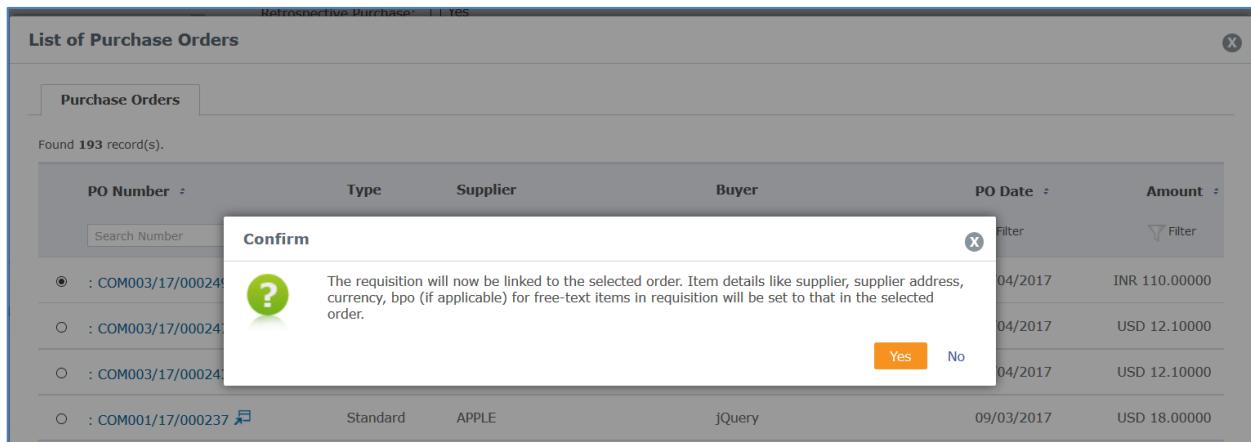
2. A list of PO's will appear in the popup as shown below:

The screenshot shows a modal window titled "List of Purchase Orders". The table contains the following data:

PO Number	Type	Supplier	Buyer	PO Date	Amount
: COM003/17/000249	Standard	APPLE	disha	10/04/2017	INR 110.00000
: COM003/17/000247	Standard	AVNISH TEST SUPPLIER	disha	07/04/2017	USD 12.10000
: COM003/17/000243	Standard	AVNISH TEST SUPPLIER	jQuery	10/04/2017	USD 12.10000
: COM001/17/000237	Standard	APPLE	jQuery	09/03/2017	USD 18.00000
: COM001/17/000224	Standard	APPLE	jQuery	21/02/2017	USD 55.00000

View PO in new tab

3. Choose a PO and click **Select**.
4. You will see a confirmation message which will inform you that current requisition will be linked to the selected order and the item details will be set as per the selected purchase order. Click **Yes** if you agree.



Note: Supplier should be same as that in the selected order.

5.11.3.3 Create New Quick Sourcing Event

If there are any **Guided Procurement** items added to your cart, then you will be able to create a quick sourcing event for those items.

5. To create a new quick sourcing event, select the **(guided procurement)** items from cart as shown below and click **Create New Quick Sourcing Event**.

The screenshot shows a shopping cart interface with a table of items. The first item, 'pen AVNISH TEST SUPPLIER', has its checkbox checked and is highlighted with a red box. The second item, 'naq items AVNISH TEST SUPPLIER', also has its checkbox checked. At the top right of the table, there is a 'Actions' button with a dropdown menu. The 'Create Quick Source Event' option in this menu is also highlighted with a red box. Below the table, there are tax and amount summary lines: 'Item-level taxes sub-total: INR 0.00000' and 'Amount: INR 90,132.00000'.

6. A side by side Quick Source panel will appear where you can initiate a quick source event.

7. **Quick Source Name:** Enter the name of the quick source inquiry. This field is marked as mandatory, but however if you don't enter the inquiry name, then it will be auto-set to {first item name & count of remaining items}.
8. **Currency:** Select the currency for this event. The currency selected here will be used for bidding. Once quick source is awarded and flipped into a requisition, this currency will be maintained.
9. **Include Item Details:** All the items selected from the item table will appear in a grid on the side by side panel.

You can change the **Item Name**, **Quantity**, **UOM**, and **Market/Current Price**.

You can also add more items on the quick source panel using the  icon.

10. **Include questions for Supplier(s):** If there are any questions such as "Will the items be delivered by ship or air?" which you would like to ask the suppliers, you can add those in this section.
11. **Include an opening message for your Supplier(s):** You can write a small message for your suppliers such as "This sourcing event is created for smaller quantity, please submit your bids by the end of Q1." The opening message you write over here will be appended in the mail sent to the suppliers.
12. **Attach related documents for your Supplier(s):** If you want to upload any supporting documents, such as Disclaimers for your suppliers, then use this section. Any file uploaded in this section will be sent to the supplier as an attachment in the email.

13. **Invite Supplier(s) to bid this quick Source:** You can invite suppliers that may or may not be registered by simply entering the details in this section. The unregistered suppliers will get created as a **Potential Supplier Contact** in your **Zycus Supplier management system** or **iSupplier**.

Enter the supplier **Company, Name** and enter the **email ID**.

You can add more than one supplier for the quick sourcing event.

14. **Invite internal collaborators and colleagues:** You can choose to invite internal eProc users to monitor or amend the quick souring event.

Enter the keywords for the email id of the internal user and the email address will be auto-completed. You can add more than one internal collaborators and colleagues.

15. **By when you want quotes from the invited suppliers?:** Select a date by which you want to receive bids from your suppliers.

16. Once all the mandatory information is filled, you can choose to save the quick sourcing event as draft or submit it.

17. Click **Save as Draft** if you want to continue later or click **Create** if you want to submit.

Note: You can create a quick source event for items belonging to an item master. Note that when a quick source event is already created for an item from item master, there will be a new tab - **Sourcing** added in the **Item Details** popup as shown below:

Supplier Name	Bid Quantity	Bid Price	Bulk Price	Savings	Bid Validity	Actions
MYNTRA	1 EA	USD 10.00	-	-	-	-

5.11.3.4 Delivery and Asset Tagging

1. Select **Deliver items to multiple persons or locations** if you wish to deliver goods to different people at different locations through a single requisition.

Item Summary

pen1 sd
EBAY OFFICE SUPPLIES YER 20,0000 × 1 EA = **INR 6,4512**

Delivery and Asset Tagging	Cost Allocation	Attachments / Comments	Assigned Buyers	Miscellaneous
<input type="checkbox"/> Create asset tag(s) for this item ?				
<input type="radio"/> Use delivery information from the requisition summary				
<input checked="" type="radio"/> Deliver items to multiple persons or locations				
Deliver to	Address (Location)	Delivery date/duration ?	Ordered Qty/Amt	Amount
disha	T3-Acme Engineering Servi	<input type="text"/>	<input type="text"/> 1 EA	-INR NaN
<input type="button" value="OK"/> <input type="button" value="Cancel"/>				

Note: To deliver items to multiple persons or locations click on the plus sign .

- Enter the required details and click **Save**.

5.11.3.5 Cost Allocation

- Click on the **Cost Allocation** tab. Under the **Accounting** section, select the GL type using the **GL Type** dropdown box.

Note: The GL accounts which are defaulted can be changed.

Item Summary

pen1 sd
EBAY OFFICE SUPPLIES YER 20,0000 x 1 EA = **INR 6,4512**

Delivery and Asset Tagging **Cost Allocation** **Attachments / Comments** **Assigned Buyers** **Miscellaneous**

Accounting

Purchase Type*: CAPITALS

Asset Code:

Cost Booking

i To book cost at line item level, select option "Book cost at item level" at the requisition header.

 Copy cost booking information from the header

Cost Center	Amount
asdasd: 2	-INR NaN

 Book cost at the item level

OK **Cancel**

- In case if GL account is not mapped to a category, select the GL account using the **GL Account** dropdown box.
- Enter the **Asset Code** for the item.

Note: Asset Code for an item can only be added if the Asset Codes setting has been enabled by the Administrator.

- Under the **Cost Booking** section, if the cost booking is split for different items, select **Percentage** or **Quantity**.

Item Summary

pen1 sd
EBAY OFFICE SUPPLIES YER 20,0000 × 1 EA = **INR 6,4512**

Delivery and Asset Tagging **Cost Allocation** **Attachments / Comments** **Assigned Buyers** **Miscellaneous**

Accounting

Purchase Type*:

Asset Code:

Cost Booking

To book cost at header level, select option "Book cost to a single cost center" at the requisition header.

Copy cost booking information from the header

Book cost at the item level

Percentage Quantity Quantity proportional to delivery

Cost Center*	Percentage	Amount
linelevel_disha : linelev	100 %	-INR NaN <input type="button" value="+"/>

OK **Cancel**

7. Enter the **Budget** and **Percentage or Qty**.

8. If the cost is to be allocated to a single cost booking center, select **Book cost to a single cost center** option.

Item Summary

pen1 sd
EBAY OFFICE SUPPLIES YER 20,0000 × 1 EA = **INR 6,4512**

Delivery and Asset Tagging **Cost Allocation** **Attachments / Comments** **Assigned Buyers** **Miscellaneous**

Accounting

Purchase Type*:

Asset Code:

Cost Booking

To book cost at header level, select option **Book cost to a single cost center** at the requisition header.

Copy cost booking information from the header

Book cost at the item level

Percentage Quantity Quantity proportional to delivery

Cost Center*	Percentage	Amount
linelevel_disha : linelev	100 %	-INR NaN <input type="button" value="+"/>

OK **Cancel**

9. Follow Steps 8 to 12 of the **Billing & Delivery Info** section above.

5.11.3.6 Attachments/Comments

10. For the Attachments/Comments section, you can add, review, and modify the comments for internal use and for suppliers.

File name	Status	Visibility	Size	Actions
taxonomy.csv	Uploaded	Internal	246 B	

11. You can upload attachments for a line item.
 12. If an attachment already exists, then you can change the visibility of that attachment.
 13. You can also delete an existing attachment.

5.11.3.7 Assigned Buyers

14. For the **Assigned Buyers** section Assign buyer(s), buyer groups to an item.

8. You can assign buyer(s) and/or buyer groups to a line item.
9. On the **Assigned Buyer** textbox, click on the  icon and select one of the required option:
 - A.  - Select this option to assign an individual user as the assigned buyer of the requisition.
 - B.  - Select this option to assign a group of predefined users as the assigned buyers of the requisition.
10. Enter the name/email id of the assigned buyer/group in the **Assigned Buyer** textbox and select the required buyer/group from the enlisted buyers.

Note: The **Assigned Buyer** field can be mandatory or non mandatory or hidden, depending upon setting.

Note: If a requisition is assigned to a user group, all the buyers in the group will be notified and they will be able to see that requisition in the **Buyer's Desk** listing.

Note: The **Assigned Buyer** field is mandatory and none of the items in the requisition have the **Need a Quote** status, the status of the requisition will change to **Ready for Approval** where a buyer can be assigned.

Note: For existing documents, buyers at header level will be assigned to all the items within the document.

5.11.3.8 Miscellaneous

This section will include all the custom fields configured by your admin which needs to be captured against a line item.

Item Summary 

pen1 sd
EBAY OFFICE SUPPLIES

YER 20,0000 × 1 EA = **INR 6,4512**

Delivery and Asset Tagging
Cost Allocation
Attachments / Comments
Assigned Buyers
Miscellaneous

Conditions for use

Enter the Durability of product (in days)* :

OK
Cancel

Note: The fields appearing in this section will vary for your use since these fields are configured by your company admin.

Note: If you are adding a punchout item to your cart, then any taxes applicable to that punchout item will be displayed on the Checkout page.

5.11.4 Actions on the Items in your Cart

11. To update multiple line items in your requisition, select the items by checking the box against the line item and click **Update all lines (shown below)**.

Items in your Cart - 2 Item(s)

Update all lines | + Add Item

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input checked="" type="checkbox"/> + 1 123	Camera	EPROC SUPPLIERT	AUTO10951	N/A	USD 4.00	6 EA	USD 24.00	
<input checked="" type="checkbox"/> + 2 234	Lens	EPROC SUPPLIERT	AUTO10951	N/A	USD 10.00	5 EA	USD 50.00	

Amount: **USD 74.00**

Note: If there are any catalog items which were flipped from a contract, then the item will be denoted by



the icon and you will be able to view the **Referenced Contract Number** as shown below:

Items in your Cart - 2 Item(s)

Update all lines | + Add Item

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input checked="" type="checkbox"/> + 1 123	Camera	EPROC SUPPLIERT	AUTO10951	N/A	USD 4.00	6 EA	USD 24.00	
<input checked="" type="checkbox"/> + 2 234	Lens	EPROC SUPPLIERT	AUTO10951	N/A	USD 10.00	5 EA	USD 50.00	

Amount: **USD 74.00**

12. A popup will appear. You can update information such as:

- Cost Center
- Required By
- Assigned Buyers
- Existing Buyers (view/delete)

You can apply the above changes to: selected items, items which are empty, or all the items.

Update all lines

Cost Allocation **Delivery** **Buyer**

Cost Center: Search Cost Center
Also applies to lines where cost is split

Apply **Apply where empty** **Close**

Update all lines

Cost Allocation **Delivery** **Buyer**

Required by:

Also applies to lines where delivery is split

Apply **Apply where empty** **Close**

Update all lines

Cost Allocation **Delivery** **Buyer**

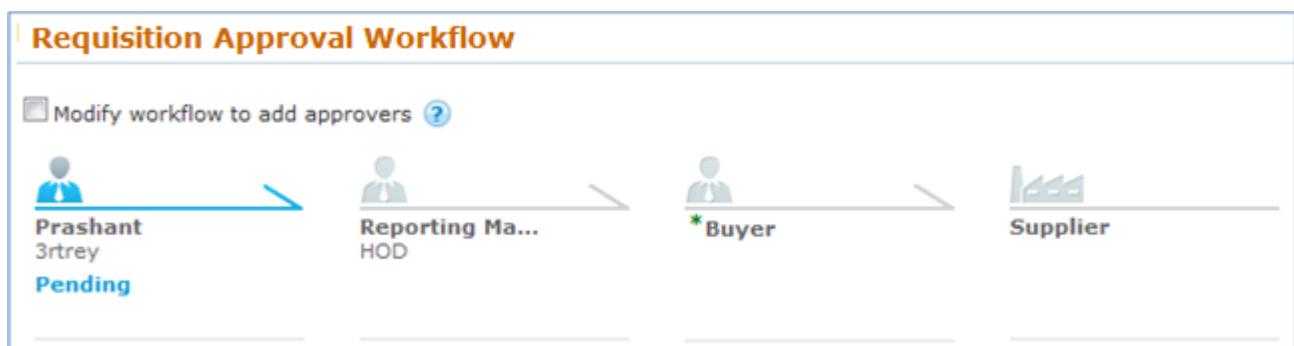
Assigned Buyers:

Existing Buyers :

Apply **Apply where empty** **Close**

5.11.5 Requisition Approval Workflow

13. The **Approvals Required** section displays the workflow of approvals required for checkout.



15. Check the **Modify workflow to add approvers** option to add approvers to the requisition workflow at the cost center level after it is saved.

Note: If the **Modify workflow to add approvers** option is checked, the requisition is saved in the '**Ready for approval**' status and will be available for editing under the **My Requisitions** tab.

16. Click **I'm Done** to proceed with the request or click **Save as Draft** to save your request. The order is placed and is listed under **My Requisitions** tab.

5.11.6 How to checkout a split requisition?

Split requisition helps you to automatically group the items in the requisition based on Category and Price Type. Based on the item groups, the workflow for each group will be modified.

Item group which contain item(s) marked as 'Need a quote', when submitted & confirmed will be sent to the buyer. After the buyer updates pricing & other information, requisition will be returned to requester.

To checkout a split requisitions:

1. Click on **Checkout**. The **Checkout** page is displayed.

Note: If the requisition is split, the **I'm Done** button is displayed as **Continue** button.

2. Enter the required information and the following message is displayed in the **Requisition Approval Workflow** section.



This shopping cart may be split into multiple groups for approval that you can review on the next screen.
[Learn more](#) about Requisition Splitting.

Note: Click **Learn More** to know more about Requisition Splitting.

3. Click **Continue**. The **Confirm Split Requisitions** page is displayed.

Shown below is the image where you can review the item groupings in the requisition and confirm splitting requisitions.

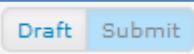
Items splits within the requisitions

Items that can be sent for approval

Items Grouped by (Criteria : Value)			Total	Actions	
▼ Category : Office Stationary ; Price Type : Buyer Negotiated Price			INR 604.98000	Draft	Submit
Line No.	Item No.	Item and Supplier Name	Unit Price	Qty/Amt	Total Price
1	PenStationary	PenStationary	USD 12.00000	1.00000 EA	INR 604.98000
Total: INR 604.98000					
View workflow					
▼ Category : Electronics ; Price Type : Estimated price			INR 34.00000	Draft	Submit
Line No.	Item No.	Item and Supplier Name	Unit Price	Qty/Amt	Total Price
3	N/A	Camera	INR 3.00000	3.00000 EA	INR 9.00000
2	N/A	Mobile Charger	INR 5.00000	5.00000 EA	INR 25.00000
Total: INR 34.00000					
View workflow					
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>					

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4. Select either **Draft** or **Submit** for each group in the split requisition as required.



Note: Group of items saved as 'Draft' status will be available for modification through the same requisition.

Note: Group of items with the 'Submit' status will be sent for further processing.

Note: Total of 15 groups and up to 200 line items will be supported in a requisition.

5. To view the workflow of the split requisitions, click on the **View Workflow** button under the required split requisition.

Requisition Approval Workflow

This document requires approval as per the workflow below.

Mark for adding or selecting approvers

 disha
Requester
Pending

 Buyers

 Supplier

Save **Cancel**

6. Select the **Mark for adding or selecting approvers** to save the requisition in the *Ready for Approval* status. This will allow you to add approvers once the requisition is available for editing under the **My Requisitions** page.

Note: The **Mark for adding or selecting approvers** is checked & un-editable by default if the workflow has selectable user, processor select type – Multiple or Single, or has cost center approver in the sub process node.

7. Click **Save** to apply the workflow settings.
8. Click **Confirm** to apply the selected actions for each individual item in the split requisitions.
9. Once a requisition is submitted, you can only make edits at line level for each item groups. Header level editing will not be possible.

Chapter 6: Tracking My Requisitions

6.1 Introduction

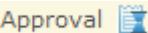
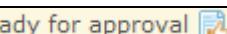
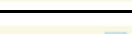
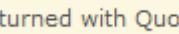
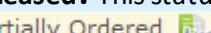
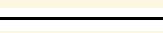
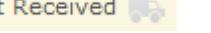
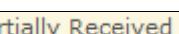
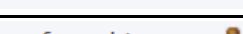
eProc enables you to track all your requisitions and view them individually. You can search, filter, and sort your requisitions.

6.2 Viewing My Requisitions

1. You can view all your requisitions. You can also search, sort, and filter all requisitions.
2. Under the **Requisition** tab, click **My Requisitions** sub-tab. The **My Requisitions** page is displayed.

