

# Adding a Product Request

Last Modified on 08/04/2023 2:02 pm CDT

This feature provides locations a tool to request inventory from centralized warehouses and for the warehouse to release and ship the product. If product is not available at the warehouse, a Procurement team member can create a Purchase Order.

At *Accounting / Inventory / Product Requests*, choose **Add Request**.

**Note:** If saving a Product Request where the Product does not exist at the Requesting Location or Requested Warehouse, a prompt will display to add the product (if product sync rules are set up) or a message will display indicating the product does not exist (if product sync rules are not set up).

Header information populates to all lines in the grid but can be edited on any line.

## General Tab

When information is entered on the *General* tab, a prompt displays asking if this should be applied to all lines in the Product Grid. Alternatively, each of these fields can be populated in the Product Grid by line item.

The screenshot shows the 'Product Request' window with the 'General' tab selected. The form contains the following fields and data:

- Date:** 02/10/2023
- Req. by Date:** / /
- <Requesting Location>:** SSI Farm Services - IL
- <Requested Warehouse>:** SSI Farm Services - MO
- Pickup/Delivery:**  Pickup,  Delivery
- Comments:** (Empty text box)
- <Email Notifications>:** (Empty text box)

	<Product Name>	DeptId	ProdId	Request Date	Requesting Location	Reque	Notify	Requested By	<Requested Warehouse>	Requested Wareh
1	Bagged Fert 10-...	Bag00	10-10...	02/10/2023	SSI Farm Services...	00MAIN	<input type="checkbox"/>	03/03/2023	SSI Farm Services - MO	02MISO
2	Bagged Fert 13-...	Bag00	13-13...	02/10/2023	SSI Farm Services...	00MAIN	<input type="checkbox"/>	03/03/2023	SSI Farm Services - MO	02MISO
3	Bagged Fert 19-...	Bag00	19-19...	02/10/2023	SSI Farm Services...	00MAIN	<input type="checkbox"/>	03/03/2023	SSI Farm Services - MO	02MISO

Buttons: Save, Cancel

- **Date** – This defaults to the current date.
- **Req. by Date** – Enter the date product is needed.
- **Requesting Location** – This defaults to the location currently logged into. Double-click to change. The *Requesting Location* cannot be the same as the *Requested Warehouse*.

- **Requested Warehouse** – Double-click to select the location from which products are being requested. This defaults to the *Requested Warehouse* from the previous request. The *Requested Warehouse* cannot be the same as the *Requesting Location*.
- **Pickup/Delivery** – Select if product(s) are to be delivered or will be picked up at the warehouse.
- **Comments** – Enter *Comments* about the request. Comments are saved with a user and date/time stamp.
- **Email Notifications** – Double-click the *<Email Notifications>* header to add emails set up by selecting **Setup at Inventory / Product Requests** or manually enter an email address. A *Status* must be indicated in order for email notifications to be sent.

## Additional Info Tab

When information is entered on the *Additional Info* tab, a prompt displays asking if this should be applied to all lines in the Product Grid. Alternatively, each of these fields can be populated in the Product Grid by line item.

	<Product Name>	DeptId	ProdId	Request Date	Requesting Location	Requesting Location ID	Requested By Date	<Requested Warehouse>	Req
1	Bagged Fert 10-...	Bag00	10-10...	02/10/2023	SSI Farm Services...	00MAIN		SSI Farm Services - MO	02MI
2	Bagged Fert 13-...	Bag00	13-13...	02/10/2023	SSI Farm Services...	00MAIN		SSI Farm Services - MO	02MI
3	Bagged Fert 19-...	Bag00	19-19...	02/10/2023	SSI Farm Services...	00MAIN		SSI Farm Services - MO	02MI

Optionally enter a *Freight* amount, indicate *Estimated Total\$* or *Estimated \$/Unit*, and choose a *Freight Vendor*. After products are in the grid, select **Apply Freight**.

**Note:** Currently, this information does not populate into Delivery Tickets or Purchase Orders created from Product Requests.

