eossolutions

A KUMAVISION GROUP COMPANY
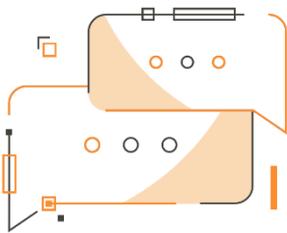
Purchase request

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
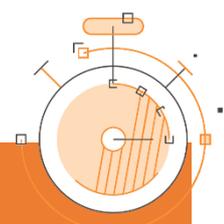
Quick Guide
Ready to go in 4 steps

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

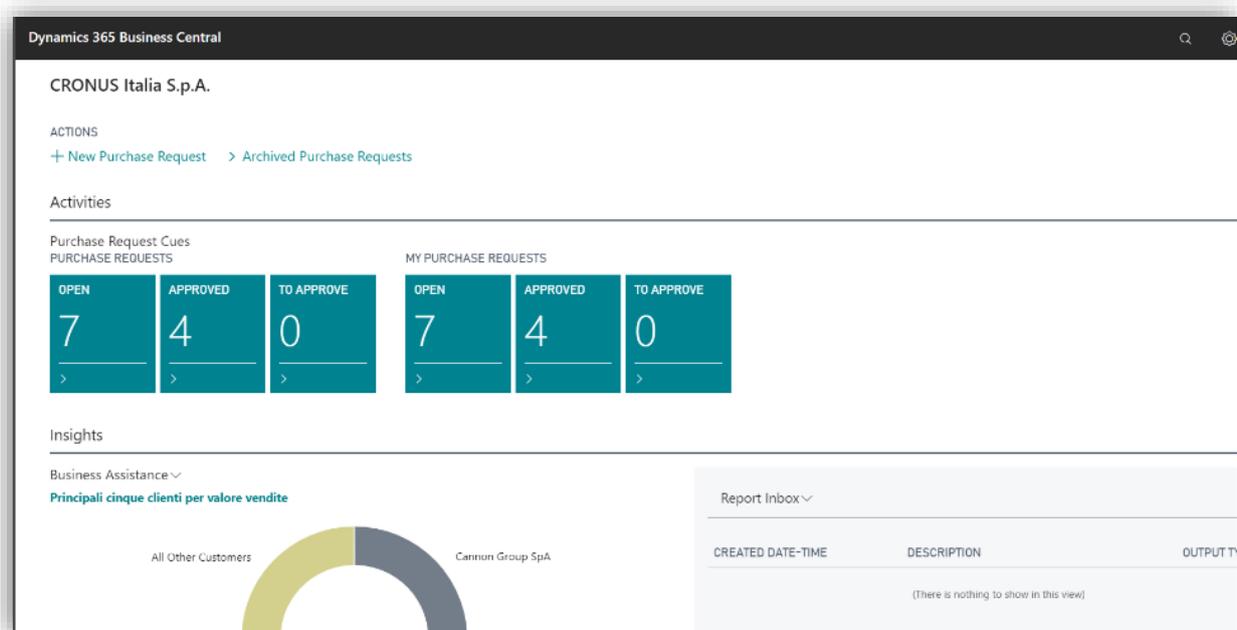allows you to change the purchase request's status manually

