



Infor **Mongoose**

Version 9.01

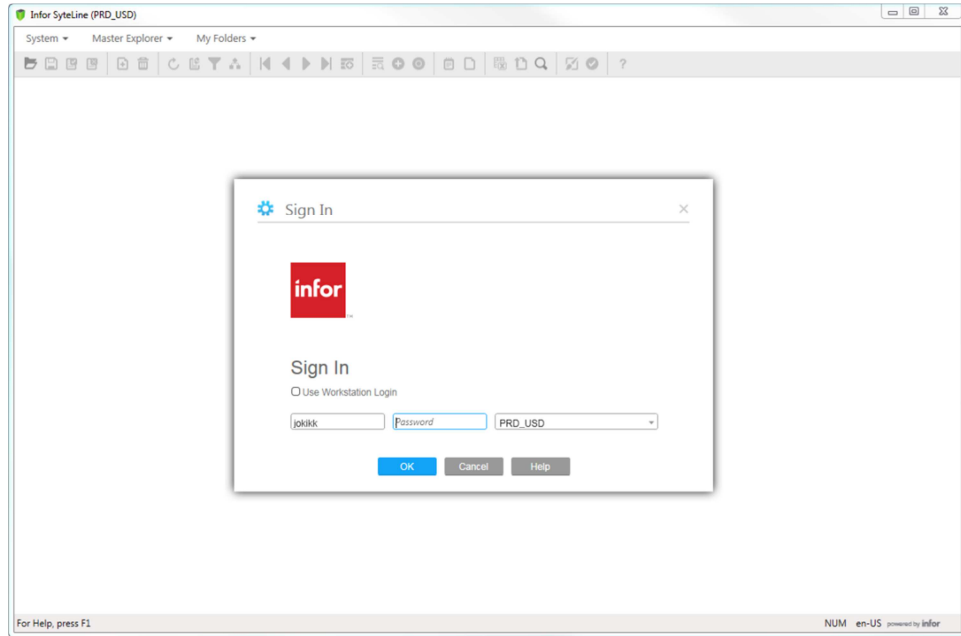
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# Purchase Order

## Requisitions Submission

### Step-by-Step Directions

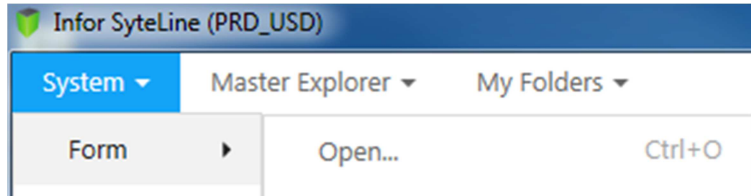
# Syteline: Sign In



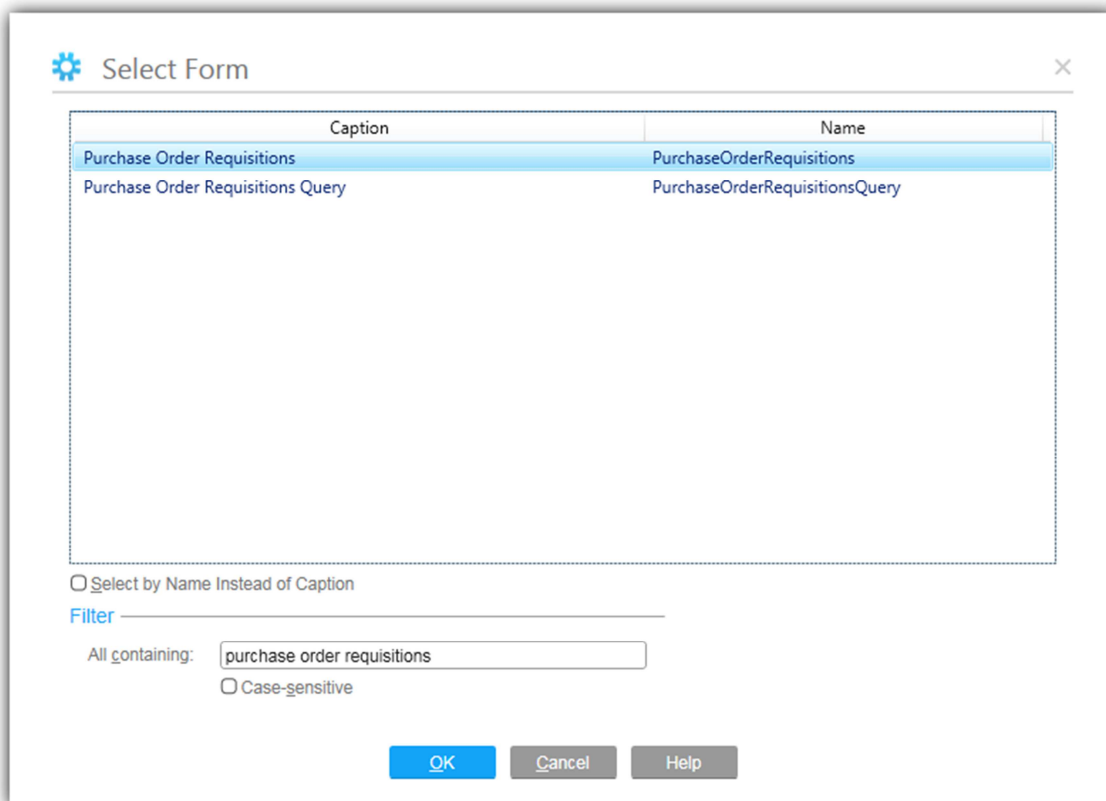
- Sign in to Syteline
  - Type your username.
  - Type your password.
  - Select the environment.
    - PRD\_USD for US
    - PRD\_CDN for Canada

