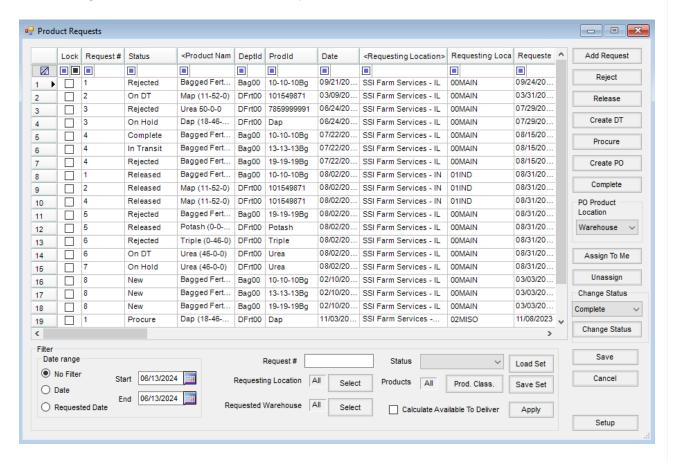
Product Request Actions

Last Modified on 06/13/2024 8:57 am CDT

The following actions are available for Product Requests:



- Edit Choose the *Lock* option on the line(s) to edit anything about the request. Only requests with a *Status* of *New* are eligible for edit. Only those with access to the product on the request may edit.
- **Delete** Choose the *Lock* option then select the row number to highlight the line. Press **Delete** on the keyboard. Only requests with a *Status* of *New* are eligible for deletion. Only those with access to the product on the request may delete a request.
- **Reject** Choose the *Lock* option on one or more rows in the grid with a *Status* of *New* or *Procure* and choose **Reject**. Only those with access to the product at the *Requested* Warehouse may reject a request.
- Release Choose the Lock option on one or more rows in the grid with a Status of New or On Hold. Select
 Release. If the Available to Deliver quantity is not sufficient to cover the Requested Quantity, a message will
 provide information about the product with an issue. Deselect the request(s) with the Available to Deliver
 issue and choose Release. Only those with access to the product at the Requested Warehouse may release a
 request.
- Release Quantity less than Requested Quantity To release less quantity than is being requested, choose the Lock option on one or more rows in the grid with a Status of New, then edit the Released Quantity and select

Release. A message displays indicating the *Released Quantity* is less than the *Requested Quantity*. If the additional quantity will be available later, select **Yes** to create a new Product Request for the remaining quantity. The new Product Request references the original in the *Comments*. Select **No** if the balance of the *Requested Quantity* will not be available and no new Product Request is needed.

• Create DT – Choose the Lock option on one or more rows in the grid with a Status of Released and where the Requesting Location and Requested Warehouse are the same for all lines in the grid. Choose Create DT. Select a customer/location for the Delivery Ticket.

Note: When creating Delivery Tickets from Product Requests, differing *Requested By* dates are allowed on the same Delivery Ticket. The oldest *Requested By* Date is used.

- The Delivery Ticket populates with:
 - Products from the request, but the Inventory Department is changed to the Requested
 Warehouse's product
 - Quantities from the request
 - Requested date populates in the Dispatch Info Date Requested field
 - Comments are populated with the Request #(s) and any comment from the request. (Comments may be truncated)
- After the Delivery Ticket is created, the Status of the Request changes to On DT.
- As the Delivery Ticket is processed, the Status of the Product Request changes as follows:
 - Products are Picked (Status changes to Picked).
 - Products are picked on the Delivery Ticket by choosing the *Picked* option per line item in the product grid.
 - Delivery Ticket is Loaded (Status changes to In Transit).
 - Delivery Ticket is imported into Inter-Company Transfer (Status changes to Complete).
- **Procure** If there is not sufficient product to fill the request and more product needs to be ordered from the vendor, choose the *Lock* option on one or more rows in the grid with a *Status* of *New* and select **Procure**. Only those with access to the product at the *Requested Warehouse* may change a *Status* to *Procure*.
- Create PO Choose the Lock option on one or more rows in the grid with a Status of Procure, then use the PO
 Product Location drop-down to select if products on the PO should be for the Requesting Location or the
 Requested Warehouse. Choose Create PO and select a Vendor for the Purchase Order.
 - The Purchase Order is created with:
 - Products (using the Inventory Department based on the PO Product Location selection)
 - Quantities
 - Request # (in the Comments)
 - Requested Date (in the Date Requested)
 - Ship To and Freight Information

- **Complete** Procurement or Distribution staff can use the **Complete** button to move Direct Ship Product Requests from *On Hold* to *Completed*.
- Assign To Me After locking the appropriate row(s) this assigns the Product Request(s) to the User currently signed in.
- Unassign After locking the appropriate row(s) this clears the Assignee column for the Product Requests.
- Change Status Users assigned to a Role with the *Allow all status changes for Product Request* option checked (found by adding/editing a Role at *Hub / Setup / Users*) have the ability to check the *Lock* column, choose a *Status* from the drop-down, then select Change Status to update the status of that line.

Note: These changes are logged in the ProductRequestAuditLog table in the database.