

Purchase Request Module

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Overview

Streamline procurement by enabling employees to submit purchase requests without needing vendor or item details. The Purchase Request app keeps everything inside Business Central—eliminating emails and spreadsheets—while maintaining your purchasing workflows. Requesters focus on what they need; purchasers handle sourcing and pricing. Integrated with approval workflows, the Purchase Request Module app gives your team a straightforward way to request what they need while letting your purchasing department do what they do best.

Installation & Setup

This app is licensed through Microsoft. To purchase and deploy it in your production environment, follow the instructions in the link below:

[How to purchase and license the app through Microsoft AppSource](#)

Setup

Assign User Permission Set

- 1) **Open** the **User List** page.
- 2) On the Users list, **select** users that will require permission to the app.
- 3) On each of the selected **User Cards**, go to the **User Permission Sets** tab, add the necessary permission sets based on the role of the user:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ APEPURCHREQUEST	APEPURCHREQUEST		Purchase Request Module	System

APEPURCHREQUEST - Assign this to the users that will be using this app.



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Assisted Setup

- 1) **Open** the Assisted Setup page and **select** “Set Up Purchase Request” in the Purchase Request Setup group to launch the setup wizard

▼ Purchase Request Setup	<input type="checkbox"/>	–	
Set Up Purchase Request	<input type="checkbox"/>	Read	Set Up Purchase Request

- 2) **Click** Next to begin the setup

Purchase Request Setup Wizard



Welcome to Purchase Request Setup
You are going to initiate the Setup Process for Purchase Request.


Following the Setup Process to Configure the Purchase Request WorkFlow.
Choose Next To Add the Purchase Request WorkFlow.

Back **Next** Finish



- 3) **Select** the No. Series to be used for Purchase Request records and Purchase Orders Converted from Purchase Request and **click** Next to continue.

Purchase Request Setup Wizard



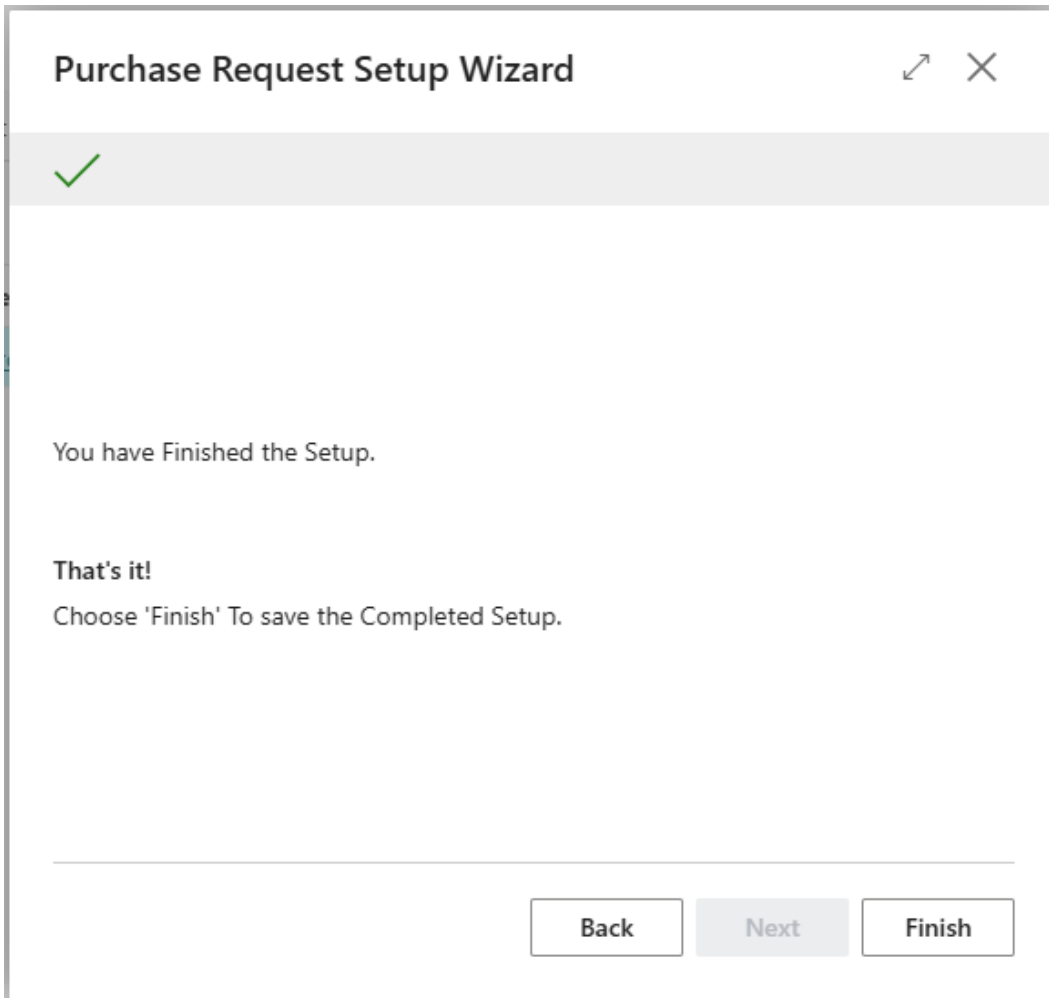
This Step will Configure Number Series and add the Purchase Request WorkFlow Template. Press Next to Proceed.

