

# **PURCHASE REQUEST**

*App For Microsoft Dynamics 365 – Business Central*

**AMJS CONSULTING**



The document outlines the functionality of the "**purchase request**" feature within Microsoft Dynamics Business Central. This feature facilitates the process of initiating and managing purchase requests within the Business Central system. It enables users to create requests for the acquisition of goods or services, specifying details such as quantity, and expected delivery dates. The purchase request functionality streamlines the procurement workflow by providing a centralized platform for tracking and approving purchase requests, ensuring efficient and organized procurement processes within the Dynamics Business Central environment.

### **Purchase request**

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### **OTHER APPS**

[Transfer Approval Workflow](#)

[Vendor Bank Account Approval Workflow](#)

# SETUP

## PURCHASES & PAYABLES SETUP

Before you can manage purchase processes, you must configure the rules and values that define the company's purchase request policies.

### General Settings

On **Purchase Request** documents, you can specify a **Purchase Type**.

The **Purchase Type Mandatory** field in the **Purchases & Payables Setup** page specifies it is mandatory to enter a **Purchase Type**.

The screenshot shows the 'Purchases & Payables Setup' page in a software interface. The page title is 'Purchases & Payables Setup' and it is in the 'General' tab. The 'Purchase Type Mand...' field is highlighted with a red box. The field is a toggle switch, currently turned off. Other fields include 'Discount Posting' (set to 'All Discounts'), 'Invoice Rounding' (toggle on), 'Create Item from It...' (toggle off), 'Copy Vendor Name t...' (toggle on), 'Ext. Doc. No. Mandat...' (toggle on), 'Allow Tax Difference' (toggle on), 'Calc. Inv. Discount' (toggle off), 'Calc. Inv. Disc. per Ta...' (toggle off), 'Appln. between Curr...' (set to 'All'), 'Exact Cost Reversing ...' (toggle off), 'Prepmt. Auto Update...' (set to 'Never'), 'Default Posting Date' (set to 'Work Date'), 'Combine Special Ord...' (set to 'Always Combine'), 'Use Vendor's Tax Are...' (toggle off), 'Auto Post Non-Inv. v...' (set to 'None'), 'Ignore Updated Addr...' (toggle on), and 'Document Default Li...' (set to 'Item').

### Number Series Settings

On the **Number Series** FastTab, you must specify unique identification codes that will be used for **Purchase Request** documents.

Purchases & Payables Setup

## Purchases & Payables Setup

Number Series Show less

Vendor Nos. ....	FOURN	Credit Memo Nos. ....	A-AV
Quote Nos. ....	A-DEVIS	Posted Credit Memo ...	A-AV+
Request Nos. ....	A-RFQ	Posted Receipt Nos. ....	A-RCPT
Blanket Order Nos. ....	A-PREV	Posted Return Shpt. ...	A-EXP
Order Nos. ....	A-CDE	Posted Prepmnt. Inv. N...	
Return Order Nos. ....	A-RETCDE	Posted Prepmnt. Cr. M...	
Invoice Nos. ....	A-FACT	Price List Nos. ....	P-PL
Posted Invoice Nos. ....	A-FACT+		

### Archiving Settings

You can set up an automatic archiving of **Purchase Request**. When automatic archiving is turned on, a new version of the archived document is created when someone does the following things:

- Changes or deletes a document.
- Converts a request to a quote, order, or invoice.

The following table describes the options for the **Archive Request** field.

Option	Description
<b>Never</b>	Don't archive purchase requests when they're deleted.
<b>Question</b>	Prompt the user to choose whether to archive purchase requests when they're deleted.
<b>Always</b>	Archive purchase requests automatically when they're deleted.

Purchases & Payables Setup

## Purchases & Payables Setup

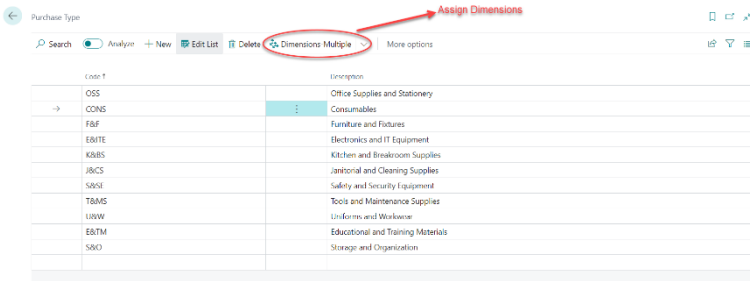
Archiving

Archive Request ....	Never	Archive Blanket Orders ..	<input checked="" type="checkbox"/>
Archive Quotes ....	Never	Archive Return Orders ...	<input checked="" type="checkbox"/>
Archive Orders ....	<input checked="" type="checkbox"/>		

## PURCHASE TYPE

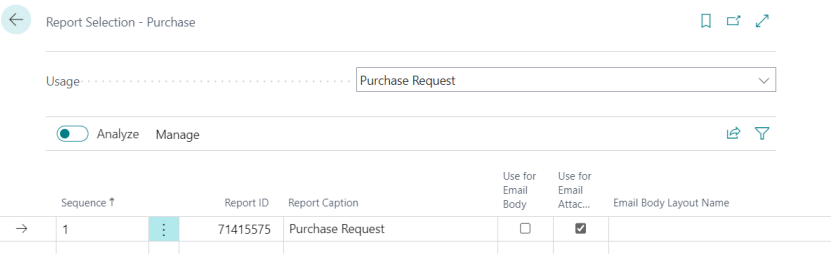
**Purchase Type** are a valuable tool used within the procurement process. They provide a systematic classification of procurement requests based on their specific nature and purpose.

