# Requisition Management

WHAT IT DOES FOR YOU

The **Requisition Management** component brings an organization into the electronic age for processing of purchase order requests. From the initial requester through all approval stages to the purchasing agent the process is handled electronically. The module provides an electronic routing system, opportunity to comment and return requests, date and user stamped history of the process, easy inquiry and full reporting capabilities at any stage through purchasing and receipt of product.

Browse Requisition gives the user a full view of their own requisitions' status, as well as any approval trees in which they are a participant. The red dots tell them where there is current activity.

HOW IT WORKS

An approval tree is key to the **Requisition Management** module. At the top of each approval tree are the individuals who can ultimately order the products and create the purchase orders. Below that top level are as many approval levels as required for an organization, typically one to three and at the bottom is the entry level for starting requisitions. An individual employee may be both an entry level requester as well as an approver. A single employee may have entry rights in multiple trees, such as when an administrative assistant serves more than one
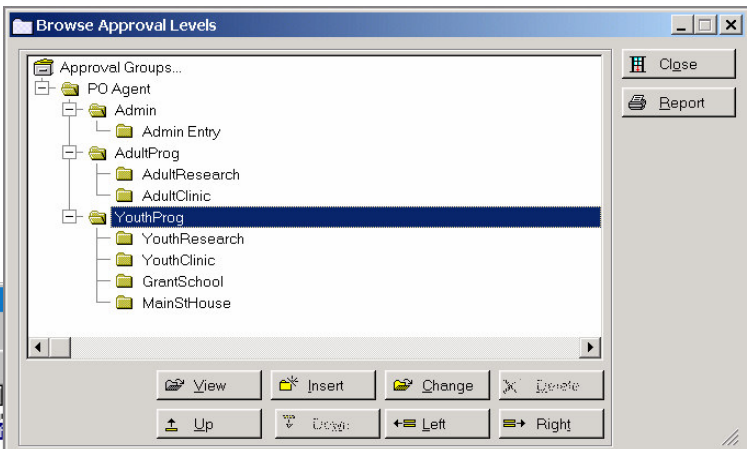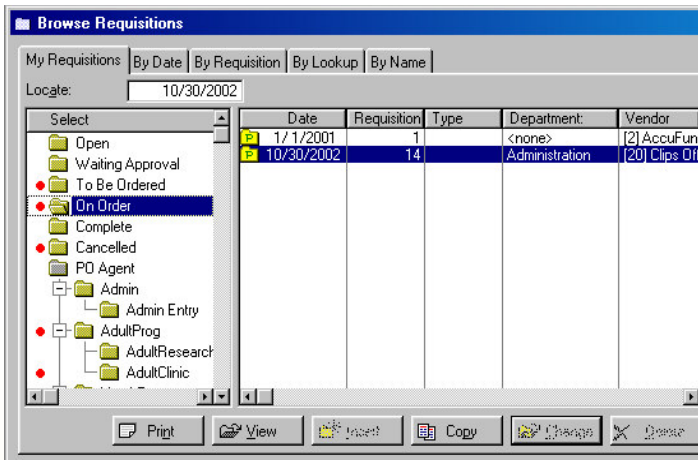
The multi-level approval trees may be set up to meet the review and approval needs of each organization. to meet the sp

department. The module is integrated with the **AccuFund Inventory** module, allowing lookup of inventory and non-inventory items for recent history, preferred vendors and pricing information.

Each employee has a view of the status of his/her requisitions through a simple folder-based browse screen. By clicking on the folders the user has an at-a-glance view of every requisition initiated by them as well as any waiting for approval by them. As items are received through the receiving screens in the **AccuFund Accounts Payable** module, the requisitions are updated with their current status.

AccuFund, Inc.
www.accufund.com

400 Hillside Avenue, Needham, MA 02494
877-872-2228   781-433-0233   sales@accufund.com

OTHER FEATURES

Other features of **Requisition Management** include:

- ✓ On screen history of all approvals and disapprovals
- ✓ At final approval, system may be set to automatically create purchase orders in the PO system
- ✓ For approvers, an agent may be added to the task bar to alert them when requisitions are awaiting their approval
- ✓ Approvers may "reach down" multiple levels if an

From the requisition, a user may see the approvals, purchase orders on which it was included, and bills on which the PO was paid.

intermediate level approver is not available

- ✓ On denial or approval, approvers may add comments to the requisition form
- ✓ AccuFund stores signatures for printing on forms tied to approval levels
- ✓ Order stock, non-stock and service items
- ✓ When printing requisitions, they may be Emailed directly from the module as a PDF attachment
- ✓ Requisition Management must be installed with the Purchase Order/Inventory module and may be integrated with third party accounting products

COMPONENT INTEGRATION

The Requisition Management module is integrated with the following modules:

- ✓ General Ledger - All accounting information is posted to the requested column for inclusion in reporting as desired by your organization
- ✓ Purchasing and Inventory - Requisitions are a front-end

approval system for the purchase orders. Once fully approved they become available to be included in purchase orders.

COMPONENT AVAILABILITY

The **Requisition Management** module must be purchased in conjunction with the **Purchasing and Inventory** module, but does not require the *AccuFund Accounting Suite*. It may be integrated with other accounting systems.

STANDARD REPORTS/TEMPLATES PROVIDED

All modules utilize the **AccuFund Reports/Forms Designer**. This functionality allows each organization to customize the provided reports to meet their unique needs. Sample reports/templates included with the **Requisition Management** module include:

- ✓ Requisition document
- ✓ Requisition activity
- ✓ Requisition status

Requisition Alert lets approvers know when there are requisitions to be approved, and in which approval tree they exist.