

ABM Purchase Requisitions

Improved Control and Workflow for Purchasing
in Every Organisation

Purchase Requisition Management

- Many ABM clients have asked about imposing value limits on purchase orders
- All organisations need a simple process for reviewing and approving requisitions so that they can proceed to purchase ordering
- Developed in conjunction with our largest companies, ABM now has a module to respond to this....

Purchase Requisitions

- Purchasing Authority
 - While many clients just want a simple value limit, others may require different limits depending on the type of purchase
 - The staff required to approve a purchase may differ depending on the type.
 - Normal purchases for stock
 - Capital Expenditure
 - Consulting Costs, IT, etc.

System Configuration

- Under Tools → Options → Purchasing there is a new button to configure the module.
- If you don't configure the module then there are no changes to the process

The screenshot shows the 'Options' window with the 'Purchasing' tab selected. The window contains a table for document numbering and two checked checkboxes. A red box highlights a 'Configure Purchasing Authority' button.

	Number Sequentially Starting From	or enter manually as you go
Purchase Requisitions	PC00056	<input type="checkbox"/>
Purchase Orders	PS00128	<input type="checkbox"/>
Deliveries (GRNs)	PD00138	<input type="checkbox"/>
Returns	PR00019	<input type="checkbox"/>
Invoice References	PI00270	<input type="checkbox"/>
Credit References	PC00007	<input type="checkbox"/>

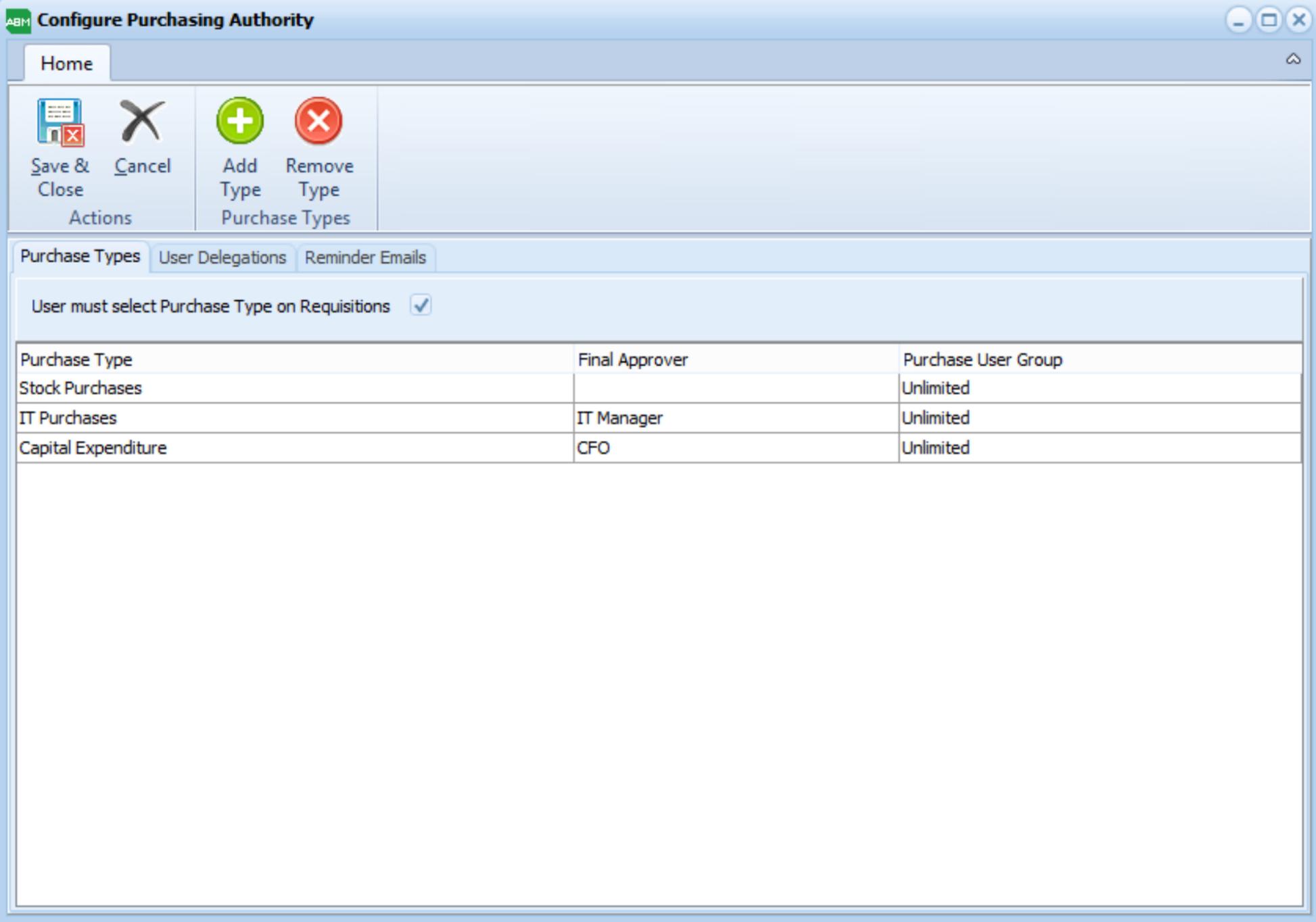
Withholding tax applies to some payments from suppliers or sub-contractors