You can assign a default dimension for a specific **Purchase Type**. The dimension is copied to the **Purchase Request** when you enter the **Purchase Type** on the **Purchase Request** document, but you can delete or change the code.



## REPORT SELECTION


You can set up default reports to use to print **Purchase Requests**.

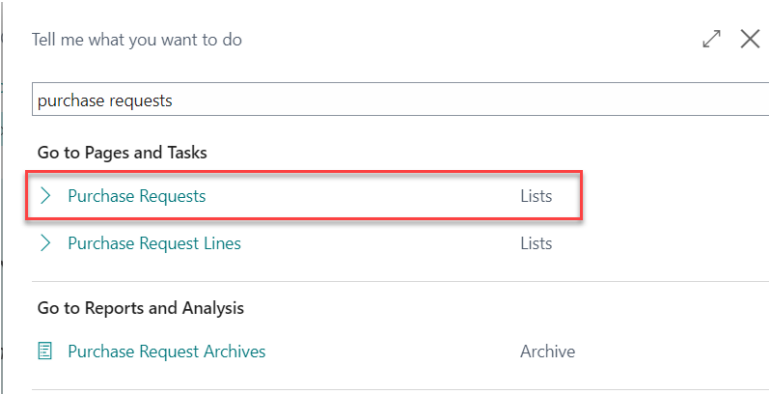


# PURCHASE REQUEST PROCESS

A purchase requisition is an internal request made by employees within a company, seeking approval to acquire goods or services on the company's behalf. The objective is to enhance transparency in procurement, minimize the potential for fraud, and ensure diligent financial oversight throughout purchasing and procurement processes.

## CREATE A NEW PURCHASE REQUEST

To create a **Purchase Request**, select the **search for page** icon  in the top corner of the page, enter **Purchase Requests**, and then choose the related link.



Tell me what you want to do ↗ ×

purchase requests

**Go to Pages and Tasks**

- [> Purchase Requests](#) Lists
- [> Purchase Request Lines](#) Lists

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**Go to Reports and Analysis**

- [📄 Purchase Request Archives](#) Archive

- 1- To create a new document, select the **New** action.
- 2- In the **Purchase Type** field, enter the categorization that characterizes the procurement request.
- 3- Several fields on the **Purchase Request** page are filled in with information from the user. Fill in the remaining fields on the **General** tab, as necessary. For example, you can add the **Request Receipt Date**.
- 4- Now, you can fill in the **Purchase Request** lines with goods that you request.

- 5- On the **Lines** FastTab, in the **No.** field, enter the number of an item, in the **quantity** field, enter the number of items to be requested.

Purchase Request 7001

Home Print Request Approval Order More options

Release Purchase Quote

**General**

No. 7001 Requested Receipt Date 10/31/2023

Purchase Type EBMT Status Open

Document Date 4/10/2023 Buy-from Buy from Vendor No. \*

**Lines** Manage Line

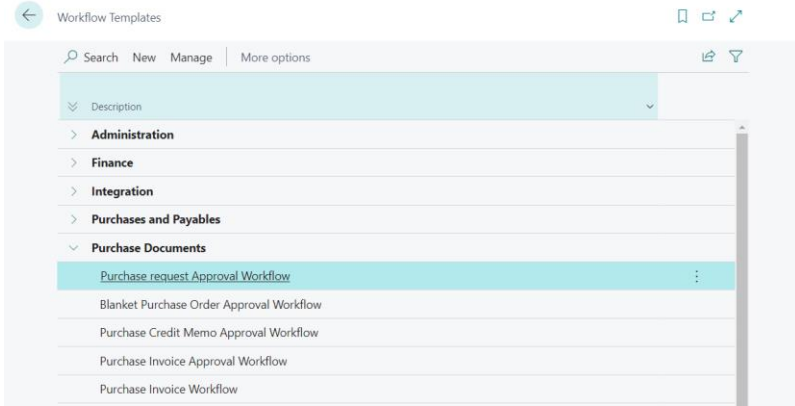
New Line Delete Line

No.	Description	Purchase Type	Quantity	Unit of Measure Code	Requested Receipt Date	Department Code	Customer Code	Buy from Vendor No.	Purchase Document Type	Purchase Document No.
1898-S	A118 MS Desk	EBMT	2	PCS	10/11/2021	ADM		*	Quote	
→ 1900-S	HVES Guest Chair, Black	EBMT	1	PCS	10/11/2021	ADM		*	Quote	

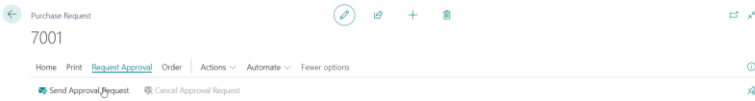
- 6- To print this **Purchase Request**, use the **Print** action.
- 7- After you've filled in the document, you can release it, and Business Central changes the value in the **Status** field to **Released**. This status indicates that the request is ready for the next stage of processing.

