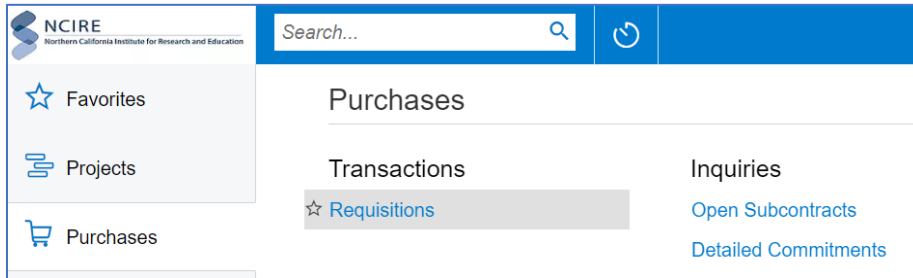

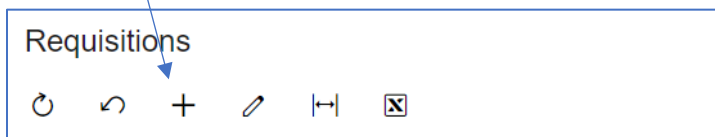


Create a requisition

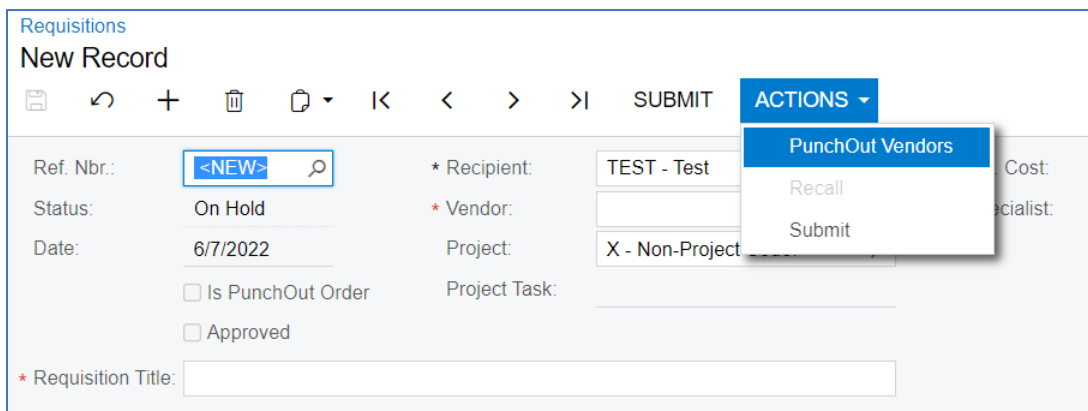
1. On the left menu, select “Purchases → Requisitions”.



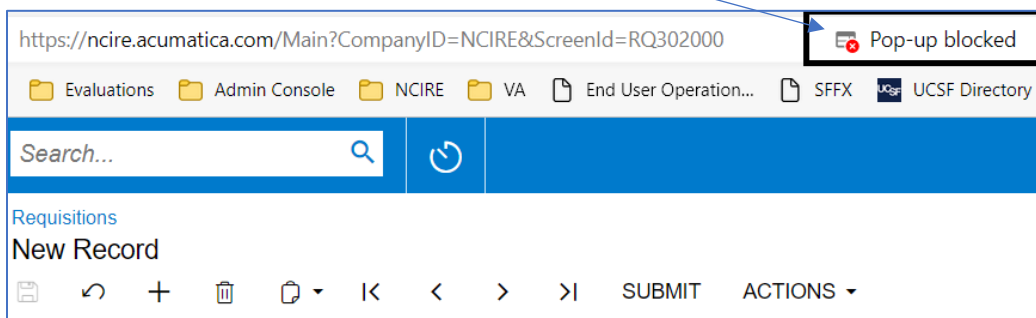
2. Click the  button to start a new requisition.



