Request Document System – Help Document

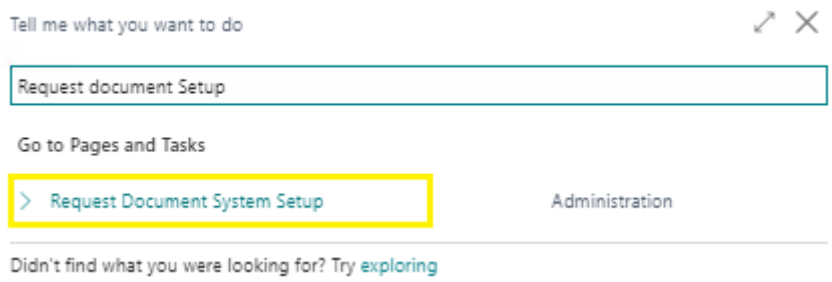
I. Administration Setup

This section will describe how an admin account can setup the Request Doument System. Below shows how an initial setup of the extension is done. Together with other setup that are needed for additional configuration needed by process.

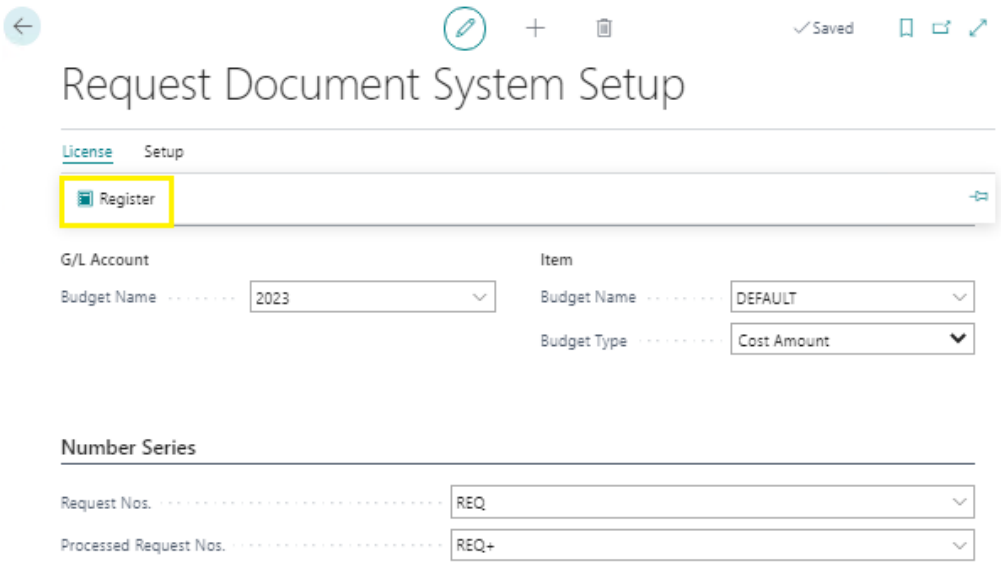
A. Setup Request Document Setup

Request document setup is the configuration page of the extension, this will control the licensing, no. series and budget for comparison used in the request process.

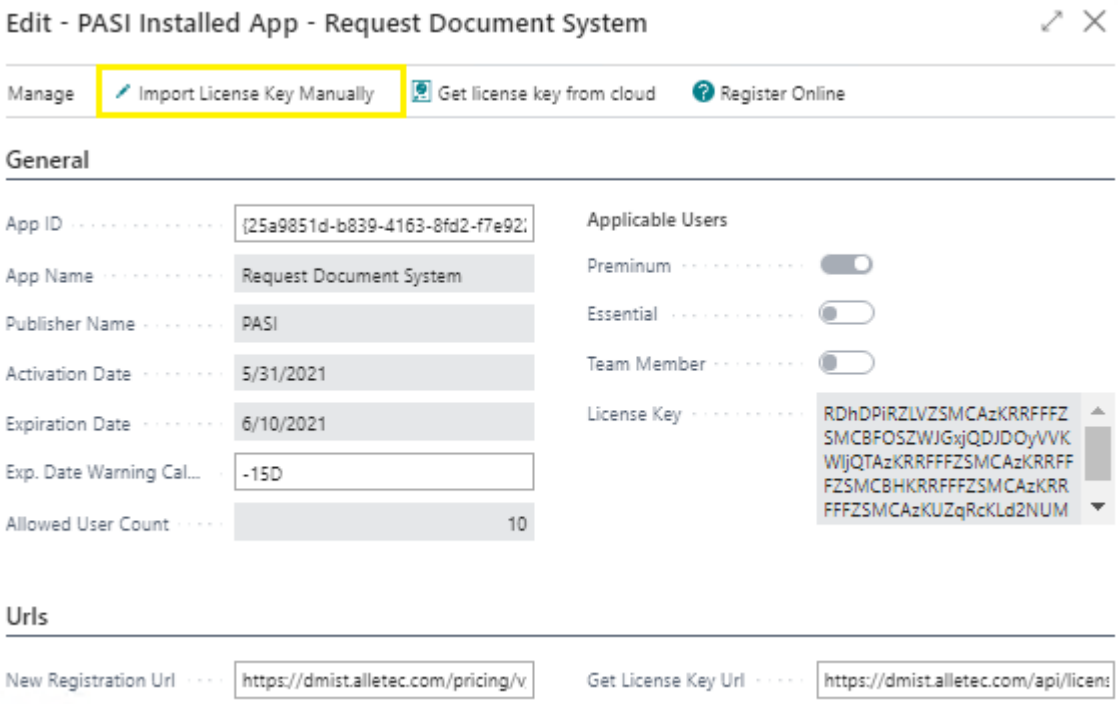
1. Search for **Request Document Setup.**



2. On the license tab, click **Register.** This will be for the license key registration.



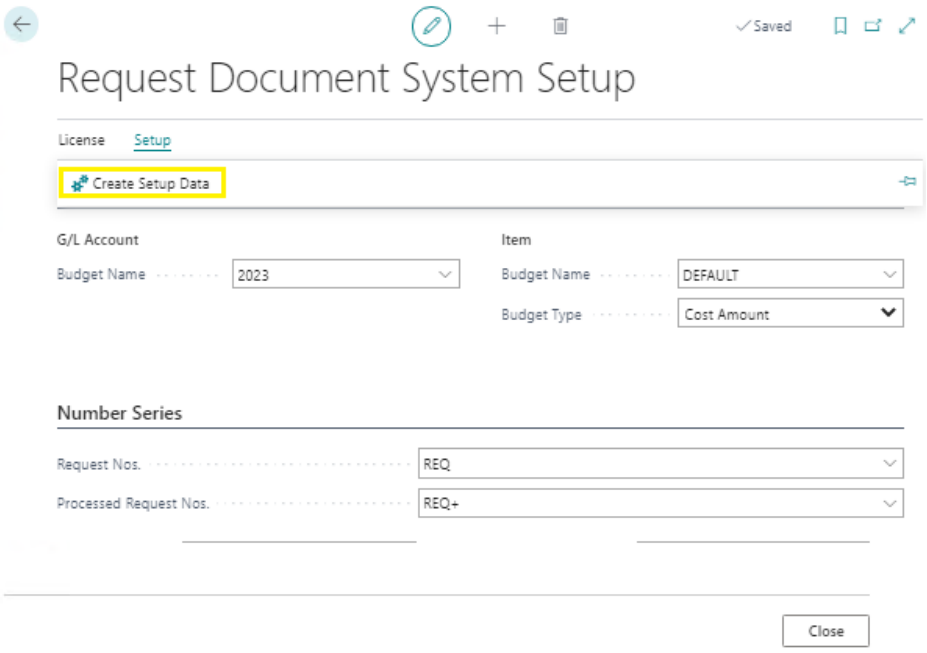
3. Slect the **Import License Key** to manaually paste the purchased key in the dialog box that will appear.



4. Details of the license should appear in the window after confirming the key. Elements like the image above should be available.