## Opening the Purchase Order Requisitions Form

- Opening the Purchase Order Requisitions form:
  - Click on the **System** menu and click on **Form** and then **Open**.
  - Or use the shortcut and type **Ctrl + O**



- In the Select Form window, start typing or use the filter field.
  - find the form “Purchase Order Requisitions”
  - Select the form.
  - Click OK.



## Creating Purchase Order Requisitions

Infor SyteLine (PRD\_USD) - Purchase Order Requisitions (Filter In Place)

System Master Explorer My Folders

Purchase Order Requisitions (Filter In Place) ×

Requisition:  Status:  ☐ Start Approval Process

Date:  Requisition Cost:

Lines

Requester:

Approver:




Warehouse:  Deliver To:

Integration

☐ External

External Requisition:

Filter In Place NUM en-US powered by infor

- Click on the  icon to take off the “Filter In Place”.
- Click on the  icon to create a new Purchase Order Requisition.
- Click on the  icon to save it.

## Purchase Order Requisitions: Header Level

**Infor SyteLine (PRD\_USD) - Purchase Order Requisitions**

System ▾ Master Explorer ▾ My Folders ▾

**Purchase Order Requisitions** ×

① Requisition: 1 Status: Requested ③ ☐ Start Approval Process

② Date: 11/10/2016 Requisition Cost: 0.00000 USD ④

**Lines**

⑤ Requester: jokikk

⑥ Approver:

⑦ Warehouse: NOBL Deliver To: Kenta Joki ⑧

**Integration**

☐ External

External Requisition:

Requisition (Purchase Order Requisition 1 of 1) NUM en-US powered by infor

	Field	Description	Action
1	Requisition	The system automatically assigns a requisition number.	None
2	Date	Date field for tracking purposes.	Change, if needed
3	Status	The system automatically updates this status. "Requested" – Requisition prior to PO conversion "Converted" – Requisition has been converted to a PO	None
4	Requisition Cost	The system automatically calculates this total cost.	None
5	Requester	Username of requester for tracking purpose	Change, if needed
6	Approver	This field serves no purpose and does not need to be touched.	Ignore
7	Warehouse	This field serves no purpose and does not need to be touched.	Ignore
8	Deliver To	Name of the person this order should deliver to.	Change, if needed

To get started, click on the  icon to start entering line details.