There are times when purchase invoices are reallocated to a central billing account

[Configure Purchasing Authority](#)

System Configuration – Purchase Types

- » Define your purchase types
- » Optionally set a Final Approver
- » The purchase user group is for the users that will be notified to do the purchase order



The screenshot shows the 'Configure Purchasing Authority' application window. The window title is 'ABM Configure Purchasing Authority'. The 'Home' tab is active, and the 'Purchase Types' sub-tab is selected. The interface includes a toolbar with 'Save & Close', 'Cancel', 'Add Type', and 'Remove Type' buttons. Below the toolbar, there is a checkbox labeled 'User must select Purchase Type on Requisitions' which is checked. A table displays the configured purchase types:

Purchase Type	Final Approver	Purchase User Group
Stock Purchases		Unlimited
IT Purchases	IT Manager	Unlimited
Capital Expenditure	CFO	Unlimited

System Configuration - Users

- » Define the User hierarchy
- » Top spot has no limit
- » Tree structure describes how requisitions will escalate for approval
- » Value limits for each purchase type

User Name	Stock Purchases	IT Purchases	Capital Expenditure
CEO			
CFO	0.00	500.00	10,000.00
IT Manager	0.00	5,000.00	2,000.00
Richard	0.00	500.00	500.00
Andrea	1,000.00	200.00	1,000.00
Bob	200.00	50.00	0.00
Hanna	200.00	50.00	0.00
David	200.00	50.00	0.00

System Configuration - Emailing

- When requisitions are escalated to a user they will be emailed a notification with the requisition details and buttons to action it
- Reminders can also be sent on a daily basis

Configure Purchasing Authority

Home

Save & Close Cancel

Actions

Purchase Types User Delegations Reminder Emails

Send reminders on the selected days at 07:00 a.m.

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Email Account Details

Server Name outlook.office365.com Port 21

Username richard@concept-eng.co.nz

Password

From address richard@concept-eng.co.nz

Reply-To address richard@concept-eng.co.nz

Bcc address

Components

- ABM 9.3 – Available for release now.
- Requires the Flex Server
- Purchase Requisitions Processing Service
 - Handles escalating requisitions and sending emails
- Purchase Requisitions Web Application

