

SECTION: M&S CONTROL	SUBJECT: Create a D365 Purchase Requisition
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PP No.: 602-A / **SPP No.:** 802-A**Section:** Purchasing**Subject:** Procedure- Create a D365 Purchase Requisition**Approved By:** Tony Massey**Effective Date:** December 21, 2021**Last Reviewed Date:** December 21, 2021**Policy Owner:** ERP Financial Manager

A purchase requisition is used by a Service Center to request the purchasing department order materials or merchandise.

How to create a Purchase Requisition

- There are two types of Purchase Requisitions
 - An RO (Regular Order) is done every month and submitted to purchasing no later than the 10th
 - An EPO (Emergency Purchase Order) is only to be used when the RO was not sufficient to complete a month's production, or a new sale has come in requiring material or equipment that would not be reasonable to have on hand. (i.e. we sold 100 rodent bait stations to a multi-family community, you shouldn't have 100 RBS on-hand, so you put in an EPO).
- The RO is ordered on or before the 10th and is delivered on the last week of the month. When placing the RO, you must plan for what you will need NEXT month.
 - Planning an RO there are three categories of product to consider
 - What's on the rotation chart (pest) or agronomic program (GreenUp).
 - What product the office uses every month (i.e. every month we use four 18# pails of Contract while doing rodent bait station monitoring).
 - Seasonal product use (i.e. in September make sure you have rodent products going into the fall/winter, in April make sure you have wasp freeze going into spring/summer).
 - The procedures for calculating an order are provided in the following policies:
 - Pest services- PP 602-D
 - GreenUP- PP 602-E
 - Termite- PP 602-F

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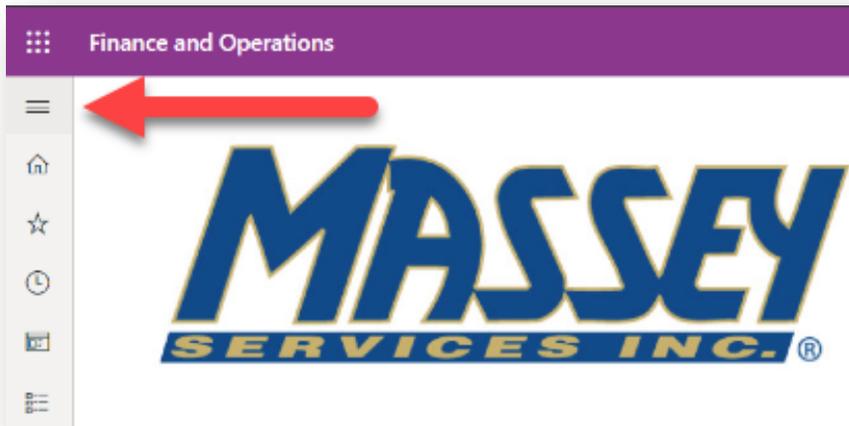
Page 1 of 8

SECTION: M&S CONTROL

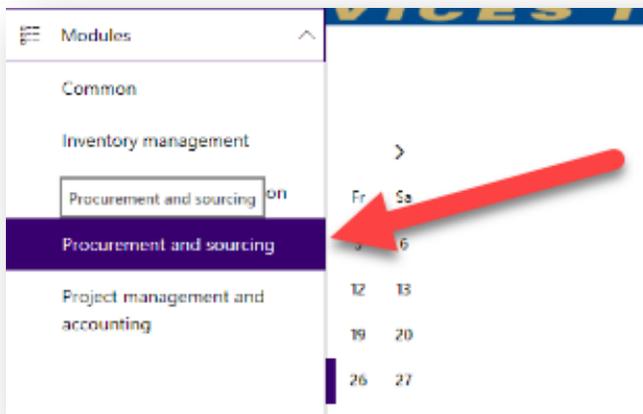
SUBJECT: Create a D365 Purchase Requisition