5. Once license is confirmed and saved, go back to the Request Document Setup page.

6. Click **Create Setup Data** to import the initial configuration of the extension.



7. Initial configuration wil include the ollowing:

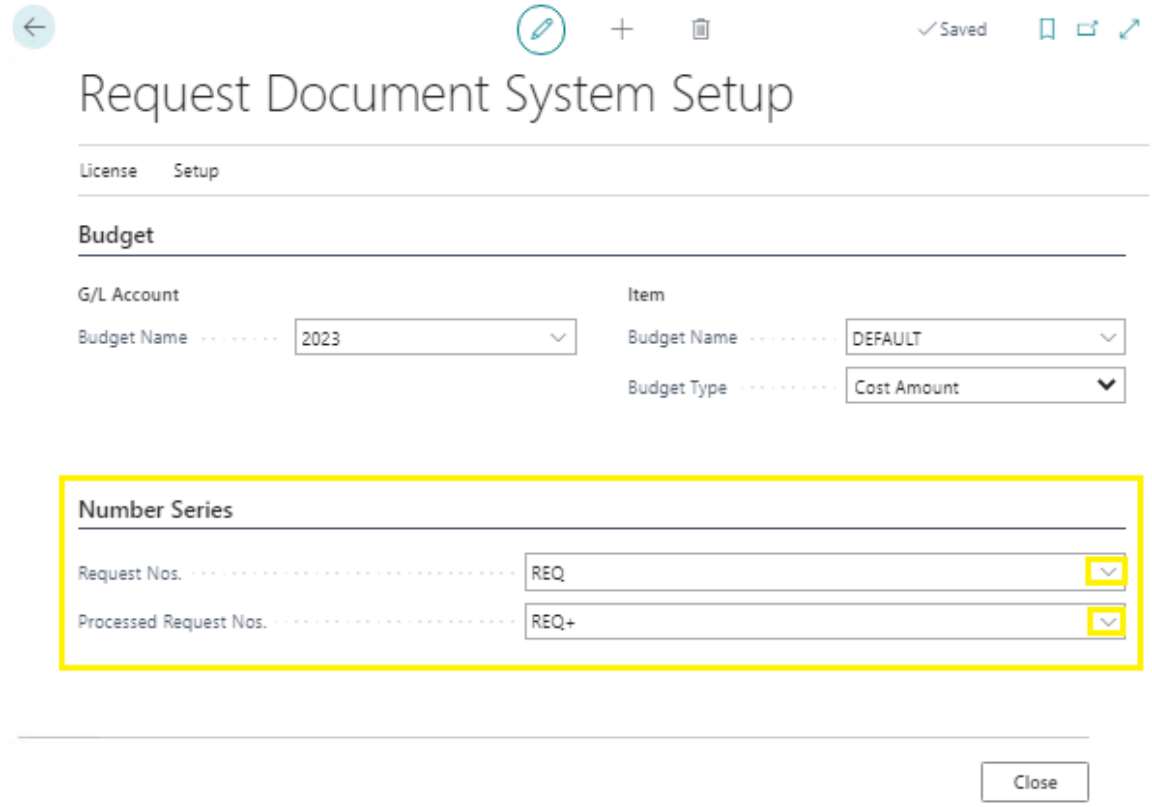
   a. **Request Codes –** used as an indentifier for the requests' target document

   b. **No. Series** – an initial series for the request list and processed request. These can be modified based on the users preference.

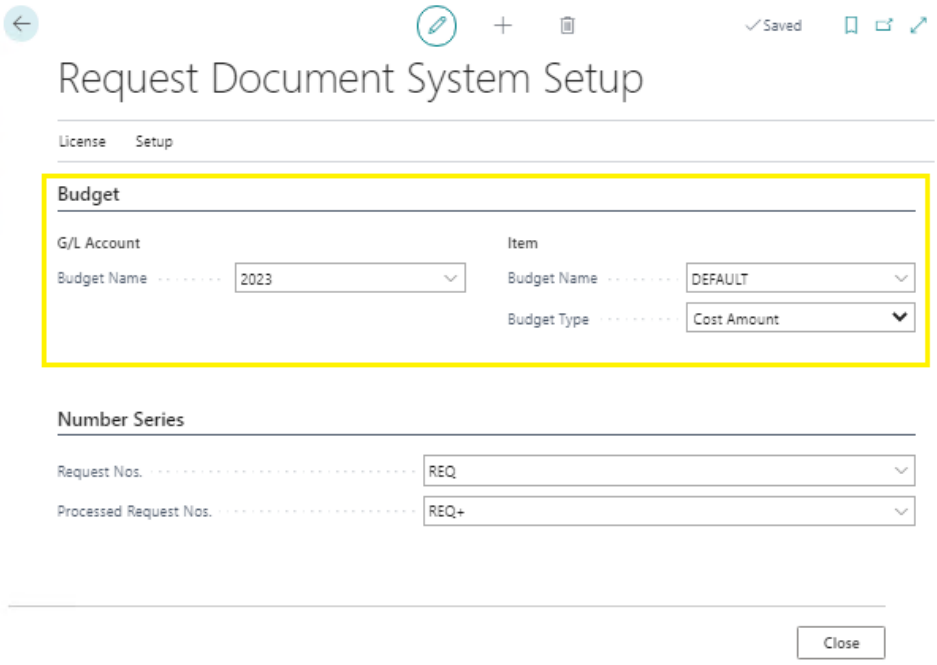
   c. **Workflow Template** – a template modeled from the standard Business Central workflow. This will help so that user will not have to mofidy or create workflow events.

8. After create setup data, admin may now **Assign No. Series.** Below is an image of the created no. series already assign in the number series for request documents.

   Click the arrow down for selecting a different no. series.



9. **Budget** tab is for selecting the current budget that is followed on requests. This is to optimized process of communicating with other people to check allowed amount to purchase.

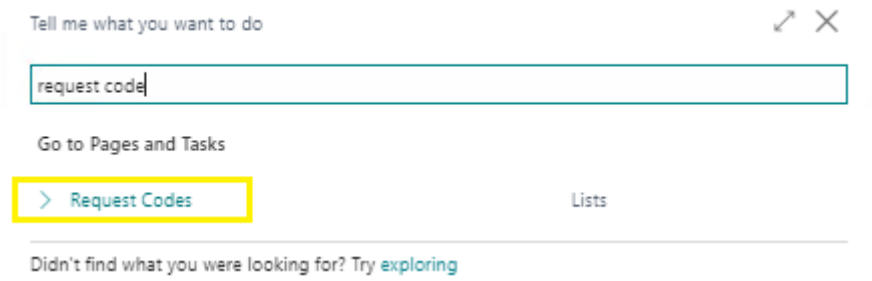


a. Then **Close** page to begin using the extension**.**

B. Create Request Code

This is used for request document as an identifier of the target document where the request will be processed.

1. Search for the **Request Code** in the search box and seect the right link.



2. A window of configured request code ist will appear.

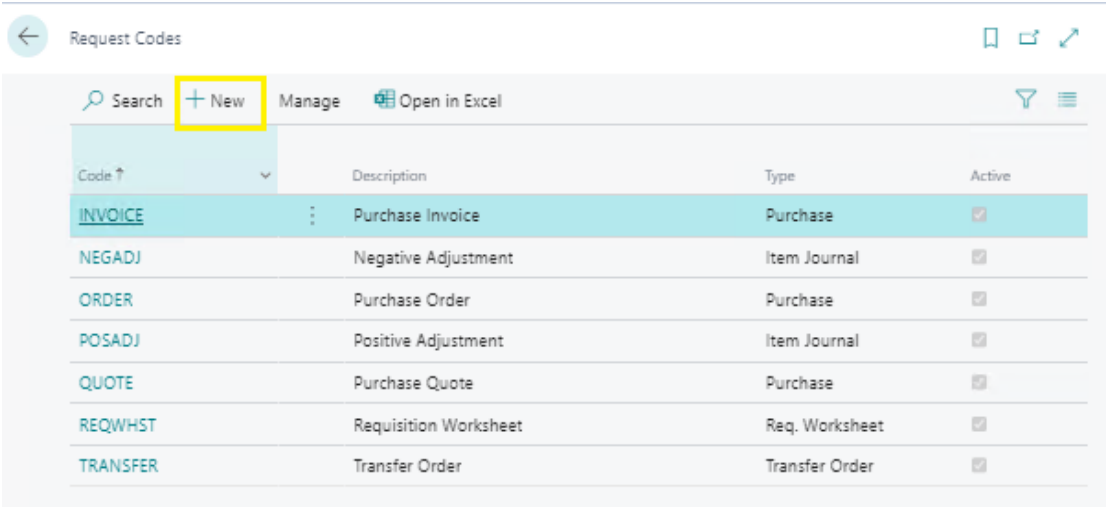
a. **Code –** will be tagged in the request document

b. **Description –** a longer name that describes the code

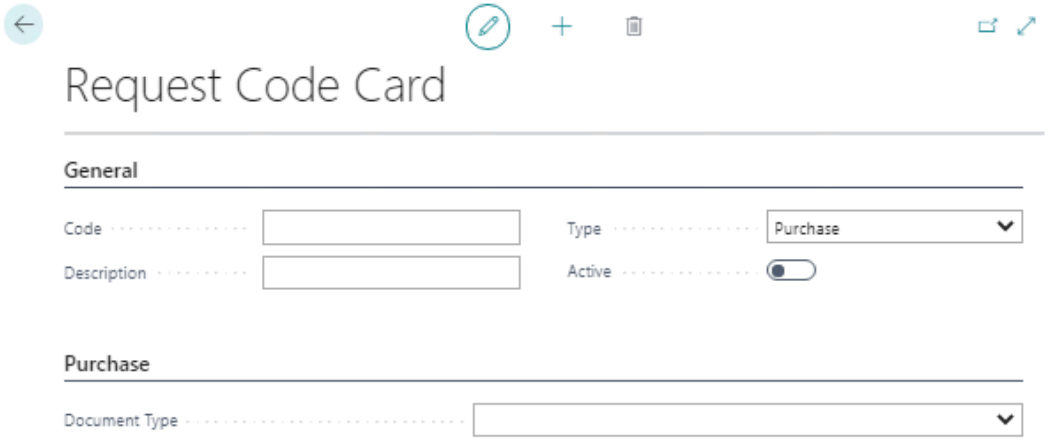
c. **Type –** refers to what type of document it will create.

d. **Active -** an indicator if a request code can be used.