Using the Module

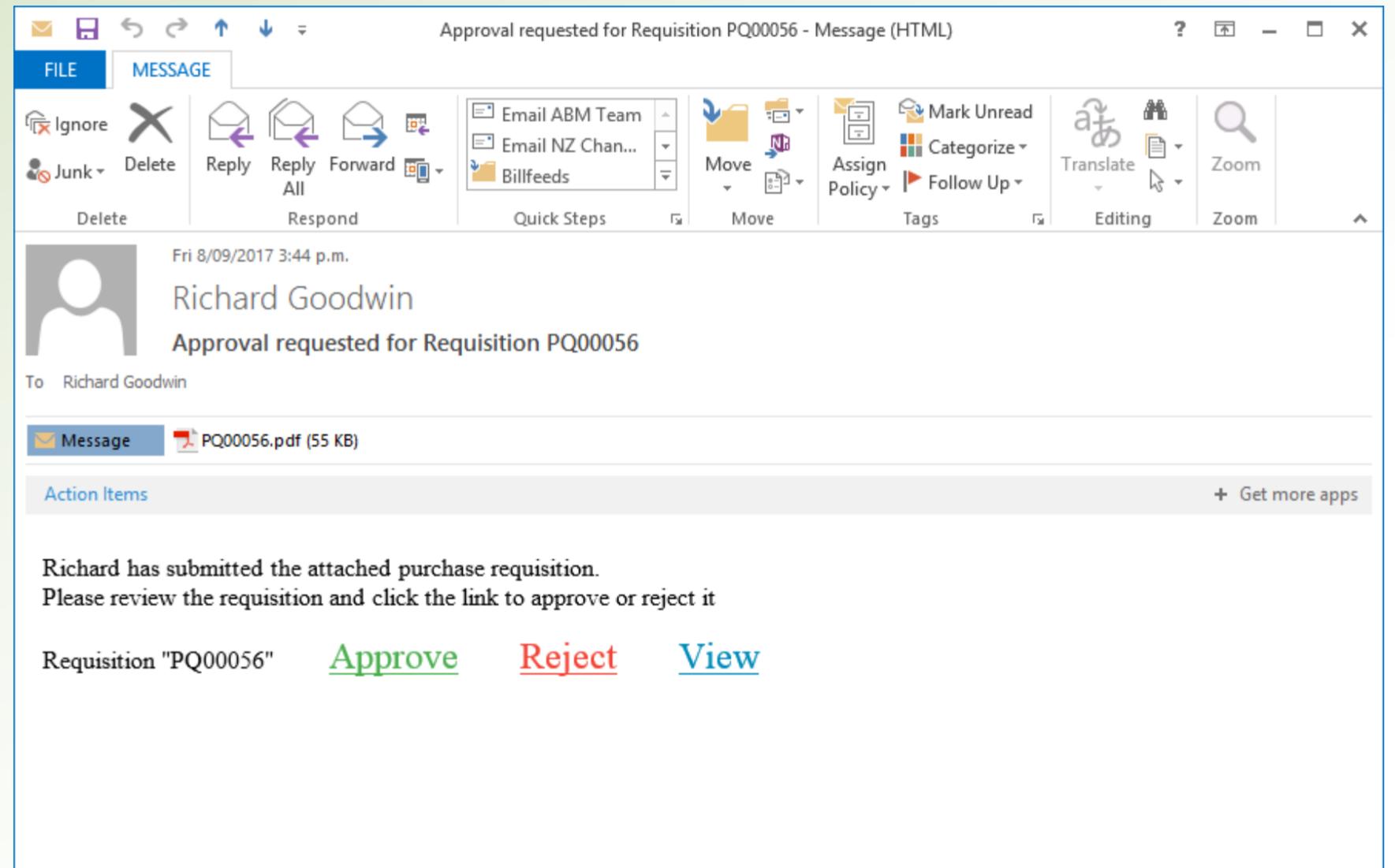
- Change security to prevent most users from entering Purchase Orders, only Requisitions
- Users enter Purchase Requisitions as normal in ABM
- Select a Purchase Type

The screenshot displays the 'Supplier Details' section of the ABM interface. The supplier is 'Commercial Biocides Ltd' located at '3963 Park Road, Riccarton, Christchurch 43786 Canterbury'. The 'Requisition Date' is '08/09/2017'. The 'Requisition Status' is 'Pending'. The 'Purchase Type' is set to 'Capital Expenditure', which is highlighted with a red box. Other fields include 'All Prices' set to 'Exclude GST', 'Call Number' (empty), and 'GST Applies' checked. At the bottom, there are buttons for 'Suggest Order' and 'Add First Line Item'. A table header is visible at the bottom with columns: 'Code', 'Description', 'Quantity', 'Price', 'Discount', 'Exc.GST', 'GST', and 'Inc.GST'. The 'ADVANCED BUSINESS MANAGER' logo is in the bottom right corner.

