602A & SPP 802A – Procedure, Create a D365 Purchase Requisition

600: Purchasing · https://milo.masseyservices.com/docs/602a-spp-802a-procedure-create-a-d365-purchase-requisition-2/

Section: Purchasing & M&S Control

Subject: Procedure, Create a D365 Purchase Requisition

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Policy Owner: Senior Director of Purchasing

Policy

A Microsoft Dynamics 365 (D365) purchase request is used by the service center to order materials, supplies, equipment or services through the Purchasing department.

Procedure

To create a purchase requisition in D365, follow the steps below:

1. Log in to Microsoft D365.

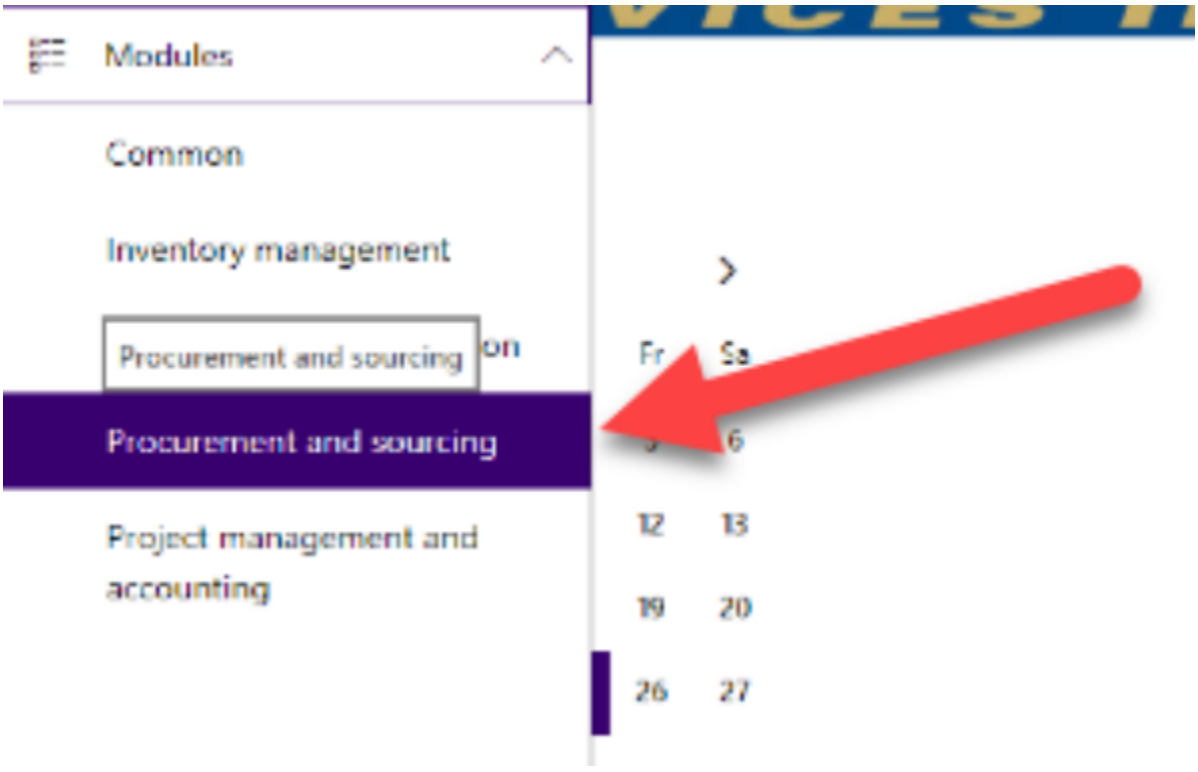
2. Click on the modules pane to access the modules (left side of the screen, top icon).

Figure 1. "Module pane" link.