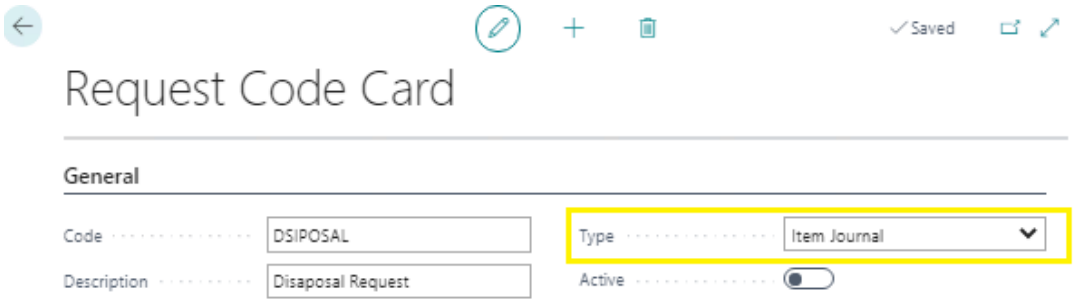
3. To create a new request code not included in the available list, click **New.**



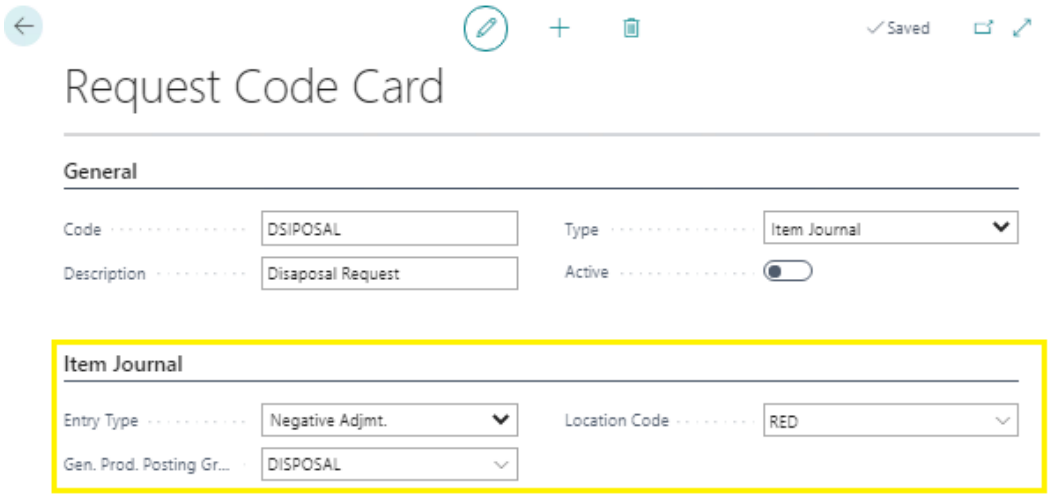
4. Populate the General tab for a code and description that will be used. In this case, we created a DISPOSAL code which will be used for adjustments that should be tagged with disposal.



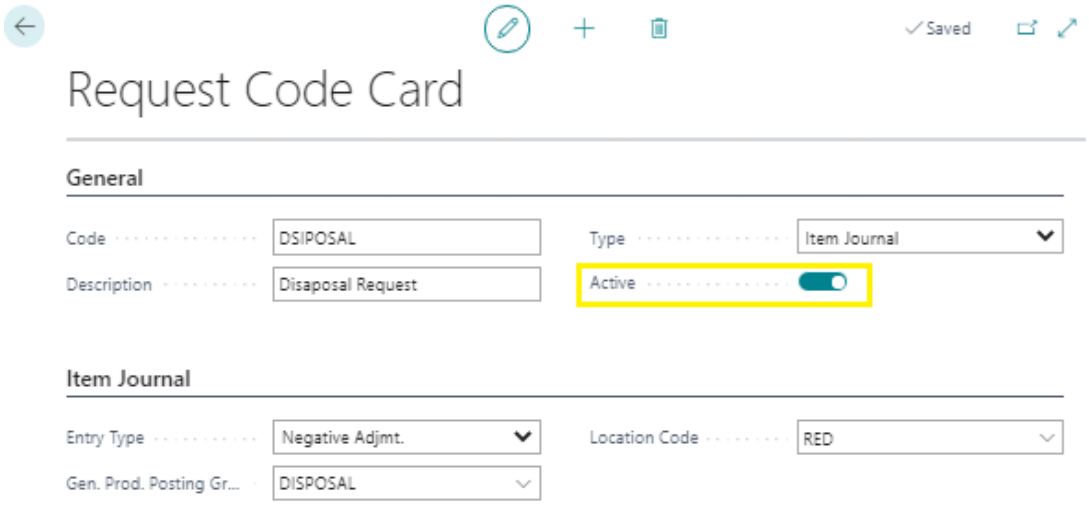
5. In the **Code,** type in DISPOSAL and a longer name in the **description**. Take note of the **Type** field as it will be used to identify the target document.



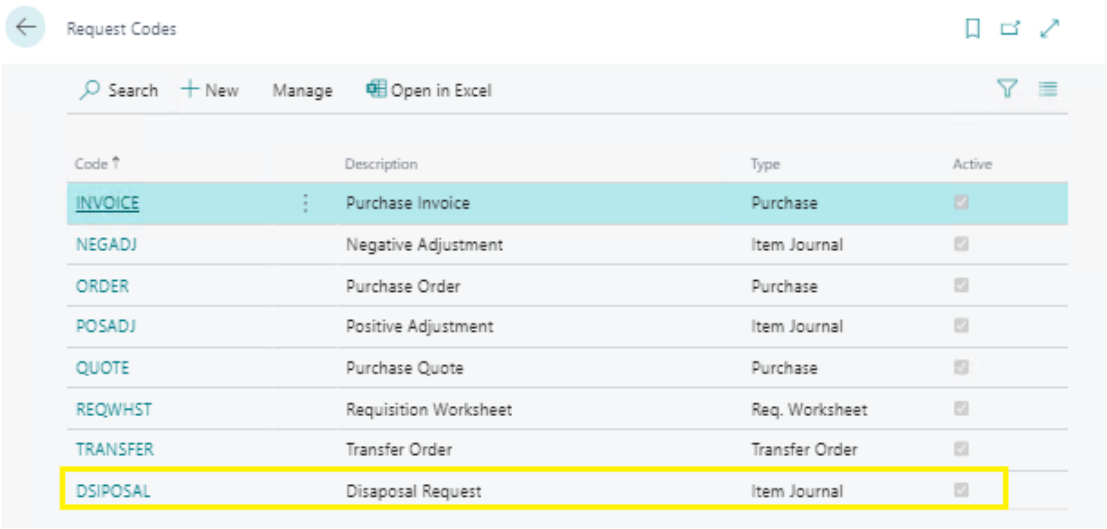
6. The tab below will depend on the type selected. This is for the details of the documents that will be created, such as entry type, document type, and no. series.



7. Don’t forget to toggle the **Active** button as this will indicate if the request code is used.



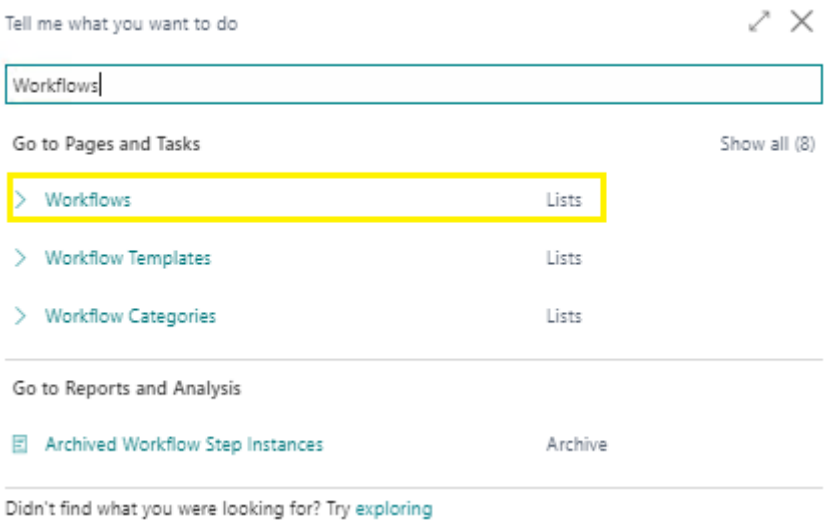
8. Go back to the Request list and it will be added. This can be now selected in the Request Document.



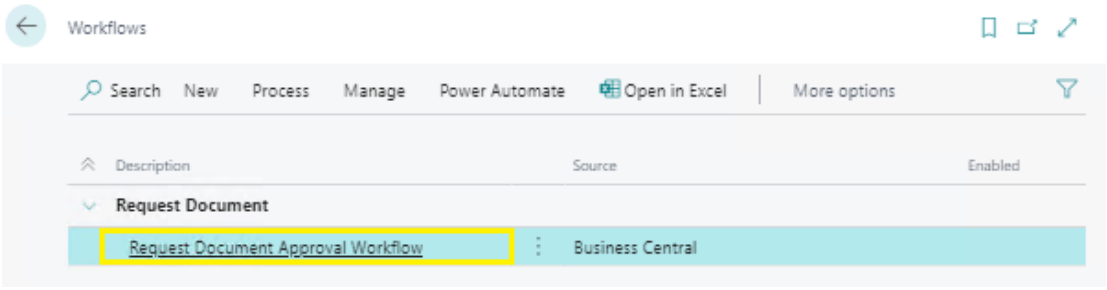
C. Enable Workflow

This section is about how to enable the workflow template included in the inititial configuration. A workflow will help automate approval process and follows the same concept as the standard Business Central.