The screenshot shows the 'My Requisitions' page in the eProc application. The top navigation bar includes links for Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. The sub-navigation bar shows Online store, My Requisitions (which is selected and highlighted in orange), My Favorites, Shopping Basket, All Requisitions, View Orders, and Quick Source Events. A message at the top indicates 315 records found. The main table lists requisitions with columns for Status, Requisition Number, Name, Requester, Submitted On, Amount, and Actions. The 'In Process' status is highlighted in orange. The table includes filters for Requisition Number, Name, Requester, and Submitted On, and a legend for Approval, Delivery, and Quotation. At the bottom, there are options to show 10 or 20 records per page, and a footer note about Zycus Inc. and emPowered by ZYCUS.

The following table describes the Requisition status under the **My Requisitions** tab in detail:

Status	Description
Draft	This status describes that the requisition is in draft stage
In Process: This status describes that a requisition is in following stages:	
Draft 	This status describes that the requisition is in draft stage
In Approval 	This status describes that the requisition is sent for approval
Ready for approval 	This status describes that the approvers are to be added in the workflow
With Buyer 	This status describes that the requisition is with the buyer. There will be a Recall Request option when requisitions status is “With Buyer”
Returned For Amendment 	This status describes that the requisition has been returned for further amendments
Returned with Quote 	This status describes that requisition is returned with quote
Sent for Quote 	This status describes that requisition is sent for quote. There will be a Recall Request option when requisitions status is “Sent for Quote”
Ordering 	This status describes that the requisition is scheduled for release (based on admin setting for PO release)
Released: This status describes that a requisition is in following stages:	
Partially Ordered 	This status describes that requisition is partially ordered
Not Received 	This status describes that items are not yet received against this purchase order
Partially Received 	This status describes that requisition is partially received
Fully Received 	This status describes that requisition is fully received
Rejected 	This status describes that the requisition is rejected by the requisition approver
Closed	This status describes that the requisition is closed
Cancelled 	This status describes that the requisition is cancelled
Sent for Buyer Review 	This status describes that the requisition is being revised by the assigned buyer
Transferred to me 	This status describes that the requisition is assigned to you via the entity ownership was changed.

Note: Only the requests under **In Approval** status can be recalled. The request then again goes back to **Draft** stage.

Note: Only the requisitions under **Draft** status can be modified or deleted.

3. Click on a requisition number to open it. You will be navigated to the following page:

The screenshot shows the eProc 17.03.1.0 Requisitioner Manual interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. Below the navigation bar, a sub-menu includes Online store, My Requisitions, My Favorites, Shopping Basket, All Requisitions, View Orders, and Quick Source Events. A message "Requisition: COM003/PR/910 - PR for pen, naq items 6799881 - INR 90,099.00000" is displayed. The main content area shows "Requisition Info" and "Billing, Delivery & Cost Allocation Info". Under Requisition Info, fields include Requisition Name (PR for pen, naq items 6799881), Urgent Requirement (No), Attachments (None), Reason for ordering (-), Comments for supplier (-), and On Behalf of (-). Under Billing, Delivery & Cost Allocation Info, Organization Unit (OU) is listed as Apeksha's Company > Apeksha's Company BU > SEEZ_LOC. Delivery address is Head Office, Athens Co, Bhayander, Maharashtra, India. Bill-to address is HQ, Athens Co, Bhayander, Maharashtra, India. Cost Center is ol_po: qweq. A "Required by" field is also present. Below this, Purchase Type is PROJECT, Settlement via is Invoice, and Retrospective Purchase is No. A section titled "Items that are sent for Approval" shows a grouped list of items. One item is listed: Line No. 2, Item No. N/A, Item and Supplier Name: Keyboard (APPLE), Reference Contract: -, Availability: N/A, Unit Price: INR 423.00000, Qty/Amt: 213 EA, Total Price: INR 90,099.00000. Item-level taxes sub-total is INR 0.00000 and the amount is INR 90,099.00000. There are buttons for Actions, Expand All, and Collapse All. A link to "View workflow" is also present. An "Audit Trail" link is located below the approval section. At the bottom, a footer notes "© 2017 - Zycus Inc., All Rights Reserved" and "emPowered by ZYCUS".

4. Here you can review your item details along with billing and delivery information.
5. You can take actions such as reminding the approver to approve the requisition, recall the requisitions. If the requisition is approved, then you can copy it.

6.2.1 Save View as Favorite

On **My Requisitions** page, there will be an option to save the listing view as favourite. When a user marks a view of listing page as favourite and save it, that same view will be loaded every time the user visits page.

6. To mark a view as favorite, click the highlighted link.

Requisition Approval Buyer's Desk PO Reports P-card Setup Catalog Inventory Workflow eForms Budget

Online store My Requisitions My Favorites Shopping Basket All Requisitions View Orders

+ Add My Requisitions

Found 148 record(s). Legends: Approval Delivery Quotation

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
Draft	OU_1-001/PR/278	PR Number - 761494 by Shadab QS for Vist...*	Shadab QS	-	INR 7,506.00	Actions
Draft	OU_1-001/PR/275	PR Number - 5889553 by Shadab QS for Vls...*	Shadab QS	-	INR 7,262.00	Actions
Draft	OU_1-001/PR/274	PR Number - 3871469 by Shadab QS for pen...*	Shadab QS	-	INR 7,273.00	Actions
Draft	OU_1-001/PR/273	PR Number - 3780213 by Shadab QS for Vls...*	Shadab QS	-	INR 7,273.00	Actions
Draft	OU_1-001/PR/272	EPROC-13556	Shadab QS	-	INR 80.00	Actions
Draft	OU_1-001/PR/271	PR Number - 8573817 by Shadab QS for pen...*	Shadab QS	-	INR 7,273.00	Actions
With Buyer	OU_1-001/PR/270	PR Number - 4379429 by Shadab QS for non...*	Shadab QS	30/01/2017	INR 4.00	Actions
Draft	OU_1-001/PR/269	PR Number - 3527662 by Shadab QS for <sc...*	Shadab QS	-	INR 2,204,906.00	Actions
Sent for Quote	OU_1-001/PR/268	PR Number - 5720796 by Shadab QS for <sc...*	Shadab QS	30/01/2017	INR 2,204,906.00	Actions
Sent for Quote	OU_1-001/PR/267	Nilesh Test excel*	Shadab QS	30/01/2017	INR 0.00	Actions

Show 10 records per page. View Quick Source Events

7. There will be an option to switch back to the default view by clicking on **revert** option if required (refer the image below).

Requisition Approval Buyer's Desk PO Reports P-card Setup Catalog Inventory Workflow eForms Budget

Online store My Requisitions My Favorites Shopping Basket All Requisitions View Orders

+ Add My Requisitions

Found 148 record(s). Legends: Approval Delivery Quotation

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
Draft	OU_1-001/PR/278	PR Number - 761494 by Shadab QS for Vist...*	Shadab QS	-	INR 7,506.00	Actions
Draft	OU_1-001/PR/275	PR Number - 5889553 by Shadab QS for Vls...*	Shadab QS	-	INR 7,262.00	Actions
Draft	OU_1-001/PR/274	PR Number - 3871469 by Shadab QS for pen...*	Shadab QS	-	INR 7,273.00	Actions
Draft	OU_1-001/PR/273	PR Number - 3780213 by Shadab QS for Vls...*	Shadab QS	-	INR 7,273.00	Actions
Draft	OU_1-001/PR/272	EPROC-13556	Shadab QS	-	INR 80.00	Actions
Draft	OU_1-001/PR/271	PR Number - 8573817 by Shadab QS for pen...*	Shadab QS	-	INR 7,273.00	Actions
With Buyer	OU_1-001/PR/270	PR Number - 4379429 by Shadab QS for non...*	Shadab QS	30/01/2017	INR 4.00	Actions
Draft	OU_1-001/PR/269	PR Number - 3527662 by Shadab QS for <sc...*	Shadab QS	-	INR 2,204,906.00	Actions
Sent for Quote	OU_1-001/PR/268	PR Number - 5720796 by Shadab QS for <sc...*	Shadab QS	30/01/2017	INR 2,204,906.00	Actions
Sent for Quote	OU_1-001/PR/267	Nilesh Test excel*	Shadab QS	30/01/2017	INR 0.00	Actions

Show 10 records per page. View Quick Source Events

6.3 Viewing All Requisitions

Based on activity assigned to your role, you can view all requisitions in your scope along with requisitions associated with you under the **All Requisitions** page. You can also search, sort, and filter all these requisitions.

- Under the **Requisition** tab, click on the **All Requisitions** sub-tab. The **All Requisitions** page is displayed.

The screenshot shows the eProc interface with the 'All Requisitions' sub-tab selected. The page displays a grid of requisition records. Each record includes a status icon (e.g., Draft, In Process, Rejected), a unique ID (e.g., COM003/PR/911), a brief description, the requester's name (disha), the date it was submitted, the total amount (e.g., INR 90,099.00000), and a 'Actions' dropdown menu. The top navigation bar includes links for Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Inventory, Workflow, eForms, and Budget. The bottom of the page shows pagination and filtering options.

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
Draft	COM003/PR/911	PR for naq items 347244*	disha	-	INR 90,099.00000	Actions
In Process	COM003/PR/910	PR for pen, naq items 6799881*	disha	19/04/2017	INR 90,099.00000	Actions
In Process	COM003/PR/909	PR for pen, naq items 1749785*	disha	19/04/2017	INR 90,132.00000	Actions
In Process	COM003/PR/908	PR for pen, naq items 3999877	disha	18/04/2017	INR 33.00000	Actions
In Process	COM003/PR/907	PR for naq items, pen 2109017*	disha	18/04/2017	INR 90,132.00000	Actions
In Process	COM003/PR/906	PR for naq items 8588720*	disha	18/04/2017	INR 90,099.00000	Actions
In Process	COM003/PR/905	PR for naq items 1850250*	disha	-	INR 90,099.00000	Actions
Rejected	COM003/PR/904	PR for category 5, Tools and General Mac...	disha	18/04/2017	INR 507.40000	Actions
In Process	COM003/PR/903	PR for category 3, category 8 8458122*	disha	18/04/2017	INR 6,676.40000	Actions
In Process	COM003/PR/902	PR for category 4, category 7 3063653*	disha	18/04/2017	INR 6,748.85700	Actions

The following table describes the Requisition status under the **All Requisitions** tab in detail:

Status	Description
Draft	This status describes that the requisition is in draft stage
In Process: This status describes that a requisition is in following stages:	
Draft	This status describes that the requisition is in draft stage
In Approval	This status describes that the requisition is sent for approval
Ready for approval	This status describes that the approvers are to be added in the workflow
With Buyer	This status describes that the requisition is with the buyer. There will be a Recall Request option when requisitions status is "With Buyer"
Returned For Amendment	This status describes that the requisition has been returned for further amendments
Returned with Quote	This status describes that requisition is returned with quote
Sent for Quote	This status describes that requisition is sent for quote. There will be a Recall Request option when requisitions status is "Sent for Quote"
Ordering	This status describes that the requisition is scheduled for release (based on admin setting for PO release)

Released: This status describes that a requisition is in following stages:	
Partially Ordered 	This status describes that requisition is partially ordered
Not Received 	This status describes that items are not yet received against this purchase order
Partially Received 	This status describes that requisition is partially received
Fully Received 	This status describes that requisition is fully received
Rejected 	This status describes that the requisition is rejected by the requisition approver
Closed	This status describes that the requisition is closed
Cancelled 	This status describes that the requisition is cancelled
Sent for Buyer Review 	This status describes that the requisition is being revised by the assigned buyer
Transferred to me 	This status describes that the requisition is assigned to you via the entity ownership was changed.

6.4 Viewing Quick Sourcing Events

As a requisitioner, you will be able to view the quick sourcing events created from **My Requisitions** page.

Based on activity assigned to your role, you can also view all quick sourcing events based on your scope along with requisitions associated with you under the **All Requisitions** page.

To **View Quick Sourcing Events**, follow the given steps:

17. On the **My Requisitions** page, click **View Quick Sourcing Events** as shown below:

Requisition ▾ Approval ▾ Buyer's Desk ▾ PO Reports P-card Setup ▾ Catalog ▾ Inventory ▾ Workflow ▾ eForms ▾ Budget

Online store My Requisitions My Favorites Shopping Basket All Requisitions View Orders

+ Add **My Requisitions**

Found 45 record(s).

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
With Buyer	OU_1-001/PR/134	PR by Shadab QS for Gd item restrict*	Shadab QS	03/01/2017	INR 5.00	Actions
In Approval	OU_1-001/PR/133	PR by Shadab QS for Pen12	Shadab QS	03/01/2017	INR 2.00	Actions
Draft	OU_1-001/PR/132	PR by Shadab QS for Gd Item 21 requester*	Shadab QS	-	INR 10.00	Actions
Sent for Quote	OU_1-001/PR/131	PR by Shadab QS for Gd Item 20*	Shadab QS	02/01/2017	INR 20.00	Actions
Cancelled	OU_1-001/PR/130	PR by Shadab 213QS for A, B*	Shadab QS	02/01/2017	INR 0.00	Actions
Cancelled	OU_1-001/PR/128	PR by 768QS for Gd Item 7*	Shadab QS	30/12/2016	INR 20.00	Actions
In Approval	OU_1-001/PR/125	sffs	Shadab QS	29/12/2016	INR 2.00	Actions
In Approval	OU_1-001/PR/119	PR by Shadab QS for Rice, Sugar*	Shadab QS	29/12/2016	INR 20.00	Actions
In Approval	OU_1-001/PR/112	PR by Shadab QS for draft*	Shadab QS	28/12/2016	INR 20.00	Actions
Draft	OU_1-001/PR/104	PR by Shadab QS for pencil 123	Shadab QS	-	INR 2.00	Actions

Show 10 records per page.

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18. You will land on the following page:

Requisition ▾ Approval ▾ Buyer's Desk ▾ PO Reports P-card Setup ▾ Catalog ▾ Inventory ▾ Workflow ▾ eForms ▾ Budget

+ Create New Quick Source Event **Latest Quick Source**

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	test event	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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19. All the quick sourcing events you have created will be listed on this page.

6.4.1 Understanding Quick Sourcing Event listing page

The sourcing events created for guided procurements items will be tracked through this page. The following table describes the Sourcing status in detail:

Status	Description
Draft	The event is currently in draft stage and can be edited before submitting.
In Progress	The sourcing event is in progress.
Awarded	The sourcing event is complete and the supplier has been awarded.
Closed	The sourcing event is closed and no actions can be taken on it. You can only view the event details and supplier response (if any).

Columns	Description
Status	Displays the current status of the event.
Event Name	Displays the name of the event.
Event Creator	Displays the name of the eProc user who created the event.
Supplier Response Status	Displays the status on the No. of Suppliers invited v/s the No. of Suppliers responded.
Time Ticker	Displays the time and date by which the event will close.
Actions	<ul style="list-style-type: none"> • For events in Draft stage: Edit Delete • For events in progress: Add Supplier Add Collaborator Modify Closure Date View Responses • For events in closed stage: View Responses • For events which are awarded: View Responses

6.4.1.1 Events in draft stage

1. For events which are in draft stage, you can edit or delete the event. For a given event, go to the **Actions** drop down menu and select **Edit**.
2. A sourcing event side by side panel will open as shown below:

The screenshot shows the eProc interface with the 'Create Quick Source' dialog box open over a list of events. The dialog box contains fields for 'Item Name*', 'Quantity*', 'UOM', and 'Market/Current Price'. It also includes sections for 'Include question for Supplier(s)', 'Include an opening message for your Supplier(s)', 'Attach related documents for your Supplier(s)', and 'Invite Supplier(s) to bid this quick Source'. The list of events on the left shows various statuses like Draft, In Progress, and Closed, along with event names and creators.

Status	Event Name	Event Creator
Draft	MySQL Workbench Software	Shadab Ansari
In Progress	Gd item restrict	Shadab Ansari
In Progress	Gd Item 21 requester	Shadab Ansari
Closed	Gd Item 20	Shadab Ansari
Closed	new todays event	Shadab Ansari
Closed	A	Pooja Singh
Closed	A and 5 more	Pooja Singh
Closed	A and 3 more	Shadab Ansari
Closed	Gd Item 9	Shadab Ansari
Closed	rainbow 1 st event	Shadab Ansari

3. Make changes to the event as required. You can publish the event by selecting **Create**. Or you can again **save it as draft**.

6.4.1.2 Events in progress

1. For events which are in progress, you can add suppliers, collaborators, modify the closure date or view supplier responses.

6.4.1.2.1 Add Supplier

1. For a given event, under the **Actions** drop down menu, select **Add Supplier**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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2. Add Supplier popup will appear as shown below. Enter the company name, supplier name and email ID.

Add Supplier

Company*:

Name*:

Email Id*:

[Add Supplier](#) [Cancel](#)

3. Once you enter all the information, click **Add Supplier**.

6.4.1.2.2 Add Collaborator

1. For a given event, under the **Actions** drop down menu, select **Add Collaborator**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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4. **Add Collaborator** popup will appear as shown below. Enter the eProc users email ID and click **Add Collaborator**.

Add Collaborator

Email Id*:

Add Collaborator **Cancel**

6.4.1.2.3 Modify Closure Date

1. For a given event, under the **Actions** drop down menu, select **Modify Closure Date**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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2. **Modify Closure Date** popup will appear as shown below. Select a new date by which you want the event to end. Click **Update**.

Modify Closure Date

Modify Closure Date* : [Clear](#)

[Update](#) [Close](#)

6.4.1.2.4 View Responses

1. For a given event, under the **Actions** drop down menu, select **View Responses**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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2. Supplier Response popup will appear as shown below. This will be a view only popup where you will be able to view the supplier(s) responses for each line item.

Compare Supplier Responses	Supplier Information	Total Bid Amount	Actions
Submitted	Shadab Ansari 1/1 (Supplier Responded / Invited) End Time: 03/01/2017 00:00:00	INR 1.00 Quantity: 10 EA Price: INR 2.00	X
		INR 10.00	
		Savings? 50.00 %	

[Add Supplier](#) [Add Collaborator](#)

OU_1-001/PR/132

3. For reference purpose, you will also be able to view and open the Requisition Number from which the quick sourcing event was created (refer the image below).

The screenshot shows a requisition list and a detailed view of a bid response.