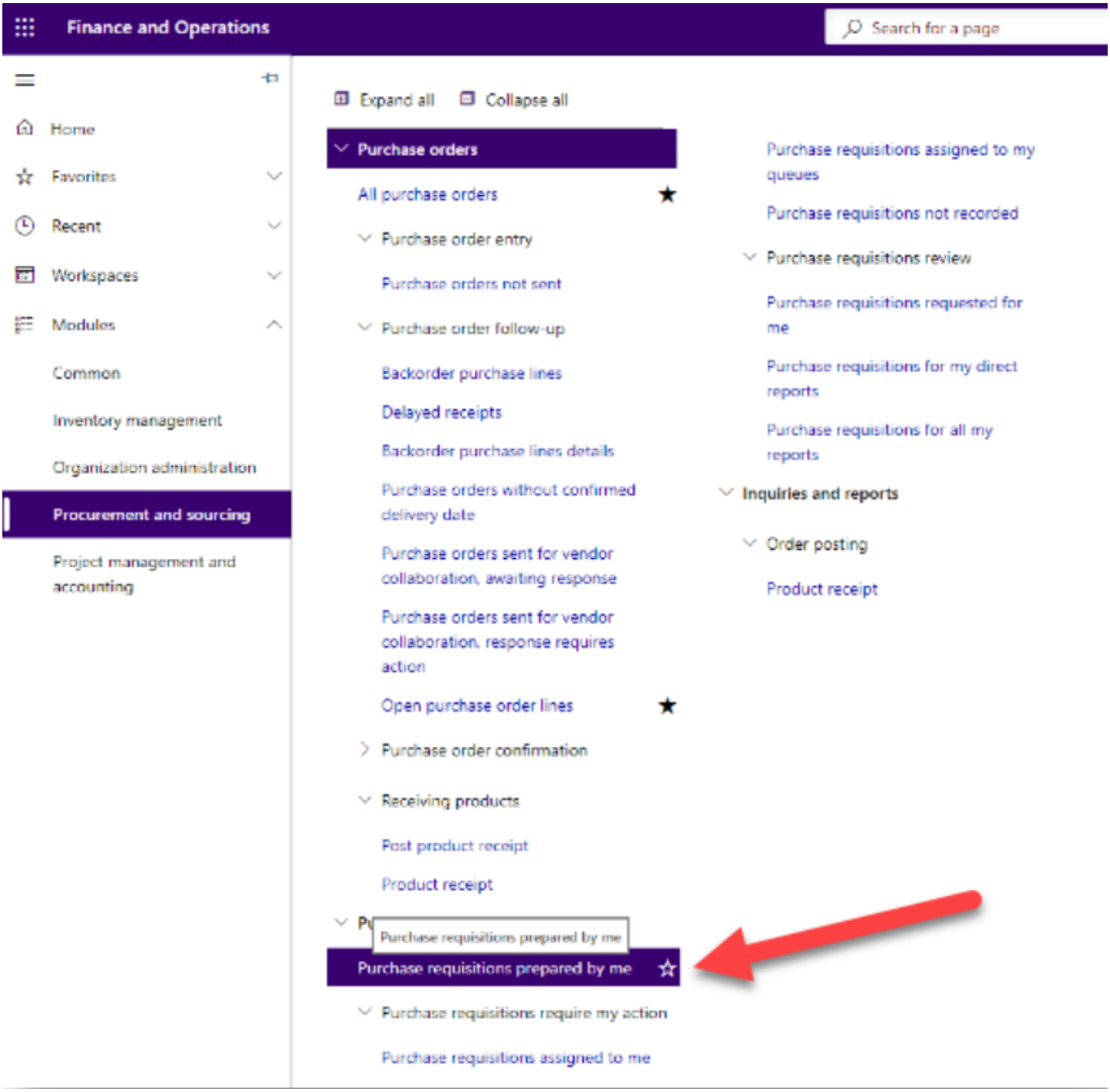
3. Click on "Procurement and sourcing."

Figure 2. "Procurement and sourcing" link.



