Create Purchase Requisition

Triggers

Essential background information on this topic includes the following:

- A purchase requisition is used to initiate the procurement of materials or services not included in MRP (or Design and Construction services for CPA).

- Purchase requisitions can later be converted into request for quotations (RFQs) or purchase orders (POs).

Before You Begin

Before beginning the task, obtain the following information:

- Vendor.

- Purchasing Organization code.

- Purchasing Group.

- Account assignment category.

- Material.

- Delivery Date.

- Plant.

- Material Group.

- Order Type.

- Purchase requisition Date.

Transaction Flow

Begin this transaction using either the menu path or the transaction code.

Menu Path

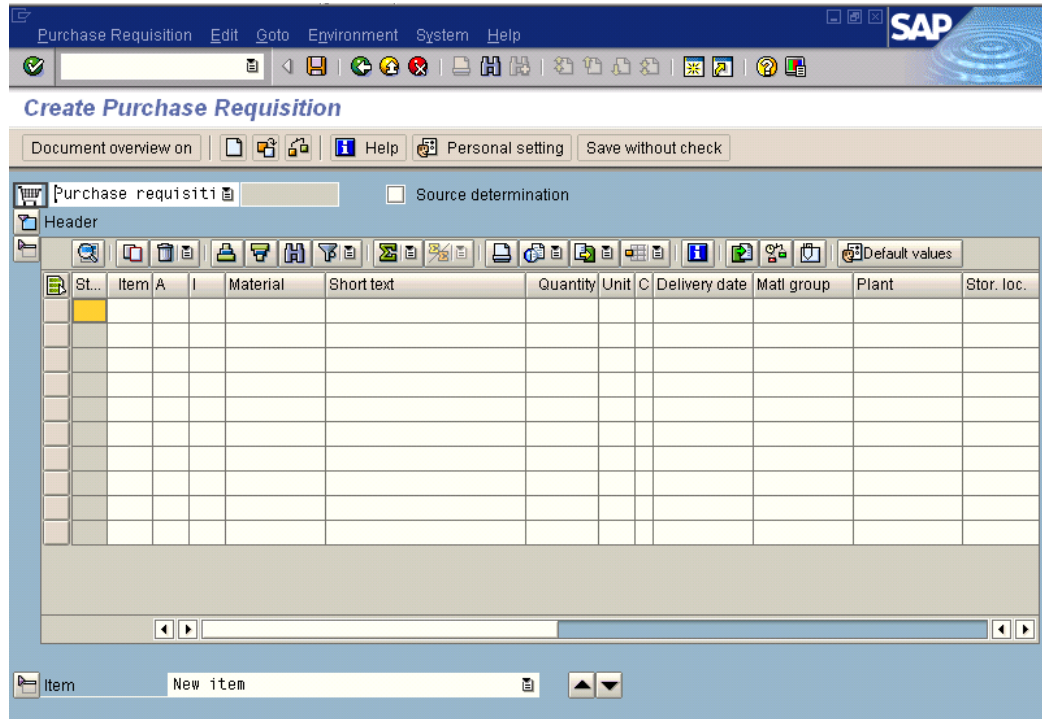Logistics > Materials Management > Purchasing >

Purchase Requisition > Create

Transaction Code

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1. Display the *Create Purchase Requisition* screen using the above menu path or transaction code.