Requisition List:

- Closed**: XYZ (Shadab Ansari) - 0/1 (Supplier Responded / Invited), Closed 4 day(s) back, End Time: 27/01/2017 00:00:00, Actions
- Awarded**: Flip test (Shadab Ansari) - 1/1 (Supplier Responded / Invited), Closed 6 day(s) back, End Time: 25/01/2017 00:00:00, Actions

Detailed View (Compare Supplier Responses):

Compare Supplier Responses		anil.supplier@zycus.com	Submitted
door knobs	Quantity: 100 EA Price: -	<input type="checkbox"/> INR 2.00 Quantity: 50 EA	
Tiles	Quantity: 100 EA Price: -	<input type="checkbox"/> INR 2.00 Quantity: 50 EA	
Glass	Quantity: 2 EA Price: -	<input type="checkbox"/> INR 2.00 Quantity: 2 EA	
Total Bid Amount		INR 204.00	

Action Buttons: Award

4. The requisition will open in a new tab as shown below:

Requisition Details

Requisition: OU_1-001/PR/132 - PR by Shadab QS for Gd Item 21 requester - INR 10.00 - V

General Information

Requisition No:	OU_1-001/PR/132	Parent Requisition:	-
Requisition Name:	PR by Shadab QS for Gd Item 21 requester	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type ?:	Raw materials
Created By:	Shadab QS	Attachment(s):	-
Settlement via:	Invoice	Status:	Draft
Suggested PO:	-	Retrospective Purchase:	No

Items

Line No.	Item No.	Item Name & Supplier Name	Reference Contract	Unit Price	Qty/Amt	Total P
1	N/A	Gd Item 21 requester	-	INR 1.00	10 EA	INR 10

6.4.1.2.5 Closed Events

- For an event which is closed, you will be able to **View Supplier Responses** and **Award a Supplier**.
- Under the **Actions** drop down menu, select **View Responses**. Following popup will appear:

Compare Supplier Responses		<input type="checkbox"/> anil.supplier@zycus.com Submitted	<input type="checkbox"/> jagrati.supplier@zycus.com Not Viewed	<input type="checkbox"/> kunal@gmail.com Not Viewed
Quantity: 1 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 2 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 10 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 3 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 4 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	

OU_1-001/PR/130 **Award** ▾

- The **View Response** popup will show a comparison of the prices in line item between each supplier.
- To award a supplier, on the **View Response** popup, select a supplier (who has provided the best bid) for each line item.
- You can either select one supplier for all the line items or you can select different supplier for different line items. Once you select the suppliers for each line item, click **Award** button as shown below:

Compare Supplier Responses		<input type="checkbox"/> anil.supplier@zycus.com Submitted	<input type="checkbox"/> jagrati.supplier@zycus.com Not Viewed	<input type="checkbox"/> kunal@gmail.com Not Viewed
Quantity: 1 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 2 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 10 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 3 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 4 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	

OU_1-001/PR/130 **Award** ▾

- You will have an option of flipping the selected quote for an item from the supplier in to a requisition.

6.4.1.2.5.1 Flipping to Linked Requisition

If a sourcing event is created from an existing requisition through eProc, then while awarding, you will have the option to flip the selected items to **Linked Requisition**.



1. Select **Flip to Linked Requisition**. You will be navigated to the **Checkout** page:

2. This will be the same requisition from which you created a quick sourcing event. However now the requisition will be updated since you will have quotes from the suppliers for the selected item(s).
3. Fill in the required information in the requisition and you can proceed to submit or sent the requisition for approval.

6.4.1.2.5.2 Flipping to New Existing Requisition

If a sourcing event is created from scratch through eProc, then while awarding, you will have the option to flip the selected items to **New Requisition** or **Existing Requisition**.



1. Select **Flip to New Requisition**. You will be redirected to the **Checkout** page:

Retrospective Purchase: Yes
Add items to existing PO: No [Show all POs](#)

Items in your Cart - 1 Item(s)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input type="checkbox"/> + 1	N/A	InkJet Printers (AMAZON)	-	N/A	INR 100.00	1 EA	INR 100.00	Edit View Delete

Amount: INR 100.00

Requisition Approval Workflow

Mark for adding or selecting approvers

Shadab QS Requester → 5 approvers (Workflow Admin) → Buyer → Supplier

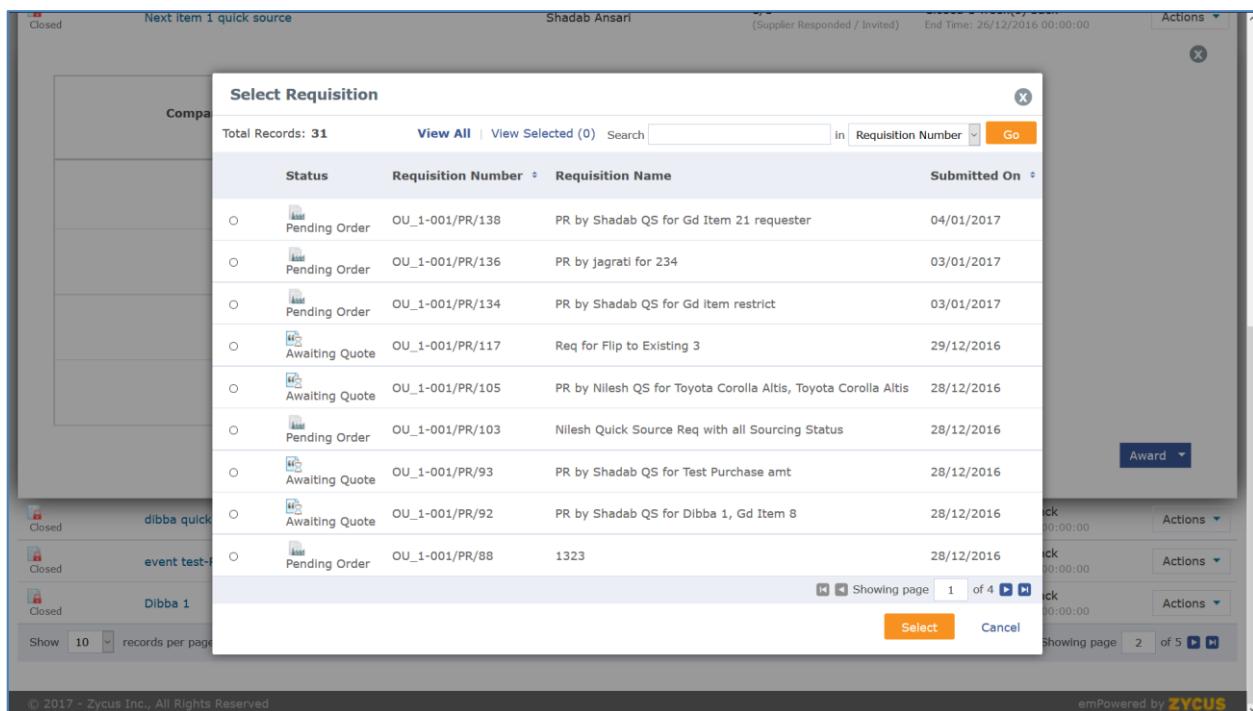
I'm Done | Save as Draft | Cancel

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2. Note that the item you selected from the sourcing event will be automatically added to the items in your cart. You can proceed to checkout this item once you fill all the requisition details.

6.4.1.2.5.3 Flipping to Existing Requisition

3. Select **Flip to Existing Requisition**. A popup will appear which will list all the requisitions which are in **Pending Order** or **Awaiting Quote** status.



4. You can choose any one requisition in which the selected item will be added. On selecting a requisition, you will be navigated to the **Checkout** page as shown below:

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	White Board Marker	-	N/A	USD 12.00	12 Gal/min	USD 144.00	
2	N/A	Ball Pen	-	N/A	INR 100	1 EA	USD 2.00	

5. The item(s) that you selected to be added to the existing requisition will be highlighted in green as shown in the image above.
 6. You can precede to checkout the items once you fill all the requisition details.

Note: If you are not the owner of the sourcing event, then you will not be able to award the supplier response.

6.4.1.2.5.4 Flipping Linked and Non-Linked Items

Users can create quick sourcing events for items from different requisitions using the item level view on Buyer's Desk.

When the Quick Source event is awarded and flipped back, the item details will be flipped onto the linked requisitions.

If a quick source event consists of items which have no requisition reference, then the user will also have an option to flip such items into a new or existing requisition.

1. On the **Quick Source Events** page, open an event which is awarded. Event consisting of items with reference and without requisition reference will appear as shown below:

The screenshot shows the eProc interface with the 'Quick Source Events' tab selected. A list of events is displayed, with one event highlighted. The highlighted event is titled 'Bottle Mix' and is marked as 'Awarded'. It has a status of '1/1 (Supplier Responded / Invited)' and a 'Time Ticker' showing 'Closed 5 minute(s) back End Time: 02/02/2017 19:00:00'. The event creator is 'krishma maniar'. The event details include a 'Compare Supplier Responses' section with a green 'Submitted' button, a 'Bottle' section with a linked requisition 'COM019/COM019-BU038/532', and a 'Dust Bin' section with a linked requisition 'COM019/COM019-BU038/532'. A 'Total Bid Amount' of 'USD 66,000' is listed. The 'Savings?' field is 'N/A'. The text 'Item linked to a requisition' is overlaid on the linked requisition sections, and 'Item without requisition reference' is overlaid on the 'Dust Bin' section. Below the main list, there is a table of other events in various statuses like Draft, In Progress, etc.

2. The linked requisition reference will be displayed as shown below:

This screenshot shows a detailed view of the 'Compare Supplier Responses' section for the 'Bottle' item. It includes a 'Compare Supplier Responses' header with a checked email field 'saw@es.gu' and a green 'Submitted' button. Below this is a 'Bottle' section with a quantity of '300 EA' and a price of '-'. At the bottom of this section, a red box highlights the 'Linked Requisition' field, which contains the text 'Linked Requisition: COM019/COM019-BU038/532'.

3. To flip the items into requisitions, click **Award**. Select **Flip to Linked Requisitions** as shown below:

4. You will see the following popup:

Flip Items to Requisition

There are items in this quick source event which are not linked to any requisition. What do you want to do with them?

Flip to existing linked requisition
 Select requisition:

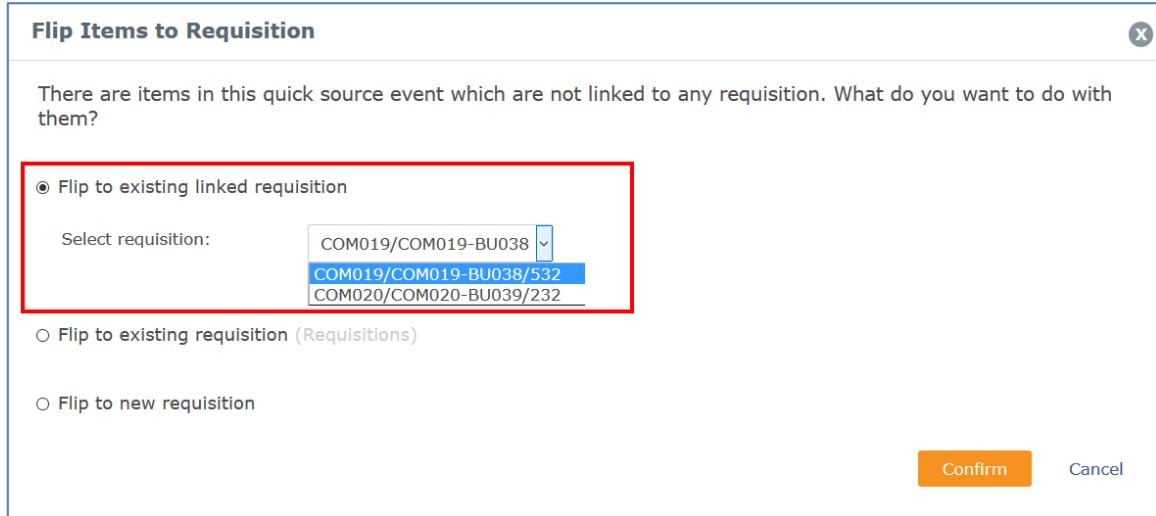
Flip to existing requisition (Requisitions)
 Flip to new requisition

Confirm **Cancel**

Note: Since your event consists of items without requisition reference, you will see the above popup.

5. To address the line items which is without requisition reference, you have an option of:

- **Flip item to existing linked requisition:** If you want to link the item to any linked requisition from this quick sourcing event, then select the requisition from the drop down list.



- **Flip item to existing requisition:** If you want to link the item to any requisitions on eProc, then select this option. Click **(Requisitions)** link as shown below:



- A popup will appear. This popup will have all those requisitions listed whose status is “**Awaiting Quote**”. Choose the required requisition from the list and click **Select**.

Select requisition

Total Records: 932	View All	View Selected (1)	Search <input type="text"/> in Requisition Number	Go
Status	Requisition Number	Requisition Name	Submitted On	
<input checked="" type="radio"/> Awaiting Quote	COM019/COM019-BU038/532	krishma/Bottle/COM019/2017	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	COM019/COM019-BU038/530	TesT additional excel 1	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	COM019/COM019-BU038/529	Nilesh-32	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	COM019/COM019-BU038/528	Nilesh-23	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	C002/BU002/524	Micha QS/item 1,fghfhf item 1/C002/2017	02/02/2017	
<input checked="" type="radio"/> Pending Order	C002/BU002/522	er	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	C002/BU002/521	Micha QS/wer1/C002/2017	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	C002/BU002/520	Micha QS/itemre 1/C002/2017	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	C002/BU002/519	Micha QS/dSDsd/C002/2017	02/02/2017	
<input checked="" type="radio"/> Awaiting Quote	C002/BU002/518	Micha QS/te/C002fcg2017	02/02/2017	

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[Select](#) [Cancel](#)

- Your item will be linked to the selected requisition.
- Flip to new requisition:** If you wish to flip the item to a completely new requisition, then select this option and click **Confirm**. A completely new requisition will be created and listed under **My Requisitions** tab.

6.5 Create a Quick Sourcing Event

To create a **Quick Sourcing Event**, refer section [Add Item to Requisition](#)

- eProc allows you to modify your current cart and add extra items while it retains the existing items.
- On clicking **Add Item**, you will be navigated to the **online store** where you can search for the items and add them to cart.

<input type="checkbox"/> Expand All <input type="checkbox"/> Collapse All Update all lines + Add Item									
<input type="checkbox"/>	Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input checked="" type="checkbox"/>	1	34434	pen  AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	  
<input type="checkbox"/>	2	N/A	naq items  AVNISH TEST SUPPLIER	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	  
Item-level taxes sub-total: INR 0.00000									
Amount: INR 90,132.00000									

6.5.1.1 Add Cart Items to PO

You can link the items from your cart to an existing PO of type Standard or Released.

18. To add the items click Add Items to PO as shown below:

The screenshot shows a shopping cart interface with two items listed:

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	
2	N/A	naq items AVNISH TEST SUPPLIER	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	

Below the table, there are two status messages:

- Item-level taxes sub-total: INR 0.00000
- Amount: INR 90,132.00000

At the top right of the table area, there is a blue button labeled "Add Items to PO" with a red box around it.

19. A list of PO's will appear in the popup as shown below:

The screenshot shows a modal window titled "List of Purchase Orders". Inside the modal, there is a table with the following columns: PO Number, Type, Supplier, Buyer, PO Date, and Amount. One row in the table is circled with a red circle, and a red arrow points from the text "View PO in new tab" to this circled row. The table shows 193 records found.

PO Number	Type	Supplier	Buyer	PO Date	Amount
COM003/17/000249	Standard	APPLE	disha	10/04/2017	INR 110.00000
COM003/17/000247	Standard	AVNISH TEST SUPPLIER	disha	07/04/2017	USD 12.10000
COM003/17/000243	Standard	AVNISH TEST SUPPLIER	jQuery	10/04/2017	USD 12.10000
COM001/17/000237	Standard	APPLE	jQuery	09/03/2017	USD 18.00000
COM001/17/000222	Standard	APPLE	jQuery	21/02/2017	USD 55.00000

At the bottom of the modal, there are "Select" and "Close" buttons. Below the modal, there is a message bar with a warning icon and the text "This shopping cart contains 193 purchase orders. Learn more about purchase orders in the shopping cart." At the very bottom of the page, there are "Continue", "Save as Draft", and "Cancel" buttons.

20. Choose a PO and click Select.

21. You will see a confirmation message which will inform you that current requisition will be linked to the selected order and the item details will be set as per the selected purchase order. Click Yes if you agree.

The screenshot shows a modal window titled "Confirm". Inside the modal, there is a message: "The requisition will now be linked to the selected order. Item details like supplier, supplier address, currency, bpo (if applicable) for free-text items in requisition will be set to that in the selected order." Below the message, there are "Yes" and "No" buttons. The background of the modal shows a list of purchase orders with one row highlighted.

PO Number	Type	Supplier	Buyer	PO Date	Amount
COM003/17/000249	Standard	APPLE	disha	10/04/2017	INR 110.00000
COM003/17/000247	Standard	AVNISH TEST SUPPLIER	disha	07/04/2017	USD 12.10000
COM003/17/000243	Standard	AVNISH TEST SUPPLIER	jQuery	10/04/2017	USD 12.10000
COM001/17/000237	Standard	APPLE	jQuery	09/03/2017	USD 18.00000

Note: Supplier should be same as that in the selected order.

Create New Quick Sourcing Event.

6.6 Viewing a Requisition

- Click on a **Requisition Number** to view the requisition. The following page is displayed.

The screenshot shows the ZYCUS eProc Requisitioner interface with several callout boxes highlighting different features:

- General Information:** Displays requisition details.
- Items:** Displays details of items in the cart.
- Delivery:** Displays delivery info.
- Cost Booking:** Displays where the cost is booked.
- Accounting:** Displays the accounting details.
- Workflow:** Displays the workflow status.
- Audit Trail:** Displays the action taken against requisition at each level.