Steps To Creating a Purchase Requisition

1. Log in to Microsoft D365.
2. Click on the modules pane to access the modules (left side of the screen, top icon).



3. Click on "Procurement and sourcing".



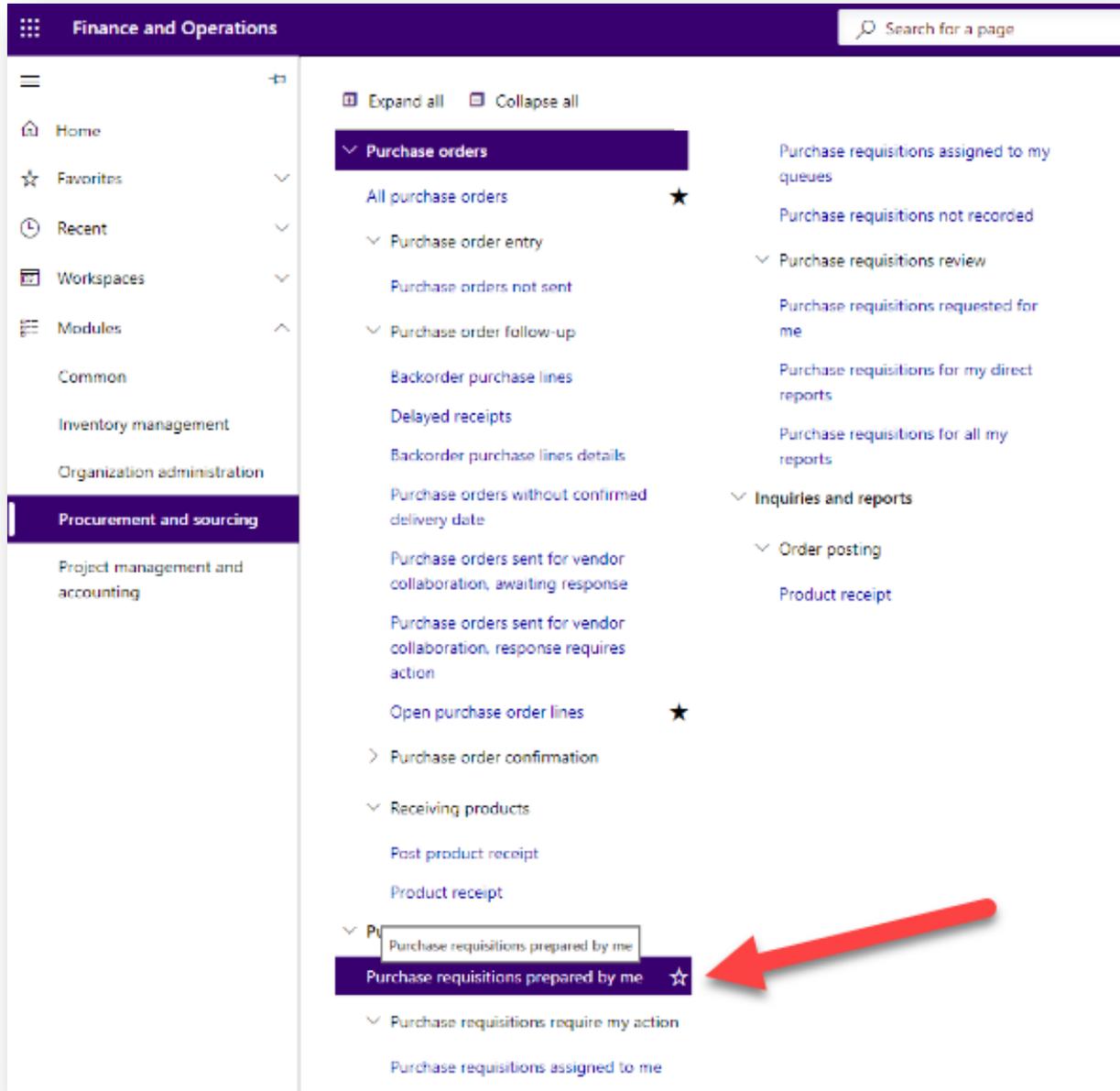
4. Under the Purchase Requisitions menu, click "Purchase requisitions prepared by me"

