

Simplify and Automate Complex Requisition Processes Involving Vendor Bids, Sales Quotes, and Approvals

Automate the way you gather requests, obtain vendor bids, create and approve quotes, manage purchases, and fulfill orders for internal or external clients. Eliminate paperwork while providing your sales, service, shipping, receiving, management, and other departments with greater visibility. Requisition Management integrates with Acumatica Purchase Order Management, Inventory Management, Project Accounting, Service Management, Sales Order Management, Acumatica Construction Edition, and Accounts Payable.

WITH ACUMATICA REQUISITION MANAGEMENT, YOU CAN

- Receive and approve requests from multiple sources
- Bundle requests into a requisition
- Source materials from inventory or use a vendor bidding process
- Create a sales quote for customer approval
- Create sales and purchase orders
- Include alerts when requests exceed allocated budgets
- Combine multiple requests into a single requisition automatically
- Create approval steps for requests and requisitions

KEY BENEFITS

SAVE TIME AND ELIMINATE PAPERWORK

- Automate the requisition process, including order collection, supplier bids, sending and approving quotes, issuing purchase orders, and receiving goods.

ENHANCE WORKFLOW AND APPROVALS

- Use approval maps and authorizations to ensure that the right people are alerted when they are needed in the process.

STREAMLINE VENDOR BIDDING

- Eliminate paperwork and speed up the bidding process by emailing requests to multiple vendors.
- Award business to a single vendor or select multiple vendors for different line items on the request.

PROVIDE SALES QUOTES EASILY

- Create quotes based on catalog pricing or cost-plus algorithms.
- Print or email quotes to customers
- Generate sales orders and purchase orders automatically to complete sales activities.

The screenshot shows the Acumatica Requisition Management interface. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Capital, 8/24/2020 6:52 AM, admin admin). The main content area is titled 'Requisitions' and contains a form for creating or editing a requisition. The form includes fields for Ref Nbr (0000003), Priority (Normal), Currency (USD), and Est. Ext. Cost (6,975.50). The status is 'Released' and the creator is 'EP00000002 - Maxwell Baker'. The date is 3/5/2015 and the location is 'MAIN - Primary'. The description is 'Requisition (with bidding) for inventory'. Below the form are tabs for DOCUMENT DETAILS, SHIPPING INSTRUCTIONS, BIDDING, VENDOR INFO, APPROVAL DETAILS, OTHER INFORMATION, PURCHASE ORDERS, and SALES ORDERS. The 'BIDDING' tab is active, showing a table of bidding vendors.

| *Vendor | Vendor Name | *Location | Location Name | Currenc | Shipping Terms | FOB Point | Lead Time (Days) | Ship Via | Expiration Date | Promised Date | Request Sent |
|-------------|--|-----------|------------------|---------|----------------|-----------|------------------|-----------|-----------------|---------------|--------------------------|
| ELEEASTCOM | East COM Electronic Supplies | MAIN | Primary Location | USD | | | 15 | 3/24/2015 | 3/9/2015 | | <input type="checkbox"/> |
| ELEMCCOVER | McCovern Computers | MAIN | Primary Location | USD | | | 20 | 3/31/2015 | 3/9/2015 | | <input type="checkbox"/> |
| ELESOFTEDEV | Entellestar Software Development Group | MAIN | Primary Location | USD | | | | 3/31/2015 | 3/17/2015 | | <input type="checkbox"/> |

Create requisitions for internal items or stock inventory. Send requests to vendors and manage the entire vendor request for quote (RFQ) bidding process online.

REQUISITION MANAGEMENT FEATURES AND CAPABILITIES

| | |
|--------------------------------------|---|
| Purchasing Integration | Automatically create purchase orders in the purchase order module from approved requisitions. |
| Predefined Request Lists | Limit requests to a specific list of inventory items by user. |
| Hide Inventory Items | Optionally hide your product catalog from users, requiring manual item entry. |
| Collect and Organize Requests | Bundle requests from multiple sources in a single requisition. Create approval rules based on quantity, request amount, or other factors. |
| Request Classes | Set requisition defaults by request class to simplify data entry and reduce errors. Limit selection to a specific list of items, create customer-only requests, hide vendor information, hide inventory catalog information, allow multiple vendors per request, and set promised lead times. |
| Create Customer Quotes | Create customer quotes to offer a price to customers for requested goods. |
| Lead Times | Set lead times for vendor items. Promise dates are calculated automatically by backing out the lead time from the required date for item requests. |
| Shipping Instructions | Designate where the vendor should ship the requested items when the requisition is approved, and the purchase order is released. Requests can be made to ship items to any company location, to customer locations, job sites, or other addresses. |
| Sales Order Integration | Turn an approved quote into a sales order form with one click. Sales orders are managed by the rules within the sales order module and linked to the requisition for easy access. |
| Complete Integration | Take advantage of integration with purchasing, order management, inventory management, project accounting, service management, and all Acumatica financial modules to automate all processes, eliminate duplicate data entry, and properly account for all transactions. |
| Audit Trail | Automatically create a complete audit trail of all transactions, including the identity of users who entered and approved the transaction or modified the record. Optional notes and attached electronic documents remain with the activity records. |

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Contact us today to get started: [888-228-8300](tel:888-228-8300) | acumatica.com