Select Number Series for Purchase Request

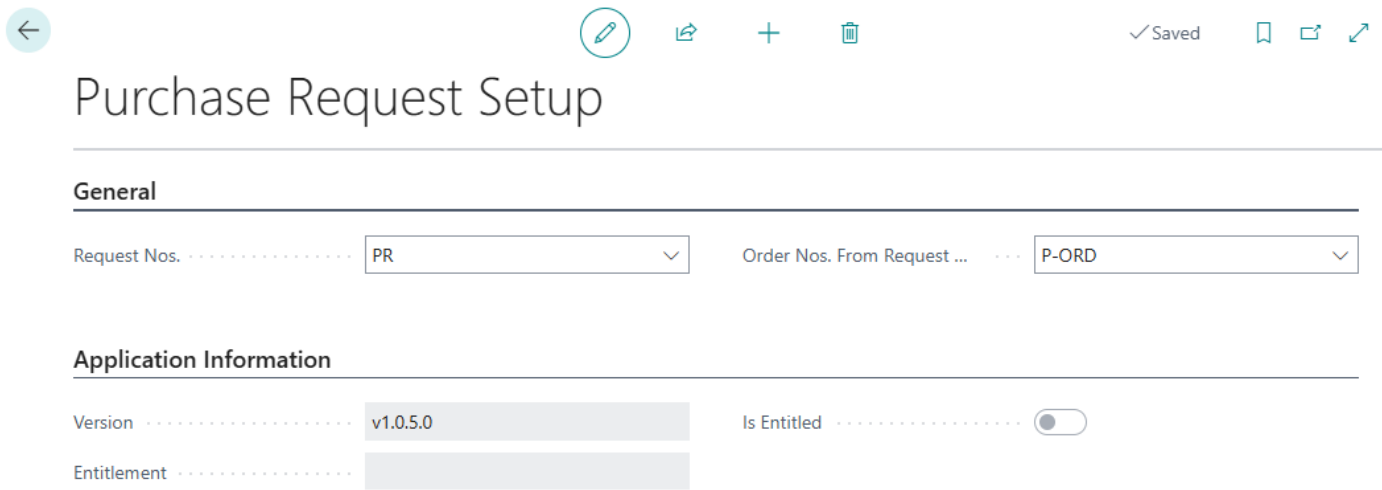
Select Number Series for Purchase Request Converted Orders



4) **Click** Finish to complete the setup



The No. Series settings can be updated by going to the Purchase Request Setup page



The screenshot shows the 'Purchase Request Setup' page. At the top, there is a navigation bar with a back arrow, a pencil icon, a share icon, a plus icon, and a trash icon. On the right side of the navigation bar, there is a 'Saved' status with a checkmark, and icons for bookmark, share, and refresh. The main title 'Purchase Request Setup' is centered below the navigation bar. The page is divided into two sections: 'General' and 'Application Information'. The 'General' section contains two dropdown menus: 'Request Nos.' with the value 'PR' and 'Order Nos. From Request ...' with the value 'P-ORD'. The 'Application Information' section contains a 'Version' field with the value 'v1.0.5.0', an 'Entitlement' field which is currently empty, and an 'Is Entitled' toggle switch which is currently turned off.

