Managing Product Requests

Last Modified on 04/01/2025 9:48 am CDT

	11 - 11								
1	Rejected	Bagged Fert 10-10-10	Bag00	10-1	09/21/20	SSI Farm Services - IL	00MAIN	09/24/20	Reject
2	On DT	Map (11-52-0)	DFrt00	1015	03/09/20	SSI Farm Services - IL	00MAIN	03/31/20	Release
3	Rejected	Urea 50-0-0	DFrt00	7859	06/24/20	SSI Farm Services - IL	00MAIN	07/29/20	
3	On Hold	Dap (18-46-00)	DFrt00	Dap	06/24/20	SSI Farm Services - IL	00MAIN	07/29/20	Create DT
4	Complete	Bagged Fert 10-10-10	Bag00	10-1	07/22/20	SSI Farm Services - IL	00MAIN	08/15/20	
4	In Transit	Bagged Fert 13-13-13	Bag00	13-1	07/22/20	SSI Farm Services - IL	00MAIN	08/15/20	Procure
4	Rejected	Bagged Fert 19-19-19	Bag00	19-1	07/22/20	SSI Farm Services - IL	00MAIN	08/15/20	Create PO
1	Released	Bagged Fert 10-10-10	Bag00	10-1	08/02/20	SSI Farm Services - IN	01IND	08/31/20	
2	Released	Map (11-52-0)	DFrt00	1015	08/02/20	SSI Farm Services - IN	01IND	08/31/20	Complete
4	Released	Map (11-52-0)	DFrt00	1015	08/02/20	SSI Farm Services - IN	01IND	08/31/20:	PO Product
5	Rejected	Bagged Fert 19-19-19	Bag00	19-1	08/02/20	SSI Farm Services - IL	00MAIN	08/31/20	Location
5	Released	Potash (0-0-60)	DFrt00	Potash	08/02/20	SSI Farm Services - IL	00MAIN	08/31/20	Warehouse
6	Rejected	Triple (0-46-0)	DFrt00	Triple	08/02/20	SSI Farm Services - IL	00MAIN	08/31/20:	
6	On DT	Urea (46-0-0)	DFrt00	Urea	08/02/20	SSI Farm Services - IL	00MAIN	08/31/20	Assign To M
7	On Hold	Urea (46-0-0)	DFrt00	Urea	08/02/20	SSI Farm Services - IL	00MAIN	08/31/20	
8	New	Bagged Fert 10-10-10	Bag00	10-1	02/10/20	SSI Farm Services - IL	00MAIN	03/03/20	Unassign
8	New	Bagged Fert 13-13-13	Bag00	13-1	02/10/20	SSI Farm Services - IL	00MAIN	03/03/20	Change Status
8	New	Bagged Fert 19-19-19	Bag00	19-1	02/10/20	SSI Farm Services - IL	00MAIN	03/03/20	Complete
] 1	Procure	Dap (18-46-00)	DFrt00	Dap	11/03/20	SSI Farm Services	02MISO	11/08/20: 🧹	
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O Date		Reduest	Requesting Location		Select Products All Prod. Cla		od Clase C	Save Set	
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Product Requests can be managed at Inventory / Product Requests.

Setup

Rules and notification emails can be set up at a company level by selecting **Setup** to indicate which change in status of a Product Request will trigger the sending of an email to selected recipients. This will use the company *From* mail host and information set up at *Hub / Setup / Company Preferences*. The *To* list can be set up or modified at any time and those emails on the current Product Request form line will receive an email when those statuses change.

A Status must be indicated in order for email notifications to be sent.

🖷 Product Request Setup	×					
Statuses Eligible for Email Notifications	Valid Domains					
<status></status>	<domain></domain>					
1 ✓ Complete In Transit New On DT On Hold Picked Procure Rejected ▲						
Email Addresses	(44)					
	Save Cancel					

Statuses

As a request moves through the supply chain, the *Status* changes as follows:

- New This indicates a brand-new request.
- **Released** The warehouse supervisor has allocated the quantity to the requesting location, but the product has not left the warehouse.
- **On DT** A *Released* request has been used to create a Delivery Ticket.
- Picked A Delivery Ticket has been created and a warehouse worker has gathered product for shipment.
- In-Transit The Delivery Ticket has been Loaded.
- **Procure** All resources to fill the request have been exhausted and Procurement needs to order from the vendor.
- On Hold The request has been pulled into a Purchase Order for the *Requested Warehouse* Inventory Department. Direct Ship Product Request forms imported into a Purchase Order with the Location's product, will be marked as *On Hold*.
- **Rejected** This indicates they are not going to get the product, cannot get it from the supplier, do not want to sell it anymore, etc.
- Complete Complete can mean either:

- A request was pulled into a Delivery Ticket then the Delivery Ticket was loaded into an Inter-Company Transfer.
- A request was pulled into a Purchase Order for the Requesting Location Inventory Department.

Note: A user security preference can be found by selecting **Roles** at *Hub / Setup / Users* to give the User permission to change the status of a Product Request without going through the normal, required Product Request transaction sequence of events.

Filters

The grid of Product Requests defaults to empty but can be filtered and populated with requests that have not been deleted.

At the bottom of the Product Request grid, filters can be used as follows:

- Date Range Options here are *No Filter*, *Date* (this is the date the request was entered), or *Requested Date* (this is the date the location needs the product).
- **Request #** Enter a number by which to search.
- Requesting Location and/or Requested Warehouse Choose Select to filter by one or more locations.
- Status Choose from the drop-down to filter by Product Request status.
- Products Select Prod. Class to choose a Product Classification.
- Apply After filtering options are selected, choose Apply to populate the grid with the requests.
- Load Set/Save Set For frequently used filtering, select the desired filters and choose Save Set. Provide a name for the Save Set and either assign to a user ID or leave *Unassigned* if anyone may use. After the Save Set is created, choosing Load Set populates the pre-selected filters and automatically populates the grid.
- Calculate Available To Deliver This option defaults as unchecked and prevents the Available to Deliver calculation from being calculated unless enabled. This option is remembered with the Load Set/Save Set functionality for those wanting the Available to Deliver to be calculated every time.

Actions

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.