2. ADVANCED

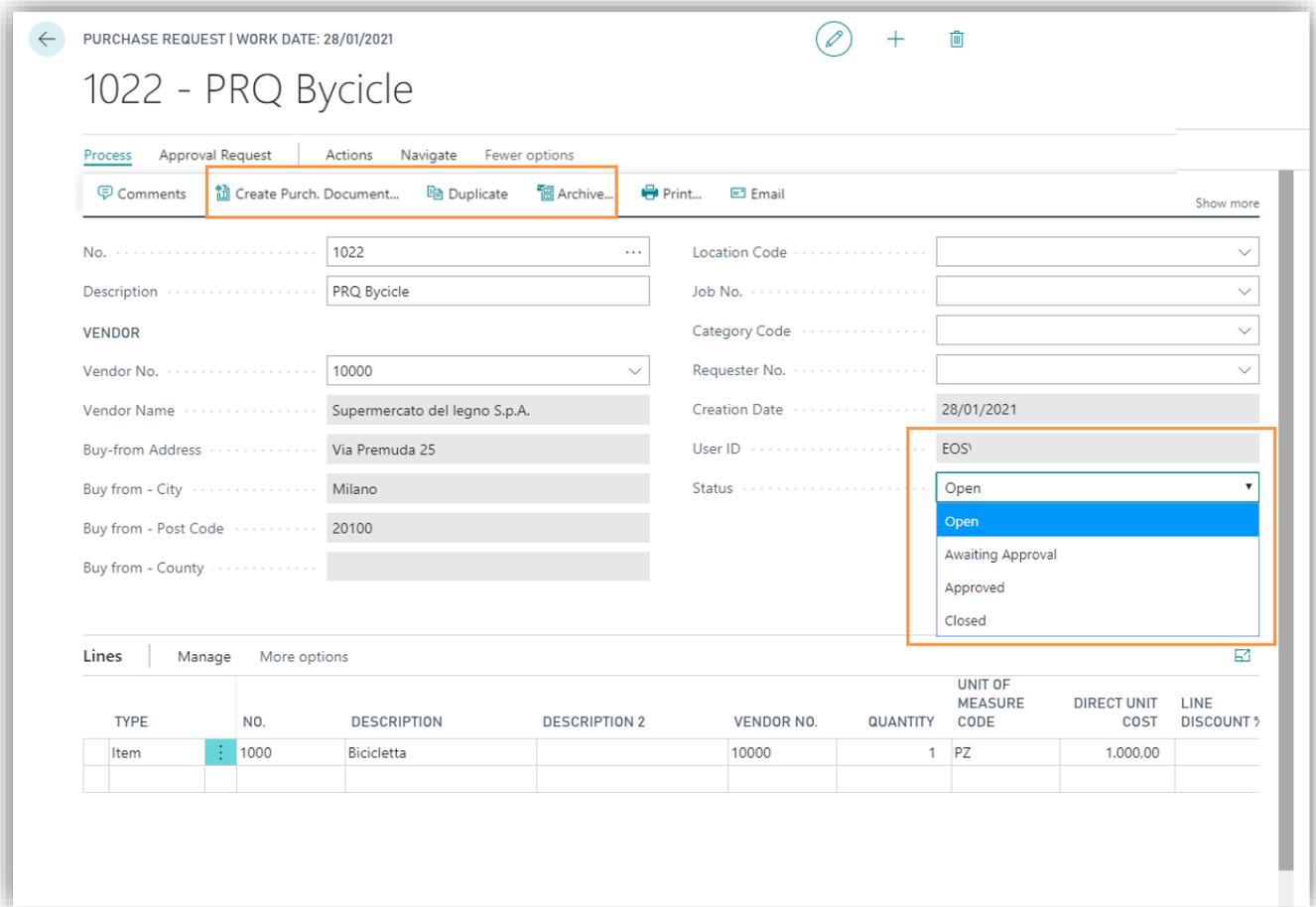allows the user to use the standard Business Central approval feature

