

Purchase request

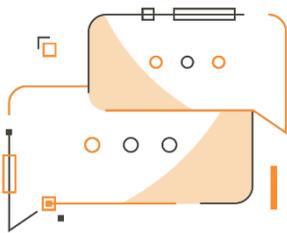
Manage purchase requests of goods & services in
Dynamics 365 Business Central



Purchase Request

App for Microsoft Dynamics 365 Business Central

The Purchase Request EOS Solutions app allows to manage purchase requests of goods / services in Dynamics 365 Business Central.



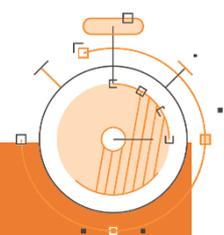
Do you want to manage internal purchase requests from colleagues? Are you looking for a simple way to check-approve-convert it to order? Do you need to archive or duplicate purchase requests?

How it works

The Purchase Request App allows you to manage the business process related to requests for the purchase of goods / services.

It allows to:

- Generate orders and quotes directly from the PRQ (Purchase Requests)
- Archive closed PRQs
- Group several requests into one
- Differentiate the PRQs by category



Quick Guide

Ready to go in 4 steps

1. Set a Number of series in the setup
2. Create a Purchase Request
3. Create an order/quote directly from the PRQ
4. Choose whether to duplicate / archive the PRQ



It is possible to associate the Purchase Requests with an approval workflow in three ways:

1. BASE

allows you to change the purchase request's status manually

2. ADVANCED

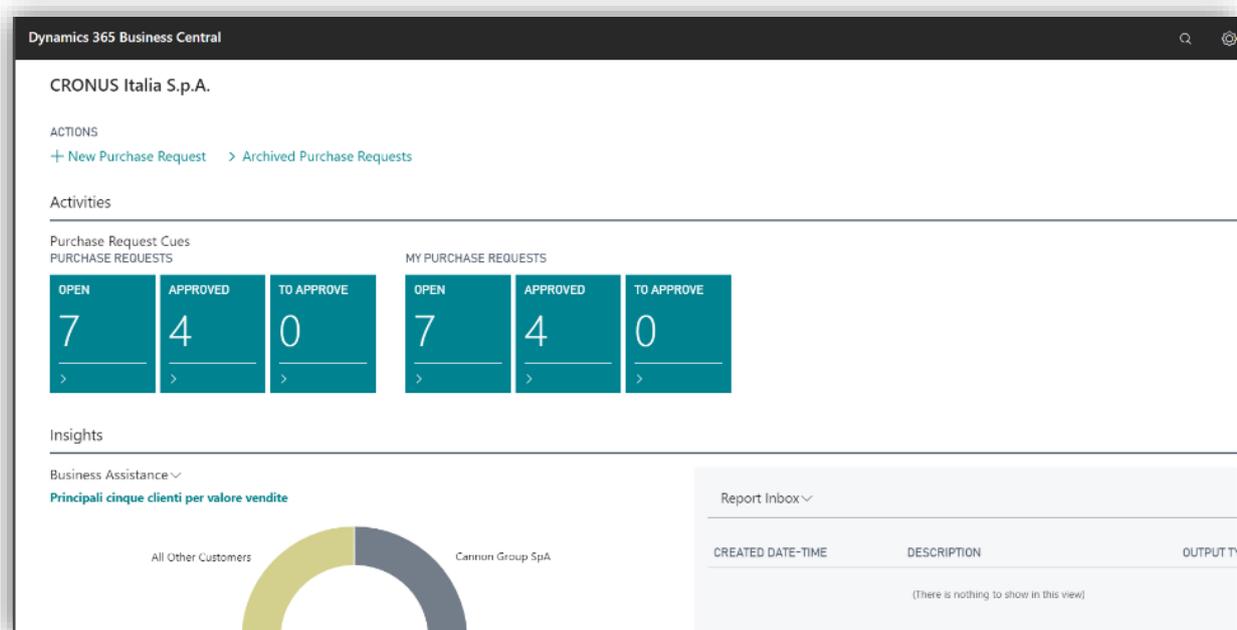
allows the user to use the standard Business Central approval feature