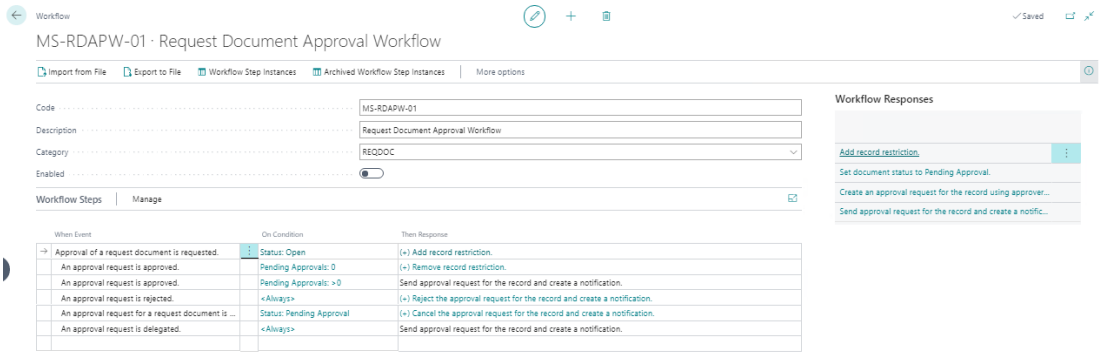
1. Type in **Workflows** in the search box and select the highlighted item.



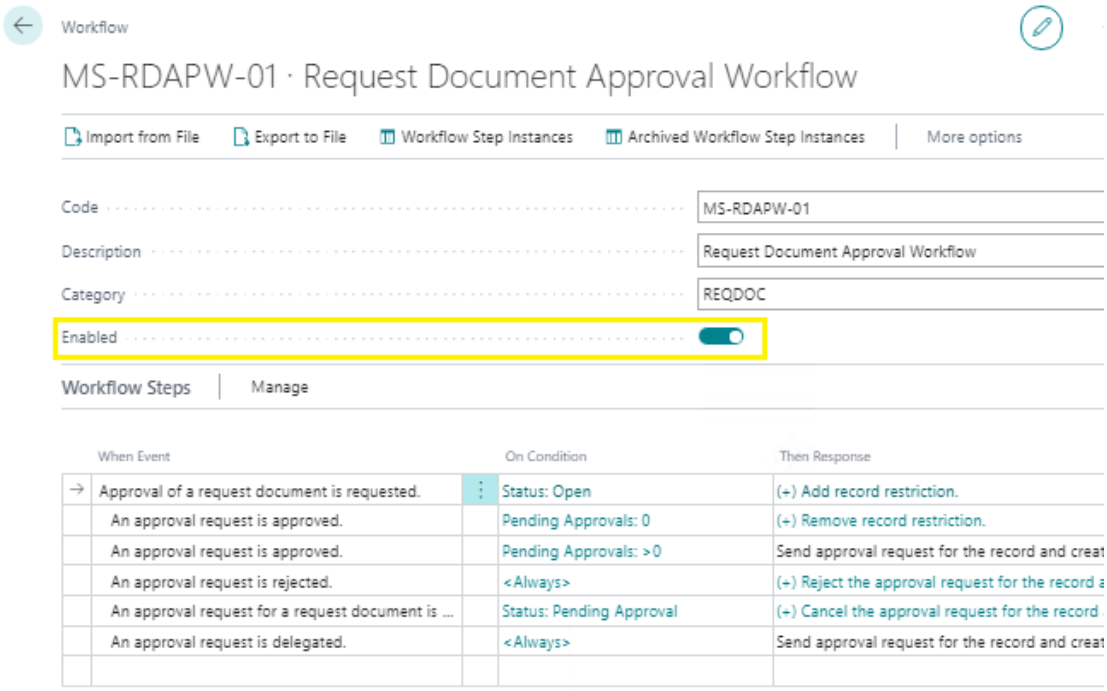
2. Look for the **Request Document Approval Workflow** and double click to open and view the steps and events in it.



3. Once responses are configured to the desired approver type. Enable the workflow.



4. Clicke the toggle **Enabled** to turn on the workflow template.

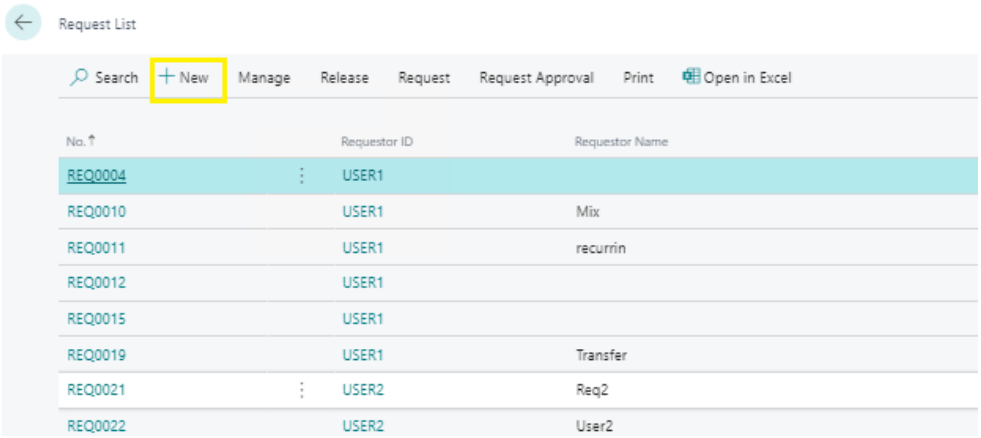


II. Create Request Document – Approval Process

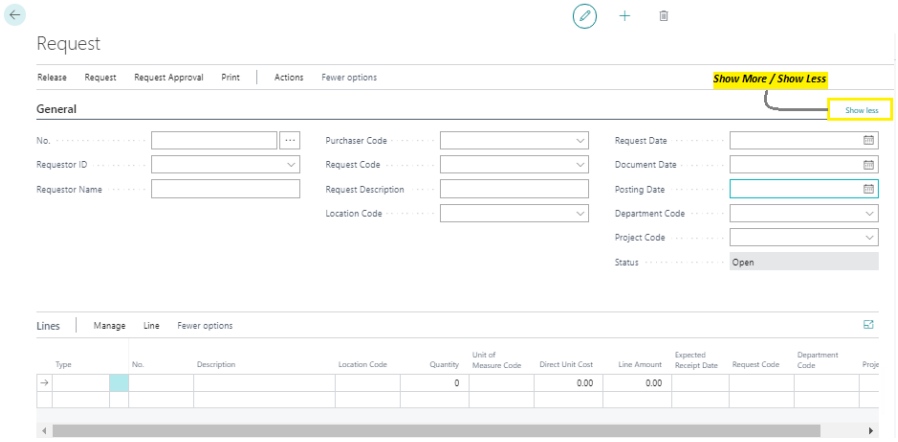
This chapter will show how to create a request document. In these sample, it will show how to create a document that will be processed to a Purchase Order.

1. In the search box, type in **Request list** and then select the right item as highlighted below.

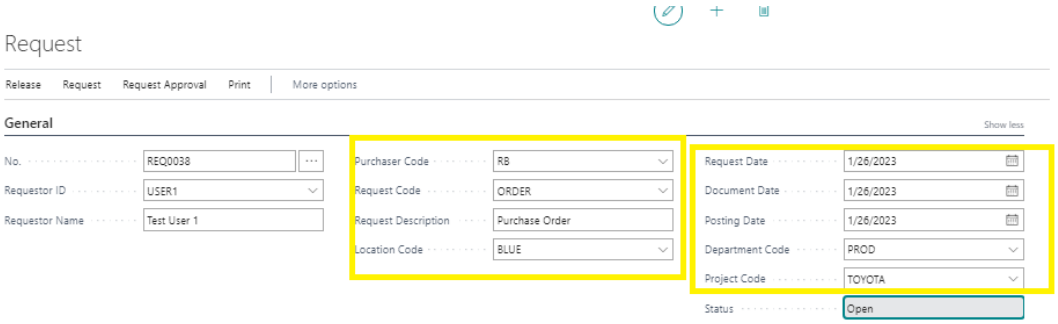
2. A window with request list will appear, this is wehere all requests are monitored and created. Click **New** to create a blank document for a fresh request.



3. Expand the general tab by cicking **ShowMore** to view all fields available in the header.



4. Fill-up fields in the general tab. Boxed values beow are user controlled.



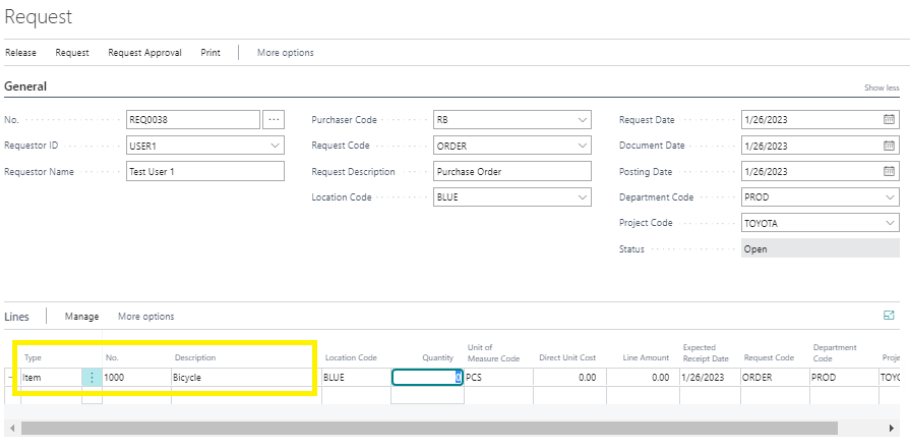
a. **Purchaser Code –** will be for tagging the purchaser id necessary

b. **Request Code –** identifier for the target document. In this case, ORDER for a Purchase Order