APPROVED BY:
Tony MasseyEFFECTIVE DATE:
December 21, 2021

Page 2 of 8

SECTION: M&S CONTROL

SUBJECT: Create a D365 Purchase Requisition

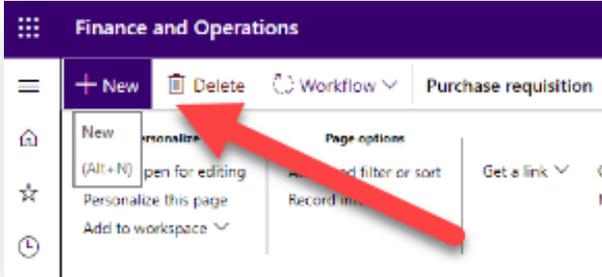


5. Click on “New” (top left corner).

APPROVED BY:
Tony Massey

EFFECTIVE DATE:
December 21, 2021

SECTION: M&S CONTROL	SUBJECT: Create a D365 Purchase Requisition
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6. Click to open the “Site” drop down menu (right side of the screen).

Create purchase requisition

Purchase requisition
0033561

Name
EPO or RO 3.25.21

Requested date
3/25/2021

Accounting date
3/25/2021

SELECT DEFAULT PROJECT

Buying legal entity
[Empty]

Project ID
[Empty]

Site
[Dropdown menu]

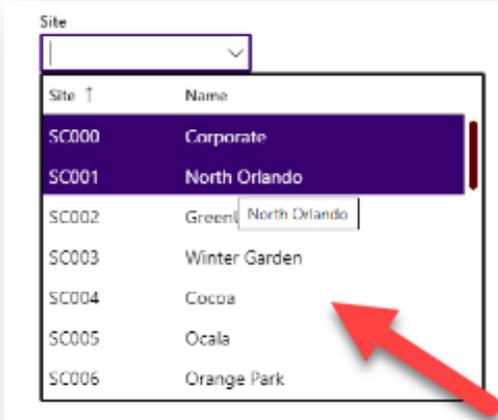
Warehouse
[Dropdown menu]

Location
[Dropdown menu]

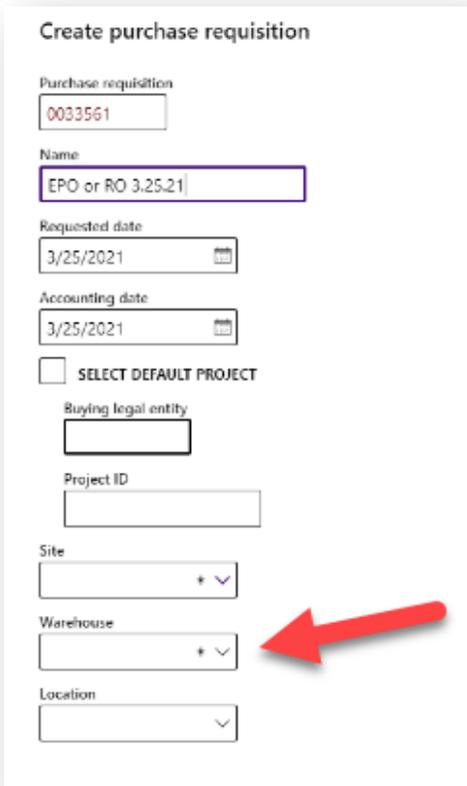
7. Scroll to find and click your service center.

APPROVED BY: Tony Massey	EFFECTIVE DATE: December 21, 2021	Page 4 of 8
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SECTION: M&S CONTROL	SUBJECT: Create a D365 Purchase Requisition
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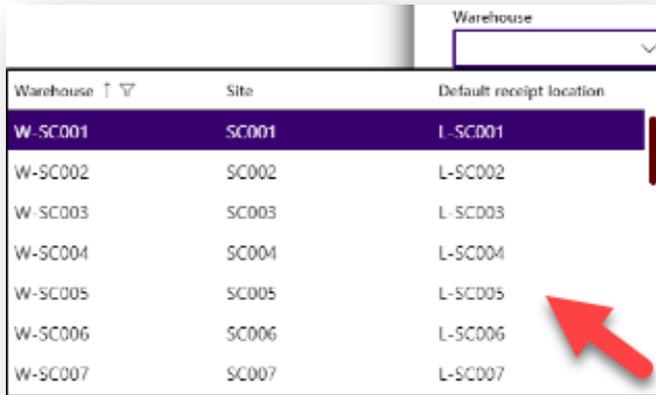
8. Click to open the “Warehouse” drop down menu (right side of the screen).