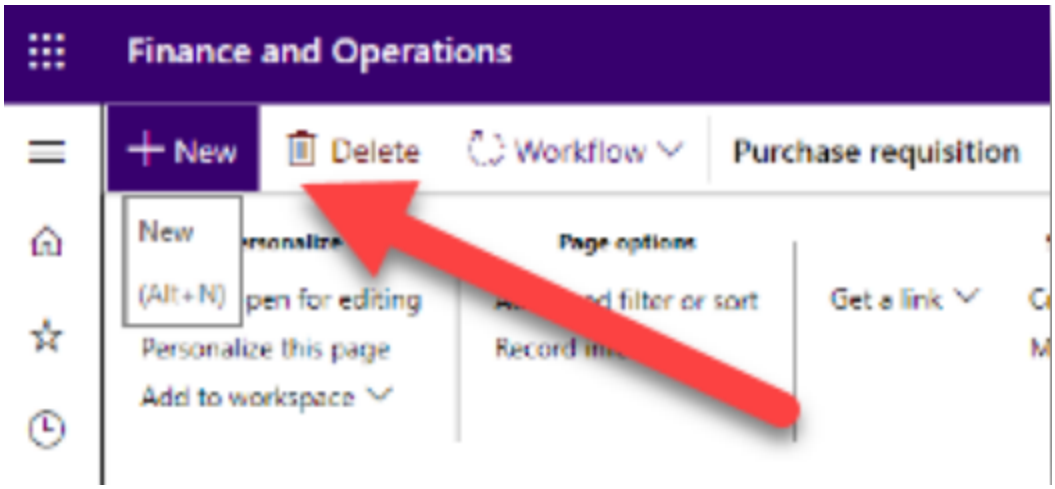
4. Under the Purchase Requisition menu, click "Purchase requisitions prepared by me." (See Figure 3.)

Figure 3. "Purchase order rquisitions prepared by me" link.



5. Click on "New" (top left corner).

Figure 4. "New" link.



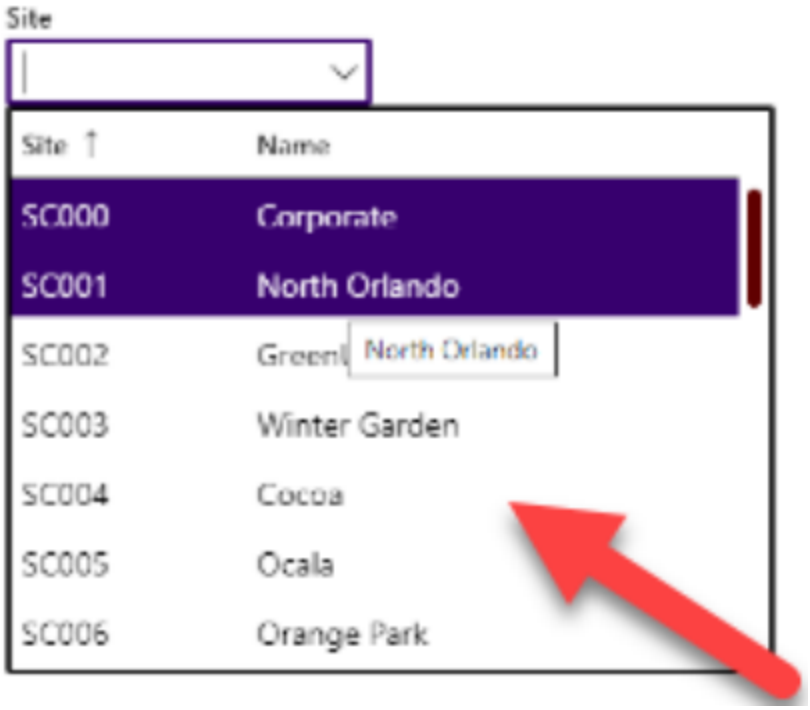
6. Click to change the purchase requisition name. The name should be either emergency purchase order (EPO) or requisition order (RO), followed by the three-digit service center number and the date as indicated. For example, if the RO is created on September 25, 2021 by Service Center 126, the requisition name would be “RO126092521.” (See Figure 5.)

Figure 5. New purchase requisition form.



