

Simplified Purchase Requisitions

Are your Project Managers and field personnel Costpoint experts? For most companies, the answer is no. A lot of personnel are scared to deal with Costpoint requisition screens and pass on the responsibility of entering requisitions to accountants and data specialists. The Costpoint 7 simple purchase requisition may be your answer, as it significantly eases data entry requirements.

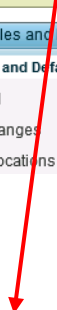
Simple purchase requisitions present requisitions in a simplified data entry screen where buyers and accountants can pre-define some of the purchasing rules and accounting data and the field personnel can simply fill in what they want to buy in a simple question and answer format:

- Who is Requisitioning these Items?
- When and Where Should the Items be Delivered?
- What Will the Requisitioned Items Be Charged to?
- What Should Be Ordered?

Templates are set up in Procurement Planning Controls. They define the rules, and what kinds of information will auto-fill when a Simple Purchase Requisition is entered.

Materials > Procurement Planning > Procurement Planning Controls > **Manage Purchase Requisition Types**

Identification		New	Copy	Delete	1 of 4 Existing	Table	Query	X					
Requisition Type ID *	OS	Description *	Office Supplies	<input checked="" type="checkbox"/>	Active	<input type="checkbox"/>	Default						
Charge Number Rules and Defaults		Other Rules and Defaults											
Charge Number Rules and Defaults		Org Default Rule * Project's Owning Org											
<input type="checkbox"/>	Project Required	<input type="checkbox"/>	Inventory Requisition	<input type="checkbox"/>	Allow Project Changes	<input type="checkbox"/>	Allow Account Changes	<input type="checkbox"/>	Allow Org Changes	<input type="checkbox"/>	Allow Inventory Abbrev Changes	<input type="checkbox"/>	Allow Reference Number Changes
Charge Numbers Allocations Allowed *		One Charge Per Req											



Requisition ID and Status New Copy Delete 1 of 1 New Table Query

Requisition Type **OS** x Office Supplies Requisition ID Status **Pending** Approval Process **STD**

Submit for Approval

Who is Requisitioning these Items?

Requisitioner * Organization
 Phone Extension

When and Where Should the Items be Delivered?

Requested Date * Ship To Deliver To

What Will the Requisitioned Items Be Charged to?

Project Proj Abbrev
 Account Proj Acct Abbrev
 Organization Org Abbrev
 REF_1 REF_2

Additional Information

All the user has to do is answer the questions, much of which may be filled out, depending on the setup of the template above.

What Should Be Ordered? New Copy Delete 1 of 1 New Table Query

Line Item Rev Misc Type

Description Procurement Type

Additional Description

How Much Should Be Ordered?

Quantity x Unit of Measure **Services Period Of Performance**
 Start Date End Date

What is the Estimated Cost?

Unit Cost Extended Cost Sales Tax/VAT Total Cost

Is There Any Additional Information?

Suggested Vendor Vendor Part Rev
 Manufacturer Manufacturer Part Rev
 Ship To Deliver To

Easier, right? Well, stay tuned to [Bits & Bytes](#) for more tips on how CP7 will improve your Costpoint experience!