## Purchase Order Requisitions: Line Level

Infor SyteLine (PRD\_USD) - Purchase Order Requisition Lines (Linked)

System ▾ Master Explorer ▾ My Folders ▾

Purchase Order Requisitions **Purchase Order Requisition Lines (Linked)** ×

Requisition: 1 ☐ External Status: Requested  
Date: 11/10/2016 Requisition Cost: 0.00000 USD

PO Req  
PO Req Report  
Convert PO Req  
Item Content  
Price Request  
Recalculate Cost

① Line: 1 Status: Requested  
② Item:  ③ Due Date: 11/10/2016  
④   
⑤ Manufacturer:   
⑥ Manufacturer Item:   
⑦ Requisition Code:  ⑧ Capital Item: No  
⑨ Ship to Warehouse: NOBL ⑩ Ordered: 0.000 ⑪   
⑫ Line Notes:

**General** Costs

⑬ Vendor:  RINGI Number:  ⑭  
⑮ Buyer:  Department Id:  ⑯  
Commodity Code:  ⑰  
Account:  ⑱  ⑲  ⑳  ㉑  ㉒  
Production & Whse Supplies ☐ Expedited  
Destination: Inventory ㉓ 0 0 ☐ Unlinked Reference  
Item Price Request:

PO: 0 0 Plan Cost: 0.00000 USD  
☐ Quoted Plan Extended Cost: 0.00000 USD

Item (Purchase Order Requisition Line 1 of 1) (Linked to Purchase Order Requisitions) NUM en-US powered by infor

## Purchase Order Requisitions: Line Level

	Field	Explanation	Action
1	Line	System will auto assign the line number.	None needed
2	Item	Enter part number here.	Entry required
3	Due Date	Select your requested due date.	Entry required
4	Description	Enter description here.	Enter, if needed
5	Manufacturer	This field serves no purpose and does not need to be touched.	Ignore
6	Manufacturer Item	This field serves no purpose and does not need to be touched.	Ignore
7	Requisition Code	This field serves no purpose and does not need to be touched.	Ignore
8	Capital item	Change to Yes, if item is a capital item.	Change, if needed
9	Ship to Warehouse	This field serves no purpose and does not need to be touched.	Ignore
10	Ordered	Enter the quantity here	Entry required
11	Unit of Measure	Select the unit of measure	Entry required
12	Line Notes	Enter any line notes, if necessary.	Enter, if needed
13	Vendor	Select vendor	Entry required
14	RINGI Number	Enter RINGI number, if applicable	Enter, if needed
15	Buyer	Purchasing buyer	Leave blank
16	Department Id	This field serves no purpose and does not need to be touched.	Ignore
17	Commodity Code	This field serves no purpose but is required, select 000	Change to 000
18	Account	Select appropriate account code	Entry required
19	Location	Select the shipping address	Entry required
20	SMC custom code	This field serves no purpose and does not need to be touched.	Ignore
21	Department	Select your department ID	Entry required
22	SMC custom code	This field serves no purpose and does not need to be touched.	Ignore
23	Destination	This field serves no purpose and does not need to be touched.	Ignore

General
Costs

Material: 0.00000  
Freight: 0.00000  
Duty: 0.00000  
Brokerage: 0.00000  
Insurance: 0.00000  
Local Freight: 0.00000  
Plan Cost: 0.00000  
☐ Update Job Material Unit Cost

Field	Explanation	Action
Material	Unit cost of the item	Entry required
Freight	Freight is not added at the line level	Ignore
Duty	Duty is not added at the line level	Ignore
Brokerage	Brokerage is not added at the line level	Ignore
Insurance	Insurance is not added at the line level	Ignore
Local Freight	Local Freight is not added at the line level	Ignore

## Purchase Order Requisitions: Submit for Approval

Infor SyteLine (PRD\_USD) - Purchase Order Requisitions

System ▾ Master Explorer ▾ My Folders ▾

Purchase Order Requisitions ×

Requisition: 1 Status: Requested ☐ Start Approval Process

Date: 11/10/2016 Requisition Cost: 1,644.50000 USD

Lines

Requester: jokikk

Approver:

Warehouse: NOBL Deliver To: Kenta Joki

Integration

☐ External

External Requisition:

Date (Purchase Order Requisition 1 of 10) NUM en-US powered by infor

- When you are finished adding lines
  - Close the line level form.
  - Go back to the header form.
  - The Requisition Cost should reflect the sum of the extended cost of all the lines.
- To submit this purchase requisition
  - Click on the “Start Approval Process” check box
  - Then click on the Save icon.