Requisition Details:

Requisition No:	1456	Reason for Ordering:	-		
Requisition Name:	IT Testing Laptop	Comments for supplier:	-		
Urgent Requirement:	No	Purchase Type:	CAPITAL		
Created on behalf of:	-	Attachment(s):	-		
Created By:	Prashant	Status:	In Approval		
Settlement via:	Invoice	Retrospective Purchase:	No		
Suggested POI:	-				
Assigned buyer:	-				
Last assigned:	-				
Item No.	Item Name & Supplier Name	Unit Price	Qty/Amt	Total Price	Actions
laptop	High-End Laptop Supplier: DNA	INR 45,000.00	1 EA	USD 0.9000	
				Approved Amount: USD 0.0000	
				Purchase Amount: USD 0.0000	

Delivery:

Item Name	Business Unit	Location	Address	Deliver to	Required by	Quantity
High-End Laptops	T3-Acme Engineering Services	T3-Pittsford Chamber of Commerce		Prashant	2015/03/01	1 EA

Cost Booking:

Business Unit:	T3-Acme Engineering Services
Cost Center:	-
Project:	-

Accounting:

Item Name	GL Type	GL Account	Amount
High-End Laptops	Cost Branch	T341: Total-1	USD 0.9000

Workflow:

Workflow steps:

- Prashant Requester (Submitted 2015/03/01 23:07:22)
- Derek test (Pending 2 weeks ago, Change Approver)
- Maheesh Reporting Manager (Change Approver)
- 27 approvers Dynamic User (Change Approver)
- Sean H Selectable User (Change Approver)
- Buyer (Change Approver)
- Supplier (Add Approver)

Audit Trail:

Action	Version	Message	Actions
Requisition submitted	v1	Reason for Ordering : -	-

6.7 Viewing Assigned Buyers

20. For a given requisition, under the Items section, for a given line item, click the  icon.

Items							
Line No.	Item No.	Item Name & Supplier Name	Reference Contract	Unit Price	Qty/Amt	Total Price	Actions
  1	2772885	   Supplier: EBAY OFFICE SUPPLIES	-	INR 554,1500	1,0000 ppm	INR 554,1500	   

21. You will be able to view the list of assigned buyers for that line item as shown below:

Assigned Buyer

Assigned buyer  :

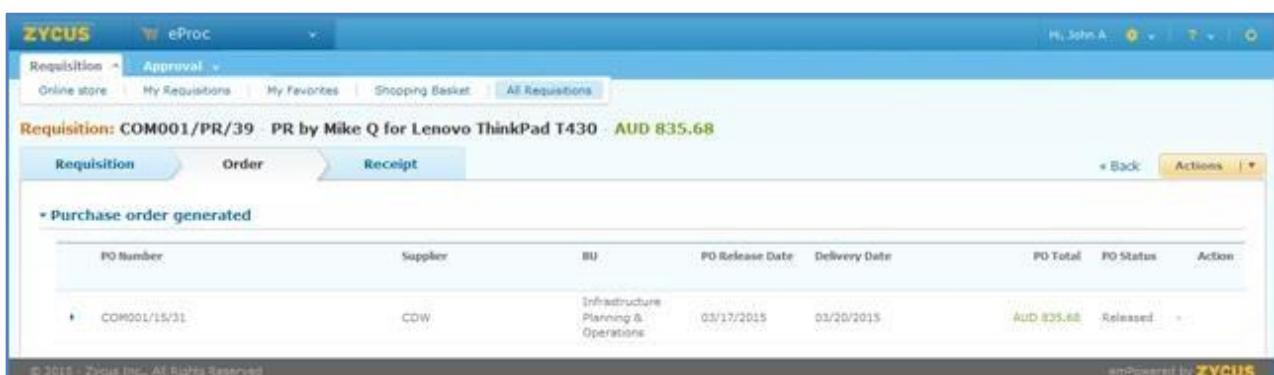
-  Budget Owner1
-  Budget Owner4
-  Buy_san_All

Close

6.8 Requesting additional items in a PO

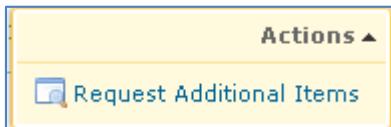
To request additional items in a PO:

- Under the **My Requisitions** tab or the **All Requisitions** tab, search for the required requisition which consists of the PO to be searched.
- Click on the **Requisition Number** to view the requisition. The **Requisition** page is displayed with the **Order** tab open.



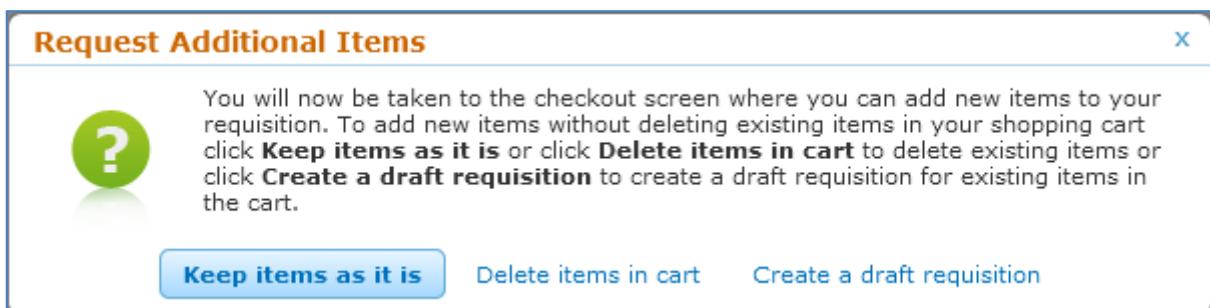
PO Number	Supplier	BU	PO Release Date	Delivery Date	PO Total	PO Status	Action
COM001/15/31	CDW	Infrastructure Planning & Operations	03/17/2015	03/20/2015	AUD 835.68	Released	

3. Look for the required PO and click on the **Actions** link corresponding to the PO.



4. Click on the **Request Additional Items** option.

- a. If any items are present in the shopping cart, the following dialog box is displayed.



- i. To keep existing items of the shopping cart intact and continue, click on the **Keep items as it is** button.
 - ii. To delete the items of the shopping cart and continue, click on the **Delete items in cart** button.
 - iii. To create a draft requisition, click on the **Create a draft requisition** button
- b. If the shopping cart is empty, the following page is displayed.

The screenshot shows the Zycus eProc interface for a requisition. At the top, there's a navigation bar with tabs for 'Requisition' and 'Approval'. Below the navigation is a toolbar with links for 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. A 'Need Help...?' button is also present.

Checkout - 0 Items, AUD 0.00

Requisition Info

- Requisition Name*: PR by John A for Grey Ultra Th...
- Urgent Requirement? Yes
- Attachments [Add Attachments](#)
- Reason for ordering
- Comments for supplier
- On Behalf of
- Purchase Type* --Select--
- Assigned buyer

Billing, Delivery & Cost Allocation Info

Organization Unit (OU): Zycosm > Infrastructure Planning & Operations > Sydney

Delivery address:
Sydney
Trinity 3 29 Delhi Road
Sydney, New South Wales
2113, Australia
Deliver to: John A

Bill-to address:
Sydney
Trinity 3 29 Delhi Road
Sydney, New South Wales
2113, Australia

Cost Center: Procurement: 8350PR

Budget: -

Required by 06/29/2015 [Clear](#)

Settlement via: Invoice

Retrospective Purchase: Yes

Add items to existing PO: No [Show all POs](#)

Items in your Cart - 0 Item(s)

[Expand All](#) | [Collapse All](#) [Search all items](#) | [+ Add Item](#)

Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
No items available						

Amount: AUD 0.00

Requisition Approval Workflow

! You will be able to view the workflow only after an item is added to this requisition.

Action Buttons:

- I'm Done
- Save as Draft
- Cancel

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- On the **Checkout** page: To add items to existing PO, click on the **Show all POs** button. The **List of Purchase Orders** dialog box is displayed.

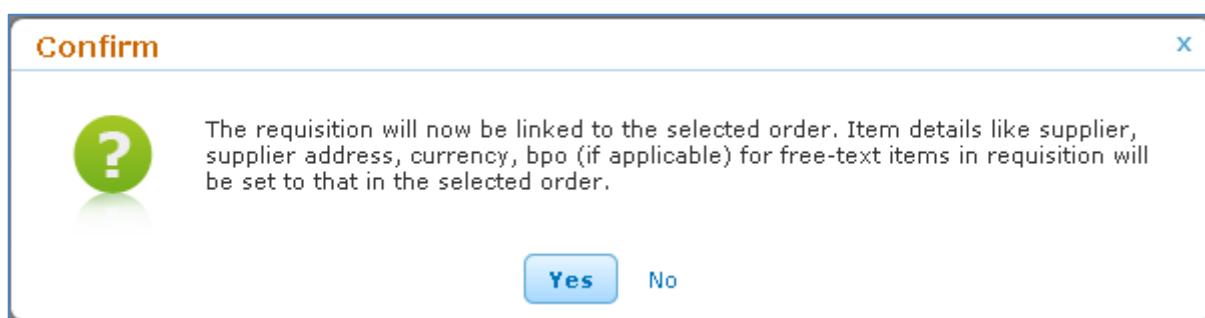
List of Purchase Orders

PO Number	Type	Supplier	Buyer	PO Date	Amount
585Compy_3	Standard	EBAY OFFICE SUPPLIERS	Charlie Z	2014/05/16	INR 11.00
582Compy_3	Standard	EBAY OFFICE SUPPLIERS	Sunil kumar	2014/05/17	INR 11.00
581Compy_3	Standard	EBAY OFFICE SUPPLIERS	Sunil kumar	2014/05/17	INR 11.00
580Compy_3	Standard	EBAY OFFICE SUPPLIERS	Sunil kumar	2014/05/17	INR 11.00
579Compy_3	Standard	EBAY OFFICE SUPPLIERS	Sunil kumar	2014/05/17	INR 11.00

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Select **Close**

6. Search and select the required PO and click on the **Select** button to select the required PO.
7. The **Confirm** dialog box is displayed. Select **Yes** to continue.



8. The **Checkout** page is displayed. Enter the required information and click on the **Continue** button.

Note: Purchase type in the requisition should be same as that in the selected order.

Note: Requisitions created using the Request Additional Items option will stay on buyer's desk and will not be automatically converted into purchase orders.

6.9 Searching a Requisition

You can search for a requisition by **Requisition Number**, **Name** and **Requester**.

Requisition Number 	Name 	Requester 
Search Number	Search Name	Search Requester

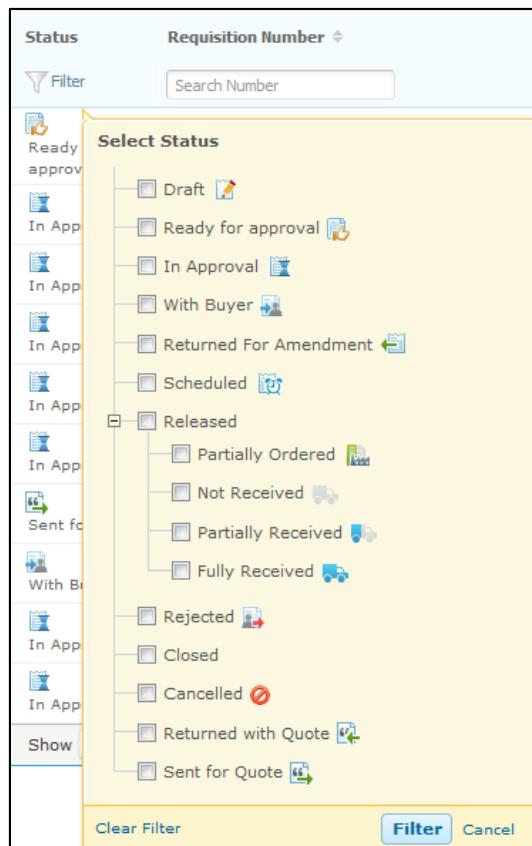
6.10 Sorting all Requisitions

Beside the **Requisition Number** header, users can click on  to sort the requisitions in ascending order and click on  to sort the requisitions in descending order.

6.11 Filtering Requisitions

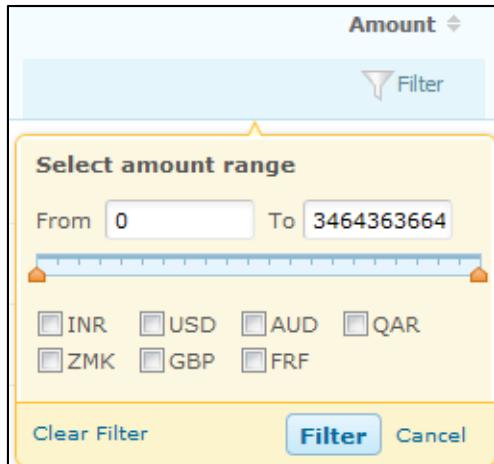
You can filter all the requisitions based on the following parameters:

- **Requisition Status:** Click on  below the **Status** header and select a status to view the requisitions under that particular status and click on **Filter**.



Note: Once a filter is applied, filter will be saved even if you navigate to a different page. However the filters will be saved only per login session.

- **Amount:** Click on  below the **Amount** header and slide through the horizontal bar to filter your requisitions based on the total amount of your requisitions and click on **Filter**.



6.12 Copying a requisition

To copy a requisition:

1. Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
2. Search for the required requisition using the search boxes.
3. Upon finding the required requisition, click on the **Action** button for the corresponding requisition.



Note: The options under the **Action** button differ depending upon the **Status** of the requisition.

4. Select the **Copy** option to copy the requisition. If there are any items present in the cart, the following dialog box is displayed.



5. To add the items of the copied requisition into the shopping cart along with the existing items, click on **Proceed with Req & existing cart items**.

OR

6. To empty the existing shopping cart and to add the items of the copied requisition into the shopping cart, click on **Proceed only with Req items**.
7. If there are no items in the shopping cart, the **Checkout** page is displayed.

The screenshot shows the Zycus eProc interface for creating a new requisition. The top navigation bar includes links for 'Requisition', 'Approval', 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. A user profile 'Hi, John A.' is visible in the top right.

Checkout - 0 Items, AUD 0.00

Requisition Info

- Requisition Name*: PR by John A for Grey Ultra Th...
- Urgent Requirement? Yes
- Attachments
- Reason for ordering
- Comments for supplier
- On Behalf of
- Purchase Type*
- Assigned buyer

Billing, Delivery & Cost Allocation Info

Organization Unit (OU): Zycosm > Infrastructure Planning & Operations > Sydney

Delivery address:
Sydney
Trinity 3 29 Delhi Road
Sydney, New South Wales
2113, Australia
Deliver to: John A.

Bill-to address:
Sydney
Trinity 3 29 Delhi Road
Sydney, New South Wales
2113, Australia

Cost Center: Procurement: 8350PR

Budget:

Required by

Settlement via: Invoice

Retrospective Purchase: Yes

Add items to existing PO: No

Items in your Cart - 0 Item(s)

Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
No items available						

Amount: AUD 0.00

Requisition Approval Workflow

Info You will be able to view the workflow only after an item is added to this requisition.

I'm Done

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- Enter the required details and click on the **I'm Done** button to continue.

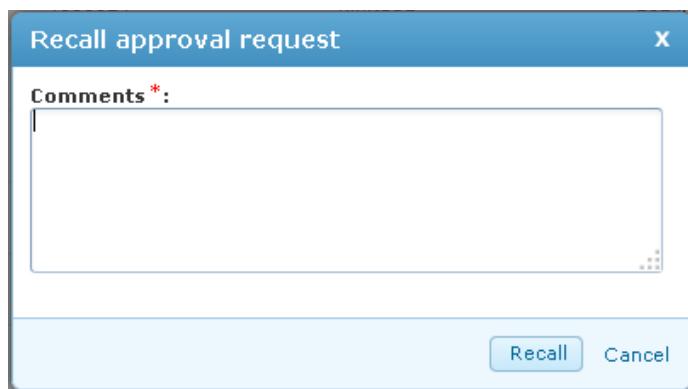
6.13 Recalling an approval request

To recall an approval request for a requisition:

1. Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
2. Search for the required requisition which is in the **In Approval** status using the status filter and the search boxes.
3. Upon finding the required requisition, click on the **Action** button for the corresponding requisition.



4. Click on the **Recall approval request** option to recall an approval request. The **Recall approval request** dialog box is displayed.



5. Enter the required comments in the textbox and click on the **Recall** button to recall the approval request.

Note: The *Recall approval request* option under the *Action* button is only available if the requisition is under the scope of the logged in user.

6.14 Reminding an approver

To remind an approver for an approval for a requisition:

1. Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
2. Search for the required requisition which is in the **In Approval** status using the status filter and the search boxes.
3. Upon finding the required requisition, click on the **Action** button for the corresponding requisition.



4. Click on the **Remind Approver** option to remind the approver for the approval of the requisition.

Note: The **Remind Approver** option under the **Action** button is only available if the requisition is under the scope of the logged in user.

Note: If the approval reminder is to be sent and if the requisition is not under the scope of the logged in user, open the requisition and click on the Remind Approver option under the Workflow section.

6.15 Adding or Changing an approver

To add or change an approver for a requisition:

- Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
- Search for the required requisition which is in the **In Approval** status using the status filter and the search boxes.
- Upon finding the required requisition, click on the **Requisition** number to view the requisition.

The screenshot shows the ZYCUS eProc software interface. At the top, there's a navigation bar with tabs like 'Requisition', 'Approval', 'Online store', 'My Requisitions', 'My Favorites', 'Shopping Basket', and 'All Requisitions'. Below the navigation bar, the main content area displays a requisition detail page for 'Requisition: 1456 - IT Testing Laptops - USD 0.9000'. The page is divided into sections: 'General Information', 'Items', 'Delivery', 'Cost Booking', 'Accounting', 'Workflow', and 'Audit Trail'. The 'General Information' section contains fields for Requisition No., Requisition Name, Urgent Requirement, Created on behalf of, Created By, Settlement via, Suggested PO, Assigned buyer, and Last assigned on. The 'Items' section lists an item named 'High-End Laptops' with a unit price of INR 48,000.00 and a quantity of 1 EA, totaling USD 0.9000. The 'Workflow' section shows a history of approval steps:

- Step 1: Prashant (Requester) submitted on 2015/03/01 23:07:22.
- Step 2: Derek (Pending) 2 weeks ago. Actions: Change Approver, Remind Approver.
- Step 3: Mahesh (Reporting Manager).
- Step 4: 37 approvers (Dynamic User).
- Step 5: Sean H (Selectable User).
- Step 6: Buyer.
- Step 7: Supplier.

 The bottom of the screen includes copyright information ('© 2013 - Zycus Inc. All Rights Reserved') and a footer note ('empowered by ZYCUS').

- Under the **Workflow** section, perform any of the required following actions:

A. To add an approver:

- i. Click on the **Add Approver** button. The **Add Approver** dialog box is displayed.

The screenshot shows the 'Add Approver' dialog box. At the top, there is a field labeled 'Approver:' with a dropdown arrow. Below it are two radio buttons: one selected for 'Require approval after' with a dropdown menu '--Select--', and another for 'Include as observer' with a help icon. A 'Preview Workflow' section below shows a horizontal timeline with six steps: 1. Prashant Requester (Submitted 2015/03/01 23:07:22), 2. Dhwani test (Pending, 2 weeks ago), 3. Mahesh Reporting Manager, 4. 27 approvers Dynamic User, 5. Sean M Selectable User, and 6. * Buyer. Step 2 is highlighted in blue. Step 4 has a circled number '3' above it, and step 5 has a circled number '4'. Step 6 has a circled number '5'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

- ii. Enter the name or the e-mail ID of the new approver in the **Approver** textbox.
- iii. Select the required user by clicking on the user name.
- iv. Using the **Require approval after** dropdown box, select the position where the new approver is to be placed.
- v. The updated workflow is displayed in the **Preview Workflow** section. Click on the **Save** button to save the new approver.

B. To change an approver:

- i. Look for the approver that needs to be changed, click on the **Change Approver** button. The **Add Approver** dialog box is displayed.

Change Approver

Replace **Dhwani** with

Include old approver(s) as an observer(s) (i)

Notify old approver(s) via email

Preview Workflow

```

graph LR
    P[Prashant Requester Submitted  
2015/03/01 23:07:22] --> D[Dhwani test Pending  
2 weeks ago]
    D --> M[Mahesh Reporting Manager]
    M --> A[27 approvers Dynamic User]
    A --> S[Sean M Selectable User]
    S --> B[*Buyer]
  
```

Save Cancel

- ii. Enter the name or the e-mail ID of the new approver in the **Replace with** textbox.
- iii. The updated workflow is displayed in the **Preview Workflow** section. Click on the **Save** button to save the new approver.