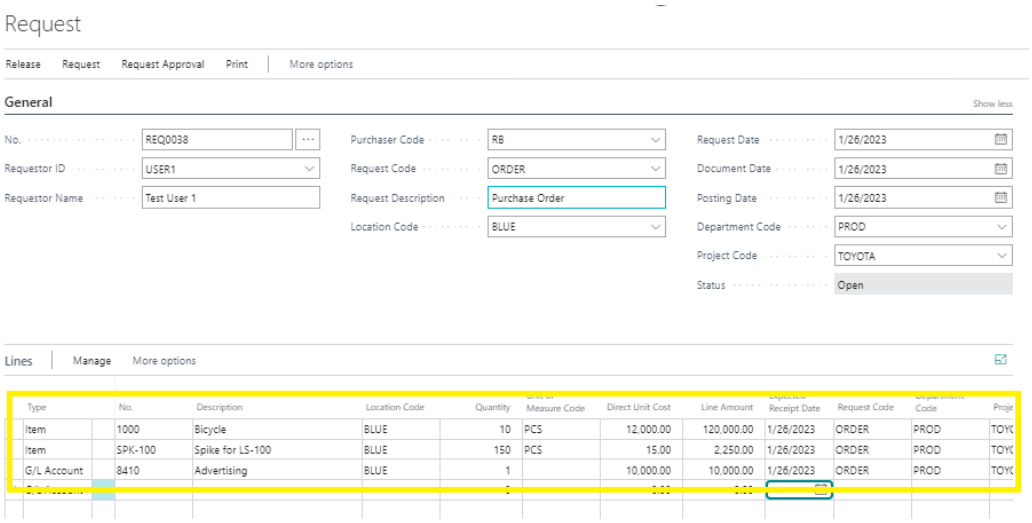
c. **Location –** is the location that will receive the request

d. **Department and Project –** these are the dimensions for later analysis in the entries.

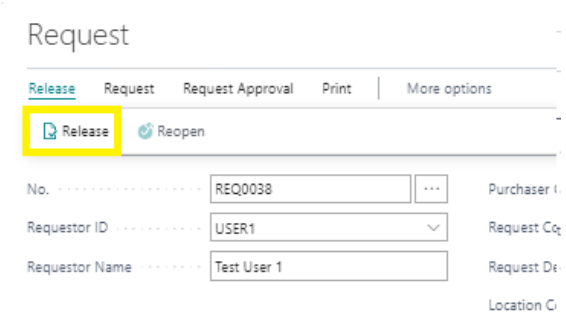
5. Next is to populate the lines. Indicate the items, services, of fixed assets being requested. Below, we have just inputted an item. Take note that details that are in the header is also copied in the lines such as, location, reques codes and dimensions.



6. Indicate the **Quantity** and other sucsh as the correct **UOM** and **Cost** if it is know already. However, cost may subject to change base on the purchaser and supplier.

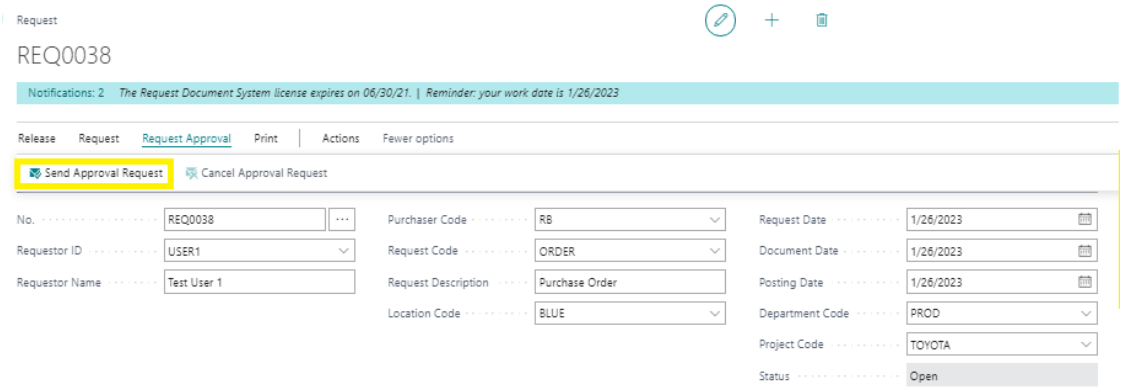


7. If no approval workfow is required, user then may release the document. Select **Release** in the release tab. This is to have the lines available for processing.

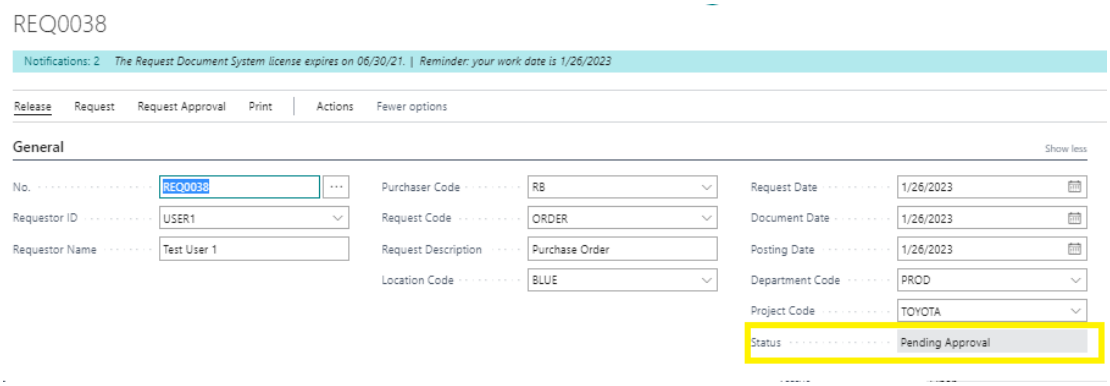


8. This will update the **Status** of the document from Open to Released.

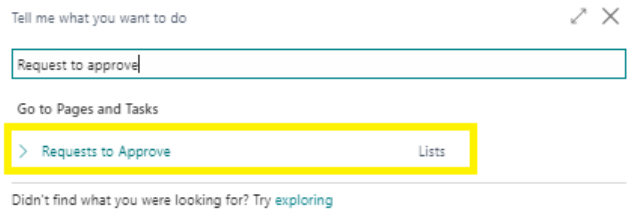
9. Since we have enables the workflow, the user will send this for approval. In the **Request Approval** tab, click **Send for Approval**



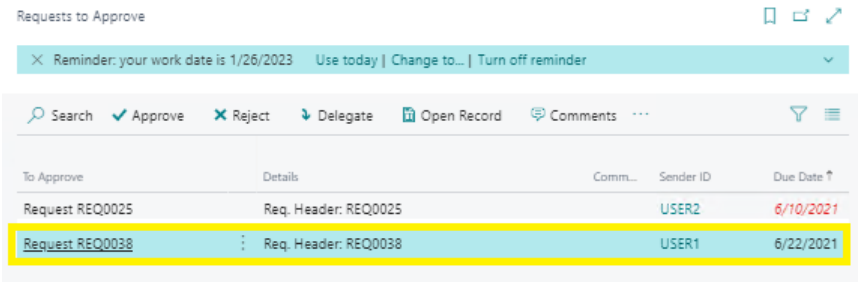
10. This will change the status to **Pending for Approval.**



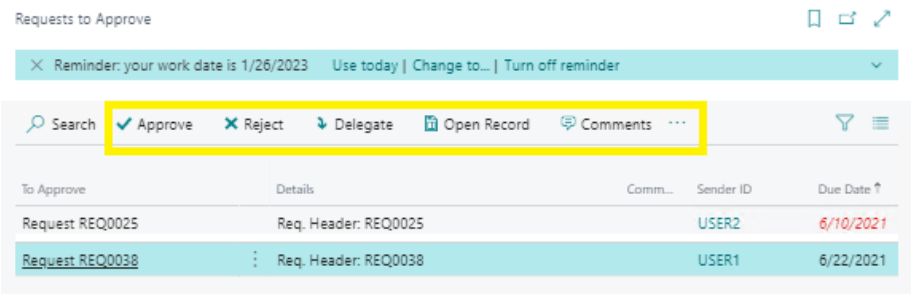
11. On the Approvers side, after login, search for **Request To Approve** and a list of pending for approval will appear.



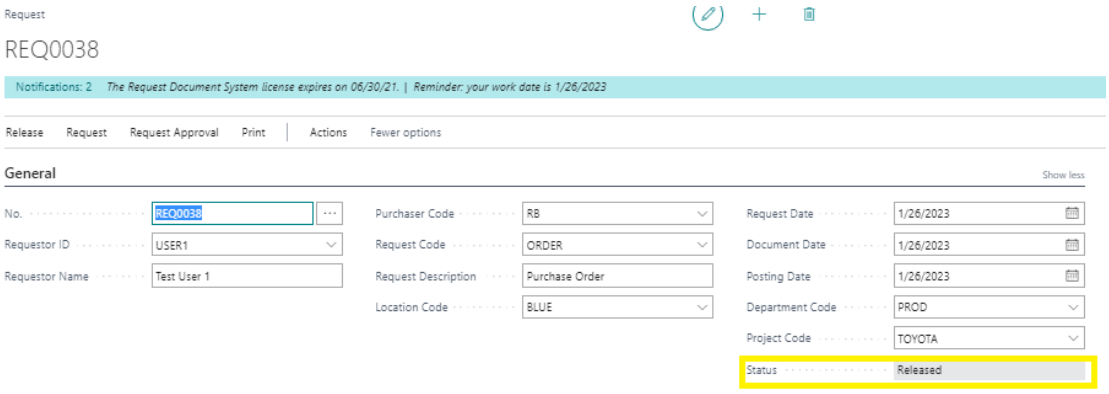
12. Select the right document in the list.