3. ADDITIONAL

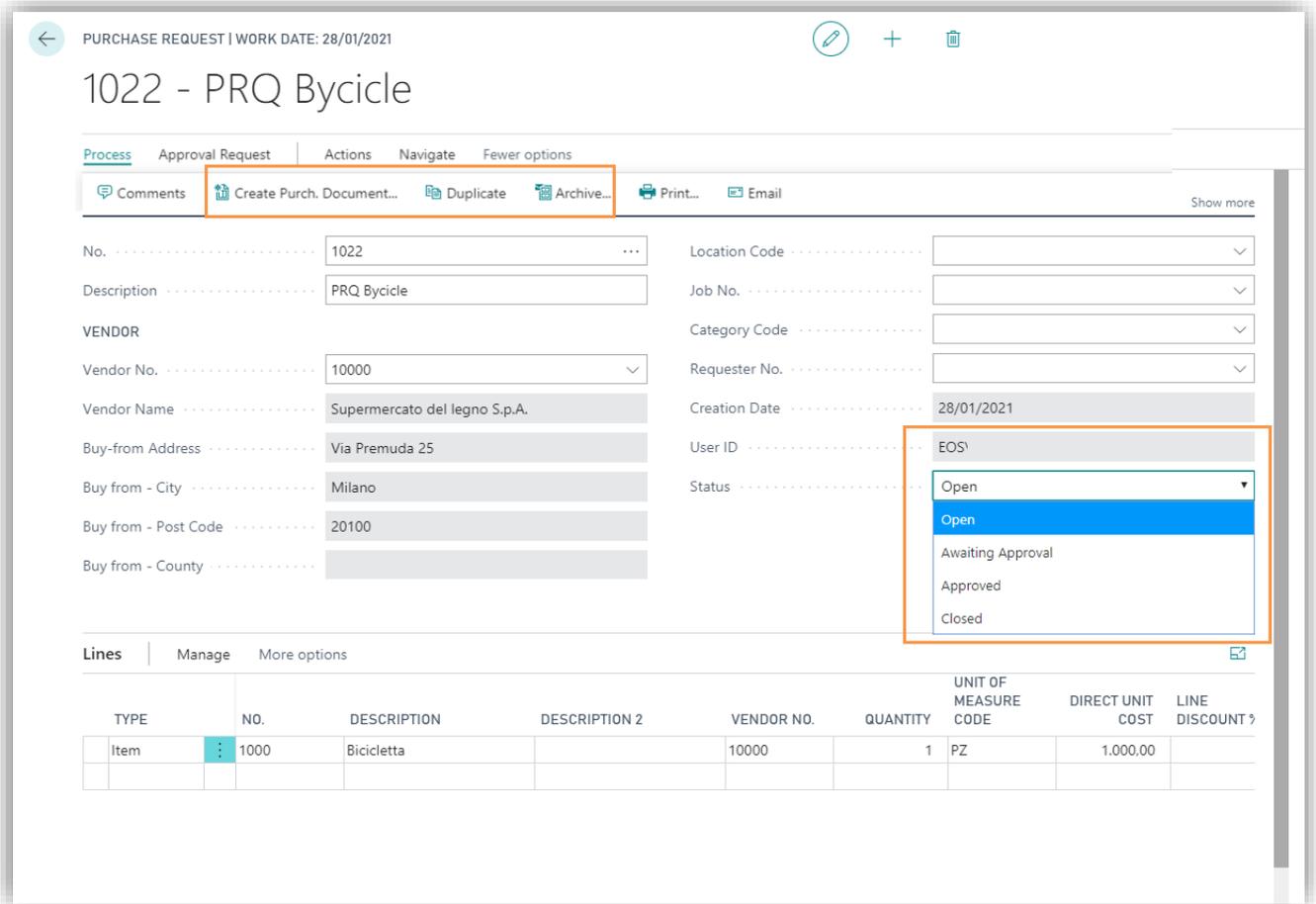
installs the DataSecurity App of Eos Solutions

Role center

To be able to monitor the requests there are 6 piles in the Role Center: 3 for the purchase requests manager (who monitors ALL the requests) and 3 for the user (who monitors ONLY PERSONAL requests).



Create a Purchase request



PURCHASE REQUEST | WORK DATE: 28/01/2021

1022 - PRQ Bicycle

Process | Approval Request | Actions | Navigate | Fewer options

Comments | Create Purch. Document... | Duplicate | Archive... | Print... | Email | Show more

No. 1022 Location Code

Description PRQ Bicycle Job No.

VENDOR Category Code

Vendor No. 10000 Requester No.