6.16 Removing an approver

To remove an approver from a requisition:

1. Under the **Requisition** tab, select the **My Requisitions** sub-tab.
2. Search for the required requisition which is in the **In Approval** status using the status filter and the search boxes.
3. Upon finding the required requisition, click on the **Requisition** number to view the requisition.

The screenshot shows the ZYCUS eProc Requisition screen. At the top, it displays 'Requisition: REQ - 781 - 6268501 - USD 138,0000'. The main tabs are 'Requisition' (selected), 'Order', and 'Receipt'. The 'Actions' button is highlighted.

General Information:

Requisition No:	REQ - 781	Parent Requisition:	-
Requisition Name:	6268501	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type:	CAPITAL
Created By:	Prashant	Attachment(s):	-
Settlement via:	Invoice	Status:	In Approval
Suggested PO:	-	Retrospective Purchase:	No
Assigned buyer:	Prashant		
Last assigned on:	2014/11/07		

Items:

Item No.	Item Name & Supplier Name	Unit Price	Qty/Amt	Total Price	Actions
N/A	Laptop - Indian Office Suppliers	USD 1,000	50 MONEY	USD 50,000	
N/A	Service received by dry - Indian Office Suppliers	USD 44,0000	2 EA	USD 88,000	

Approved Amount: **USD 0.0000**
Purchase Amount: **USD 0.0000**

Workflow:

- Prashant Requested Submission 2014/11/07 01:20:07
- Halresh Reporting Manager Pending 1 week ago
- Sean PI Ad-hoc Approver
- Prashant Ad-hoc Approver
- Buyer
- Supplier

Audit Trail:

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- Under the **Workflow** section: To remove an approver, look for the approver and click on the **Remove Approver** button below the required approver.

Note: Only approver manually added into the workflow can be removed.

6.17 Adding or Changing an approver for Cost Center

To add or change an approver at the cost center level for a requisition:

- Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
- Search for the required requisition which is in the **Ready for Approval** status using the status filter and the search boxes.
- Upon finding the required requisition, click on the **Requisition** number to view the requisition.

Requisition: COM001/PR/19 - PR by John A for Lenovo ThinkPad T43 - AUD 835.68

[« Back](#)

General Information

Requisition No:	COM001/PR/19	Parent Requisition:	-
Requisition Name:	PR by John A for Lenovo ThinkPad T43	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type:	EXPENSE
Created By:	John A	Attachment(s):	-
Settlement via:	Invoice	Status:	Ready for approval
Suggested PO:	-	Retrospective Purchase:	No
Assigned buyer:	Tom A		
Last assigned on:	03/11/2015		

Items

Item No.	Item Name & Supplier Name	Unit Price	Qty/Amt	Total Price	Actions
3018664	Lenovo ThinkPad T43 Supplier: CDW	AUD 835.68	1 EA	AUD 835.68	
				Approved Amount:	AUD 0.00
				Purchase Amount:	AUD 0.00

Delivery

Cost Booking

Accounting

Workflow

[+ Add Approver](#)

John A
Requester Pending

*Buyer

Supplier

[Change buyer](#)

Audit Trail

Filter ▾

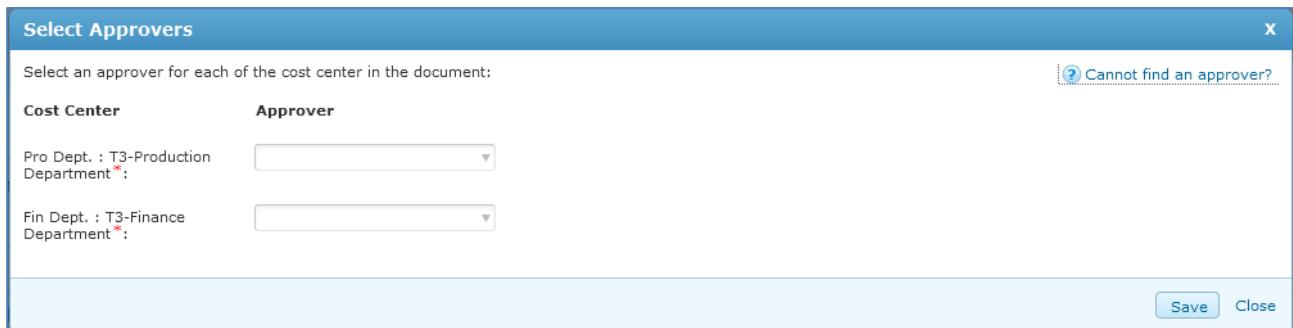
Action	User	Shared with	Role	Date/Time	Version	Message
Requisition ready for approval	John A	-	Requester	03/11/2015 19:35:09	v1	Selectable user/Cost center approvers/Assigned buyer not yet selected or Workflow marked for approver addition

[Submit for approval](#) [Modify](#)

4. Under the **Workflow** section, perform any of the required following actions:

A. To add an approver for a cost center:

- i. Click on the  [Select approver\(s\)](#) button under the **Sub Process** workflow element. The **Select Approvers** dialog box is displayed.



Cost Center	Approver
Pro Dept. : T3-Production Department	<input type="text"/>
Fin Dept. : T3-Finance Department*	<input type="text"/>

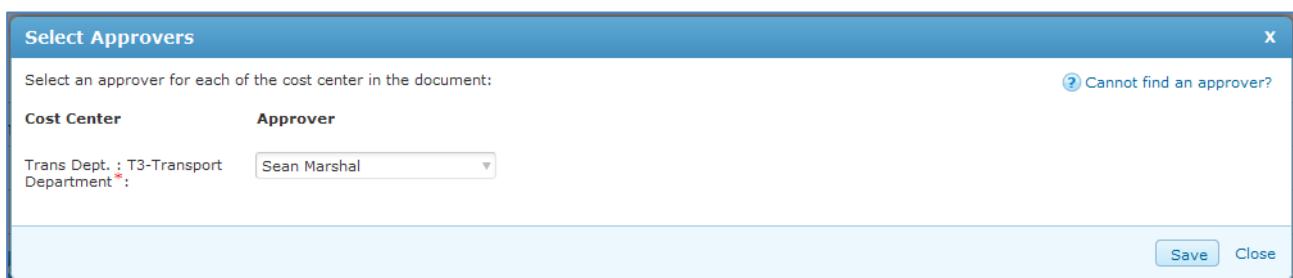
[Cannot find an approver?](#)

Save **Close**

- ii. Enter the name or the email id of the new approver in the **Approver** textbox.
- iii. Select the required user by clicking on the user name.
- iv. Click on the **Save** button to save the new approver for the cost center.

B. To change an approver for a cost center:

- i. Look for the approver that needs to be changed, click on the  [Change approver\(s\)](#) button. The **Select Approvers** dialog box is displayed.



Cost Center	Approver
Trans Dept. : T3-Transport Department*	Sean Marshal

[Cannot find an approver?](#)

Save **Close**

- ii. Enter the name or the email id of the new approver in the **Approver** textbox.
- iii. Click on the **Save** button to save the new approver for the cost center.

6.18 Assigning a buyer

To assign a buyer in a requisition workflow:

1. Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
2. Search for the required requisition which is in the **In Approval** status using the status filter and the search boxes.
3. Upon finding the required requisition, click on the **Requisition** number to view the requisition.

The screenshot shows the ZYCUS eProc system interface for managing requisitions. The top navigation bar includes links for Online store, My Requisitions, My Favorites, Shopping Basket, and All Requisitions. The current page is titled "Requisition: REQ - 2411 - ACMENG - 3916895 - USD 13,700,0000".

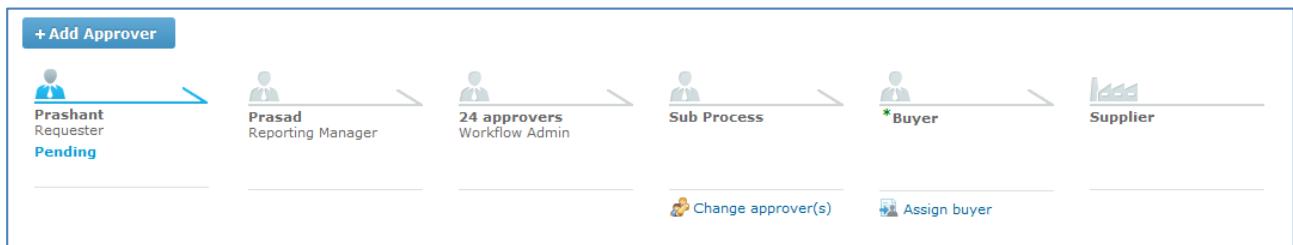
The main content area displays the "General Information" section for the requisition. Key details include:

- Requisition No: REQ - 2411 - ACMENG
- Requisition Name: 3916895
- Urgent Requirement: No
- Created on behalf of: -
- Created By: Preashant
- Settlement via: User P-card
- Suggested PO: -
- Assigned buyer: -
- Last assigned on: -
- Parent Requisition: -
- Reason for Ordering: -
- Comments for supplier: Test Submit
- Purchase Type: EXPENSE
- Attachment(s): -
- Status: Ready for approval
- Retrospective Purchase: No

The "Items" section lists a single item: Case, Notebook, Backpack, BR. The unit price is USD 635.0000, quantity is 20 EA, and total price is USD 13,700.0000. The "Approved Amount" and "Purchase Amount" are both listed as USD 0.0000.

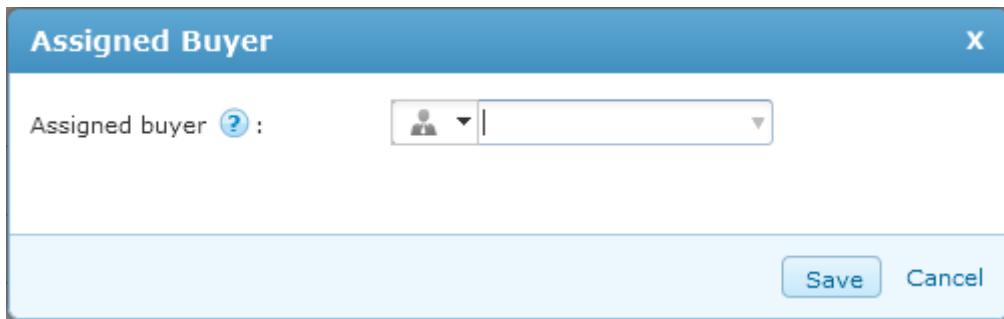
On the left side, there are expandable sections for Delivery, Cost Booking, Accounting, and Workflow. The Workflow section shows a process flow from "Preashant" (Sales Executive) to "Reporting Mgr..." (HOD), then to "Buyer", and finally to "Supplier". A button labeled "+ Assign buyer!" is located below the flowchart. At the bottom of the page are buttons for "Submit for approval" and "Modify".

Note: If the workflow is configured with single approver at a given node, the workflow displays the name of the approver. If the node is configured with multiple approvers; it displays the count of approvers for that particular node as shown below.



4. Under the **Workflow** section, click on the **Assign Buyer** button below the **Buyer** workflow element.

5. The **Assigned Buyer** dialog box is displayed as follows:



6. On the **Assigned Buyer** textbox, click on the icon and select one of the required option:

- A. - Select this option to assign an individual user as the assigned buyer of the requisition.
- B. - Select this option to assign a group of predefined users as the assigned buyers of the requisition.

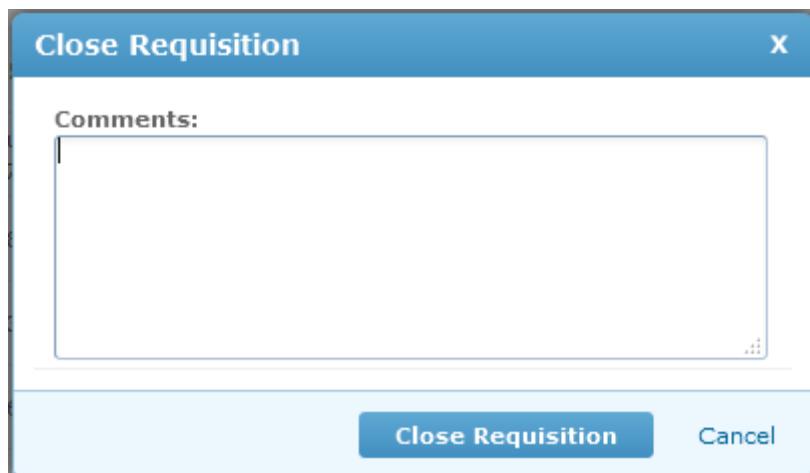
Above both options displays the list of only Buyers to be selected.

- 7. Enter the name/email id of the assigned buyer/group in the **Assigned Buyer** textbox and select the required buyer/group from the enlisted buyers.
- 8. Click on the **Save** button to save the selected buyer/buyer group as the assigned buyer for the requisition.

6.19 Closing a Requisition

To close a requisition:

1. Under the **Requisition** tab, select the **My Requisitions** or the **All Requisitions** sub-tab.
2. Search for the required requisition which needs to closed.
3. Upon finding the required requisition, click on the **Action** button for the corresponding requisition.
4. Select the **Close** option ( **Close**)
5. The following **Close Requisition** dialog box is displayed



6. Enter the required comments & click **Close Requisition**.

Chapter 7: Create Favorites & Baskets

7.1 Introduction

eProc enables you to create favourites and baskets. You can tag your favourite items. You can shop items and place them in a basket.

7.2 Favorites

You can mark an item as your favourite from the item list in the Catalog or Supplier Punchouts.

7.2.1 Adding a Favourite

To add favourites:

1. On the item search results page, select an item using the checkbox next to it and click **Add to Favorites**. The item gets added and is displayed in the **My Favorites** page.

The screenshot shows a list of items from a catalog. The first item is a 'Samsung Fascinate Android Phone (Verizon Wireless)'. Its price is listed as 'USD 350.000000' and '~ INR 17,500'. Below the item details, there is a quantity selector set to '1 EA' and a shopping cart icon. To the left of the item, there is a checkbox checked, and an 'Actions' menu is open. The 'Actions' menu contains several options: 'Compare (1)', 'Add to Cart (1)', 'Add to Basket (1)', and 'Add to favorites (1)'. The 'Add to favorites (1)' option is highlighted with a yellow background and a blue border. The second item listed is a 'GALAXY S II'. Its price is listed as 'USD 650.000000' and '~ INR 32,500'. Below the item details, there is a quantity selector set to 'EA' and a shopping cart icon. To the left of the item, there is an unchecked checkbox and an 'Actions' menu, which is currently not visible on the screen.

2. Click on **Requisition tab>My Favorites** sub tab. The **My Favorites** page is displayed.

The screenshot shows a web-based application interface for managing requisitions. At the top, there's a navigation bar with links for 'Requisition', 'Approval', 'Online store', 'My Requisitions', 'My Favorites' (which is currently selected), 'Shopping Basket', and 'All Requisitions'. Below the navigation is a toolbar with buttons for 'Compare', 'Add to Cart', 'Add to Basket', and 'Remove from favorites'. A message box indicates '1 Item | USD 0.54' and a 'Checkout' button. The main area is titled 'My Favorites' and displays a table of selected items. The table has columns for 'Item No.', 'Item Name & Supplier Name', 'Availability', 'Unit Price', 'Qty', and 'Actions'. The items listed are: 5155800009322 HARDWARE (Supplier: EBAY OFFICE SUPPLIERS), 2693206 TANGENT 2-BUTTON WASHABLE MOUSE (Supplier: EBAY OFFICE SUPPLIERS), 5110257764756 HP INKCARTRD NO.11 MAGENTA (Supplier: EBAY OFFICE SUPPLIERS), 570557546921 WRITING PAPER (Supplier: EBAY OFFICE SUPPLIERS), 5220608003600 PENSTAY-PUT 11BK (Supplier: EBAY OFFICE SUPPLIERS), and 5220608008724 PENSTAY-PUTBE (Supplier: EBAY OFFICE SUPPLIERS). Each item row includes a checkbox, a star rating, and a link to the supplier's page. At the bottom of the table, there are buttons for 'Show 10 records per page' and 'Showing Page 1 of 1'. The footer contains copyright information: '© 2015 - Zycus Inc., All Rights Reserved.' and 'empowered by ZYCUS'.

22. Select the desired items and click **Add to Cart** to add the items to cart. For more information, see [Adding Items to Cart](#).
23. Select the desired items and click **Add to Basket** to add the items to basket. For more information, see [Shopping Baskets](#).
24. Select the desired items and click **Remove from favorites** to remove the items from favorites.

7.2.2 *Searching Favorites*

To search favorites:

1. Enter a description in the **Search** field.

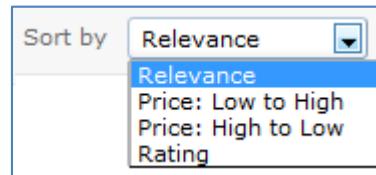
Search	in	Item No	<input type="button" value="Go"/>
--------	----	---------	-----------------------------------

2. Select an option from the drop down list.
3. Click **Go**. The search results are displayed.

7.2.3 *Sorting Favorites*

To sort favorites:

- Select an option to sort from the **Sort by** drop down list.



7.2.4 Viewing Favorites

- Under **Requisition** tab, click **My Favorites**. You will be navigated to the following page:

Total Records: 6	Item No	Item Name & Supplier Name	Availability	Unit Price	Qty	Actions
	1	wireless mouse Supplier: APPLE	N/A	SEK 1,000.00000	WM	
	2	wireless keyboard Supplier: APPLE	N/A	INR 50.00000	EA	
	3	aux wire Supplier: APPLE	N/A	INR 76.00000	EA	
	4	02934 Supplier: APPLE	N/A	USD 10.00000	EA	
	5	56453 Supplier: APPLE	N/A	USD 1.00000	EA	
	6	14 Supplier: APPLE	N/A	INR 11.00000	EA	

Show 10 records per page.

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- If there are any changes in the items which have been added in your favorites, then you will be notified as shown below:
- If an item was removed from the catalog, then the item will be seen as **console** (stroked in red).
- If an item was updated in the catalog, then you will see an icon next to the item.

The screenshot shows the 'My Favorites' section of the eProc application. At the top, there are navigation links: Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. Below these are links for Online store, My Requisitions, My Favorites (which is selected), Shopping Basket, and All Requisitions. The main area displays a list of items under 'My Favorites'. Each item has a checkbox, a star rating, the item name, supplier, availability, unit price, quantity, and an 'Actions' column with a shopping cart icon. A message at the top says 'Some items have been updated.' Below the list, there are buttons for 'Compare', 'Add to Cart', 'Add to Basket', and 'Remove from favorites'. The bottom of the screen shows a footer with copyright information and a 'Showing page 1 of 1' message.

3.

7.3 Shopping Baskets

You can place the items which you shop for regularly in a basket. The basket saves the items and provides with a quick easy access to the items to checkout.