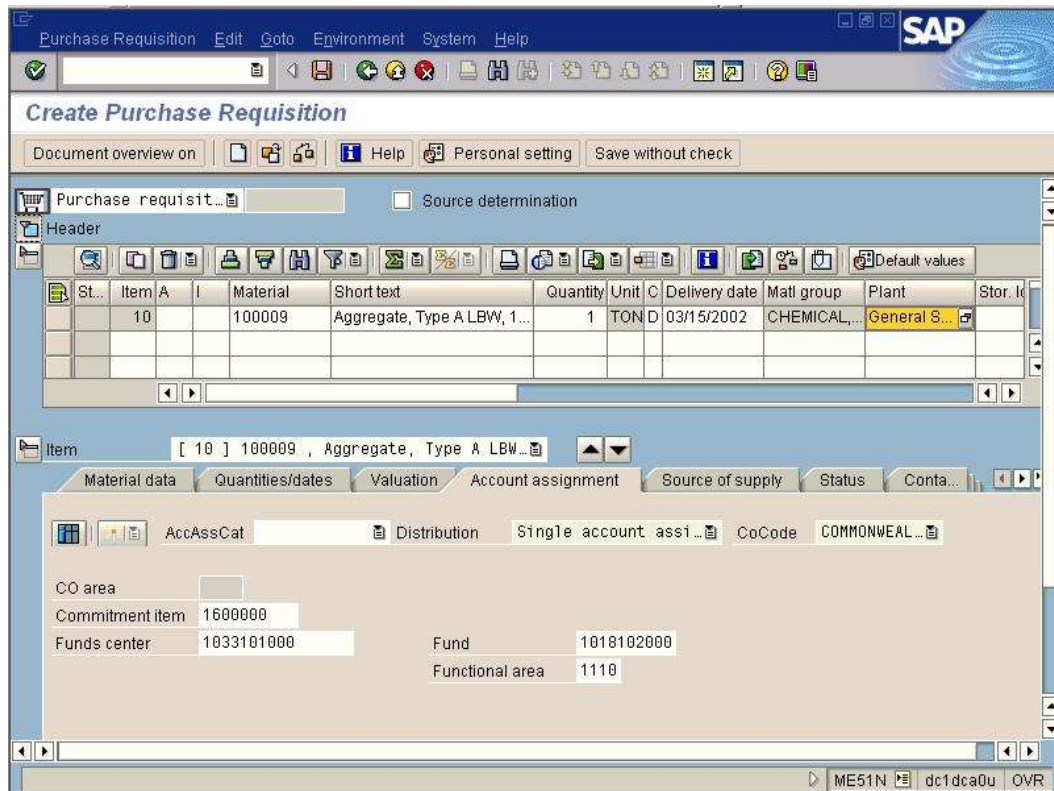   ▶ Note the *Create Purchase Requisition* screen.

2. Enter the following fields to create a line item:

Order type	Click the DROP DOWN 📋 icon to select the order type purchase requisition. **Hint:** The field is found to the right of the SHOPPING CART 🛒 icon.	R
Source determination	Select the checkbox to have the system determine sourcing automatically. **Note:** After checking, if contract(s) exist and material is added, a new screen will appear for vendor selection.	O
Material	Enter the material number, or click the MATCHCODE 🔲 icon for a list of possible entries.	R
Quantity	Enter the quantity.	R
Delivery date	Enter the delivery date.	R

Plant	Enter the plant code.	R
	Example: 7821 for Penn Dot Cumberland County.	

3. Click the ENTER ✅ icon.

4. Click the HEADER 🗂 icon to expand the header details.

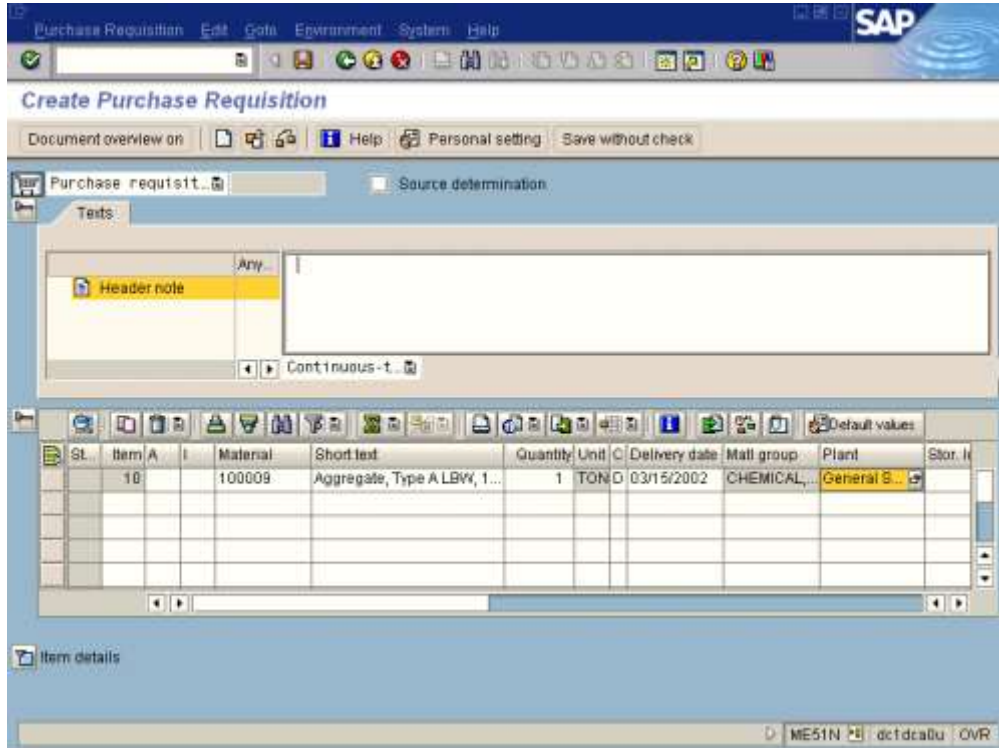► Additional tabs of data appear on the *Create Purchase Requisition* screen.