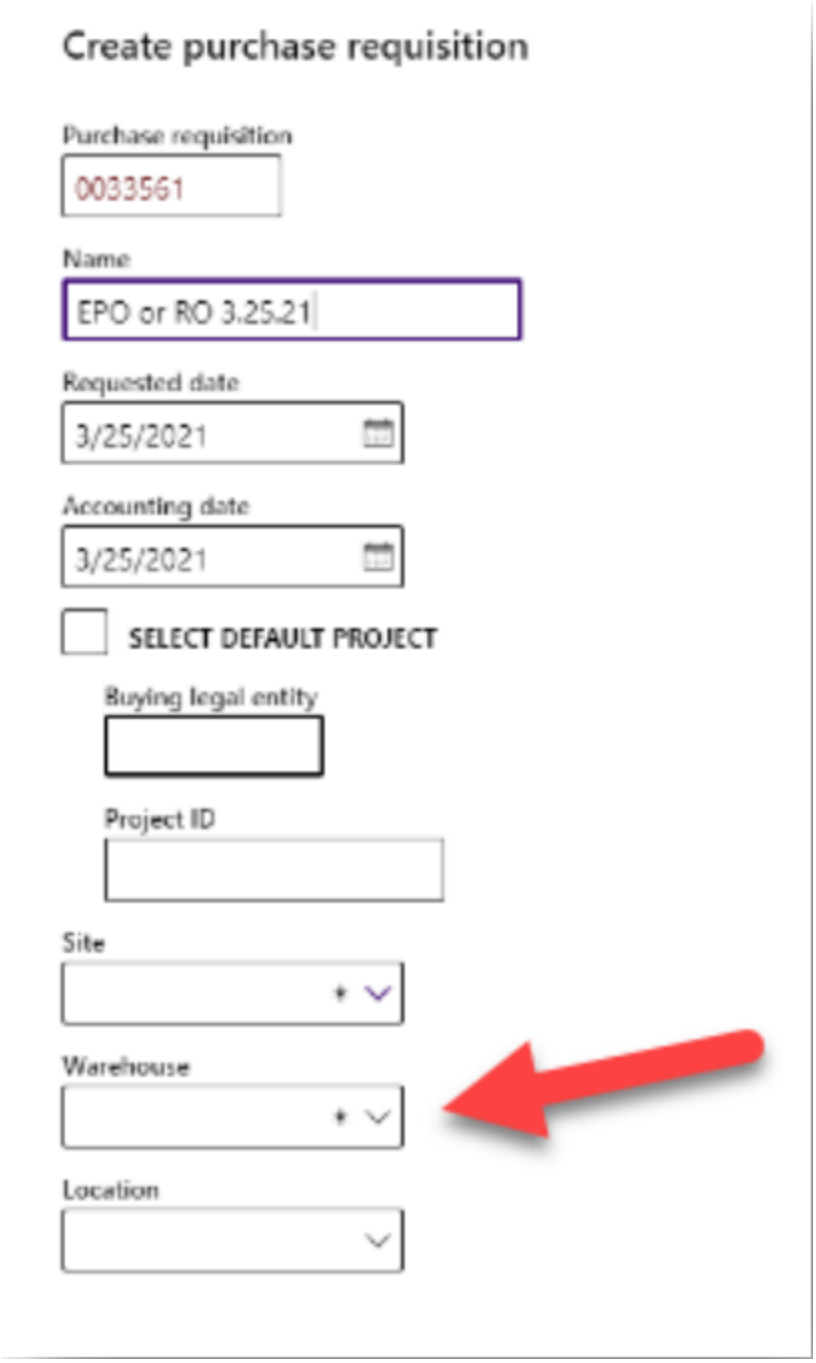
7. Click to open the “Site” drop down menu (right side of the screen), then scroll to find and select your service
center. (See Figure 6.)

Figure 6. Site drop down menu.