Vendor Name Supermercato del legno S.p.A. Creation Date 28/01/2021

Buy-from Address Via Premuda 25 User ID EOS

Buy from - City Milano Status Open

Buy from - Post Code 20100

Buy from - County

Lines | Manage | More options

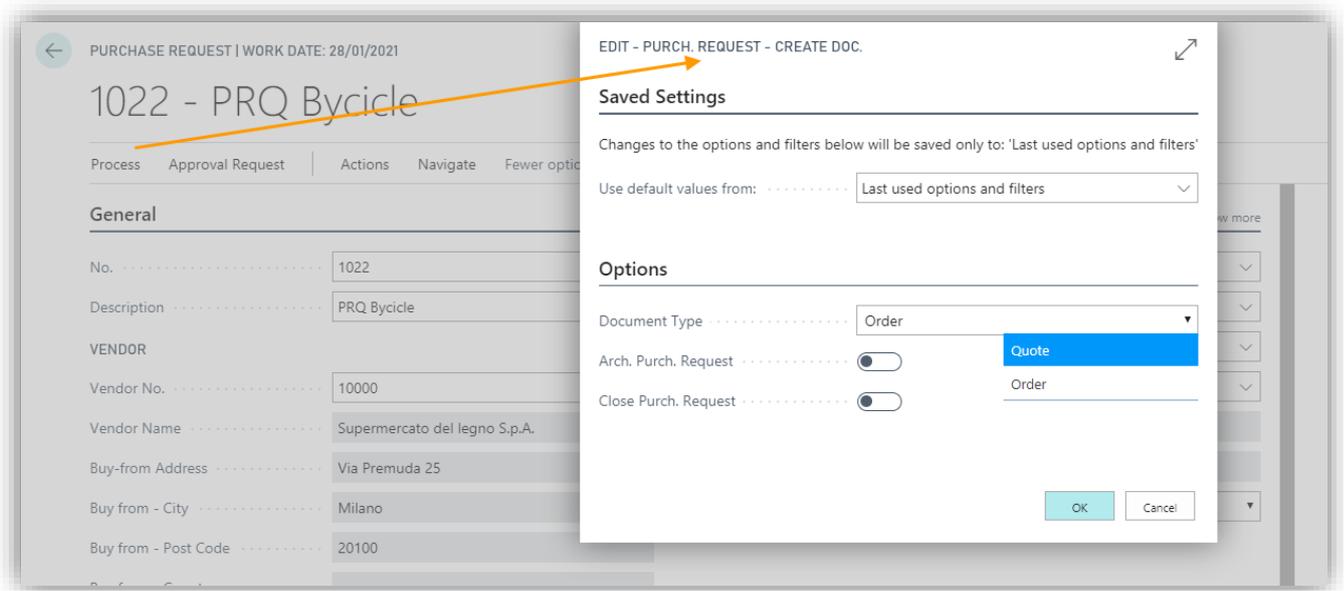
TYPE	NO.	DESCRIPTION	DESCRIPTION 2	VENDOR NO.	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %
Item	1000	Bicicletta		10000	1	PZ	1.000,00	

In the request card, the goods / services for which the Purchase Request is made must be specified in the lines.

It is also possible to enter purely descriptive purchase requests if you do not know the Item code and / or Vendor name.

Create a Purchase document

From the PRQ it is possible to create directly a purchase document (order/quote):

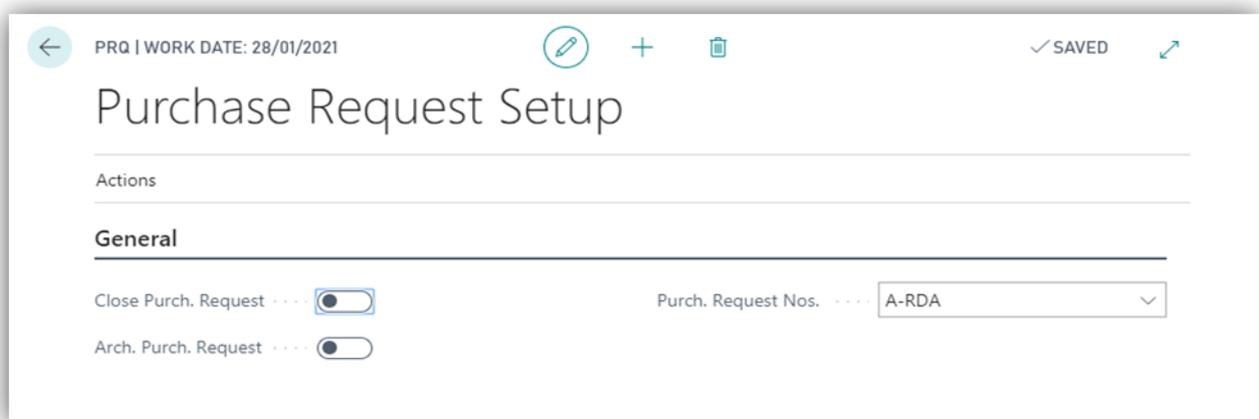


You can **duplicate** or **archive** the purchase requests.

Once archived the requests will be moved to the list of Archived Purchase Requests.

Setup

We need to assign a Number of series to the Purchase Requests. You can choose whether to automatically close/archive requests after creating the purchase document:



Subscription

Some features of the Purchase Request App require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

Contact us for more info:

www.eos-solutions.it/en/contact-support.html



www.eos-solutions.it