7.3.1 Adding Items to a Basket

To add items to basket:

The screenshot shows the 'Actions' dropdown menu for an item. The menu includes options: Compare (1), Add to Cart (1), Add to Basket (1) (which is highlighted with a yellow background), and Add to favorites (1). The main area displays two items: 'Dell Inspiron 15R Laptop, 39.6cm (...)' and 'Dell Inspiron Mini 1018 4034CLB Net...'. Each item has a brief description, price (USD 600.000000 and USD 270.000000 respectively), delivery time (49 days and 27 days), and a shopping cart icon.

1. In the item search results page, select an item and click **Add to Basket**. The **Add to Basket** page is displayed.

Add to basket

Select a Basket

Existing Basket: --Select-- Create New:

Items to be added If the item already exists, the quantity present will be replaced by the new quantity

Item No.	Item Name & Supplier Name	Availability	Unit Price	Qty	Actions
D13S86423018467	Dell Inspiron 15R Laptop, 39.6cm (15.6") widescre Supplier: DNA	49 days	USD 600.00000	1 EA 	

Add to basket **Cancel**

25. Select a basket from the **Add to Existing Basket** drop down list.

Note: If **Add to Existing Basket** option is selected and if the item already exists then the quantity for existing items in the selected basket will be overridden.

26. Select **Create New Basket** to create a new basket and specify a name for your basket in the text box field.

27. Click **Add to basket**. The basket is added.

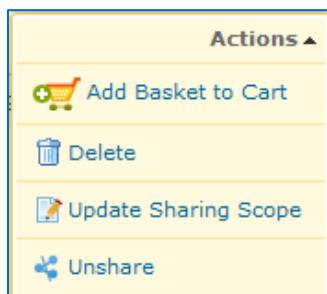
28. Click on **Requisition** tab>**Shopping Basket** sub tab. The **Shopping Basket** page is displayed.

The screenshot shows a list of shopping baskets. Each basket entry includes the basket name, created by user, number of items, delivery lead time, total price, and an 'Actions' button. The 'Actions' button typically contains options like 'Add Basket to Cart', 'Delete', 'Update Sharing Scope', and 'Unshare'. The page also includes navigation links for 'All', 'My Baskets', 'Shared Baskets', and 'Search', along with a search bar for 'Basket Name'.

Basket Name	Created By	Items in Basket	Delivery Lead Time (days)	Total Price	Actions
Free text Basket	Akki	1	N/A	USD 11,600.00	Actions
do + Test	Akki	2	N/A	USD 57.02	Actions
Basket_Suresh	Akki	1	7 days	USD 2,600.00	Actions
basket..	Sund	2	15 days	USD 48,840.00	Actions
testing null	sandy	3	51 days	USD 437.73	Actions
Regression basket	disha	4	9 days	USD 1,660.79	Actions
Steffy basket	<H1>BUG</H1>	1	1 days	USD 216.00	Actions
test	Akki	1	4 days	USD 732.00	Actions
test-12	Akki	1	4 days	USD 833.00	Actions
658_Sharing_362	<H1>BUG</H1>	2	N/A	USD 91,246.00	Actions

29. Click on **My Baskets** to view the baskets created by you.

30. For any shopping basket, under **My Baskets**, click **Actions** to perform any action corresponding to a basket.



- Click **Add Basket to Cart** to add the items in the basket to cart.
- Click **Delete** to delete a basket.
- For a shared basket:
 - Click **Update Sharing Scope** to share your baskets with other dimensions.
 - Click **Unshare** to stop sharing your basket with other dimensions.
- For an unshared basket:
 - Refer to [Sharing Baskets](#) for more details.

Note: Zero Price items can also be added to the Basket.

7.3.2 Sharing Baskets

To share a basket:

2. Click **Actions** corresponding to the basket you wish to share.
3. Click **Share**. The **Sharing Scope** dialog box is displayed.

The screenshot shows the 'Sharing Scope' dialog box. At the top left, it says 'Select Sharing Scope *:' with a dropdown menu set to 'Department'. A tooltip 'Department' is shown above the dropdown. Below the dropdown is a list of options: '--Select--', 'Purchasing Scope', 'Company', 'Business Unit', 'Location', 'Department', and 'Organization Units'. To the right of the dropdown is a search bar with 'View Selected (3)' and a 'Search' button. Further right are buttons for 'Code' and 'Go'. The main area shows a table with two rows. The first row has a checkbox, code 'DEPT052', name 'Dev', and description 'Siemens | Customer Products'. The second row has a checkbox, code 'DEPT051', name 'Testing', and description 'Dell | Customer Service'. At the bottom right are 'Share' and 'Cancel' buttons.

Company Business Unit			
<input checked="" type="checkbox"/>	DEPT052	Dev	Siemens Customer Products
<input checked="" type="checkbox"/>	DEPT051	Testing	Dell Customer Service

4. Select an option from the drop down list and click **Share**.
5. Based on the configuration, basket sharing scope can extend to **Regions**.
6. When you select the sharing scope as department, the system will show all the organizational units (OU) mapped to the selected department.

The screenshot shows the 'Sharing Scope' dialog box. At the top left, it says 'Select Sharing Scope *:' with a dropdown menu set to 'Name'. A tooltip 'Name' is shown above the dropdown. Below the dropdown is a list of options: 'Code', 'Name', and 'Company | Business Unit'. To the right of the dropdown is a search bar with 'View All' and 'View Selected (3)'. Further right are buttons for 'Code' and 'Go'. The main area shows a table with two rows. The first row has a checkbox, code 'DEPT052', name 'Dev', and description 'Siemens | Customer Products'. The second row has a checkbox, code 'DEPT051', name 'Testing', and description 'Dell | Customer Service'. At the bottom right are 'Share' and 'Cancel' buttons.

Company Business Unit			
<input checked="" type="checkbox"/>	DEPT052	Dev	Siemens Customer Products
<input checked="" type="checkbox"/>	DEPT051	Testing	Dell Customer Service

7. If departments are not linked to OUs, OU column will display "All".

Sharing Scope

Select Sharing Scope*: Department

Total Records: 46 View All | View Selected (0) Search in Code Go

	Code	Name	Company Business Unit
<input type="checkbox"/>	DEPT043	DEPARTMENTS	All All
<input type="checkbox"/>	DEPT042	software development	All All

All | Showing page 1 of 5

Share Cancel

- Basket will be shared with only those users who have the selected departments mapped to their user profile.

Note: Initially, the sharing scope had an option of “Department and Organizational Units(s)” which is now split into “Departments” and “Organizational Units”. Based on this change, following will be the impact existing baskets:

- Department: Shared baskets will be visible to the users with whom it was shared.
- Department and Organizational Unit(s): Shared baskets will be visible to the creator and not shared.

- The basket appears under **Shared Baskets** on the **Shopping Basket** page.

- The  icon appears besides the basket name.

Basket Name	Created By	Items in Basket	Delivery Lead Time (days)	Total Price	Actions
 Sample Basket 2	Prashant	2	25 days	INR 9,250.00000	Actions ▾

7.3.3 Searching Baskets

To search a basket:

- Enter search description in the **Search** field and select an option from the drop down list and click **Go**.

Search in Basket Name Go

7.3.4 Viewing Baskets

- Under **Requisition** tab, click **Shopping Baskets**. You will be navigated to the following page:

Found 1 record(s).

Basket Name	Created By	Items in Basket	Delivery Lead Time (days)	Total Price	Actions
sourcing_basket	disha	4	N/A	USD 128.19350	Actions

Show 10 records per page.

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- Select a **Shopping Basket** you want to view. You will be navigated to following page:

This basket contains 4 item(s).

For Selected: [Compare](#) | [Add to Cart](#) | [Add to favorites](#) | [Delete from Basket](#)

Item No.	Item Name & Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
14	laptop Supplier: APPLE	N/A	INR 11.00000	1 EA Save	USD 0.21819	Edit Delete
wireless keyboard	wireless keyboard Supplier: APPLE	N/A	INR 70.00000	1 EA Save	USD 1.38848	Edit Delete
aux wire	aux wire Supplier: APPLE	N/A	INR 80.00000	1 EA Save	USD 1.58683	Edit Delete
wireless mouse	wireless mouse Supplier: APPLE	N/A	SEK 1,000.00000	1 WM Save	USD 125.00000	Edit Delete

Grand Total Price: **USD 128.19350**

- If there are any changes in the items which have been added in your basket, then you will be notified as shown below:
- If an item was removed from the catalog, then the item will be seen as **console** (stroked in red).
- If an item was updated in the catalog, then you will see an **!** icon next to the item.

Chapter 8: Requisitions Handling

8.1 Introduction

All the requisitions that are created are sent for approval. The approver is decided based on the workflow configured. Users with the role ‘Workflow admin’ can configure the workflows as per requirement

Note: Only users with approval rights will be able to access **Approval** tab and approve or reject a requisition.

8.2 Accessing the Approval Workbench

8.2.1 Viewing All Requests

By default all the requisitions that are pending for approval are displayed under **Approval** tab.

The screenshot shows the ZYCUS eProc interface with the 'Approval' tab selected. The main area is titled 'Approval Requests' and displays a grid of requisition records. The columns include Status, Requisition No., Requisition Name, Requester, Received on, Amount to be approved, and Actions. There are 257 records found out of 1883. The 'Actions' column contains a red trash icon for each record. The bottom of the screen shows navigation links for 'Requisition', 'Standard PO', 'Blanket PO', and 'All Requests'.

Status	Requisition No.	Requisition Name	Requester	Received on	Amount to be approved	Actions
Pending	2157-COM043	LJNH_FUSE BUSS (10 AMP)	jagrab10	2015/06/22	INR 5,895,201.00	Action
Pending	2092-ACHTECH-4	laptop, laptopItems127584...	sandy	2015/05/30	INR 40.00	Action
Pending	2092-ACHTECH-3	laptop, laptopItems127584...	sandy	2015/05/30	INR 29,333.04	Action
Pending	2092-ACHTECH-1	laptop, laptopItems127584...	sandy	2015/05/30	INR 17.00	Action
Pending	2091-ACHTECH	laptop_Test1, laptopItems...	sandy	2015/05/30	INR 369.37	Action
Pending	1704	<H1>BUG</H1> Requester F...	<H1>BUG</H1>	2015/05/19	INR 237,485,922.56	Action
Pending	1649	<H1>BUG</H1> Requester I...	<H1>BUG</H1>	2015/04/16	INR 29,333.04	Action
Pending	1611	Sunil Requester mobile It...	Sunil	2015/04/16	INR 100.00	Action
Pending	REQ - 1379 - ACMTECH-Ignore this document	Req_2563	<H1>BUG</H1>	2015/02/16	INR 345.00	Action
Pending	REQ - 912 - ACMTECH-Ignore maximum chars max	PR-by-disha-for-300363(2....	disha	2015/02/16	ARS 0.19	Action

8.2.2 Searching Requisition

You can search for a requisition by entering the **Document Number**.

A screenshot of a search interface. It features a header labeled "Document No" with a small downward arrow indicating it's a dropdown or filter field. Below this is a rectangular input field with the placeholder text "Search Number".

You can search for a requisition by entering the **Document Name**.

A screenshot of a search interface. It features a header labeled "Document Name" with a small downward arrow indicating it's a dropdown or filter field. Below this is a rectangular input field with the placeholder text "Search Name".

You can search for a requisition by entering the name of the **Initiator** who initiated the requisition.

A screenshot of a search interface. It features a header labeled "Initiator" with a small downward arrow indicating it's a dropdown or filter field. Below this is a rectangular input field with the placeholder text "Search Initiator".

8.2.3 Sorting Requisitions

Beside the **Document Number** header, users can click on to sort the requisitions in ascending order and click on to sort the requisitions in descending order.

A screenshot of a sorting icon for the "Document No" header. It consists of the text "Document No" followed by a small blue square containing a white upward-pointing arrow, indicating an ascending sort option.

Beside the **Received On** header, users can click on to sort the requisitions in ascending order and click on to sort the requisitions in descending order.

A screenshot of a sorting icon for the "Received On" header. It consists of the text "Received On" followed by a small blue square containing a white upward-pointing arrow, indicating an ascending sort option.

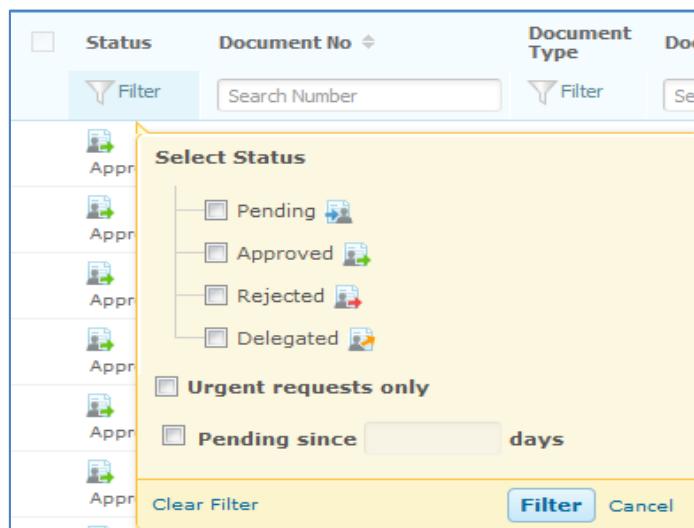
Beside the **Amount** header, users can click on to sort the requisitions in oldest first order and click on to sort the requisitions in latest first order.

A screenshot of a sorting icon for the "Amount" header. It consists of the text "Amount" followed by a small blue square containing a white upward-pointing arrow, indicating an ascending sort option.

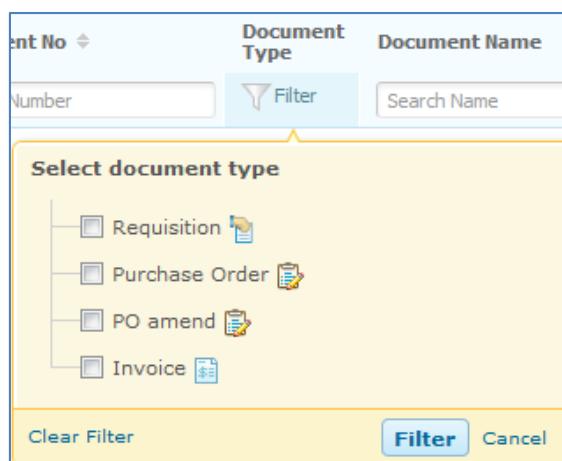
8.2.4 Filtering Requisitions

You can filter the requisitions based on the following parameters:

- **Status:** Select a status to view the requisitions under that particular status.



- **Document Type:** Select a document type to view the requisitions of the selected document type only.



- **Amount:** Slide through the horizontal bar to filter your requisitions based on the price of your requisitions.

The screenshot shows a 'Select amount range' dialog box overlaid on a main interface. The main interface has columns for 'Received On' and 'Amount'. The dialog includes a 'From' field set to '0', a 'To' field set to '1313000000', a horizontal slider, and currency selection checkboxes for USD, INR, AUD, ZMK, XOF, GBP, and ISK. At the bottom are 'Clear Filter', 'Filter', and 'Cancel' buttons.

- **Received On:** Select the dates to view the requisitions received between that period.

The screenshot shows a 'Select Date' dialog box overlaid on a main interface. The main interface has columns for 'Received On' and 'Amount'. The dialog includes date pickers for 'From' (15/07/2013) and 'To' (10/11/2013), and 'Clear Filter', 'Filter', and 'Cancel' buttons.

8.2.5 Taking Action from the Workbench

To approve a requisition:

1. Click on the **Approval** tab. The Approval Requests page is displayed. By default, all the requisitions that are pending for approval are displayed.

Approval Requests

Status	Requisition No.	Requisition Name	Requester	Received on	Amount to be approved	Actions
Pending	2157-COM043	L3NH, FLUKE BUSES (10 AMP)	jagrat10	2015/06/22	INR 5,895,201.00	Action ▾
Pending	2092-ACHTECH-4	laptop, laptopItems137584...	sandy	2015/05/30	INR 40.00	Action ▾
Pending	2092-ACHTECH-3	laptop, laptopItems137354...	sandy	2015/05/30	INR 29,333.04	Action ▾
Pending	2092-ACHTECH-1	laptop, laptopItems137584...	sandy	2015/05/30	INR 17.00	Action ▾
Pending	2091-ACHTECH	laptop_test1, laptopItems...	sandy	2015/05/30	INR 369.37	Action ▾
Pending	1704	<H1>BUG</H1> Requester Pa...	<H1>BUG</H1>	2015/05/19	INR 237,485,932.56	Action ▾
Pending	1649	<H1>BUG</H1> Requester ja...	<H1>BUG</H1>	2015/04/16	INR 29,333.04	Action ▾
Pending	1611	Sunil Requester mobile It...	Sunil	2015/04/16	INR 100.00	Action ▾
Pending	REQ - 1379 - ACMTECH-Ignore this document	Req_2563	<H1>BUG</H1>	2015/02/16	INR 345.00	Action ▾
Pending	REQ - 932 - ACMTECH-Ignore maximum chars max	PR by disha for 300363(2....	disha	2015/02/16	ARS 0.19	Action ▾

Show 10 records per page. Showing Page 1 of 26

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2. To view a requisition, click on the **Requisition No.**. Requisition summary page will be displayed as shown below:

Requisition REQ :: 974-1 Items, INR 77,700.0

The following fields are available for editing: GL Account, Asset Code

Requisition Info

Requisition Name: PR :: Noah for NoteBook # 2960269 For MN-COM-01

Urgent Requirement ?: No

Attachments ?: No attachments available

Reason for ordering: -

On Behalf of: -

Purchase Type ?: EXPENSE

Assigned buyer ?: -

Billing, Delivery & Cost Allocation Info

Organization Unit (OU): Mentor Network > mentor BU > 1840 (Lawrence)

Delivery address:
325
23532523
52523525
235
AMF O'Hare, Illinois
, United States

Bill-to address:
325
23532523
52523525
235
AMF O'Hare, Illinois
, United States

Cost Center: 3ch: 3ch code

Settlement via: Invoice

Retrospective Purchase: No

Add items to existing PO: No

Close

Note: As an approver, if you are authorized to edit information in a Requisition, you will be notified about which fields can be edited. The notification will be displayed when you choose to view the requisition. Shown below is an example:

 The following fields are available for editing: **GL Account, Asset Code** X

3. Click on the item name to view the item details.

Items

Line No.	Item No.	Item Name & Supplier Name	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	Notebook   Supplier: No supplier selected	INR 110.0	50 EA	INR 5,500.0	  

Item Details

Notebook

Requirement Details

Item Number:	-	Product Category:	Notebook computers
Short Description:	Notebook	Quantity:	50
Long Description:	-	UOM:	EA
Item Type:	Goods	Price:	110.0
Receive/Bill by:	Quantity	Sourcing Status:	Quoted by supplier
		Currency:	INR

[▼ Show extra fields like manufacturer details, specifications, etc.](#)

[Close](#)

4. You can navigate between the tabs to view **Requirement Details** and **Suppliers**.
5. The **suppliers** tab will display **Requester Selected Supplier** and **System Suggested Suppliers** as shown below:

Item Details

Notebook

Requirement Details

Other Details:

Requester Selected Suppliers

Supplier Name	Address	Supplier Contact	Contract/Order Number
APPLE	INDORE	Not Available	-

System Suggested Suppliers

Type	Name	Address	View Contracts
Supplier	APPLE	INDORE	View Contracts
Supplier	APPLE	-	View Contracts
Supplier	APPLE	-	View Contracts
-	-	-	-

[Close](#)

Note: You will be able to view the contracts with the system suggested suppliers, if any.