13. Then choose the right command oabove for an action. In this scenario, we will use **Approve.**



14. This will update the status of the request to **Released** as this is the only approver of the document.

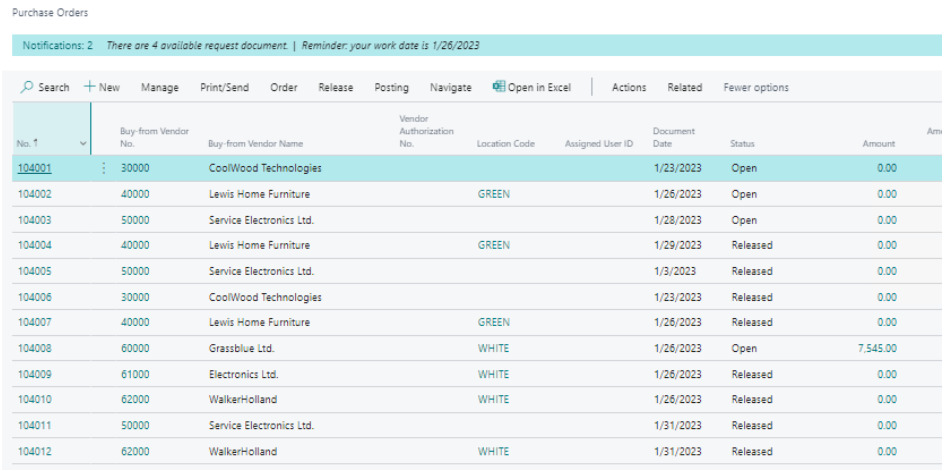


15. After the document is released, this will be the end of request process and initiate the purchase process.

III. Get Request from Purchase Order

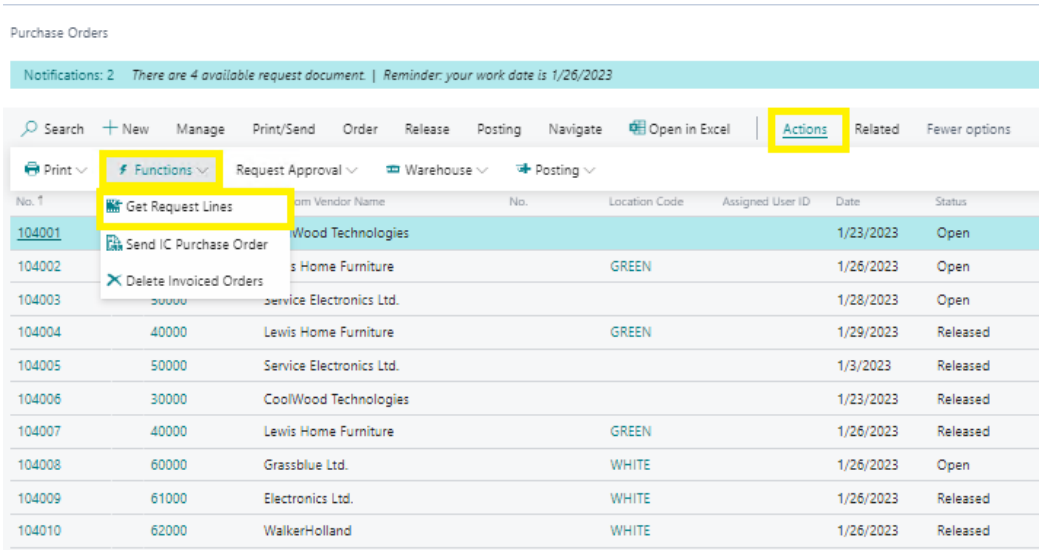
Since the reuest document is already released, we will have to create a Purchase Order using the request lines.

1. Purchaser will log in and open the PO List.

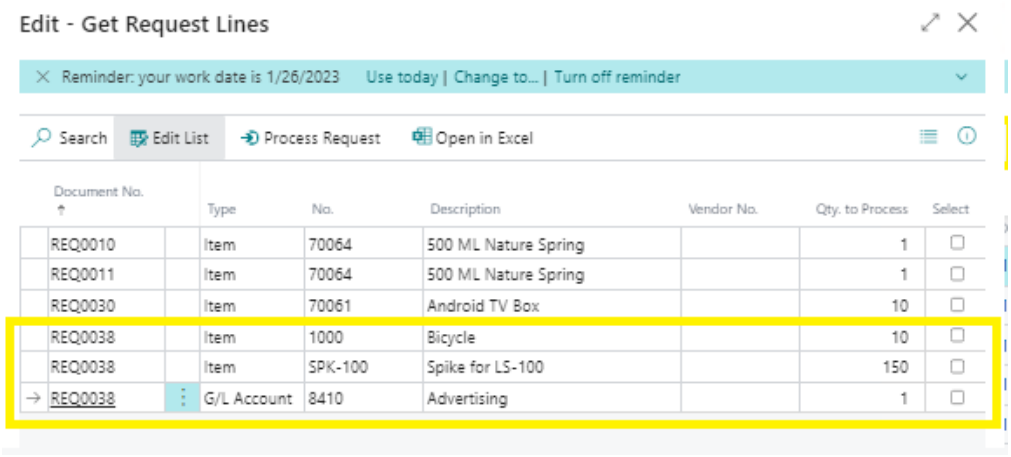


No.	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorization No.	Location Code	Assigned User ID	Document Date	Status	Amount
104001	30000	CoolWood Technologies				1/23/2023	Open	0.00
104002	40000	Lewis Home Furniture		GREEN		1/26/2023	Open	0.00
104003	50000	Service Electronics Ltd.				1/28/2023	Open	0.00
104004	40000	Lewis Home Furniture		GREEN		1/29/2023	Released	0.00
104005	50000	Service Electronics Ltd.				1/3/2023	Released	0.00
104006	30000	CoolWood Technologies				1/23/2023	Released	0.00
104007	40000	Lewis Home Furniture		GREEN		1/26/2023	Released	0.00
104008	60000	Grassblue Ltd.		WHITE		1/26/2023	Open	7,545.00
104009	61000	Electronics Ltd.		WHITE		1/26/2023	Released	0.00
104010	62000	WalkerHolland		WHITE		1/26/2023	Released	0.00
104011	50000	Service Electronics Ltd.				1/31/2023	Released	0.00
104012	62000	WalkerHolland		WHITE		1/31/2023	Released	0.00

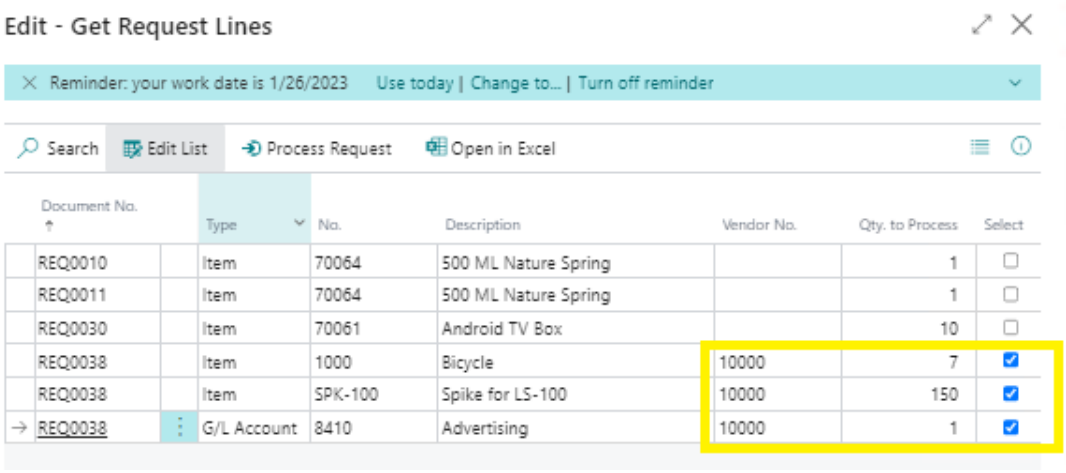
2. On the Actions tab, click the fucntions then select the **Get request lines.**



3. This will open a page with all lines from released request documents.



4. To process these lines, assign a **Vendor No.** and check the **Select.** Processor may select multiple lines and it does not have to belong to a single request document.