## APPROVAL WORKFLOW

You can automate the process of approving new or changed purchase request, by enabling the **Purchase Request Approval workflow**.



When an approval user creates a **Purchase Request** for which an approval workflow is enabled, an approval request must be sent by using the **Send Approval Request** action on the page.



Sending the approval requests will change the document status to **Pending Approval** and will restrict the record from further usage.



## CONVERT A PURCHASE REQUEST

When you have accepted the **Purchase Request**, you can convert it to purchase quote, order, or invoice.

- 1- Open the **Purchase Request** you want to convert, then choose the **Make Quote** action.

**Note**

The **Purchase Request** can be converted directly to:

- Purchase Quote (**Make Quote**)
- Purchase Order (**Make Order**)
- Purchase Invoice (**Make Invoice**)

**Note**

**Vendor No.** field must be filled for each purchase request line. You can specify the **Vendor No.** field on the **General** FastTab, system will automatically apply the same vendor for all lines.

The screenshot shows the 'Purchase Request' interface for request 7001. The top navigation bar includes 'Home', 'Print', 'Request Approval', 'Order', 'Actions', 'Automate', and 'Fewer options'. Below this, there are buttons for 'Release' and 'Make Quote'. The main details section shows:

- No.: 7001
- Purchase type: E&IT
- Document Date: 4/10/2023
- Requested Receipt Date: 10/31/2023
- Status: Released
- Buy-from: (empty)
- Buy from Vendor No.: 50000

The 'Lines' section is expanded to show a table with the following data:


No.	Description	Purchase type	Quantity	Unit of Measure Code	Requested Receipt Date	Department Code	Custom Cogn. Code	Buy from Vendor No.	Purchase Document Type	Purchase Document No.
→ 1890-S	ATHENS Desk	E&IT	2	PCS	10/31/2023	ADM		50000	Quote	
1900-S	PARIS Guest Chair, black	E&IT	1	PCS	10/31/2023	ADM		50000	Quote	

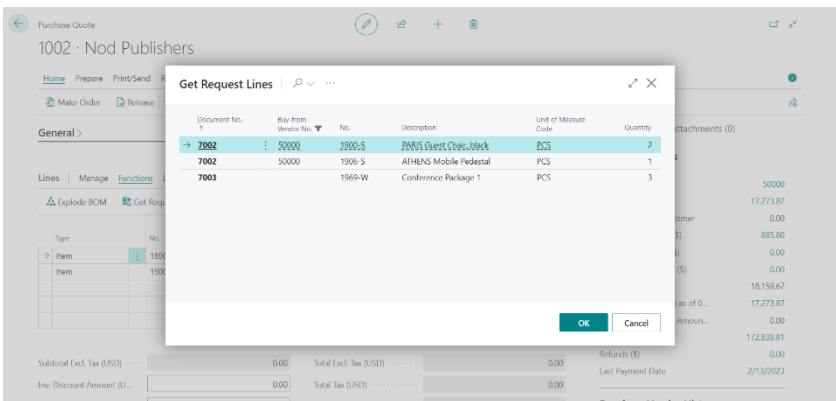
## COMBINE REQUESTS ON A SINGLE DOCUMENT

If you want to proceed more than once **Purchase Request** at a time, you can select multiple request lines on the purchase document.

### ! Note

The same step can be applied to combine the request line for purchase quotes, orders, or invoices.

- 1- Choose the  icon, enter **Purchase quote**, and then choose the related link.
- 2- Choose a purchase quote or create New one.
- 3- On the **Lines** FastTab, choose the **Get Request Lines** action.
- 4- Select multiple request lines that you want to include in the quote.



The screenshot shows a 'Purchase Quote' window for document 1002. A 'Get Request Lines' dialog is open, displaying a table of request lines to be added to the quote. The table has the following data:

Document No.	Buy from Vendor No.	No.	Description	Unit of Measure Code	Quantity
7002	50000	1900-S	PENIS Guest Chair, Jibek	PCS	1
7002	50000	1906-S	ATHENS Mobile Pedestal	PCS	1
7003	1969-W		Conference Package 1	PCS	3

The dialog also shows 'OK' and 'Cancel' buttons at the bottom.



**Your ideas matter to us! If you have innovative concepts or suggestions for our purchase request app, we'd love to hear from you. Submit your ideas effortlessly by sending us an email at [idea.rfq@amjs-consulting.com](mailto:idea.rfq@amjs-consulting.com)**

**We appreciate your input and look forward to considering your ideas to enhance our purchase request app. Thank you for being a part of our innovation journey!**