

SECTION: PURCHASING

SUBJECT: Approve a D365 Purchase Requisition

PP No.: 602-C**Section:** Purchasing**Subject:** Procedure- Approve a D365 Purchase Requisition**Approved By:** Tony Massey**Effective Date:** December 21, 2021**Last Reviewed Date:** December 21, 2021**Policy Owner:** Senior Director of Purchasing

Purchase Requisitions are used to order supplies needed to service customers and to run the service center. Service Managers create the purchase requisition. The General Managers approve all purchase requisitions. This includes both ROs and EPOs. For each pending requisition, the General Manager will receive an email notification.

- Regular Orders (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.

Process to Approve a D365 Purchase Requisition

1. Log-in to Microsoft D365.
2. Click on the Approval Required link (found under calendar).

APPROVED BY:
Tony MasseyEFFECTIVE DATE:
December 21, 2021

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

✓ ID	Subject	Document type	Due date time
✓ Purchase requisition: 0004628	Approval Required:- 0004628	Purchase requisition	8/1/2017 09:26:00

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

Purchase requisition header

ADMINISTRATION	Preparer: Darren A Valadez	DATES	BUSINESS JUSTIFICATION	Warehouse: W-SC148	Location: L-SC148
Purchase requisition: 0004628	Status: In review	Requested date: 7/26/2017	Reason: Service Manager's Requisition	Site: SC148	
Name: EPO SC148	Requisition purpose: Consumption	Accounting date: 7/26/2017	Details: EPO		

Purchase requisition lines

Line	Requester	Buying legal en...	Receiving operating unit	Item number	Procurement category	Product name	Quantity	Unit	Unit price	Net amount
1	Darren A Valadez	MSC		747269	INVENTORY ITEMS	LAWN-Blazon, 1 gallon, 4/case	2.00	Gallon	39.85	79.70
2	Darren A Valadez	MSC		736775	INVENTORY ITEMS	BORA-Bora Care Gl 4/case	96.00	Gallon	55.83	5,359.68
3	Darren A Valadez	MSC		776548P	INVENTORY ITEMS	PEST-Sprayer tip, TP9000E-SS, Stainless Steel	8.00	Each	7.85	62.80
4	Darren A Valadez	MSC		803504T	INVENTORY ITEMS	PRETREAT-Sprayer tip, TP8002E, Stainless, Boracare Pretreat	6.00	Each	7.30	43.80
5	Darren A Valadez	MSC		401150	INVENTORY ITEMS	PEST-CM Rat Glue Trap ABR 24X2 PK/Bx (1 Pk = 2 Traps)	1.00	Box	50.23	50.23

- Click “Workflow” (found in the top menu bar)..
- Click “Approve” (Inventory & Non-inventory items pulldown menu).

Workflow

Inventory & Non-Inventory Items

The Purchase Requisition 0004628 created as on 7/26/2017 10:32:00 AM by Darren A Valad

Service Center: 148,148,148,148,148.

Approve Reject More

- Click “Approve” (bottom right corner).

APPROVED BY:
Tony Massey

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