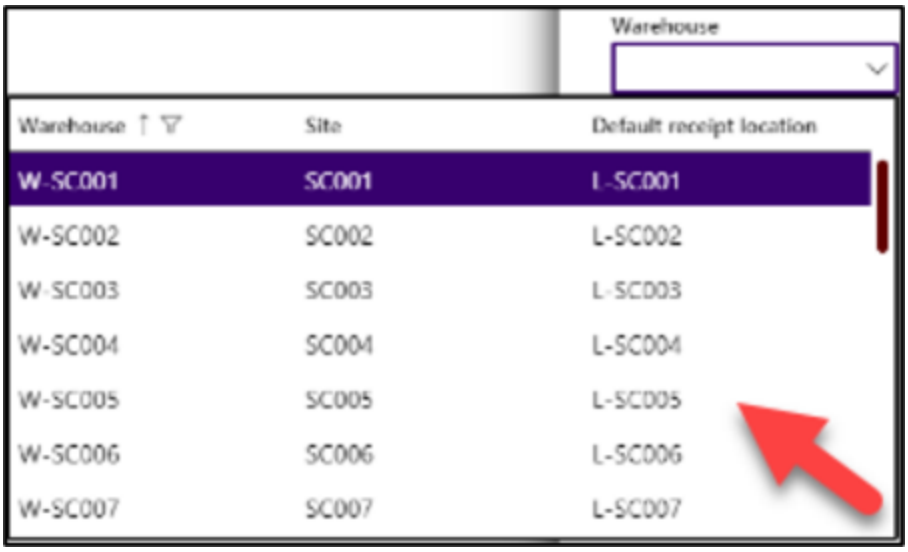
8. Click to open the “Warehouse” drop down menu (right side of the screen). (See Figure 7.)

Figure 7. Warehouse drop down menu.



9. Scroll to find and select the correct warehouse.

Figure 8. Warehouse drop down menu.



10. A pop-up window will appear, confirming your creation of a purchase requisition. Click "OK." (See Figure 9)

Figure 9. Confirmation pop-up window.

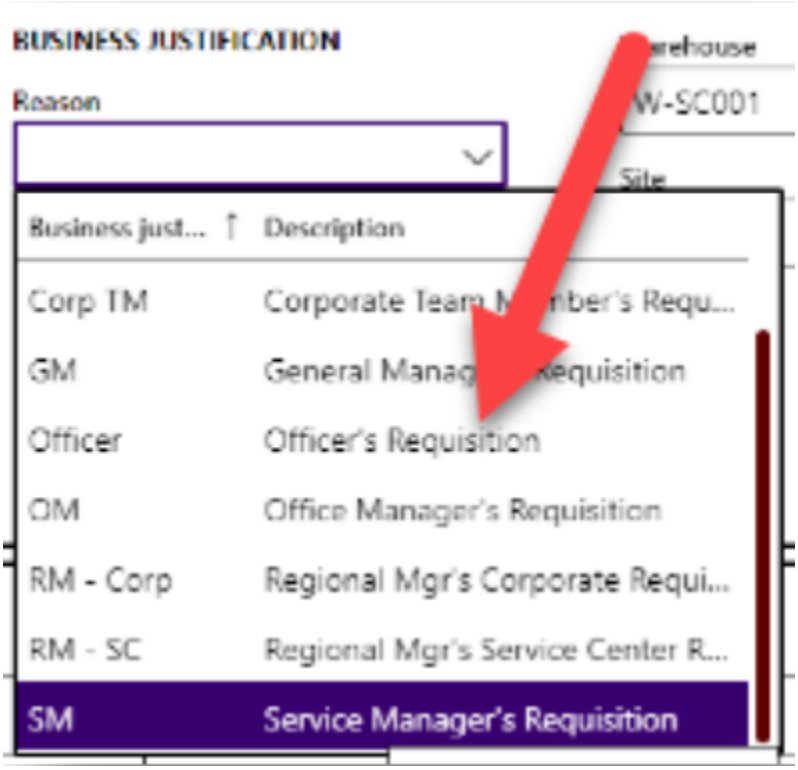


11. Click to open the “Reason” drop down menu (under the Business Justification section), then select the reasoning.

Figure 10. Business Justification.



Figure 11. Reason for Business Justification drop down menu.



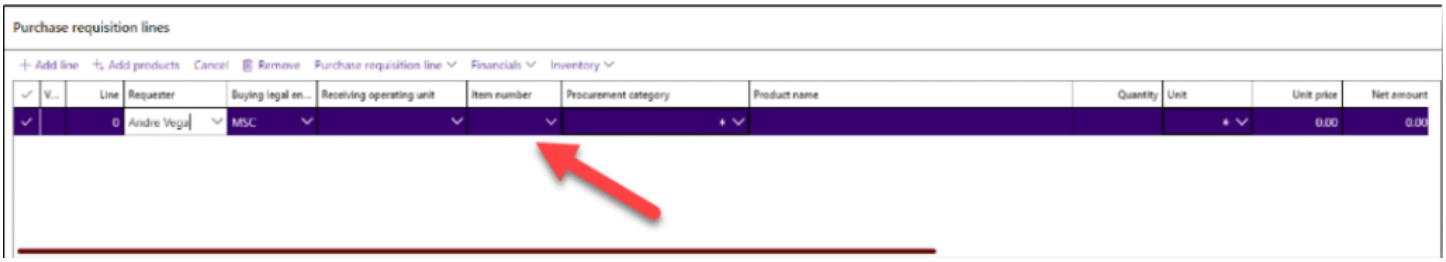
12. Click "Add line."