Purchase Request Approvals

A Default Purchase Request workflow template is created during installation of the app.

- 1) **Open** the Workflow Templates list
- 2) **Select** Purchase Request Approval Workflow APC



Workflow Templates

Workflow Templates

Search | **New** | Manage | Actions ▾ | Fewer options

⤴ Description

Incoming Document to General Journal Line OCR Workflow

Incoming Document OCR Workflow

▾ **Purchases and Payables**

Vendor Approval Workflow

▾ **Purchase Documents**

Purchase Request Approval Workflow APC

Blanket Purchase Order Approval Workflow

Purchase Credit Memo Approval Workflow

Purchase Invoice Approval Workflow

Purchase Invoice Workflow

3) Click New >> New Workflow from Template

Workflow Templates

Workflow Templates

Search | **New** | Manage | Actions ▾ | Fewer options

New Workflow from Template

Incoming Document to General Journal Line OCR Workflow

Incoming Document OCR Workflow

▾ **Purchases and Payables**

4) Adjust the new workflow if necessary and **Enable** the workflow



Workflow



✓ Saved

MS-APE-PRWFT-01 · Purchase Request Approval Workflow APC

[Import from File](#) [Export to File](#) [Workflow Step Instances](#) [Archived Workflow Step Instances](#) | Automate [Fewer options](#) ⓘ

Code MS-APE-PRWFT-01

Description Purchase Request Approval Workflow APC

Category PURCHDOC ▾

Enabled

Workflow Steps | ◀ Decrease Indent ▶ Increase Indent Delete Event Conditions New Line Delete Line

When Event	On Condition	Then Response
→ Approval of a purchase request is requested.	(View filter details)	(+) Add record restriction.
An approval request is approved.	Pending Approvals: 0	(+) Remove record restriction.
An approval request is approved.	Pending Approvals: >0	Send approval request for the record and create a notificati
An approval request is rejected.	<Always>	(+) Reject the approval request for the record and create a r
An approval request for a purchase request doc...	(View filter details)	(+) Cancel the approval request for the record and create a
An approval request is delegated.	<Always>	Send approval request for the record and create a notificati



5) Currently, the workflow supports approvals using **Workflow User Groups**.

Approval Chains are not supported at this time and are planned for a future release.

Workflow Responses - Approval of a purchase request is requested.

Response	
Add record restriction.	
Set document status to Pending Approval.	
→ Create an approval request for the record using approver type Workflow User Group and workflow user group code <Wo...	⋮
Send approval request for the record and create a notification.	

Options for the Selected Response

Show Confirmation Message

Due Date Formula

Delegate After

Approver Type

Workflow User Group Code *

[Open Approval User Setup](#)

User Guide

Requestor

This section is for employees who need to request goods or services.

- 1) **Open** Purchase Request list.
- 2) **Click New** to create a new purchase request.

Purchase Requests

No. ↑	Expected Receipt Date	Request User ID	Purchase Order No.	Description	Total Suggest Amount (LCY)
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- 3) **Enter** necessary fields in the General group.

Purchase Request ✎ ↗ + 🗑

REQ-0000002

📄 Make Order 🖨 Print | Actions ▾ Related ▾ Automate ▾ Fewer options

General Show less

Request Date	<input type="text" value="7/31/2025"/>	Specific Vendor	<input type="checkbox"/>
Expected Receipt Date	<input type="text" value="8/21/2025"/>	Location Code	<input type="text" value="MAIN"/>
Purchaser Code	<input type="text" value="HR"/>	Currency Code	<input type="text"/>
Responsibility Center	<input type="text"/>	Department Code	<input type="text"/>
Request User ID	<input type="text" value="DARWIN"/>	Customergroup Code	<input type="text"/>
Purchase Item Type	<input type="text"/>	Status	<input type="text" value="Open"/>

- 4) **Enter** details of the purchase request in the lines section.

