

Product Request Actions

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

The following actions are available for Product Requests:

The screenshot shows the 'Product Requests' application window. It features a data grid with columns for Lock, Request #, Status, <Product Nam, DeptId, ProdId, Date, <Requesting Location>, Requesting Loca, and Requeste. The grid contains 19 rows of data. Below the grid is a filter panel with options for Date range (No Filter, Date, Requested Date), Request #, Requesting Location, Requested Warehouse, Status, Products, Prod. Class., and a checkbox for Calculate Available To Deliver. On the right side of the window, there is a vertical toolbar with buttons for Add Request, Reject, Release, Create DT, Procure, Create PO, Complete, PO Product Location (Warehouse dropdown), Assign To Me, Unassign, Change Status (Complete dropdown), Change Status, Save, Cancel, and Setup.

	Lock	Request #	Status	<Product Nam	DeptId	ProdId	Date	<Requesting Location>	Requesting Loca	Requeste
1	<input type="checkbox"/>	1	Rejected	Bagged Fert...	Bag00	10-10-10Bg	09/21/20...	SSI Farm Services - IL	00MAIN	09/24/20...
2	<input type="checkbox"/>	2	On DT	Map (11-52-0)	DFrt00	101549871	03/09/20...	SSI Farm Services - IL	00MAIN	03/31/20...
3	<input type="checkbox"/>	3	Rejected	Urea 50-0-0	DFrt00	7859999991	06/24/20...	SSI Farm Services - IL	00MAIN	07/29/20...
4	<input type="checkbox"/>	3	On Hold	Dap (18-46-...	DFrt00	Dap	06/24/20...	SSI Farm Services - IL	00MAIN	07/29/20...
5	<input type="checkbox"/>	4	Complete	Bagged Fert...	Bag00	10-10-10Bg	07/22/20...	SSI Farm Services - IL	00MAIN	08/15/20...
6	<input type="checkbox"/>	4	In Transit	Bagged Fert...	Bag00	13-13-13Bg	07/22/20...	SSI Farm Services - IL	00MAIN	08/15/20...
7	<input type="checkbox"/>	4	Rejected	Bagged Fert...	Bag00	19-19-19Bg	07/22/20...	SSI Farm Services - IL	00MAIN	08/15/20...
8	<input type="checkbox"/>	1	Released	Bagged Fert...	Bag00	10-10-10Bg	08/02/20...	SSI Farm Services - IN	01IND	08/31/20...
9	<input type="checkbox"/>	2	Released	Map (11-52-0)	DFrt00	101549871	08/02/20...	SSI Farm Services - IN	01IND	08/31/20...
10	<input type="checkbox"/>	4	Released	Map (11-52-0)	DFrt00	101549871	08/02/20...	SSI Farm Services - IN	01IND	08/31/20...
11	<input type="checkbox"/>	5	Rejected	Bagged Fert...	Bag00	19-19-19Bg	08/02/20...	SSI Farm Services - IL	00MAIN	08/31/20...
12	<input type="checkbox"/>	5	Released	Potash (0-0-...	DFrt00	Potash	08/02/20...	SSI Farm Services - IL	00MAIN	08/31/20...
13	<input type="checkbox"/>	6	Rejected	Triple (0-46-0)	DFrt00	Triple	08/02/20...	SSI Farm Services - IL	00MAIN	08/31/20...
14	<input type="checkbox"/>	6	On DT	Urea (46-0-0)	DFrt00	Urea	08/02/20...	SSI Farm Services - IL	00MAIN	08/31/20...
15	<input type="checkbox"/>	7	On Hold	Urea (46-0-0)	DFrt00	Urea	08/02/20...	SSI Farm Services - IL	00MAIN	08/31/20...
16	<input type="checkbox"/>	8	New	Bagged Fert...	Bag00	10-10-10Bg	02/10/20...	SSI Farm Services - IL	00MAIN	03/03/20...
17	<input type="checkbox"/>	8	New	Bagged Fert...	Bag00	13-13-13Bg	02/10/20...	SSI Farm Services - IL	00MAIN	03/03/20...
18	<input type="checkbox"/>	8	New	Bagged Fert...	Bag00	19-19-19Bg	02/10/20...	SSI Farm Services - IL	00MAIN	03/03/20...
19	<input type="checkbox"/>	1	Procure	Dap (18-46-...	DFrt00	Dap	11/03/20...	SSI Farm Services - ...	02MISO	11/08/2023

- **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.