Code	Description	Quantity	Price	Discount	Exc.GST	GST	Inc.GST
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Using the Module

- » The Purchase Requisitions Background Service will see the requisition and escalate it accordingly.
- » The approver is emailed the document with links to Approve, Reject or View.



Approving A Requisition

- User can click on the links on the email to approve or reject requisition
- Or they can go to the website and view them from there
- Multi-select requisitions and approve or reject.
- Drill down to view the details

The screenshot shows a web browser window displaying the 'ABM - Purchase Requisition' application. The browser address bar shows 'localhost:3001/purchase-requisition/list/10/1/0/true/0/'. The application header includes the 'ABM' logo, 'ADVANCED BUSINESS MANAGER', and 'ABM - Purchase Requisition' with a 'LOG OUT' button. The main content area is titled 'Purchase Requisitions Waiting for Approval' and features a green refresh icon, thumbs up/down icons, and a pagination control set to '10'. A search dropdown is set to 'Date'. Below this is a table with one row of data:

<input type="checkbox"/>	Date	Requisition No	Entered By	Supplier Name	Total excl.GST	Total incl.GST
<input checked="" type="checkbox"/>	8/09/2017	PQ00057	Richard	Overseas Harb...	1,365.37	1,365.37

At the bottom of the page, there is a footer with 'ABM - Purchase Requisition (ABMID-1653 - 0.0.0.11)' and 'Advanced Business Manager © 20'.

ABM - Purchase Requisition

localhost:3001/purchase-requisition/details/SQPQ00057<XXXXXXXXXXXXXXXXXXXX

ABM ADVANCED BUSINESS MANAGER **ABM - Purchase Requisition** REQUISITION LIST **LOG OUT**

PQ00057    

Supplier Name	Overseas Harbour Hardware	Discount	0.00
Supplier Code	207	Total excl.GST	750.00
Requisition No	PQ00057	GST	0.00
Date	8/09/2017	Total incl.GST	750.00
Entered By	Richard		

Code	Description	Units	Quantity	Price	Discount	EXC.GST	GST	INC.GST
0160.00.00	Light, Heat & power		1	750.00	0.00	750.00	0.00	750.00
	This is text							

ABM - Purchase Requisition (ABMID-1653 - 0.0.0.11) Advanced Business Manager © 2017

Approving a Requisition

- Requisitions escalate up the organisation, step by step until they reach someone that has the authority for the required value.
- Each manager must approve in turn – it won't skip straight to someone with the required authority as managers need to know what's being purchased in their department
- If the purchase type requires a final approver then it will jump to that person in the organisation after getting initial value approval
- If that person doesn't have the value limit required it escalates up from there
- Original requestor gets an email if anyone in the chain rejects it.

Ordering

- Once a requisition is approved it will show with a green flag (Approved but not Ordered)
- Purchasing Officers can then convert to purchase order and mark the requisition as ordered when done.

The screenshot displays the ABM Explorer application window. The title bar reads "ABM Explorer". The interface includes a toolbar with icons for "Preview", "Print", "Email", "Attachments", "Send To Excel", "Comments", "Find", "Requisition", "Track", and "Billfeeds Image". Below the toolbar, a dropdown menu shows "Purchase Requisition PQ00056 of 8/09/2017".

The main content area is divided into sections:

- Supplier Details:** 002 - Commercial Biocides Ltd, 3963 Park Road, Riccarton, Christchurch 43786, Canterbury.
- Delivery Details:** 777 Mainstream Ave, Burnside, Christchurch 8050, Canterbury, Christchurch.
- Other:** (Empty field)
- Approved by:** CFO

A table below these sections lists items:

Code	Description	Units	Quantity	Price	Discount	Exc.GST	GST	Inc.GST	Location
0145.00.00	Freight Inwards		1	750.00	0.00	750.00	112.50	862.50	
2001	Acrylic - Emerald Green 1L	10	25	122.00	0.00	3,050.00	457.50	3,507.50	Head Office

A "Confirm" dialog box is overlaid on the bottom right, asking: "Has the requisition PQ00056 been fully ordered? Saying yes means that you cannot order this requisition again. Saying no means that you can, if you want to split the requisition over multiple orders." The dialog has "Yes" and "No" buttons.