

PROTEUS MMX – STATUS FIELD IN REQUISTION/ PURCHASE ORDER

EAGLE TECHNOLOGY, INC.



STATUS FIELD IN REQUISTION/ PURCHASE ORDER

OVERVIEW

1. Go to Settings >> Purchasing >> Status

Quick Links	Home Assets Invento	ry Personnel Providers	Purchasing Reports S Regions Requesters	ervice Requests Work Orders	Company Rights Active I
	INVENTORY	PURCHASING	SERVICE REQUESTS	WORK ORDERS	
	Stock Classes	Accounts	Message Customization	🖕 Approvals	
	Transaction Reasons	😹 Buyers	# Service Request Numbers	👗 Causes	
	👰 Measurement Unit	ayment Terms	S. Notifications	1 Inventory Check	
	Inventory Classification	& Receivers	Portal	Maintenance Codes	✓ Save
	inventory Usage	Requisition Numbers		Priorities	
	and the second s	Shipping Methods		Routing Configuration	
		🗯 Requisition Status		🕑 Shifts	
		VAT Rate (%)		😼 Work Order Status	
		🂣 Tax Rate (%)		Work Order Numbers	
		- AccountGL		👫 Work Types	
		Status			
	DATA FIELDS	REPORTS			
	🏠 Data Fields	Auto Print Reports			

2. Select values from the drop-down.

proteus Home Assets	Inventory Personnel Providers Purchasing Repor	ts	Service Requests	Work Orders	Company	Rights	Active Directory	KPI
Quick Links SettingsSettings -	Purchasing - Status							
-	Status							-
	Purchase request waiting approval - (PR WAPP	R), F	Purchase reque	st on hold – (PR	R HOLD), (1	11) 👻		1
	✓ Select All × Select None							1
	Search	×						1
	Purchase request waiting approval - (PR WAPPR)	1	-				10	1
	Purchase request on hold – (PR HOLD)	1					ave	1
	Purchase request cancelled – (PR CAN)	4						1
	Purchase request approved – (PR APPR)	~						1
	Request for quotation sent to supplier – (RFQ SENT)	1						1
	Purchase order approved – (PO APPR)	5	•					
		10						
_								

1

3. After selecting the values, enter email addresses into the *Notification Recipient* field **NOTE:** The user can enter multiple email addresses by separating them with semicolons.

proteus Home Ass	sets Inventory Personnel Providers Purchasing Reports Service Requests Work Orders Company Rights Active Directory KPI
Quick Links SettingsSetti	ngs - Purchasing - Status
	Purchase request waiting approval - (PR WAPPR), Purchase request on hold – (PR HOLD), (11) 💌
	Notification Recipients
	parveenf@inzerotech.com
	Notification Decinients
	Email should be separated by
	semicolon(;)

- 4. After entering the email addresses, click the *Save* button.
- Go to Settings >> General >> Global Options. Select the Yes radio button to enable the 'Purchasing status notification.'

Service request facilities filter Yes O No	
Escalation Purchasing	
Purchasing status notification Yes No	

6. Go to Purchasing >> Requisitions

proteus mmx Home	Assets Inventory Personnel Providers	Pur	chasing Reports Se	ervice Requests	Work Orders	Company	Rights	Active Directory
Quick Links Setting	gsSettings - Purchasing - Status	×	Requisitions]				
	Purchase request waiting a	1	Purchase Orders	chase request	on hold – (PR	: HOLD), (11) 🔹	
	Notification Recipients		Order					
	parveenf@inzerotech.com	1	Blanket Purchase Orders					
		6	Reorder List					
		۶	Purchasing History					10
		9	Stock Order List				🗸 s	ave

7. Click the *New* icon to create a requisition.

WHEN CREATING A NEW REQUISITON, THERE ARE THREE (3) VALUES IN THE STATUS FIELD:

1. When the requisition is created, the value will be *"Purchase request waiting approval – (PR WAPPR)"*

Proteus Home Assets Inventory Personne Ouick Links SettingsPurchasing - Requisition s >> Re	el Providers Purchasing Reports Service Requests Work Orders	s Company Righ
		lime
Work Order Time of Day Completed	UserField 14	UserField 15
Requisition Status	Status Purchase request waiting approval - (PR WAPPR)	Tax Rate (%)
Notes	Purchase request waiting approval - (PR WAPPR)	
	Purchase request on hold – (PR HOLD) Purchase request cancelled – (PR CAN)	Font

NOTE: As the user clicks *Save*, an email will be triggered to the notification recipients.

MMX37 Test site <cmms@proteusmmx.net> to me 👻</cmms@proteusmmx.net>		5:35 AM (7 minutes ago) 💥 🔦
	proteus	
This is to inform you th	at a new requisition has been created.	
Requisition Number	20171003006	
Vendor	Parveen	
Cost Center		
Requester		

3

 If the user changes the status to "Purchase request on hold – (PR HOLD)", an email will be triggered to the notification recipients.

	proteus
	- (11, 12) X
This is to inform you that the status be	een changed for requisition
Requisition Number 201710	03006
Vendor Parveer	n
Cost Center	
Requester	
Status Purchas	se request on hold – (PR HOLD)

3. If the user deletes the requisition, an email will be triggered to the notification recipients.

Requisitions deleted Inbox x	ē 🛛
MMX37 Test site <cmms@proteusmmx.net> ts ms</cmms@proteusmmx.net>	5:51 AM (27 minutes ago) 📩 🔺 👻
proteus	
This is to inform you that the following requisition(s) have been deleted: 20171003003	
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The status will be changed to "Purchase Request Cancelled - (PR CAN)"

NOTE: When the *No* radio button is selected for the **'Purchasing Status Notification'** in **Global Options,** then the process will work as demonstrated above, with the exception being that the email functionality will not be available.



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