Acumatica
The Cloud ERP

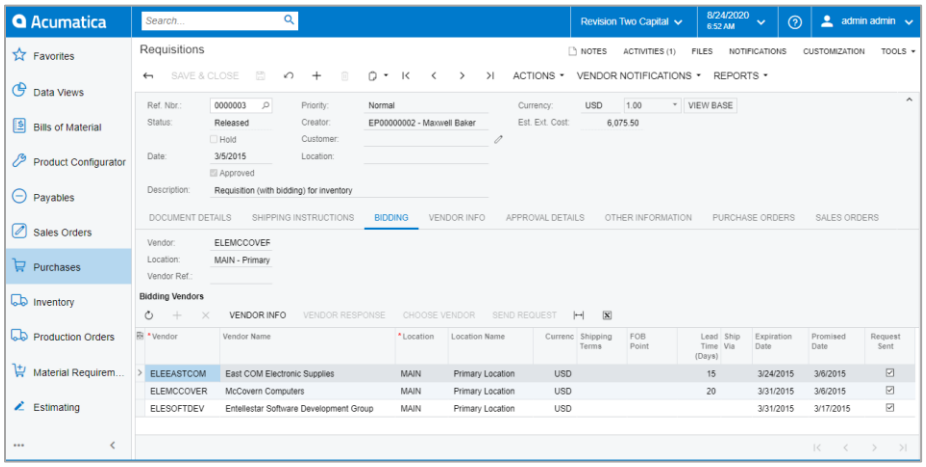
Requisition Management

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



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

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.

Acumatica
The Cloud ERP

Requisition Management

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 | acumatica.com