Lines | Manage | Line | Functions | Order

New Line Delete Line

Request Content	Location Code	Request Quantity	Requested Unit of Measure Code	Request Unit Cost	Total Request Amount	Type	No.	Description
→ Need new desk chairs	MAIN	10	EA	150.00	1,500.00			

Purchaser

- 1) Fill purchasing information based on request, add the Type, No., and update the Direct Unit Cost.

Lines | Manage | Line | Functions | Order

New Line Delete Line

Request Content	Total Request Amount	Type	No.	Description	Description 2	Direct Unit Cost Excl. Tax	Amount	Unit of Measure Code	Spec Vendor
→ Need new desk chairs	1,500.00	Item	1908-S	LONDON Swivel Chair, blue		148.10	1,481.00	PCS	

- 2) Enter a Vendor in the Specific Vendor No.

Lines | Manage | Line | Functions | Order

New Line Delete Line

Request Content	Direct Unit Cost Excl. Tax	Amount	Unit of Measure Code	Specific Vendor No.	Expected Receipt Date	C/P
→ Need new desk chairs	148.10	1,481.00	PCS	10000	8/21/2025	F

- 3) If using Approvals, **click** on Actions>>Request Approval>>Send Approval Request. This will trigger the Purchase Request Approval workflow and change the Status to Pending Approval. Once approved, the status will change to Released



Purchase Request

REQ-0000002

Make Order Print Actions Related Automate Fewer options

General

Request Date
Expected Receipt Date 8/21/2025

Release
Request Approval
Approval

Send Approval Request
Cancel Approval Request

- a. If not using Approvals, **click** on Actions>>Release>>Release

Purchase Request

REQ-0000002

Make Order Print Actions Related Automate Fewer options

General

Request Date
Expected Receipt Date 8/21/2025

Release
Request Approval
Approval


Release
Reopen
Processing

- 4) Once the order is Released, the request is ready to be converted to a Purchase Order. The purchaser will **click** on the Make Order action and follow the prompts to create the order.



Purchase Request

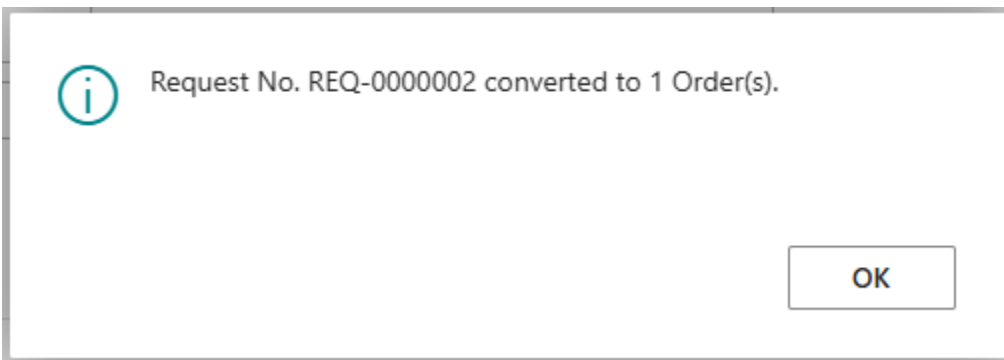
REQ-0000002

 Make Order |  Print | Actions ▾ | Related ▾ | Automate ▾ | Fewer options

General

Request Date  Specific

5) A notification will pop up to signify that the request has been converted.



