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Overview

As part of an organisation's internal financial controls, the finance team may instate a purchase requisition process to help manage requests for purchases.

A purchase requisition is typically sent to the purchasing department to procure goods or services, containing a description and quantity of the goods or services required. Typically, a finance staff member is assigned responsibility for purchase order management.

Here, users can submit purchase order requests, choosing from a list of available products. The costs for each product are pre-defined in the database, so users simply need to choose the product and insert the quantity needed.

Subtotals for each line item are auto-calculated, along with an overall total at the end. If the total is less than \$1,000, approval from a member of the purchasing team is required. If the total is more than \$1,000, approval from management is required. All interested parties will receive automatic notifications throughout the process.

The purchase ordering process differs between organisations. In some cases, the department head may approve the purchase request initially, based on their monthly or annual budget, before it is sent to the purchasing team. In other cases, as shown in this demo process, the purchasing team have authorisation to approve requests up to \$1,000.

Please bear in mind that this form alone does not compare to a full purchase ordering process, it simply makes up one part of the process.

Additional features

Automatic changes: The Unit Cost fields will change depending on the product selected. Triggers look for changes in the Product field. If the option selected changes, the trigger pushes the Dynamic Field Change and the value of Unit Cost will be automatically updated.

| Unit Cost \$ unit.cost_1 Short string | Product 1 = A | 15 | +/= | | |
|---------------------------------------|---------------|-----|-----------------|--|--|
| | Product 1 = B | 25 | ↑ + / □ | | |
| | Product 1 = C | 100 | ↑ ↓ / 亩 | | |
| | Product 1 = D | 350 | ↑ ↓ / 亩 | | |
| | Product 1 = E | 75 | ↑ + / □ | | |
| | Product 1 = F | 225 | ★/面 | | |
| | Add rule | | | | |
| | | | | | |
| Unit Cost \$ unit_cost_2 Short string | Product 2 = A | 15 | ↓ / 面 | | |
| | Product 2 = B | 25 | ++∕亩 | | |
| | Product 2 = C | 100 | ↑ + / 亩 | | |
| | Product 2 = D | 350 | ↑ + / □ | | |
| | Product 2 = E | 75 | ↑+/亩 | | |
| | Product 2 = F | 225 | ★/亩 | | |
| | Add rule | | | | |
| | | | | | |
| Unit Cost \$ unit_cost_3 Short string | Product 3 = A | 15 | ↓ ∕ | | |
| | Product 3 = B | 25 | ↑ + / □ | | |
| | Product 3 = C | 100 | + + ≠ ∞ ⊞ | | |
| | Product 3 = D | 350 | + + ∕ ⊞ | | |
| | Broduct 2 - E | 75 | A 4 2 m | | |

Workflow: Rules are in place to control what the ticket's status can move to next. For example, if the status is *Awaiting Purchaser Approval* then any user in the 'purchaser' role can move the status to *Approved* or *Rejected*. But anyone in the 'managers' role can also move the status to *Awaiting Management Approval*. Those in the 'admin' role can move the ticket to any status.

| | | | Rights | | | | | |
|--|--------------------------------------|-----|---|---|---|-------|------------------------|--------------------|
| Tickets fields, label [symname] | Field condition set | | Admin | Managers | Purchasers | Users | Submitter of ticket | Handle of issue |
| STATUS _status_ | Status = Awaiting Purchaser Approval | + = | Awaiting Purchaser Approval Awaiting Management Approval Approved Rejected Ordered Delivered | Awaiting Purchaser Approval Awaiting Management Approval Approved Rejected | Awaiting Purchaser Approval Approved Rejected | | | |

One of the Workflow rules, applicable whenever the status is currently set to 'Awaiting Purchaser Approval'

Expressions: Edit the form, and then edit the *Total* field. Here you can see a 'parseFloat' expression used to add together the values of the totals above.

| Fields properties | | | × |
|-------------------|-------------------------|------|--------|
| Properties Style | Constraints | | |
| Name | Total \$ | | |
| Symbolic name | total | Edit | |
| Optional Hint | | | |
| Туре | Short string ~ | | |
| String format | Floating point | | \sim |
| Default value | {#parseFloat(\$s f | | |
| | | | \sim |
| | Use existing variables | | |
| | Required | | |
| | 🗹 Disabled | | |
| | Reload form on changing | | |
| | | Save | lete |

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