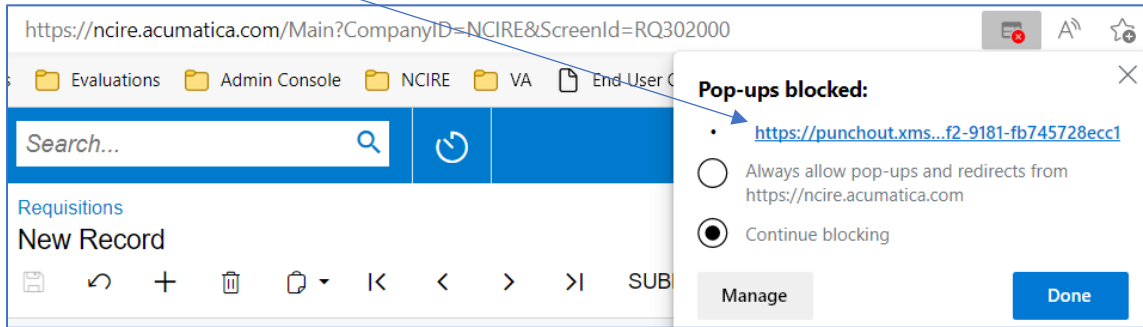
3. If you want to create a punchout requisition, select “Actions → Punchout Vendors”. If you want to create a non-punchout requisition, proceed to step 4.



If the pop-up blocker message comes up, click on it to open the details.



Then, click on the URL.




The punchout vendor selection page should appear. Click on the vendor's logo and it will take you to the vendor's B2B site. Once you've filled the shopping cart on the vendor's site and submit the order, all items will be returned to Acumatica.

4. At the header section, the following fields are required.


- Requisition Title
- Recipient (this is the person who should receive the items)
- Vendor
- Project
- Project Task (the default task is inserted automatically, change as needed)

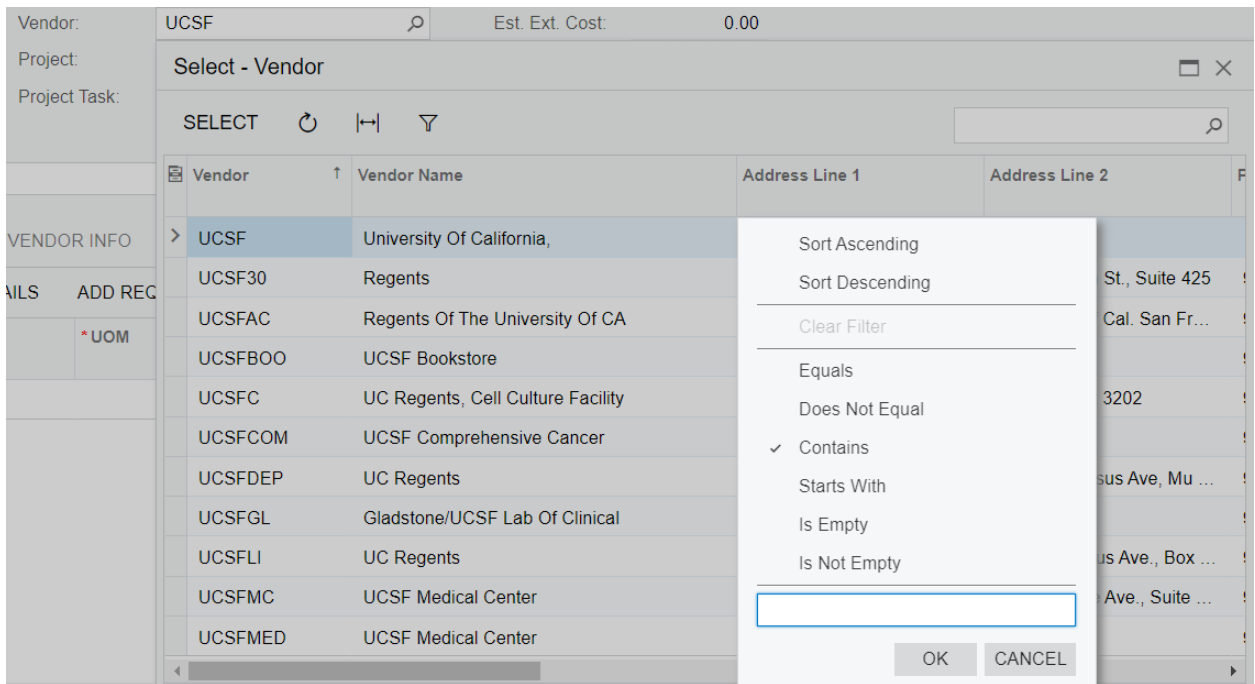
Notes


You may use the Tab key to navigate through the section. Press the Tab key to move to the next field or press Shift + Tab to move to the previous field.

