



Requisition Management

Minimize the complexity of purchasing multiple products from a wide range of suppliers with control and streamlined business processes.

- Automate purchase requests with vendor bidding
- Create sales quotes based on catalog pricing or cost-plus calculations
- Configurable approval workflows

Key business benefits

- Automate the requisition process, including order collection, supplier bids, sending and approving quotes, issuing POs, and receipts.
- Use approval maps and authorizations to ensure that the right people are alerted when they are needed in the process.
- Eliminate paperwork and speed up the bidding process by emailing requests to multiple vendors.

Related resources

- Procure-to-Pay Automation
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- Resilient Sales Strategies
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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 consolidated 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

“Another thing that I really liked—and it was a must—the software had to have this—was a Purchase Requisition which Acumatica has. Because, we are a distributor for a lot of our vendors but we have customers that come to us because we try to stay on top of everything for them and they order not only stuff that was stocked but we get them items they have a hard time finding.”

-Dan Wilkins, Partner, Bell and Company

> CUSTOMER STORIES

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.

Vendor Definition

Requests and requisitions may be specified for a defined vendor or created to solicit request for quote (RFQ) information from multiple vendors, including those who may not be already established in the system.

Expiration Dates

Capture vendor RFQ expiration dates for quotes. Create Generic Inquiries, dashboards, and business events to notify employees when RFQ expiration dates require their attention.

Mail Templates

Create mail templates or choose from a list of predefined templates for sending proposal requests to vendors via email.

Non-Stock Item Requests

Employees may create requests to purchase non-stock items for office supplies or contracted services.

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.

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ABOUT DSD BUSINESS SYSTEMS

Founded in 1984 in San Diego, DSD Business Systems is an award-winning cloud accounting, ERP, CRM, HR and custom development technology partner with 45 offices throughout North America. As a Gold Acumatica Partner, DSD is recognized annually by Accounting Technology Magazine as a Technology Pacesetter, as well as a Top 100 VAR Firm by both Bob Scott's Insights and Accounting Today.

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