SECTION: M&S CONTROL

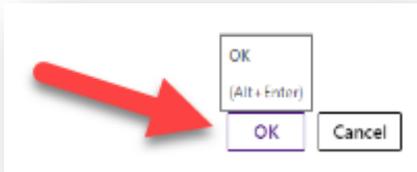
SUBJECT: Create a D365 Purchase
Requisition

9. Scroll to find and click the correct warehouse.



Warehouse	Site	Default receipt location
W-SC001	SC001	L-SC001
W-SC002	SC002	L-SC002
W-SC003	SC003	L-SC003
W-SC004	SC004	L-SC004
W-SC005	SC005	L-SC005
W-SC006	SC006	L-SC006
W-SC007	SC007	L-SC007

10. Click “OK” to confirm your selections (bottom left of the screen).



11. Click “OK” to confirm your selections.



12. Click to open the Reason drop down menu (under business justification).

APPROVED BY:
Tony MasseyEFFECTIVE DATE:
December 21, 2021

Page 6 of 8

SECTION: M&S CONTROL	SUBJECT: Create a D365 Purchase Requisition
----------------------	---

Purchase requisition header

ADMINISTRATION Purchase requisition: 0033561 Name: EPO or RO 3.25.21	Preparer: Andre Vega Status: Draft Requisition purpose: Consumption	DATE Requested date: 3/25/2021 Accounting date: 3/25/2021	BUSINESS JUSTIFICATION Reason: + v Details:	Warehouse: W-SC001 Site: SC001	Location: L-SC001
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13. Select the reason for the requisition.

BUSINESS JUSTIFICATION

Reason: W-SC001

Business just...	Description
Corp TM	Corporate Team Member's Requi...
GM	General Manager's Requisition
Officer	Officer's Requisition
OM	Office Manager's Requisition
RM - Corp	Regional Mgr's Corporate Requi...
RM - SC	Regional Mgr's Service Center R...
SM	Service Manager's Requisition

14. Click "Add line".

Purchase requisition lines

+ Add line | Add products | Cancel | Remove | Purchase requisition line | Financials | Inventory

✓	V...	Item number	Buying legal en...	Receiving operating unit	Item number	Procurement category	Product name	Site	Warehouse	Batch number
We didn't find anything to show here.										

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

APPROVED BY: Tony Massey	EFFECTIVE DATE: December 21, 2021	Page 7 of 8
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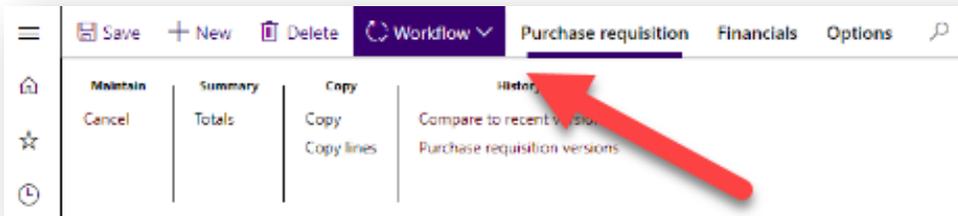
SECTION: M&S CONTROL	SUBJECT: Create a D365 Purchase Requisition
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Purchase requisition lines

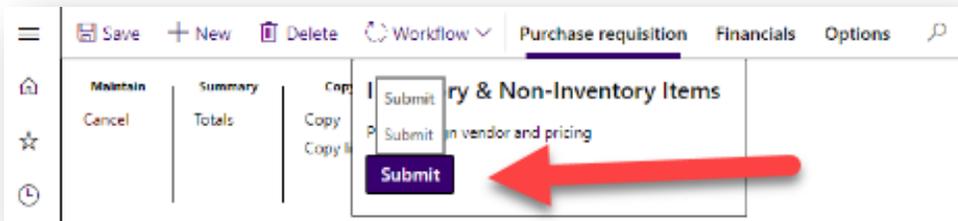
Line	Requester	Buying legal en...	Receiving operating unit	Item number	Procurement category	Product name	Quantity	Unit	Unit price	Net amount
0	Andre Vega	MSC							0.00	0.00

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

16. Click on “Workflow” (top menu bar).



17. Click “Submit” to verify the purchase requisition.



18. Click “Submit” to verify the final Purchase Requisition (bottom right of the screen).