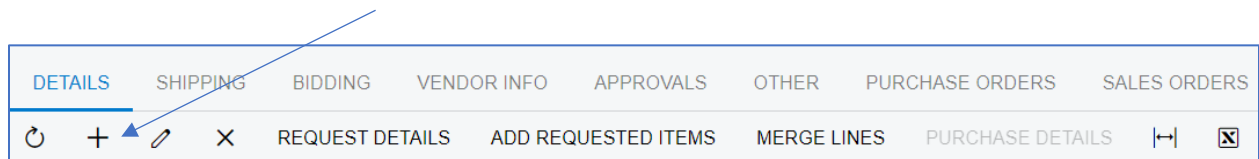
Any field with the magnify class icon  has lookup function. You may type directly in the textbox, and the suggested list will be shown as you type.

Ref. Nbr.:	<NEW>	* Recipient:	TEST - Test	Project Task:	
Status:	On Hold	Vendor:	ucsf	Creator:	TEST
Date:	6/1/2022	Project:	REGUCSE - Regents Of The Univ. Of Cal.	Est.:	0.00
	<input type="checkbox"/> Is PunchOut Order		REGUNI03 - Regents, UCSF	Est.:	
	<input type="checkbox"/> Approved		UCREG27 - UCSF		
Requisition Title:			UCREG89 - UCSF Genomics Core Facility		
			UCREG90 - UCSF Es Cell Targeting Core		

You may also click on the magnify class icon  to bring up the filter screen. Simply click on the column header to activate the filter condition menu. You may apply filter to more than one column.



5. On the “Details” tab, click the  button to add a new line.



The following fields are required for each line item.

- Catalog #
- Item Description
- Qty
- Unit Cost
- Required Date
- Item Type (only requires for punchout requisition)

6. If you need to remove a line item, simply select the line item and then click the **X** button.

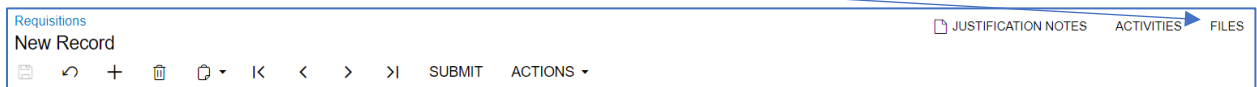


DETAILS		SHIPPING	BIDDING	VENDOR INFO	APPROVALS
REQUEST DETAILS		ADD REQUESTED ITEMS			
<input type="checkbox"/>	<input type="checkbox"/>	Line Nbr.	* Catalog #	Item Description	Qty
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	ASK-120GB	Apricorn Aegis Secure Key 3.0 1...	2.00
<input type="checkbox"/>	<input type="checkbox"/>	2	1000019P	PRINTER, HP 1200SE	1.00

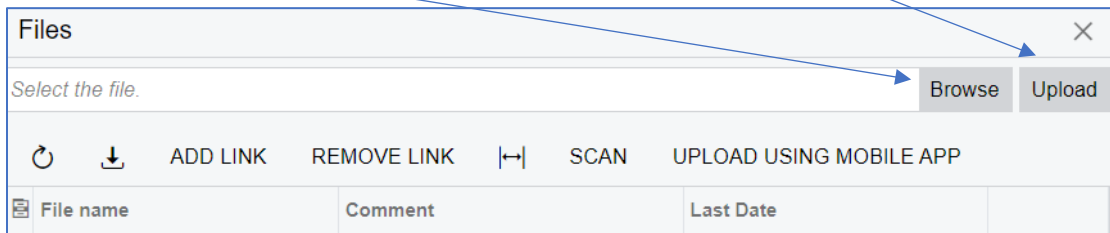
7. Click on the Justification Notes section to enter justification note.



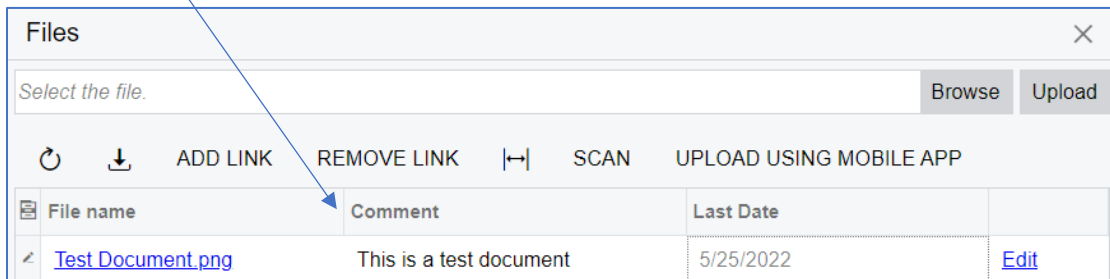
8. Click on the Files section to attach file(s).



