Acumatica
The Cloud ERP

Requisition Management

Minimize the complexity of purchasing multiple products from a wide range of suppliers with control and streamlined business processes.

- **Automate purchase requests with vendor bidding**
- **Create sales quotes based on catalog pricing or cost-plus calculations**
- **Configurable approval workflows**

Key business benefits

- Automate the requisition process, including order collection, supplier bids, sending and approving quotes, issuing POs, and receipts.

- Use approval maps and authorizations to ensure that the right people are alerted when they are needed in the process.

- Eliminate paperwork and speed up the bidding process by emailing requests to multiple vendors.

Related resources

- Procure-to-Pay Automation
  > LEARN MORE

- Resilient Sales Strategies
  > LEARN MORE

- Schedule a Personalized Demo
  > LEARN MORE

Simplify and Automate Complex Requisition Processes Involving Vendor Bids, Sales Quotes, and Approvals

Automate the way you gather requests, obtain vendor bids, create and approve quotes, manage purchases, and fulfill orders for internal or external clients. Eliminate paperwork while providing your sales, service, shipping, receiving, management, and other departments with greater visibility. Requisition Management integrates with Acumatica Purchase Order Management, Inventory Management, Project Accounting, Service Management, Sales Order Management, Acumatica Construction Edition, and Accounts Payable.

WITH ACUMATICA REQUISITION MANAGEMENT, YOU CAN

- Receive and approve requests from multiple sources

- Bundle requests into a consolidated requisition

- Source materials from inventory or use a vendor bidding process

- Create a sales quote for customer approval

- Create sales and purchase orders

- Include alerts when requests exceed allocated budgets

"We know the pricing of 10 different vendors on the same product, so we can compare them instantly and, depending upon those needs, satisfy whatever is the customer's biggest priority. For example, if a customer is concerned about cost but is not worried about delivery times, we can provide a quote that fits those needs. Or, if a customer needs the packaging right away, we can use a more expensive vendor and ship that day if needed."

-Patrick Madison, CFO, Korpack

> CUSTOMER STORIES

Purchasing Integration

Automatically create purchase orders in the purchase order module from approved requisitions.

Predefined Request Lists

Limit requests to a specific list of inventory items by user.

Hide Inventory Items

Optionally hide your product catalog from users, requiring manual item entry.

Collect and Organize Requests

Bundle requests from multiple sources in a single requisition. Create approval rules based on quantity, request amount, or other factors.

Request Classes

Set requisition defaults by request class to simplify data entry and reduce errors. Limit selection to a specific list of items, create customer-only requests, hide vendor information, hide inventory catalog information, allow multiple vendors per request, and set promised lead times.

Create Customer Quotes

Create customer quotes to offer a price to customers for requested goods.

Lead Times

Set lead times for vendor items. Promise dates are calculated automatically by backing out the lead time from the required date for item requests.

Shipping Instructions

Designate where the vendor should ship the requested items when the requisition is approved, and the purchase order is released. Requests can be made to ship items to any company location, to customer locations, job sites, or other addresses.

Sales Order Integration

Turn an approved quote into a sales order form with one click. Sales orders are managed by the rules within the sales order module and linked to the requisition for easy access.

Vendor Definition

Requests and requisitions may be specified for a defined vendor or created to solicit request for quote (RFQ) information from multiple vendors, including those who may not be already established in the system.

Expiration Dates

Capture vendor RFQ expiration dates for quotes. Create Generic Inquiries, dashboards, and business events to notify employees when RFQ expiration dates require their attention.

Mail Templates

Create mail templates or choose from a list of predefined templates for sending proposal requests to vendors via email.

Non-Stock Item Requests

Employees may create requests to purchase non-stock items for office supplies or contracted services.

Complete Integration

Take advantage of integration with purchasing, order management, inventory management, project accounting, service management, and all Acumatica financial modules to automate all processes, eliminate duplicate data entry, and properly account for all transactions.

Audit Trail

Automatically create a complete audit trail of all transactions, including the identity of users who entered and approved the transaction or modified the record. Optional notes and attached electronic documents remain with the activity records.