Explanation

Note: If an outline agreement exists for the material, the system displays the information in the Item section of the Source of supply tab.

5. Click the TEXT tab.

▶ The *Create Purchase Requisition* screen, Text tab appears.

6. Enter the following fields:

| Text	Enter text required. This text applies to all line items on the requisition. **Example**: 90-day delivery.	O

7. Click the HEADER ⬜ icon to collapse the header details.

8. Click the ITEM DETAILS ![icon] icon to expand the item details.

▶ The *Create Purchase Requisition* screen, item details are

displayed.

9. View line item detail by either clicking on the tabs, or click the LIST ![icon] icon to display a list of options for the item detail section of the screen.

10. Click the Quantities/dates tab.

▶ The *Create Purchase Requisition* screen, Quantities/dates tab appears.

11 Review the quantities/dates information displayed. If any information requires
· changes, make those changes here.

12 Click the LIST icon and choose the Account assignment tab.
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▶ The *Create Purchase Requisition* screen, Account assignment tab appears.
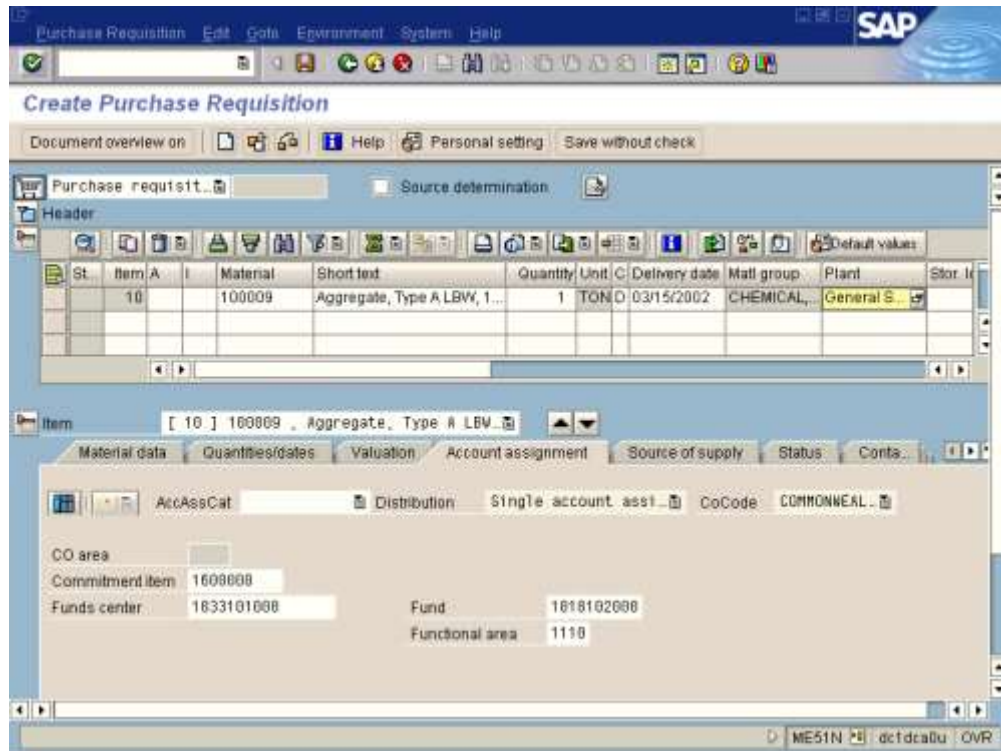
13 Review the accounting information displayed. If any information requires changes, make
· those changes here.

14 When changes are completed, click the ENTER icon.
·

15. Click the SAVE 💾 icon.

▶ The *Create Purchase Requisition* screen appears. A new purchase requisition has been created and the number is displayed in the status bar.

16. Click the EXIT 🔼 icon until the *SAP Easy Access* screen appears.