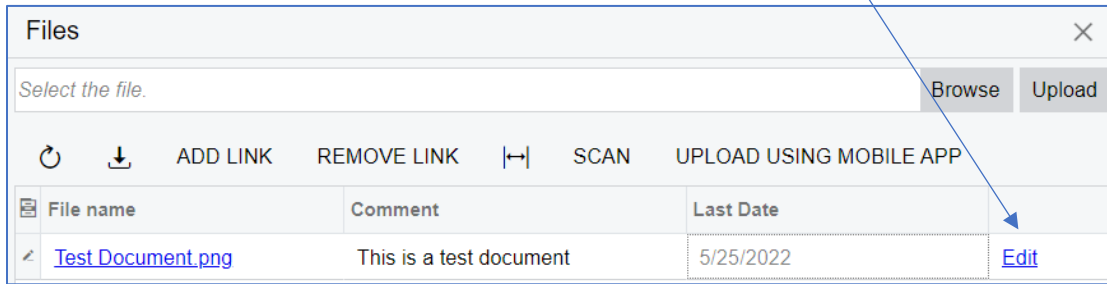
Click the "Browse" button to select a file and then click the "Upload" button.




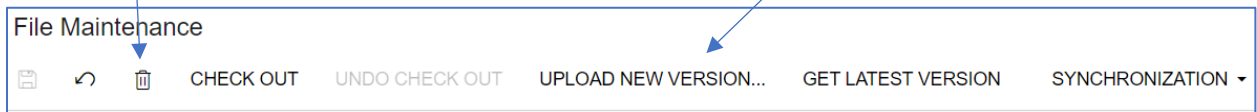
Add a comment to describe the file if needed.



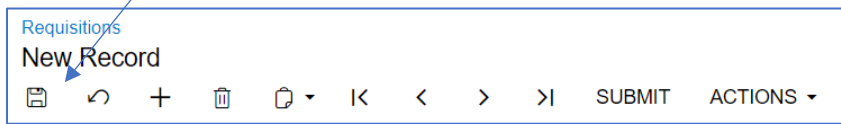
To remove the attached file or upload a new version, click on the “Edit” link. It should open a new tab.



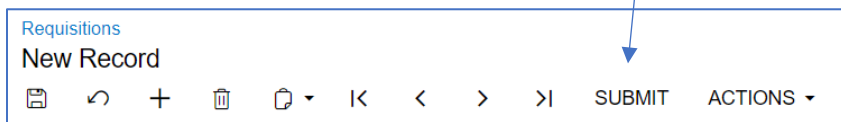
Click the  button to remove the file completely or click “Upload New Version” to update the file.



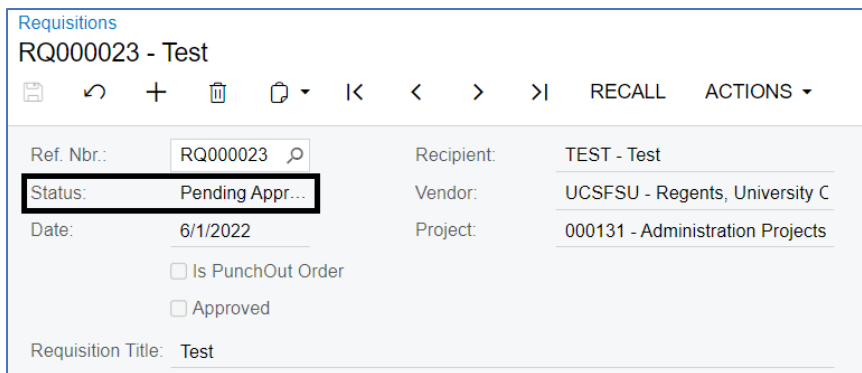
9. Click the Save button to save the record.



10. To submit the requisition for approval, click the “Submit” button.



The status should change to “Pending Approval”.



Recall a requisition

1. Open the requisition.
2. There are two methods available:

- Click the "Recall" button.

Ref. Nbr.:	RQ000023	Recipient:	TEST - Test
Status:	Pending Appr...	Vendor:	UCSFSU - Reg
Date:	6/1/2022	Project:	000131 - Admin

- Go to "Actions → Recall".