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

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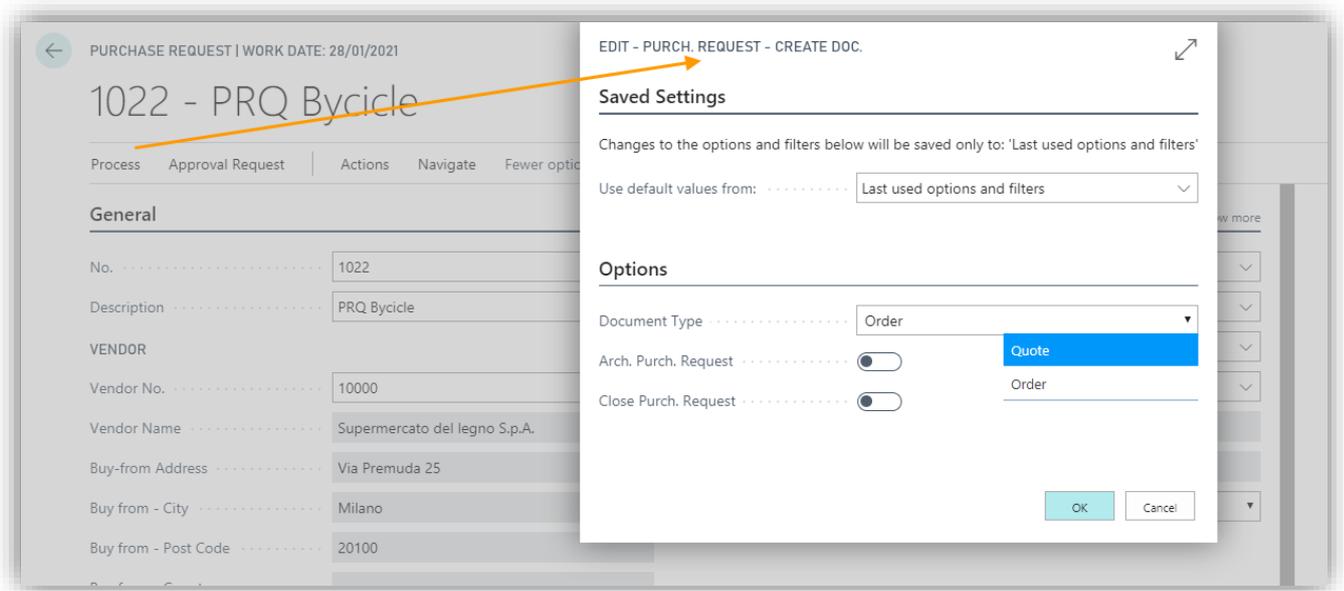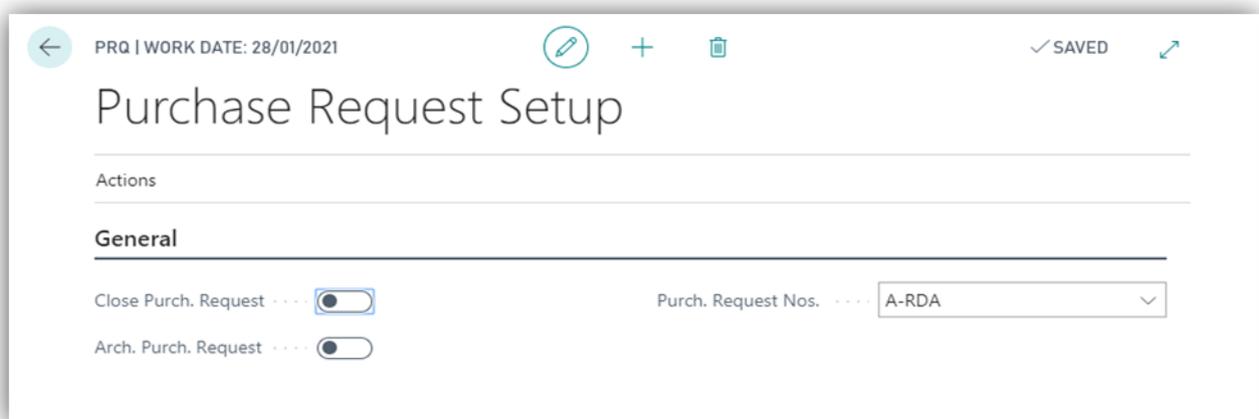
You can **duplicate** or **archive** the purchase requests.

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