6. Based on the fields available for editing, you can change the **GL Account** and/or **Asset Code**. Click on the **Edit** button from the line item (*highlighted below*).

Requisition Items

[Expand All](#) | [Collapse All](#) [Update all lines](#)

Line No.	Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	2100076	NoteBook APPLE	N/A	INR 77,700.0	1 EA	INR 77,700.0	

Amount to be approved: INR 77,700.0

Requisition Approval Workflow

[+ Add Adhoc Approver](#)

Noah
Requester
Submitted
17/08/2016 15:00:47

sandip
Reporting Manager
Pending
1 hour ago

Noah
sandip Kachhadhya

14 approvers
Dynamic User

Buyer

Supplier

[Change Approver](#)

[Comments *](#):

[Close](#)

7. On clicking **Edit**, **Item Summary** popup will be displayed. Go to the **Cost Allocation** tab.

Item Summary

Requisition Item

NoteBook
APPLE

INR 77700 × 1 EA = **INR 77,700.0**

Actions

Accounting

Purchase Type: EXPENSE

GL Account: Search GL Account

Asset Code:

Cost Booking

Copy cost booking information from the header

Cost Center	Amount
3ch: 3ch code	INR 77,700.0

Book cost at the item level

OK **Cancel**

8. Add the **GL Account** and **Asset Code**. Click **OK**. The item(s) in requisition will be updated as per your editing.
9. On the Approval request listing page, for an approval request having status as **Pending**. Under the **Actions** option, select the **Approve** option.

Status	Document No	Document Type	Document Name	Initiator	Received On	Amount	Actions
Pending	PO - 975	Purchase Order	Order for Req# REQ -643- ...	<H1>BUG</H1>	08/11/2013	USD 40.80	Actions
Pending	PO- 736 -.. Sequence number starts at*:	Purchase Order	Compound taxes	Prashant	28/10/2013	36,012.10	
Pending	PO- 721 -T3-Acme Engineering Services-T3	Purchase Order	Copy of Copy of Copy of C...	Patil	27/10/2013	AUD 100.00	
Pending	PO- 720 -T3-Acme Engineering Services-T3	Purchase Order	Copy of Copy of Copy of C...	Patil	27/10/2013	AUD 100.00	

10. The **Approve Requisition** message box is displayed. Enter your approval comments in the **Comments** area and click **Approve**.

Approve 1 Document(s)

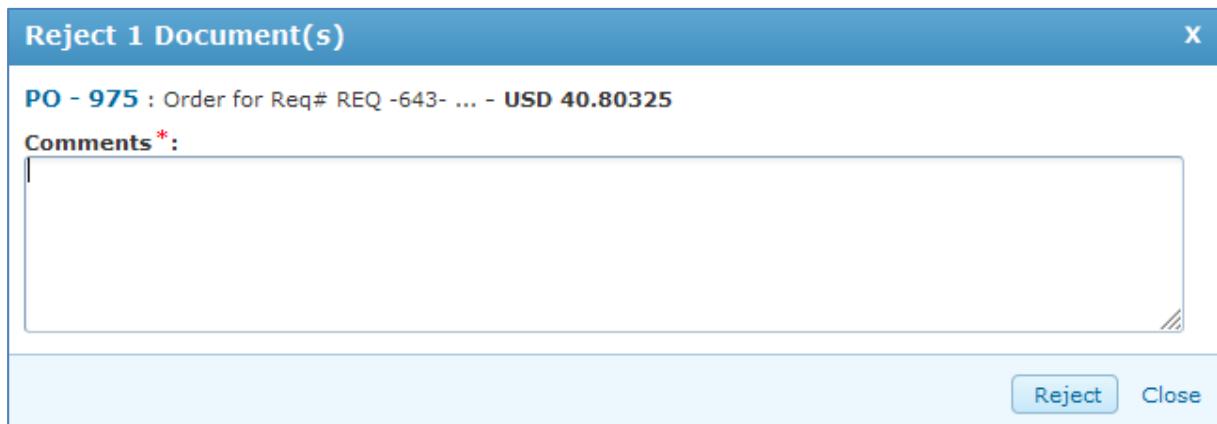
PO - 975 : Order for Req# REQ -643- ... - USD 40.80325

Comments:

Approve **Close**

To reject a requisition:

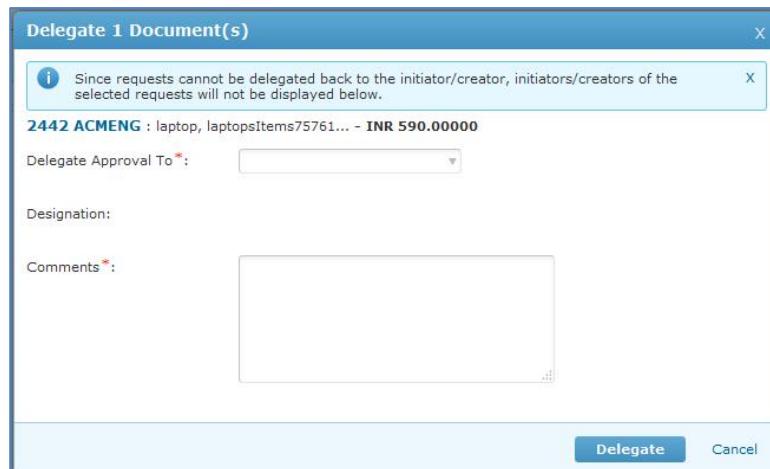
1. Click **Approval** tab. The Approval Requests page is displayed. By default, all the requisitions that are pending for approval are displayed.
11. On the Approval request listing page, for an approval request having status as **Pending**, click **Actions > Reject**. The **Reject Requisition** message box is displayed.



12. Enter your comments in the **Comments** area and click **Reject**.

To delegate a requisition:

1. Click **Approval** tab. The Approval Requests page is displayed. By default, all the requisitions that are pending for approval are displayed.
2. On the Approval request listing page, for an approval request having status as **Pending**, click **Actions > Delegate**.



3. Enter & select the Name/Email ID of the user to whom the request id to be delegated

Delegate 1 Document(s)

Since requests cannot be delegated back to the initiator/creator, initiators/creators of the selected requests will not be displayed below.

2442 ACMENG : laptop, laptopsItems75761... - INR 590.00000

Delegate Approval To*: Vaibhav

Designation: Engineering Manager

Comments*:
 [Empty text area]

Delegate Cancel

- Enter the required **Comments** and click **Delegate**.

Note: Based on the scope of the document (Requisition, PO, BPO, or Catalog) you will be able to delegate the approval request only to those users who have respective requisition/PO/BPO header scope in their requesting scope/subset in addition to existing delegation rules.

8.3 Viewing Requisition Details & Taking Action

To view requisition details:

- Click **Approval** tab. The Approval Requests page is displayed. By default, all the requisitions that are pending for approval are displayed.

2. On the Approval request listing page, for any approval request, click **Actions > View**.

The screenshot shows a workflow interface for an approval request. It displays three stages: 'Requester' (status: Submitted, date: 2015/03/05 05:47:49), 'Reporting Manager' (status: Pending, date: 2 weeks ago), and 'Buyer' (status: Pending). Below the stages is a 'Comments' section with a note: (*required when Rejecting or Delegating). At the bottom are three buttons: 'Approve' (green checkmark icon), 'Reject' (red X icon), and 'Delegate' (person icon).

3. In the Workflow section, enter your comments in the **Comments** area.
4. Click **Approve** to approve the requisition.

OR

5. Click **Reject** to reject the requisition.
6. Click **Delegate** to delegate the requisition to another approver.
7. In case if **Delegate** is to be delegated, the **Delegate** dialog box is displayed.

The 'Delegate' dialog box contains two input fields: 'Delegate Approval To:' and 'Designation:'. At the bottom are 'Delegate' and 'Cancel' buttons.

8. Enter the name/e-mail ID of the approver to whom the requisition is to be delegated for approval.
9. Click **Delegate** to continue.

Note: Comments are mandatory only if the requisition is being rejected or delegated.

8.4 Approval Delegation Settings

To enable approval delegation:

1. Navigate to the following path: **Approval > My Settings**

2. Enter and select the Name/EmailID of the User whose Approval Requests are to be delegated

3. Enter and select the Name/EmailID of the User to whom the Approval Requests are to be delegated

4. Select the duration for which the Approval Requests are to be Auto Delegated

5. Click **Enable** to activate the Auto Delegation of Approval Requests

Note:

- **My settings (only To):** Only to those users who have your requesting scope as a subset of their requesting scope in addition to existing delegation rules.
 - **My settings (From & To):** **From** will display all users of tenant listed in addition to existing delegation rules (existing behaviour). **To** will display only those users who have **From** user's requesting scope as a subset of their requesting scope in addition to existing delegation rules.
6. In case of delegation action on multiple documents, all tenant users will be displayed but requesting scope will be validated on "Delegate" action. If the user does not have the same requesting scope as that of document, then it will display the following error message: "**Selected user has insufficient privileges for approving document <doc_no>**".

Chapter 9: Creating Receipt

9.1 Introduction

eProc enables requesters to create receipt for the received items against a requisition. A requester is expected to create a receipt each time his order is delivered. The requisition status remains partially received until receipts are created in the system for the entire order.

9.2 Creating a New Receipt

Note: Receipts can be created only for Released requisitions.

To create a new receipt:

7. Search and open the required **Requisition**. Click on the **Actions** menu.
8. Select the **Create New Receipt** option. The following page is displayed.

Requisition: REQ :: 968 - PR :: Noah for Mobile1 # 7576172 For MN-COM-01 - INR 48,000.0

Sr. No.	Item Name and Supplier	Rating	Asset Code	Location(s)	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
1	Mobile1 Supplier: APPLE	-		1840 (Lawrence)	INR 4,000.0	12EA	1	1	1	INR 4,000.0

Comments & Attachments

Delivery Information

Receipt Date*: 04/08/2016 [Clear](#)

Consignment/Packing Slip No.:

Shipped via:

Air-way Bill No.:

Comments:

Attachment(s): [Add Attachments](#)

Submit | **Save as Draft** | **Cancel**

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9. Under the **Items Ordered** section, select an item and enter the quantity received and approved in the **Received** and **Approved** fields respectively.

Note: Approved quantity cannot be greater than Received quantity.

9.2.1.1 Automatic Return Notes

10. If the approved quantity is less than the received quantity, then for the pending quantity, an **Automatic Return Note (ARN)** will be created. Shown below is the ARN creation process.

What is Return Notes?

Return notes are acknowledgement notes created when goods are returned to the Supplier, damaged or otherwise. They help keep a track of the goods received and returned.

Requisition: REQ :: 968 - PR :: Noah for Mobile1 # 7576172 For MN-COM-01 - INR 48,000.0

Requisition		Order		Receipt		< Back		Actions		
Online store	My Requisitions	My Favorites	Shopping Basket	All Requisitions	View Orders					
Receipts » New Receipt										
Items Ordered										
Sr. No.	Item Name and Supplier	Rating	Asset Code	Location(s)	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
1	Mobile1 Supplier: APPLE	-		1840 (Lawrence)	INR 4,000.0	12EA	1	1	0	INR 0.0
Return Details										
Returned Quantity / Amount:	1.0	Reason for Return*:	--Select--	Value of Returned Goods/Services:	INR 4,000.0	Return Method*:	--Select--			
Comments & Attachments										
Delivery Information										
Receipt Date*:	04/08/2016	Clear								
Consignment/Packing Slip No.:										
Shipped via:										
Air-way Bill No.:										
Comments:										
Attachment(s):	Add Attachments									
Return Notes Information:										
PO Number	RMA Number									
CR Memo PO NO :: 927: <input type="text"/>										
<input type="button" value="Submit"/> <input type="button" value="Save as Draft"/> <input type="button" value="Cancel"/>										

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- For line item 1, ordered quantity = 12, pending = 1, received = 1, approved = 0.
- For the difference between the Approved and Received quantity, an Automatic Return Note will be created.
- The return note section will be expanded once the Approved quantity is < Received quantity.

Receipts » New Receipt

Items Ordered

Sr. No.	Item Name and Supplier	Rating	Asset Code	Location(s)	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
<input checked="" type="checkbox"/> 1	Mobile1 Supplier: APPLE	-	-	1840 (Lawrence)	INR 4,000.0	12EA	1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 0	INR 0.0

Return Details

Returned Quantity / Amount: 1.0	Reason for Return*: --Select--	Value of Returned Goods/Services: INR 4,000.0	Return Method*: --Select--
------------------------------------	-----------------------------------	--	-------------------------------

[Comments & Attachments](#)

11. Enter the **Reason** for returning the items and the **Return Method**.

Receipts » New Receipt

Items Ordered

Sr. No.	Item Name and Supplier	Rating	Asset Code	Location(s)	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
<input checked="" type="checkbox"/> 1	Mobile1 Supplier: APPLE	-	-	1840 (Lawrence)	INR 4,000.0	12EA	1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 0	INR 0.0

Return Details

Returned Quantity / Amount: 1.0	Reason for Return*: --Select--	Value of Returned Goods/Services: INR 4,000.0	Return Method*: --Select--
------------------------------------	-----------------------------------	--	-------------------------------

[Comments & Attachments](#)

12. Under the **Delivery Information** section, enter the required details in the respective fields.

13. Select the date on which the goods/items are received in the **Receipt Date** field.

14. Enter the consignment details or packaging slip number in the **Consignment/Packaging Slip No. field**.

Note: *The date has to be between the date on which requisition was made and the date when the goods were received.*

15. Click **Add Attachment(s)** to upload an attachment.

16. Select **Is this the last goods receipt for this order?** checkbox if you are creating a receipt for the last set of goods received.

17. If you select the **Is this the last goods receipt for this order?** checkbox, the **Allow creating invoices for this order?** checkbox will be enabled.

18. Select the **Allow creating invoices for this order?** checkbox if you want to allow creation of invoices for this order.

19. If there are any return items, then a new section **Return Notes Information** will appear.

20. Enter a **Return Material Authorization** number so as to identify the return notes.

Return Notes Information:

Return Material Authorization
(RMA) #:

- Click **Save as Draft** to save the receipt.

OR

- Click **Submit** to submit the receipt.
- On submitting a receipt, a Return Notes will be auto-created as shown below:

Note: When an **Automatic Return Note** is generated, the supplier will be notified automatically.

9.2.1.2 Creating Return Note

- To create a return note manually, go to the Requisition tab.
- For a given **Requisition** in **Released** stage, click on **PO Number**.

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
With Buyer	REQ :: 969	PR :: Noah for Mobile1 # 8363151 For MN...*	Noah	05/07/2016	INR 48,000.0	Actions
Released	REQ :: 968	PR :: Noah for Mobile1 # 7576172 For MN...*	Noah	04/07/2016	INR 48,000.0	Actions
With Buyer	REQ :: 967	PR :: Noah for Mobile1 # 8420885 For MN...*	Noah	04/07/2016	INR 48,000.0	Actions
With Buyer	REQ :: 966	PR :: Noah for Mobile1 # 5101736 For MN...*	Noah	04/07/2016	INR 48,000.0	Actions
With Buyer	REQ :: 965	PR :: Noah for Mobile1 # 5244268 For MN...*	Noah	04/07/2016	INR 48,000.0	Actions
Rejected	REQ :: 848-2	req - 11 a#2/2	Noah	30/06/2016	INR 400,000.0	Actions
Rejected	REQ :: 848-1	req - 11 a#1/2	Noah	30/06/2016	INR 2.0	Actions
Released	REQ :: 964	PR :: Noah for Notebook # 986097 For MN...*	Noah	29/06/2016	INR 5,500.0	Actions

- Traverse to the **Receipts** tab, hover on **Create** and click **Create Return Note** as shown below:

The screenshot shows the eProc Requisition module interface. At the top, there's a navigation bar with links like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, and More links. Below the navigation bar, it says "Requisition: REQ :: 872 - PR :: Noah for Mobile1 # 7243493 For COM001 - INR 48,000.0". There are three tabs: Requisition, Order, and Receipt. The Receipt tab is selected. On the left, under "Receipts", there's a "Create" dropdown with "Create Receipt" and "Create Return Note" options. The "Create Return Note" option is highlighted with a red box. Below this, there's a table with columns: Document Number, Document Type, Date, Status, and Actions. One row is visible: GRN/274, Receipt, 26/04/2016, Confirmed, with View and Cancel buttons. At the bottom, it says "Show 10 records per page." and "Showing page 1 of 1".

Note: **Return Note** can only be created if any of the received items on the order has an accepted quantity > 0.

4. On clicking **Return Note**, a new section will appear to add in the information for the returned quantity as shown below:

Requisition: REQ :: 872 - PR :: Noah for Mobile1 # 7243493 For COM001 - INR 48,000.0

Return Note » New Return Note

Return Note Number*: GRN/8 Return Note Description*: Return Note for CR Memo PO NC

Notes :

Attachment(s): [Add Attachments](#)

Notify Supplier Yes

Supplier Details

Name:	TESTING APPLE	Return Material Authorization (RMA)#:	<input type="text"/>
Address*:	<input type="text"/>	Supplier Contact:	<input type="text"/>
		Supplier Email:	<input type="text"/>

Comments for supplier :

Items Received

Sr. No.	Item Name	Ordered Quantity / Amount	Unit Price	Net Approved Quantity/Amount
1	Mobile1	12 EA	INR 4,000.0	12 EA

Return Details

Returned Quantity / Amount*: Reason for Return*: Value of Returned Goods/Services: INR 0.0 Return Method*:

[Comments & Attachments](#)

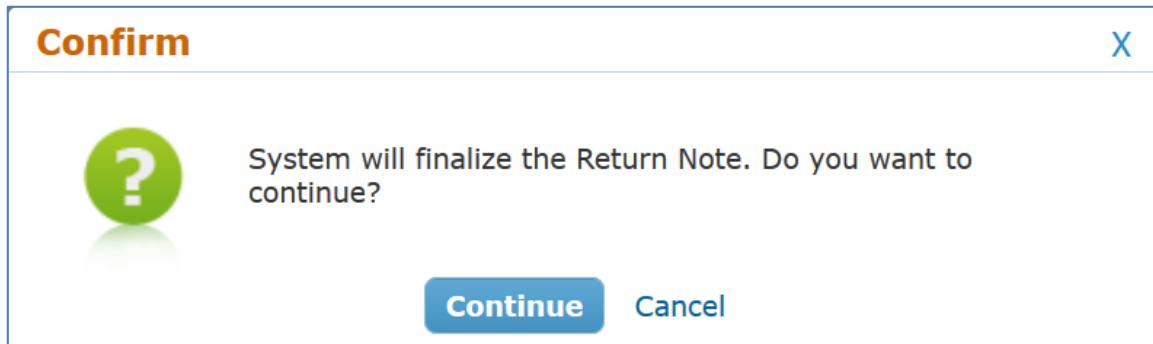
Buttons: Submit | Save as Draft | Cancel

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5. Mandatory fields like **Return Note Number** and **Return Note Description** will be auto filled. However they can be edited.
6. You can add **Notes** and **Attachments** while creating a return note.
7. You can choose whether to notify the supplier or not about the returned items by checking the box against **Notify Supplier**.
8. Enter the **Supplier Details**.
9. In the **Items Received** section,
 - Select a line item
 - Enter the **quantity/amount** to return
 - Enter the **reason** for returning
 - Enter the **method** for returning
10. Click **Save as Draft** to save the return note.

