602C: Procedure, Approve a D365 Purchase Requisition

600: Purchasing · https://milo.masseyservices.com/docs/602c-procedure-approve-a-d365-purchase-requisition-2/

Section: Purchasing
Subject: Procedure, Approve a D365 Purchase Requisition
Approved by: Tony Massey
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Policy Owner: Senior Director of Purchasing

Policy

Purchase requisitions are used to order materials and supplies needed to service our customers and to operate the service center. Service managers create the purchase requisitions. General managers approve all purchase requisitions. This includes both regular orders and emergency purchase orders. For each pending requisition in
Microsoft Dynamics 365 (D365), the general manager will receive an email notification.

- Regular order (RO) purchase requisitions must be approved by the 10th of every month. Before approving an RO, the general manager should review what has been ordered by the service manager and make any necessary adjustments.
- Emergency purchase orders (EPO) should be approved immediately.

PROCEDURE

To approve a D365 purchase requisition, follow the steps below:

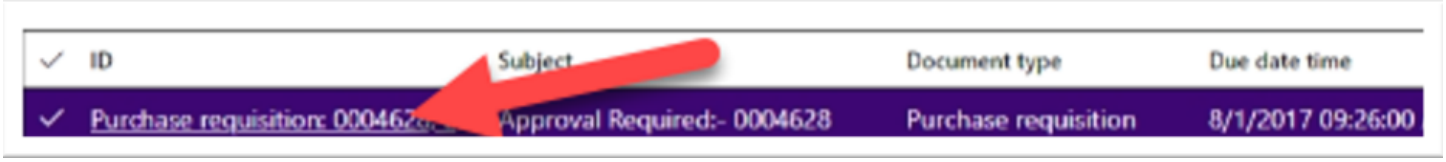
1. Log in to Microsoft Dynamics 365 (D365).

2. Click on the “Approval Required” link, found under the calendar.
Figure 1. “Approval Required” link.



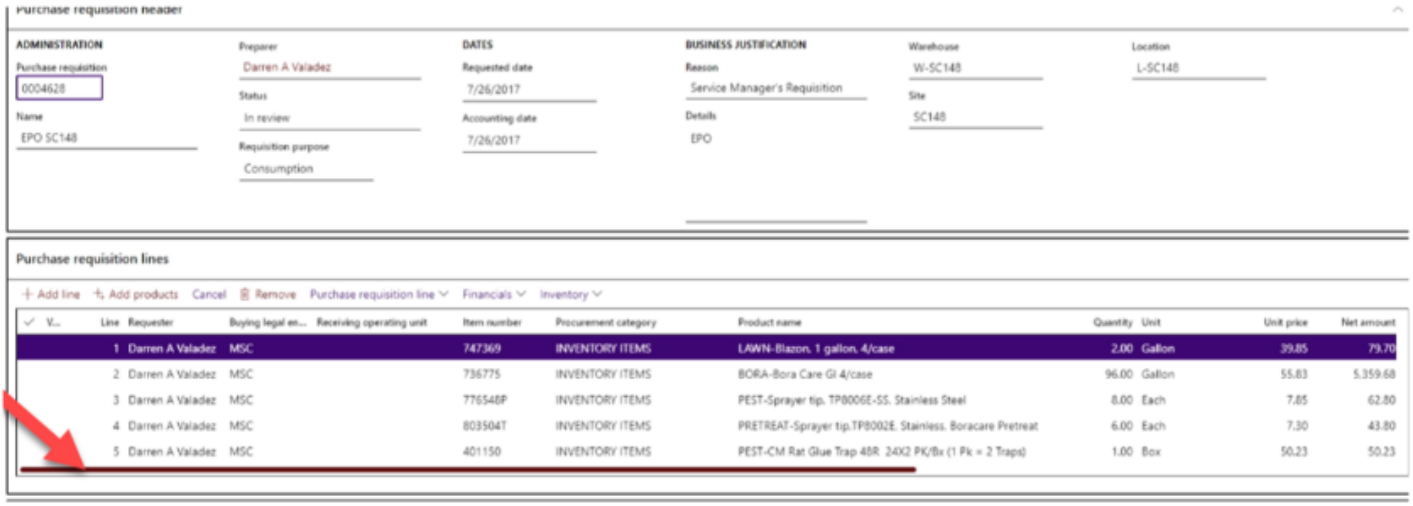
3. Click “Purchase requisitions #######” (located in the ID column) to view the items, quantity, unit, and price.

Figure 2. Purchase requisition.



4. Review the purchase requisition for accuracy. Click and drag bar over to the right to view all fields.

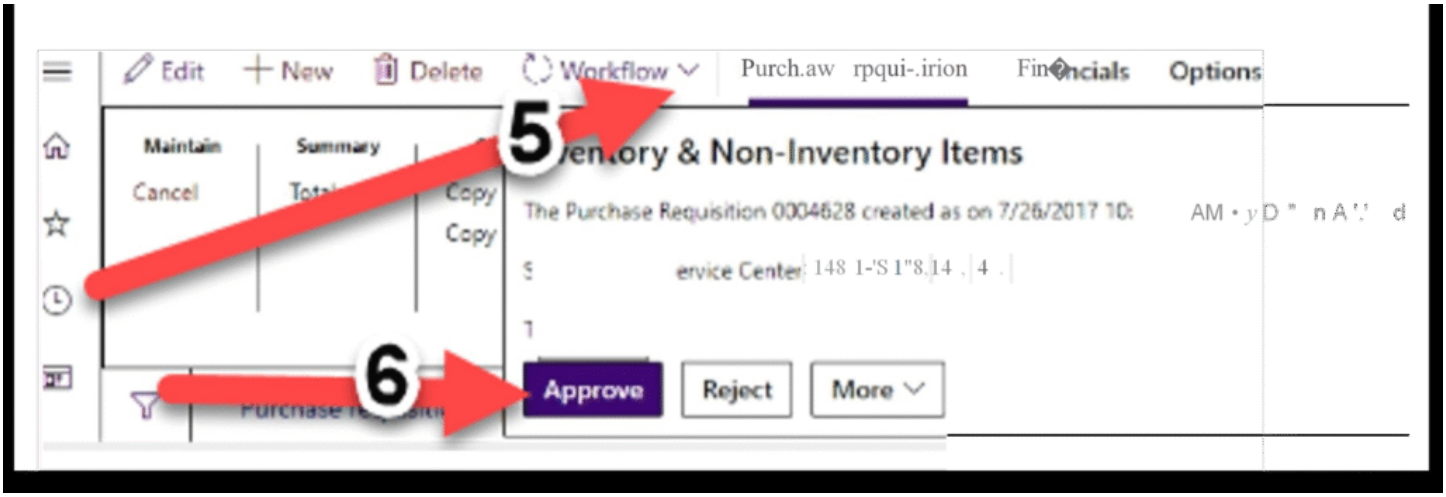
Figure 3. Bottom bar to scroll left and right within screen.



5. Click "Workflow" (found in the top menu bar).

6. Click "Approve" (Inventory & Non-Inventory items pulldown menu).

Figure 4. "Workflow" and Approve" links.



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