# Purchase Request Module

# Table of Contents

Prepared by APC Dynamics

# 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](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:

| User Permission Sets | | New Line | Delete Line | Permissions | | |
|---|---|---|---|---|---|---|
| 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** | ☐ | _ | |
| Set Up Purchase Request | ☐ | 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

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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

| PR | ⌄ |
| --- | --- |

Select Number Series for Purchase Request Converted Orders

| P-ORD | ⌄ |
| --- | --- |

Back    **Next**    Finish

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

## Purchase Request Setup Wizard

✓

You have Finished the Setup.

**That's it!**

Choose 'Finish' To save the Completed Setup.

Back | Next | Finish

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



## 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

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Workflow Templates

| | | | | |
|---|---|---|---|---|
| 🔍 | 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

| | | | | |
|---|---|---|---|---|
| 🔍 | 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

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Workflow

# 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) **Open** Approval User Setup page and define the Approval Limits in the Request Amount Approval Limit and Unlimited Request Approval fields

Approval User Setup　　　　　✓ Saved　🔖　🗗

🔗∨　🔍　🗂　|　+ New　📋 Edit List　🗑 Delete　📋 Approval User Setup Test　🧩 Notification Setup　|　More options　📤　▽

| User ID ↑ | Salespers./Pu... Code | Approver ID | Sales Amount Approval Limit | Unli... Sales App... | Purchase Amount Approval Limit | Unli... Pur... App... | Request Amount Approval Limit | Unlimited Request Approval | Substitute |
|---|---|---|---|---|---|---|---|---|---|
| → DARWIN ∨ ⋮ | | | | ☑ | | ☑ | | ☑ | |
| KATE | | | 500 | ☐ | 500 | ☐ | 500 | ☐ | |
| ZOE | | | 2000 | ☐ | 2000 | ☐ | 2000 | ☐ | |

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# 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) |
|---|---|---|---|---|---|

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 | 7/31/2025 | | Specific Vendor | (toggle) |
| Expected Receipt Date | 8/21/2025 | | Location Code | MAIN |
| Purchaser Code | HR | | Currency Code | |
| Responsibility Center | | | Department Code | |
| Request User ID | DARWIN | | Customergroup Code | |
| Purchase Item Type | | | Status | Open |

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

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| 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.

| Request Content | | Total Request Amount | Type | No. | Description | Description 2 | Direct Unit Cost Excl. Tax | Amount | Unit of Measure Code | Spe Ven |
|---|---|---|---|---|---|---|---|---|---|---|
| → 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.

| Request Content | | Direct Unit Cost Excl. Tax | Amount | Unit of Measure Code | Specific Vendor No. | Expected Receipt Date | G P |
|---|---|---|---|---|---|---|---|
| → Need new desk chairs | ⋮ | 148.10 | 1,481.00 | PCS | 10000 ⌄ | 3/21/2025 | 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

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Purchase Request

# REQ-0000002

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

**General**

    Release         ＞

    Request Approval ＞    **Send Approval Request**

Request Date  ··············     Approval        ＞    ✕ Cancel Approval Request     📅

Expected Receipt Date ··········   8/21/2025                  📅

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

Purchase Request

# REQ-0000002

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

**General**

    Release         ＞    **Release**

    Request Approval ＞    🔄 Reopen

Request Date  ··············     Approval        ＞    📇 Processing           📅

Expected Receipt Date ··········   8/21/2025                  📅

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.

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Purchase Request

# REQ-0000002

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

## General

Request Date · · · · · · · · · · · · · · · · · · ·    7/31/2025    📅    Specific

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

ⓘ    Request No. REQ-0000002 converted to 1 Order(s).

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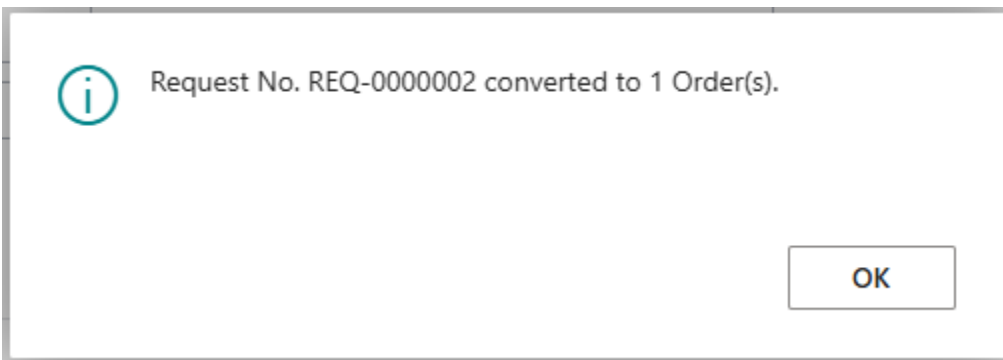
6) Once the request has been fully converted, the Status will change to Closed

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Purchase Request

# REQ-0000002

📄 Make Order    📄 Print    |    Actions ⌄    Related ⌄    Automate ⌄    Fewer options

## General                                                                    Show less

| | | | |
|---|---|---|---|
| Request Date · · · · · · · · · · | 7/31/2025 📅 | Specific Vendor · · · · · · · · · | ⬤ |
| Expected Receipt Date · · · · · | 8/21/2025 📅 | Location Code · · · · · · · · · · | MAIN ⌄ |
| Purchaser Code · · · · · · · · · | HR ⌄ | Currency Code · · · · · · · · · · | ⌄ ··· |
| Responsibility Center · · · · · · | ⌄ | Department Code · · · · · · · · | ⌄ |
| Request User ID · · · · · · · · · | DARWIN ⌄ | Customergroup Code · · · · · | ⌄ |
| Purchase Item Type · · · · · · · | ⌄ | Status · · · · · · · · · · · · · | 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

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

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

## Actions

- **Make Order**

  o Converts purchase request into orders. The Status of the request must be either Processing or Released.

- **Print**

  o Prints the Purchase Request report.

- **Release**

  o The Status is set to Release and the Purchase Request is ready to be converted to the Purchase Order.

- **Reopen**

  o The Status is set to Open for editing.

- **Processing**

  o The Status is set from Release to Processing to prevent editing of the Purchase Request.

- **Send Request Approval Request**

  o Send Approval Request to the approver of the Purchase Request.

- **Cancel Request Approval Request**

  o Cancel the Approval Request sent to the approver.

- **Set Created to Open Entry**

  o Set all Approval Entries with status "Created" for this Purchase Request to "Open".

- **Reset Approval**

  o Clear approval request of this purchase request and set status to "Open"

## Purchase Request Lines

- **Request Content**

  o Short description of what needs to be purchased

- **Location Code**

  o Location where the purchase is needed

- **Request Quantity**

  o The quantity needed to be purchased

- **Requested Unit of Measure Code**

  o How the quantity is measured.

- **Request Unit Cost**

  o 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.