Figure 12. "Add line" link.



13. In the item number field, click and input the item number.

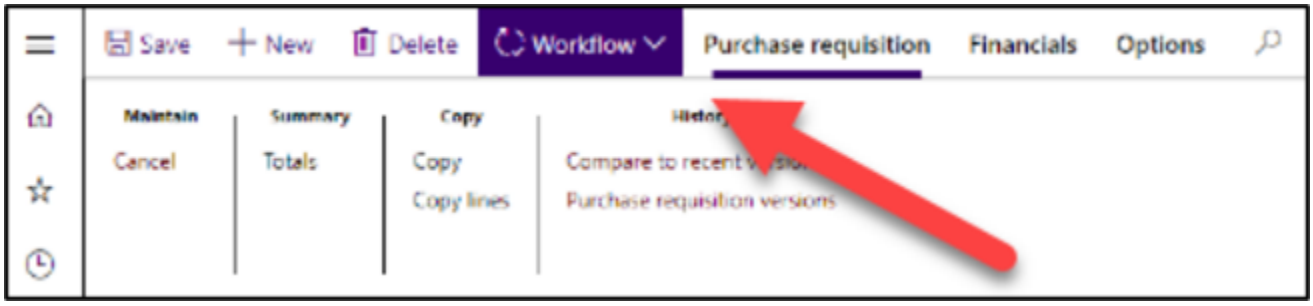
Figure 13. Item number field.



If more items are required, repeat steps 14 & 15.

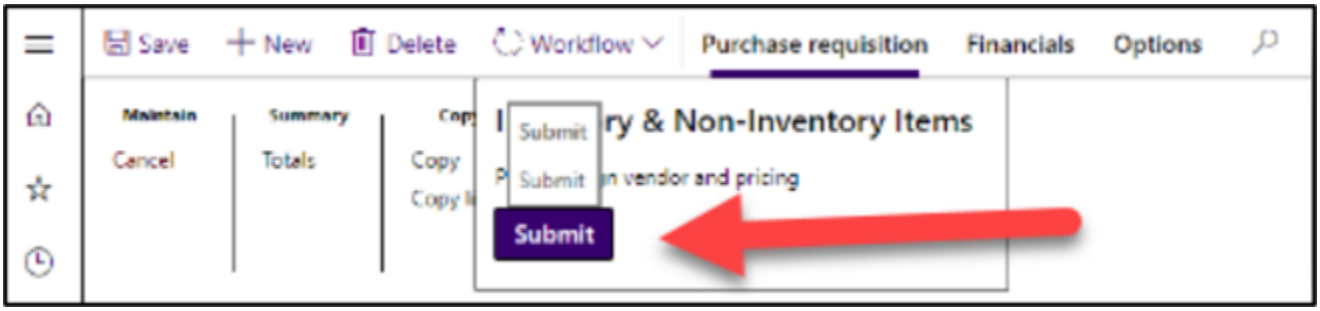
14. Click on "Workflow" (top menu bar).

Figure 14. "Workflow" link.



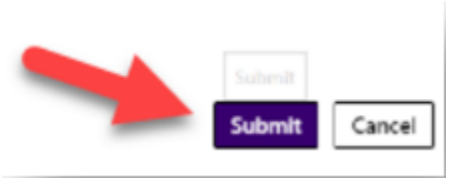
15. Click "Submit" to verify the purchase requisition. (See Figure 15)

Figure 15. "Submit" link.



16. Click "Submit" to verify the final Purchase Requisition (bottom right of the screen).

Figure 16. "Submit" link.



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