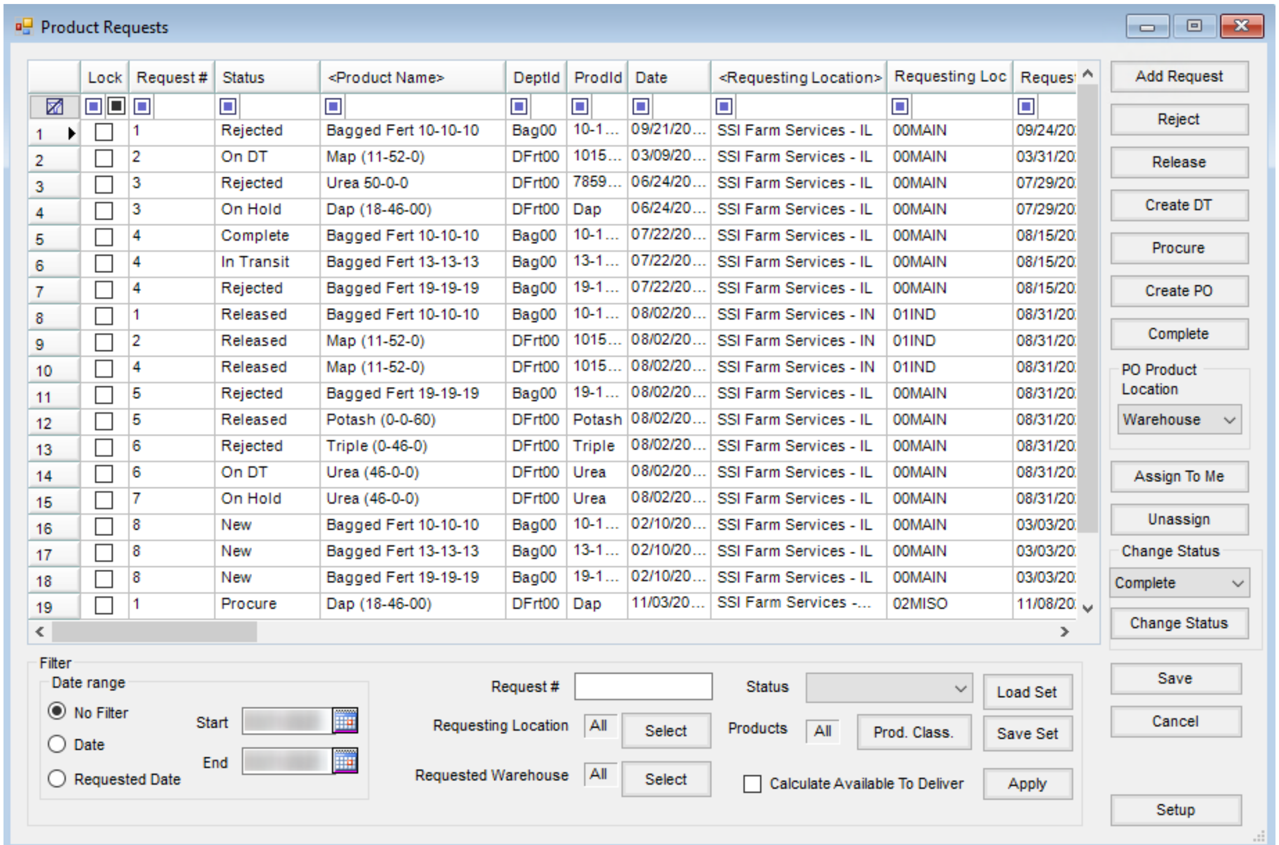
Managing Product Requests

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

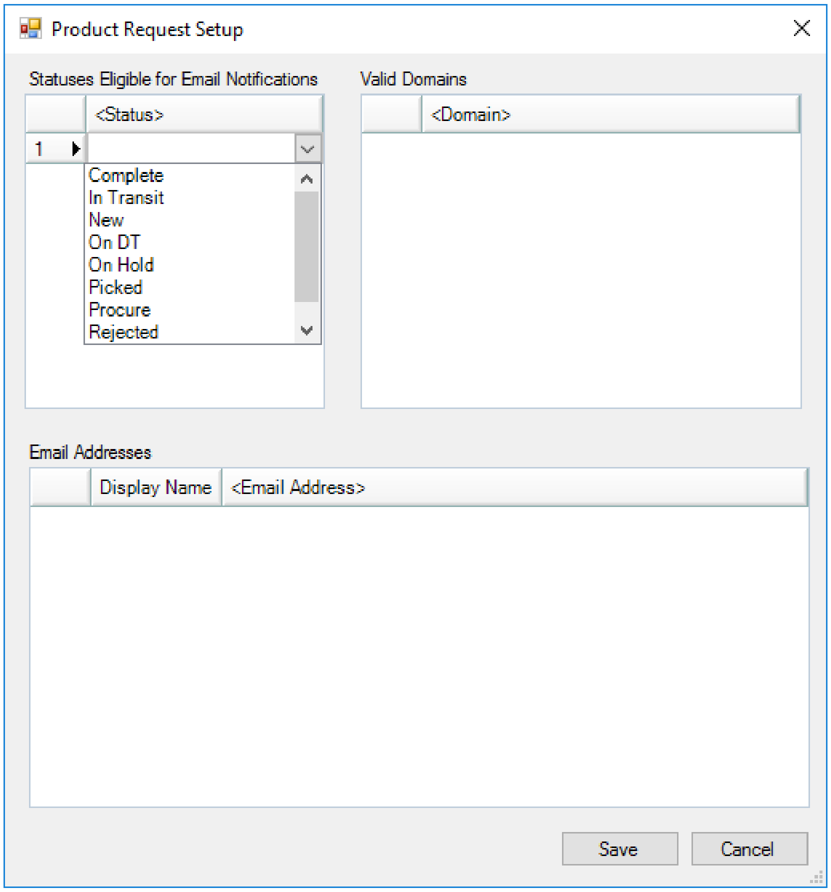
Product Requests can be managed at *Inventory / Product Requests*.



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.



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.