OR

11. Click **Submit** to submit the return note.
12. On clicking Submit, the system will finalize the return note. You will be notified about the same as shown below:



13. Click **Continue**. A new return note will be created and listed under the **Receipts** tab as shown below:

The screenshot shows the eProc software interface. The top navigation bar includes links for Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. The main content area displays a requisition details page for REQ :: 861 - PR :: Noah for dfsdf, PENCIL # 6195436 For COM001 - INR 200.0. Below this, there are tabs for Requisition, Order, and Receipt. The Receipt tab is selected, showing a table of receipts. The table has columns for Document Number, Document Type, Date, Status, and Actions. One row, GRN/8, is highlighted with a red border. At the bottom, there are pagination controls showing "Showing page 1 of 1".

Document Number	Document Type	Date	Status	Actions
GRN/8	Return Note	04/08/2016	Returned	View Download as PDF
GRN/273	Receipt	29/01/2016	Confirmed	View Cancel
GRN/272	Receipt	29/01/2016	Confirmed	View Cancel
GRN/271	Receipt	29/01/2016	Confirmed	View Cancel

14. You can choose to **View** the Return Notes.

The screenshot shows a software interface for managing requisitions. At the top, there's a navigation bar with links like 'Requisition', 'Approval', 'Buyer's Desk', 'PO', 'Reports', 'P-card', 'Setup', 'Catalog', 'Workflow', 'eForms', and 'Budget'. A user profile 'Hi, Noah' is at the top right. Below the navigation is a breadcrumb trail: 'Requisition: REQ :: 861 - PR :: Noah for dfsdf, PENCIL # 6195436 For COM001 - INR 200.0'. The main content area has tabs: 'Requisition' (selected), 'Order', and 'Receipt'. On the right, there are 'Actions' and a 'Download as PDF' button. The 'Return Note Details' section shows the following data:

Return Note Number :	GRN/8	Return Note Description:	Return Note for CR Memo PO NO :: 853
Purchase Order #:	CR Memo PO NO :: 853	Buyer:	Noah
Notes:	-	Attachments:	-
Currency:	USD	Status	Returned
Created By:	Noah	Created On:	04/08/2016
Issued Date:	04/08/2016	Notify Suppliers:	No

Supplier Details

Supplier Name:	APPLE	Supplier Contact:	-
Supplier Email:	-	Address:	TEST DELETE 5465 INDORE, IN-MP, IND, 455001, 0123456789, 113214235
Comments for supplier:	-		
Return Material Authorization (RMA) #:	-		

Items

Sr. No.	Item Name	Location name	Returned Quantity / Amount	Value of Returned Goods/Services	Reason for Return	Return Method	Comments & Attachments
1	PENCIL	Madhurya loc	15 EA	USD 150.0	Damaged Item	Credit Memo	

Audit Trail

At the bottom, it says '© 2016 - Zycus Inc., All Rights Reserved' and 'emPowered by **ZYCUS**'.

15. You can choose to **Download the Return Notes as PDF**.

9.3 Cancelling a Receipt

Receipts created for a requisition can be cancelled.

To cancel a receipt:

1. Click **Requisition** tab and **My Requisitions** sub-tab.

Found 977 record(s).

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
In Approval	2153 ACHENG	Briindisare 30 %, techni... Item received ...*	Akki	2015/06/21	USD 1,124.14	Actions
With buyer	2152 ACHENG	laptop_test, penItems9144420*	Akki	2015/06/21	USD 154.05	Actions
With buyer	2151 ACHENG	laptop_test, penItems4779647*	Akki	2015/06/19	USD 154.05	Actions
Scheduled	2150 ACHENG	laptop_test, laptopItems3461920*	Akki	2015/06/19	USD 338.07	Actions
Released	2149 ACHENG	Briindisare 30 %, techni... Item received ...*	Akki	2015/06/19	USD 143,057.63	Actions
With buyer	2130 ACHENG	laptop_test, laptopItems6632906*	Ram	2015/06/18	USD 3,613.34	Actions
Scheduled	2104 ACHENG	1 laptop_test1, Erweiterband f... Sekuro...	Akki	2015/06/04	USD 87.88	Actions
With buyer	2103 ACHENG	Items9678095*	Akki	2015/06/22	USD 0.00	Actions
With buyer	2097 ACHENG	1 Items5354951	Akki	2015/06/02	USD 1.54	Actions
Released	2096 ACHENG-2	EnGenius Durafon IX cordless phone w ...	Akki	2015/06/01	USD 360.10	Actions

Show 10 records per page.

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- Under the **Status** header, click on and select the **Released** status. Click **Filter** and the requisitions in the released state are displayed.

Found 977 record(s).

Status	Requisition Number	Name	Requester	Submitted On	Amount	Actions
In Approval	2153 ACHENG	Briindisare 30 %, techni... Item received ...*	Akki	2015/06/21	USD 1,124.14	Actions
With buyer	2152 ACHENG	laptop_test, penItems9144420*	Akki	2015/06/21	USD 154.05	Actions
With buyer	2151 ACHENG	laptop_test, penItems4779647*	Akki	2015/06/19	USD 154.05	Actions
Scheduled	2150 ACHENG	laptop_test, laptopItems3461920*	Akki	2015/06/19	USD 338.07	Actions
Released	2149 ACHENG	Briindisare 30 %, techni... Item received ...*	Akki	2015/06/19	USD 143,057.63	Actions
With buyer	2130 ACHENG	laptop_test, laptopItems6632906*	Ram	2015/06/18	USD 3,613.34	Actions
Scheduled	2104 ACHENG	1 laptop_test1, Erweiterband f... Sekuro...	Akki	2015/06/04	USD 87.88	Actions
With buyer	2103 ACHENG	Items9678095*	Akki	2015/06/22	USD 0.00	Actions
With buyer	2097 ACHENG	1 Items5354951	Akki	2015/06/02	USD 1.54	Actions
Released	2096 ACHENG-2	EnGenius Durafon IX cordless phone w ...	Akki	2015/06/01	USD 360.10	Actions

Show 10 records per page.

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- For a **Released** requisition except for **Fully Received** requisition, click on the requisition number to view the details of the requisition. The following page is displayed.

The screenshot shows the ZYCUS eProc interface for managing requisitions. The top navigation bar includes links for Requisition, Approval, Online store, My Requisitions, My Favorites, Shopping Basket, and All Requisitions. The current page is titled "Requisition: REQ - 1338 - Written Translation Services - USD 6,115.0000". The main content area is divided into several sections:

- General Information:** Displays details such as Requisition No. (REQ - 1338), Requisition Name (Written Translation Services), Parent Requisition (-), Reason for Ordering (-), Comments for supplier (-), Purchase Type (PQR), Attachment(s) (-), Status (Released (Complete)), Retrospective Purchase (No), and Last assigned on (2015/01/16).
- Items:** A table listing items with their descriptions, unit prices, quantities, total prices, and actions. Two items are listed:

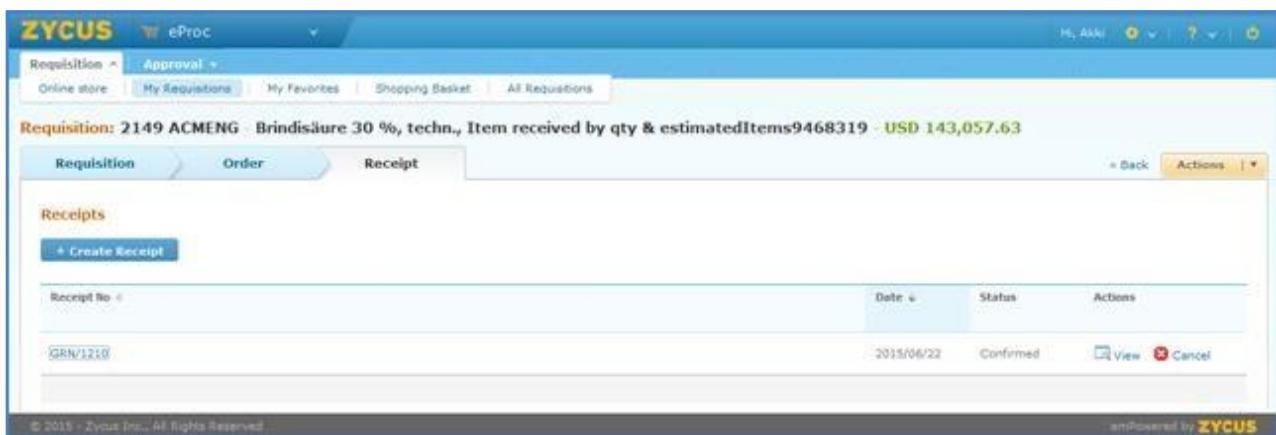
Item No.	Item Name & Supplier Name	Unit Price	Qty/Unit	Total Price	Actions
S70557546921	WRITING PAPER [Supplier: EBAY OFFICE SUPPLIERS]	USD 536.0000	10 EA	USD 5,360.0000	[Edit]
S47938388338	PAD, WRITING PAPER [Supplier: EBAY OFFICE SUPPLIERS]	USD 755.0000	1 EA	USD 755.0000	[Edit]

 Sub-totals at the bottom indicate Approved Amount: USD 6,115.0000 and Purchase Amount: USD 6,115.0000.
- Delivery:** (Collapsed)
- Cost Booking:** (Collapsed)
- Accounting:** (Collapsed)
- Workflow:** Shows the approval history with icons for each user and their status (Approved or Pending). The users are Prashant (Requester), Sean H (Tech Writer), Pradul (Reporting Manager), Premschand (Selectable User), Buyer, and Supplier.
- Audit Trail:** (Collapsed)

At the bottom of the screen, there is a footer with copyright information: © 2015 Zycus Inc., All Rights Reserved and a link to Zycus.com.

4. Click on the **Receipt** tab to view the receipts created for the requisition.

Note: To create a new receipts, click on the **Create a new Receipt** button.

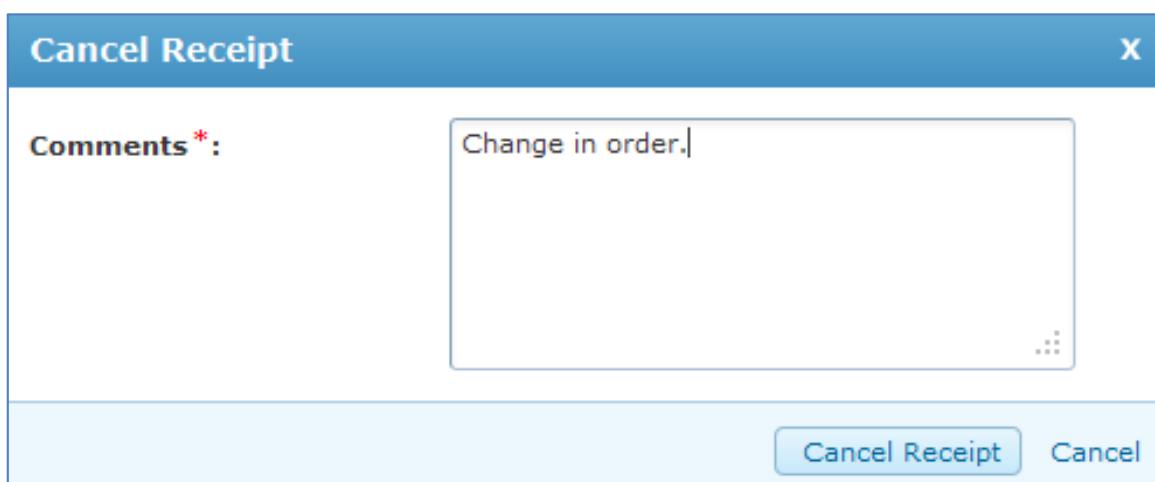


- To cancel the receipt, search for the receipt and click on the **Cancel** button.



- A new dialog box will appear, enter the comments if and click on **Cancel Receipt** button.

Note: The cancelled receipts are viewed in the **Receipts** tab with its status as 'Cancelled'.



9.4 Ability to edit Goods Receipt

1. The user can edit the receipts created by them to accommodate any change in the approved quantity of goods received.
2. Edit feature has been introduced against the receipt number as shown in the following figure:

Receipt No.	Date	Status	Actions
GRN/27	12/28/2015	Confirmed	

3. Using the feature as shown in figure above, user can edit the **Approved** quantity (in case the goods are not up to the expected quality) up to the **Received** quantity and the **Delivery** Information details as shown in the following figure:

Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No.	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods	Comments
1	laptop Supplier: DELL MARKETING	-	-	ACMENG/PR/606	INR 123.0000	2EA	0	2	2	INR 246.0000	

Delivery Information

Receipt Date*: 12/28/2015

Consignee/Packing Slip No.: 1234

Shipped via: bluedart

Air-way Bill No.:

Comments:

Attachment(s):

Is this the last goods receipt for this order?

Allow creating invoices for this order?

Notify suppliers of defective goods

Submit | **Cancel**

Chapter 10: View Orders

- Under **Requisition** tab, click **View Orders**.

Status	PO Number	Type	Supplier	Requester	PO Date	Amount	Actions
Released	COM008/16/0579	Standard	ZYCUS SUPPLIER	Poorva Patil	14/11/2016	INR 361.520	Actions
Released	Test_12/16/0565	Standard	ZYCUS SUPPLIER	Ram Samal	09/11/2016	USD 471.000	Actions
Released	Test_12/16/0564	Standard	ZYCUS SUPPLIER	Ram Samal	08/11/2016	USD 94.200	Actions
Released	COM019/16/0495	Standard	ZYCUS SUPPLIER	Poorva Patil	13/10/2016	INR 2,000.000	Actions
Released	COM019/16/0484	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 2,000.000	Actions
Released	COM019/16/0483	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 8,000.000	Actions
Released	COM019/16/0482	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 8,000.000	Actions
Released	COM007/16/0481	Standard	SUPP_NEW1	Zeba Khalil	12/10/2016	USD 400.000	Actions
Released	COM007/16/0480	Standard	SUPPLIER PORTAL CO	Zeba Khalil	12/10/2016	USD 4,000,000.000	Actions
Released	COM019/16/0470	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 6,000.000	Actions

- All the orders created by you will be visible on this page.
- For every order, you can take following actions:

- View
- Create Receipt
- Download

10.1 View

- Under **Actions** drop down menu, click **View Order**. Following page will be displayed:

Purchase Order: Test_12/16/0565- Order for Req# Test_12/PR/386 - USD 471.000

Order Delivery Receipt Invoice Payment [« Back](#)

Purchase Order Details

Organization Unit (OU):	Ram_QA_009 : Ram_QA_BU : Loc-01	Currency:	USD
Bill-to address:	Address-01 address-test Pune, India,	Shipping address:	Address-01 address-test Pune, India,
Planned Delivery Date:	15/11/2016	Expected Delivery Date:	15/11/2016
Buyer:	Ram Samal	Reference:	-
Requester:	Ram Samal	Requisition No:	Test_12/PR/386
Requester email Id:	ram.qa1@zycus.com	Approved on:	09/11/2016
Created On:	09/11/2016	Retrospective Purchase:	No
Released on:	09/11/2016	Comments for supplier:	-
		Purchase Type :	XYZ

Supplier Details

Items

Sr. No.	Item No.	Item Name	Reference Contract	Description	Market Price	Qty/Amt	Item Sub-total Price	Actions
1	pen1	pen1	-	pen1	USD 10.000	30 EA	USD 300.000	
Item sub total: USD 300.000								
Discount: USD 0.000								
Tax Type Tax Name Tax Rate Amount								
Frieght_test frieghttest2 @ 45.000 % on USD 300.000 USD 135.000								
Use_1 use2 @ 12.000 % on USD 300.000 USD 36.000								
Tax Sub-Total: USD 171.000								
Item-level taxes sub-total: USD 0.000								
Freight: USD 0.000								
Total Tax Amount : USD 171.000								
Total: USD 471.000								

Delivery Information

Payments & Credits

Cost Booking

Accounting

Terms & Notes

Enclosures

Workflow

```

graph LR
    A[PO Creator] --> B[Reporting Manager]
    B --> C[Supplier]
    
```

Audit Trail

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10.2 Create Receipt

- From the **Actions** drop down menu, click **+Create Receipt**. You will be navigated to the following page:

Purchase Order: Test_12/16/0565 Order for Req# Test_12/PR/386 - USD 471.000

Sr. No.	Item Name and Supplier	Rating	Requisition No	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
1	pen1 Supplier: ZYCUS SUPPLIER		Test_12/PR/386	USD 10.000	30.000EA	30.000			USD 0.000

Delivery Information

Receipt Date*: 09/12/2016 [Clear](#)

Consignment/Packing Slip No.:

Shipped via:

Air-way Bill No.:

Comments:

Attachment(s): [Add Attachments](#)

Buttons: Submit | Save as Draft | Cancel

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- Refer steps from section **Creating a New Receipt** to create and submit a receipt.

10.3 Download

- Click **Download** to download the order details and save the file on your system.

Found 38 record(s).

Status	PO Number	Type	Supplier	Requester	PO Date	Amount	Actions
Released	COM008/16/0579	Standard	ZYCUS	Poorva Patil	14/11/2016	INR 361.520	<button>Actions</button>
Released	Test_12/16/0565	Standard	ZYCUS	Poorva Patil	09/11/2016	USD 471.000	<button>Actions</button>
Released	Test_12/16/0564	Standard	ZYCUS	Poorva Patil	08/11/2016	USD 94.200	<button>Actions</button>
Released	COM019/16/0495	Standard	ZYCUS	Poorva Patil	13/10/2016	INR 2,000.000	<button>Actions</button>
Released	COM019/16/0484	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 2,000.000	<button>Actions</button>
Released	COM019/16/0483	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 8,000.000	<button>Actions</button>
Released	COM019/16/0482	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 8,000.000	<button>Actions</button>
Released	COM007/16/0481	Standard	SUPP_NEW1	Zeba Khalil	12/10/2016	USD 400.000	<button>Actions</button>
Released	COM007/16/0480	Standard	SUPPLIER PORTAL CO	Zeba Khalil	12/10/2016	USD 4,000,000.000	<button>Actions</button>
Released	COM019/16/0470	Standard	ZYCUS SUPPLIER	Poorva Patil	12/10/2016	INR 6,000.000	<button>Actions</button>