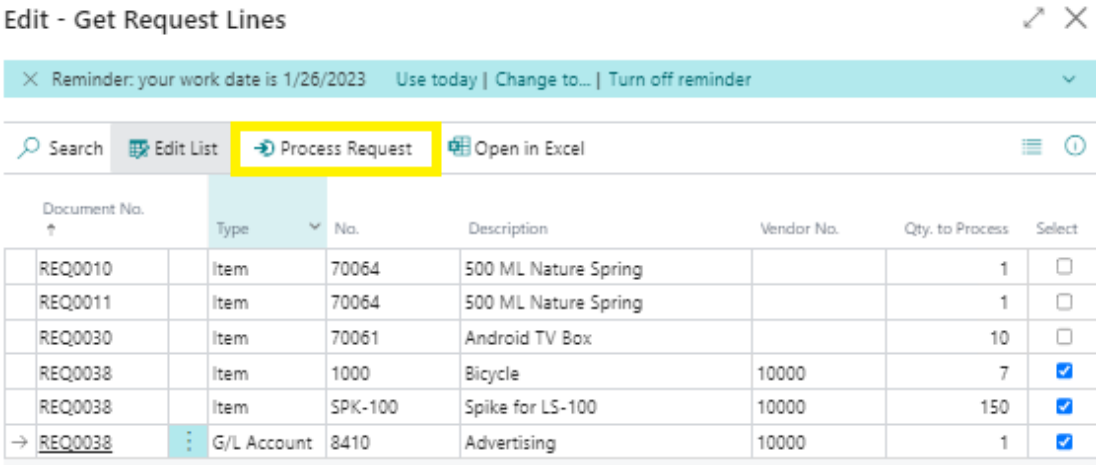


a. **Vendor –** refers to the supplier

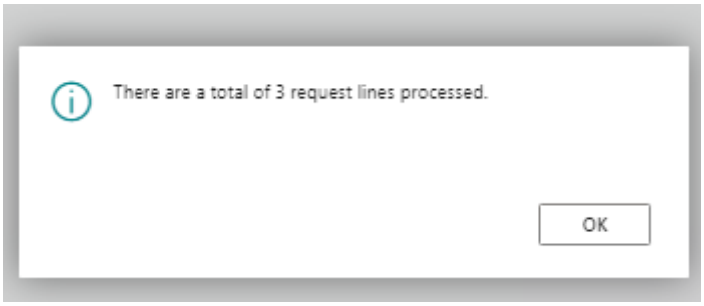
b. **Qty to process –** how many quantity will be purchased. This can be edited for partial process if supplier cannot fully met requested quantity.

c. **Select –** if line will be included in the process.

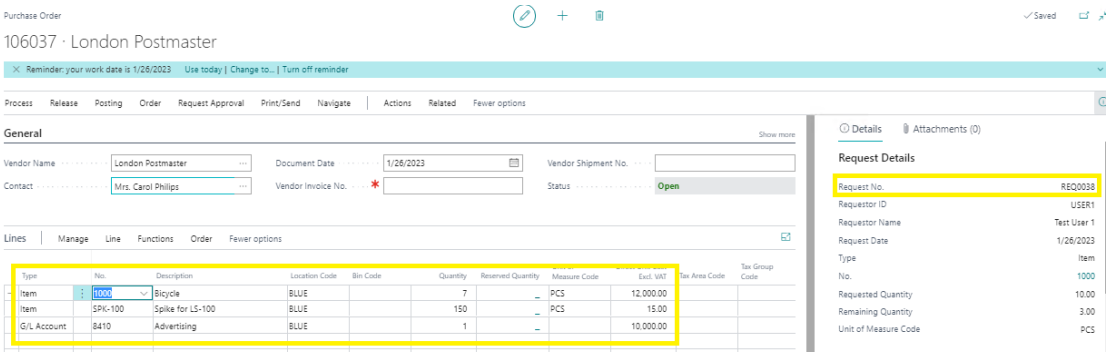
5. Once all details are correct, click the **Process Request.**



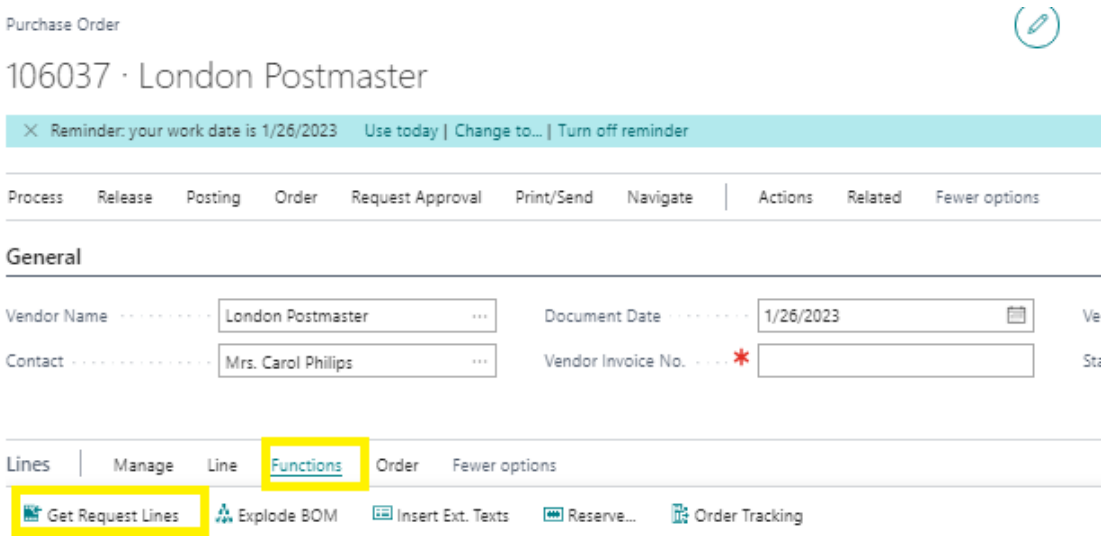
6. Confirm the message box as this confrims that a new Purchase Order is created. Then close the request process page.



7. On the PO List, anew PO is created.



8. The **Get Request Lines** function is also avaiabel in the PO Subform as shown below. This will be useful if the PO will be appended.



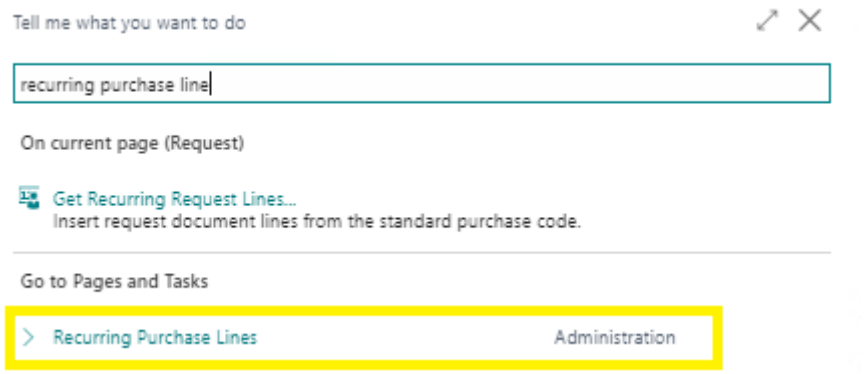
9. That concludes process on how to get request in the PO.

IV. Other Features

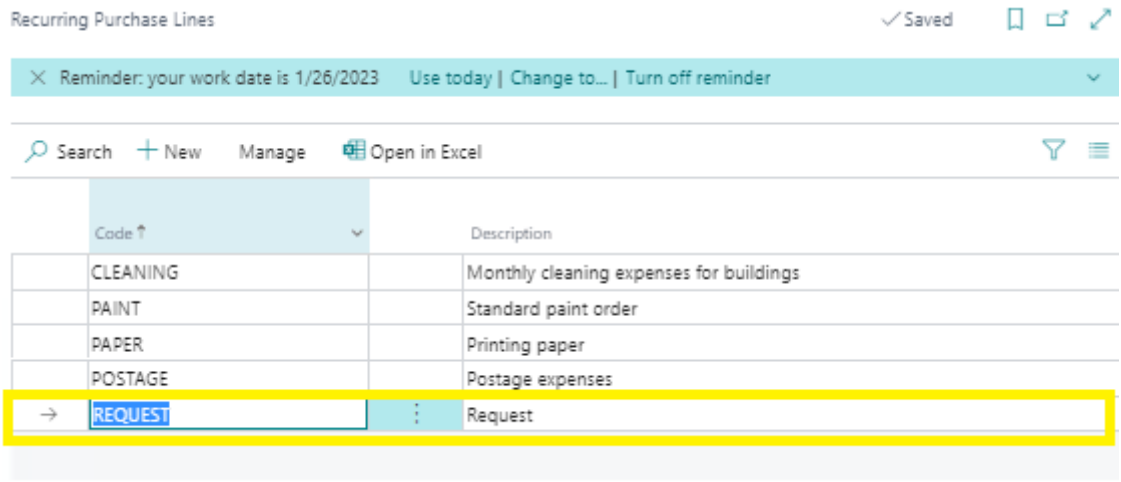
A. Recurring Request Lines

This is to keep a template of all frequently used items or services for request.

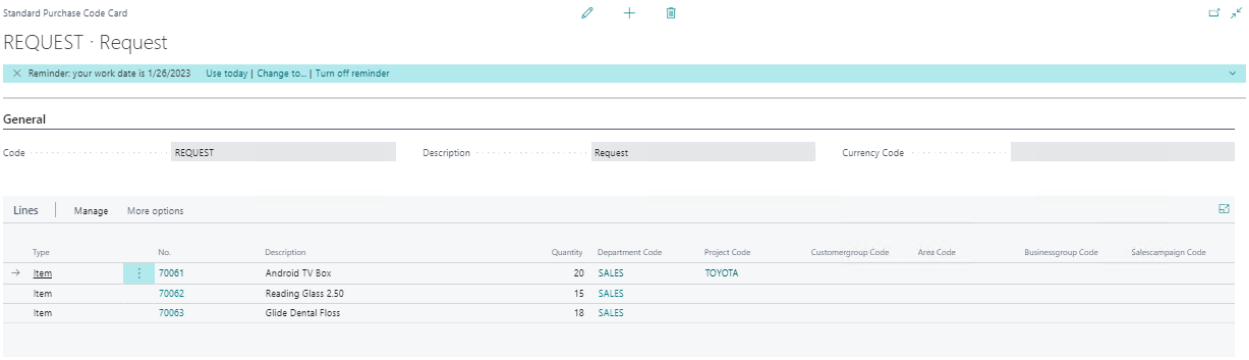
1. Prepare a **Recurring Purchase Lines.** Search for it to view the existing lines.



