

## Requisitions / Workflows

*AccuFund Onsite*

### Streamline Your Purchase Order and Payment Request Processes

AccuFund makes it easy to track requisitions through multiple approval stages, until they get to the purchasing agent or Accounts Payable for payment. All activity is date- and user-stamped for convenient status updates and reporting.

Using this electronic routing system, you can scan, attach, and forward documents to the right people, so reviewers can quickly comment on, approve, or return requests.

### Requisitions / Workflows Online Version

Looking for the cloud online version of this module?

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Select	Locate	Requisition	Hold	Department	Date	Type	Reference	Lookup	Name	Description	Purpose	Sep	Dlr	Amount
My Requisitions (21)		18	<none>		3/03/2016		mja	11	Office Max	Supplies	PO			115.00
Needs Routing (1)		19	<none>		3/03/2016		mja	11	Office Max	Supplies	PO			115.00
Needs Approval		20	<none>		3/03/2016		mja	11	Office Max	Supplies	PO			115.00
To Be Ordered		21	<none>		6/21/2016			11	Office Max	Supplies	PO			35.00
On Order (11)		22	<none>		1/11/2017		AccuFund		AccuFund, Inc.	Request	Payment			1,000.00
Completed (6)		23	<none>		1/11/2017		AccuFund		AccuFund, Inc.	request	PO			1,000.00
Disapproved (2)		24	<none>		11/08/2017		mja	11	Office Max	Supplies	PO			50.00
Cancelled		25		Administration	6/27/2018		mja	11	Office Max	Supplies	Payment			500.00
On Hold (1)		26	<none>		8/09/2018		mja	11	Office Max	Office Supplies	PO			125.00
Initial Approver		27	<none>		8/14/2018		mja	11	Office Max	Supplies	PO			150.00
Admin		28		Administration	3/21/2019		mja	11	Office Max	Office Supplies	PO			120.00
Approve		29	<none>		3/21/2019		mja	11	Office Max	Supplies	PO			115.00
Executive Director		30	<none>		11/22/2019	IT		11	Office Max	supplies	Payment			100.00
Fund 001														
Over 1000														
PO Agent														

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### Keep Everything Organized with Approval Trees

A rules-based, approval tree architecture is the key to the Requisitions and Workflow Management module's effectiveness.

The people responsible for ordering products and creating purchase orders sit at the top of each approval tree. Requests can be routed to different approvers based on cost center or department, and approval levels can be added automatically when certain conditions—such as dollar amounts or types of requests—are met.

Authorized users can easily view the status of their requisitions through a simple folder-based browser screen. Employees who function as both requesters and approvers in different situations can be assigned different entry rights in multiple approval trees.

## Convenient Features Offer a Host of Benefits for Your Team

The AccuFund Requisitions and Workflow Management module is purpose-built to simplify your workflow. Popular features include:

- Approval alerts
- Comment fields for questions and clarification
- On-screen history of approvals and denials
- Automatic AP bill and PO creation upon final approval
- Electronic signature storage
- The ability to order stock, non-stock, and service items
- The ability to email requisition forms as PDFs

Browse requisition approval areas

Locate

Area Type	Priority	Area Name	Options
Entry		AdultResearch	Enter: PO Entry
Entry		GrantSchoN	Enter: PO Entry
Entry		lawton user	Enter: PO Entry
Entry		MainStHouse	Enter: PO Entry, Payment
Entry		YouthClinic	Enter: PO Entry
Entry		YouthResearch	Enter: PO Entry
Initial Approver		Admin	Allow: No header change, No activity change
Initial Approver		AdultProg	Allow: No header change, No activity change
Initial Approver		lawton	Allow: No header change, No activity change, Make PO/Payment
Initial Approver		YouthProg	Allow: No header change, No activity change
Approver	5000	Over 1000	Allow: No header change, All activity, Add notes, Change routing, Make PO/Payment, Review=RQreq_Type <> 'Emergency' AND RQreq_AmountRequisition > 1000.00
Approver	5100	Fund 001	Allow: No header change, All activity, Review=RQreq_Type <> 'Emergency' AND GETPOSTED('001 ??? ???? ??') <> 0
Approver	8000	Executive Director	Allow: No header change, No activity change, Review=RQreq_Type <> 'Emergency' AND RQreq_AmountRequisition > 5000.00
Approver	9000	PO Agent	Allow: All of header, All activity, Add notes, Make PO/Payment, Review=RQreq_Type <> 'Emergency'
Approver	9900	Emergency	Allow: No header change, No activity change, Add notes, Change routing, Make PO/Payment, Review=RQreq_Type = 'Emergency'

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## Enjoy Greater Convenience with Built-in Integrations

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To streamline your processes even more, Requisitions Management ties into other AccuFund modules:

- Inventory—Easily check order history, preferred vendors, and pricing information
- Accounts Payable—As items are received, requisition status is updated automatically
- General Ledger—All accounting information is posted to the requested column
- Purchasing—Once approved, requisitions are available for inclusion in purchase orders
- Reports/Forms Designer—Customize reports or use built-in templates for requisition documents, activities, and status

## Let's Get Started

AccuFund supports your mission with a full suite of financial management applications for nonprofit and government organizations. To learn more and arrange a demo, contact AccuFund at 877-872-2228 or [sales@accufund.com](mailto:sales@accufund.com) or visit [www.accufund.com](http://www.accufund.com).

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