A *Contact Name*, *Contact Phone*, and *Delivery Instructions* can also be entered. Additionally, if this is a *Direct Ship*, select the checkbox.

A *Customer* and/or *Ship To* can be indicated for all lines.

# Product Grid

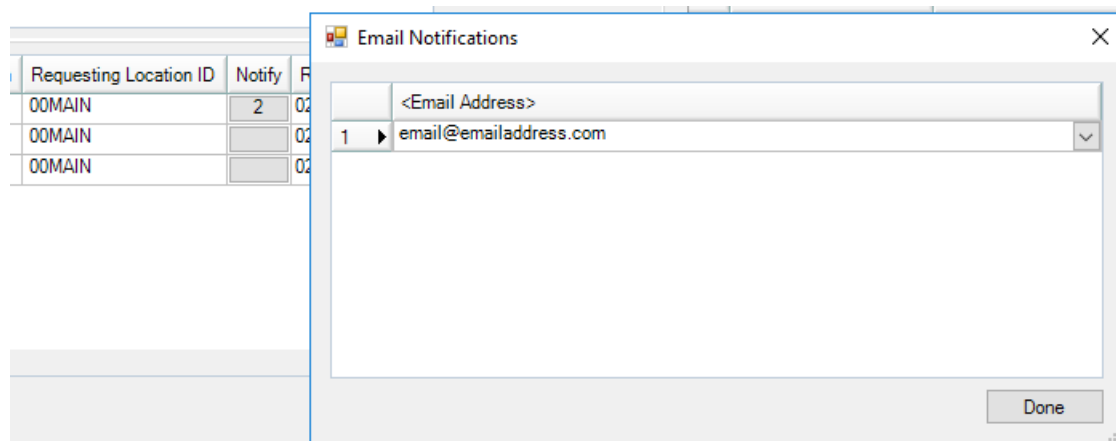
Rather than applying information to all line items in the grid, each line item can be edited separately.

	<Product Name>	DeptId	ProdId	Request Date	Requesting Location	Requesting Location ID	Notify	Requested By Date	<Requested Warehouse>
1	▶ Bagged Fert 10-...	Bag00	10-10...	02/10/2023	SSI Farm Services...	00MAIN	2	02/23/2023	SSI Farm Services - MO
2	▶ Bagged Fert 13-...	Bag00	13-13...	02/10/2023	SSI Farm Services...	00MAIN		02/23/2023	SSI Farm Services - MO
3	▶ Bagged Fert 19-...	Bag00	19-19...	02/10/2023	SSI Farm Services...	00MAIN		02/23/2023	SSI Farm Services - MO

- **Product Selection** – Double-click on <Product Name> in the grid to select products and quantities for the request.
- **Available to Deliver** – This is a calculation of the amount available at the *Requested Warehouse*. This amount is not automatically calculated on *Completed* and *Rejected* requests. Select in this column on any line to calculate the *Available to Deliver* value on demand. The calculation is: *Amt On Hand – Unloaded Delivery and Blend Tickets – Quantity on Released Product Requests = Available to Deliver*

**Note:** When asking for the *Available to Deliver* value of a product with more than one product matching the selected Product ID and Department Category in the Warehouse location, a window will display with those filtered products to indicate which Department should be used.

- **Notify** – Selecting the button in the *Notify* column opens the *Email Notifications* window where emails can be added for this specific line item by double-clicking the <Email Address> header to add a row and choosing from the drop-down (if emails have been set up [here](#)) or by entering an email address manually. The number displaying in the *Notify* column indicates the number of email addresses selected. A *Status* must be indicated in order for email notifications to be sent.



- **Manufacturer** – The product's Manufacturer displays in this column. It is populated from the *Requesting Location* product.

**Note:** Columns in the grid can be selected/deselected. Hover over any column heading, right-click, and select **Choose Columns Alphabetically**. Tag/untag items in the list to select/deselect. Select and drag columns to rearrange. After columns have been selected and arranged, hover over any column heading then right-click and select **Make This Layout My Default**. This remembers the grid layout for this user.