6) Once the request has been fully converted, the Status will change to Closed



Purchase Request



REQ-0000002

Make Order Print | Actions ▾ Related ▾ Automate ▾ Fewer options

General

Show less

Request Date	<input type="text" value="7/31/2025"/>		Specific Vendor	<input type="checkbox"/>
Expected Receipt Date	<input type="text" value="8/21/2025"/>		Location Code	<input type="text" value="MAIN"/>
Purchaser Code	<input type="text" value="HR"/>	▾	Currency Code	<input type="text"/> <input type="text" value="..."/>
Responsibility Center	<input type="text"/>	▾	Department Code	<input type="text"/>
Request User ID	<input type="text" value="DARWIN"/>	▾	Customergroup Code	<input type="text"/>
Purchase Item Type	<input type="text"/>	▾	Status	<input type="text" value="Closed"/>

Appendix

Purchase Request Header

Field

- **Request Date**
 - The date the Purchase Request is created.
- **Expected Receipt Date**
 - Specifies the date you expect the items to be available in your warehouse.
- **Purchaser Code**
 - The code of the Purchaser that is responsible for processing the purchase request.
- **Request Used ID**
 - User ID for the Purchase Request. Default is the creator of the Purchase Request.
- **Responsibility Center**
 - Specifies the code of the responsibility center, such as a distribution hub, that is associated with the involved user, company, customer, or vendor.
- **Purchase Item Type**
 - This is custom data to help organize what type of request is being created. The Workflow can be configured with specific Item type for approval.
- **Specific Vendor:**
 - This toggle is used when the company follows a Request for Quotation (RFQ) process. If there is an excluded vendor (i.e., a vendor specifically authorized by the company), the purchasing department or requesting department can enable this toggle to indicate that this Purchase Request must be fulfilled by the specified vendor.
- **Location Code**
 - Specifies the code for the location where the items on the line will be located.
- **Currency Code**
 - The Currency Code of this Purchase Request.
- **Status**
 - **Open** - The Purchase Request can be edited.
 - **Released** - The Purchase Request is approved. Before the Purchase Request Line is converted. The Type and Item No. can be changed.
 - **Pending Approval** - The document is in the approval process and cannot be edited.
 - **Rejected** - Approval of this request has been rejected

- **Processing** - Purchase Request lines are partially converted to the purchase orders.
- **Closed** - All Purchase Request lines are converted to the purchase orders.

Actions

- **Make Order**
 - Converts purchase request into orders. The Status of the request must be either Processing or Released.
- **Print**
 - Prints the Purchase Request report.
- **Release**
 - The Status is set to Release and the Purchase Request is ready to be converted to the Purchase Order.
- **Reopen**
 - The Status is set to Open for editing.
- **Processing**
 - The Status is set from Release to Processing to prevent editing of the Purchase Request.
- **Send Request Approval Request**
 - Send Approval Request to the approver of the Purchase Request.
- **Cancel Request Approval Request**
 - Cancel the Approval Request sent to the approver.
- **Set Created to Open Entry**
 - Set all Approval Entries with status "Created" for this Purchase Request to "Open".
- **Reset Approval**
 - Clear approval request of this purchase request and set status to "Open"

Purchase Request Lines

- **Request Content**
 - Short description of what needs to be purchased
- **Location Code**
 - Location where the purchase is needed
- **Request Quantity**
 - The quantity needed to be purchased
- **Requested Unit of Measure Code**
 - How the quantity is measured.
- **Request Unit Cost**
 - How much per unit of measure is requested to spend



- **Total Request Amount**
 - Total amount expected to be spent for line.
- **Type**
 - The line type that will be used on the purchase order line.
- **No.**
 - The system code for what is being purchased.
- **Description**
 - Description to be passed to the Description field of the purchase line
- **Description 2**
 - Description to be passed to the Description 2 field of the purchase line.
- **Direct Unit Cost Excl. Tax**
 - The cost per unit of measure of what will be purchased.
- **Amount**
 - The amount of the line based on Request Quantity and Direct Unit Cost Excl. Tax
- **Unit of Measure Code**
 - The Unit of Measure code to use on purchase line
- **Specific Vendor No.**
 - Specifies the Vendor to use when creating the purchase order
- **Purchase Order No.**
 - Specifies the Purchase Order where the request line has been added.
- **Purchase Order Line No.**
 - Specifies the Line No. of the Purchase Order where the request line has been added.