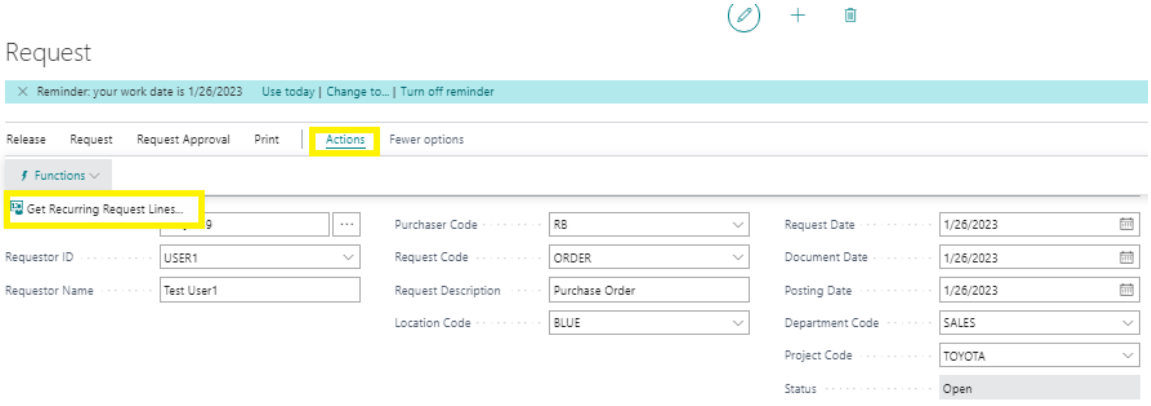
2. Create by clicking **New.** In this sample, we only viewed an existing template



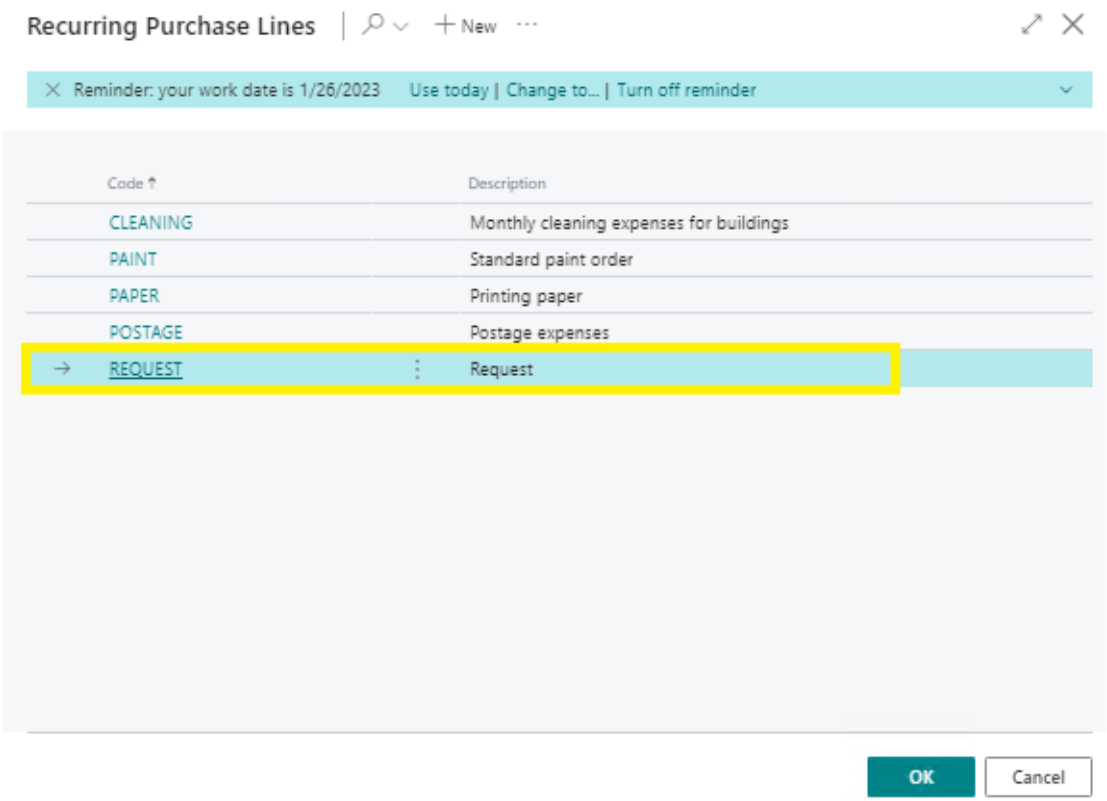
3. Manage then view the selected tempate.



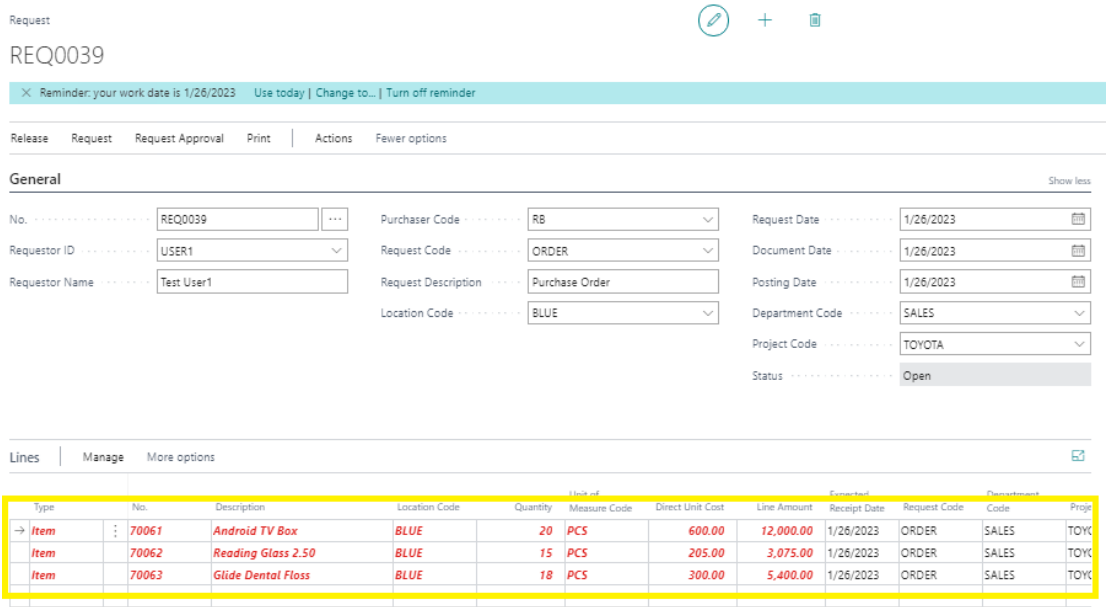
4. On the request page, after popuating the **General Tab.** Use the Actions tab then functions to select the **Get Recurring Request lines**



5. This will open the list of Recurring Lines. Select the tempate to be used then click **OK**



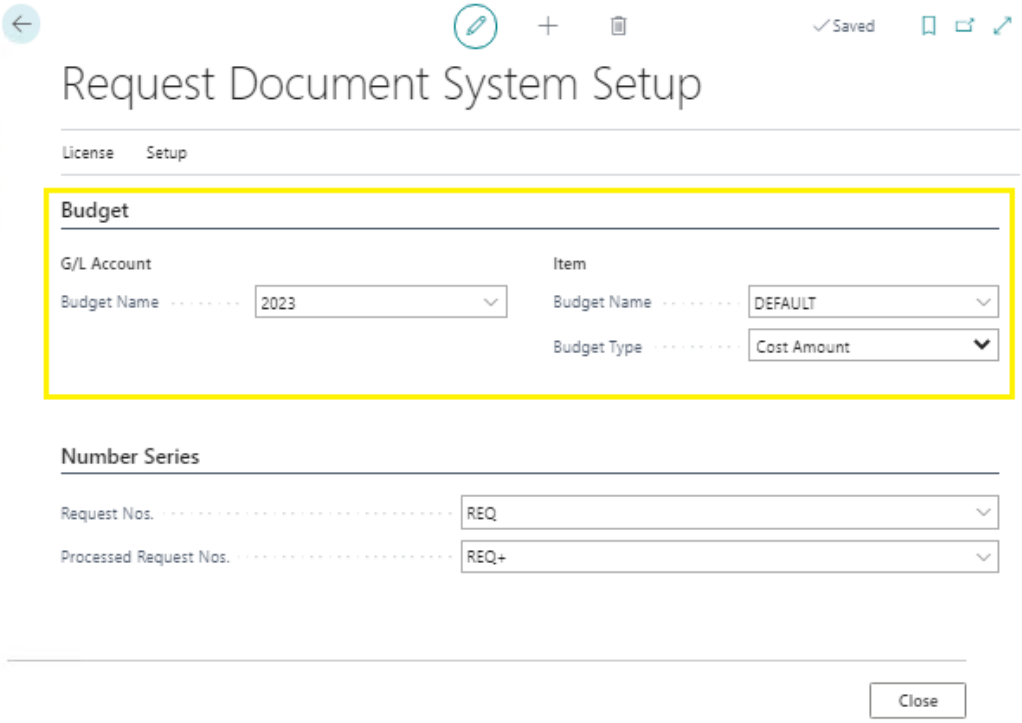
6. Request lines will be automatically popuated with the template.



B. Budget Checking

A feature that will serve as a warning to over budget requests. And will aso enable visibility to the amount requested, processed and available for requests.

1. On the Admin setup, we assgined a budget template on the setup which will automatically enable the budget checking feature.



2. On the request page, an item or services with a budget wi ook like this.