## Purchase Order Requisitions: Vendor Search

Requisition:	1	<input type="checkbox"/> External	Status:	Requested
Date:	11/16/2016		Requisition Cost:	10.50000 USD

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Line:	1	Status:	Requested
Item:	595925	Due Date:	11/10/2016
Desk organizer			
Manufacturer:			
Manufacturer Item:			
Requisition Code:		Capital Item:	No
Ship to Warehouse:	NOBL	Ordered:	3.000 EA
Line Notes:			

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General Costs

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Vendor:		RINGI Number:	
Buyer:		Department Id:	
Account:	310130	Commodity Code:	000
Error Suspe		<input type="checkbox"/> Expedited	
Destination:	Inv	0	0 <input type="checkbox"/> Unlinked Reference
Item Price Request:			

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PO:		0	0	Plan Cost:	3.50000 USD
<input type="checkbox"/> Quoted				Plan Extended Cost:	10.50000 USD

- The vendor drop down will only show the first 200 records in numerical order.
- If you know the vendor number, you can enter it
- If you want to search for the vendor, here is how:
  - Right click on the Vendor field
  - Click on "Find..."

Primary Criteria

Additional Criteria

Vendor

like

Name

like

OK

Cancel

Clear

Refresh

Results

- This form allows you to find a vendor using a certain criteria
  - Use the name field and the “like” option
  - Type in full or portion of the vendor name and add “\*” at the end
  - “\*” will show all vendors matching that criteria
    - For example if you type “O\*” it will show all vendors starting with the letter O
  - After you type your criteria, click on “Refresh” to get your search results.
  - Find the desired vendor and click it.
  - Do not select the vendor number starting with “R”. Every vendor has an “R” vendor which is used by accounting for remitting payments.
  - Then click “OK”
  - When you get back to your requisition, the vendor will be populated.

Primary Criteria

Additional Criteria

Vendor

like

Name

like

OFF\*

OK

Cancel

Clear

Refresh

Results

## Purchase Order Requisitions: Account Search

General Costs

Vendor: 52123 OFFICEMAX RINGI I  
Buyer: Depart  
Commodi

Account: 310130

- 310130 Error Suspense - Billing
- 310140 Error Suspense
- 310150 Error Suspense - Freight
- 310160 Error Suspense - Sales Tax
- 410100 Gross Sales - Merchandise
- 410102 Price Discounts - Merchandise
- 410150 Gross Sales - I/C Merchandise
- 410152 Price Discounts - I/C Merchandise
- 420100 Payment Discounts Direct
- 420101 Rebates - Direct
- 420102 Rebates - Distributor
- 420110 Handling Charges
- 420111 Restocking Fee
- 420112 Rush Order Fee
- 420113 Repair Labor - Direct
- 420114 Assembly Labor - Direct
- 420120 Compressed Air Audits
- 420130 Freight Billed to Customers
- 420131 X-DOCK AIR FRT HANDLE FEE
- 420132 ADDRESS FEE IPD < 4 LBS SLS
- 420133 ADDRESS FEE IED < 4 LBS SLS
- 420134 INT'L PRIORITY DIRECT SHIP SLS
- 420135 INT'L ECONOMY DIRECT SHIP SLS

- When you click on the Account field, you will see a lot of account codes that do not apply and it only shows you the first 200 records. To search for your desired account, please try the following.
- In the account field, you can type in part of the account followed by \* and hit the drop down box.
  - 62\* will show you everything starting with 62.
  - 627\* will show you everything starting with 627.

Account: 62\*

- 624070 Telephone - Mobile Services
- 624080 Videoconferencing
- 624090 Internet Services
- 624990 Other Telephone Expenses
- 624991 Audio Teleconferencing
- 625010 Water
- 625040 Electric
- 625990 Gas
- 625991 Sewage
- 625998 HQ Allocations - Utilities
- 626020 Office Supplies
- 626021 Printed Materials (Forms)
- 626030 IT Supplies
- 627010 Office Equipment
- 627011 Plant Equipment
- 627012 Maintenance Equip Purch.
- 627020 Computer Software
- 627040 Lab Equipment & Tools
- 627050 Computer Hardware
- 627060 Production & Whse Supplies
- 628010 Prototypes
- 629010 Subscriptions/Publications

Account: 627\*

- 627010 Office Equipment
- 627011 Plant Equipment
- 627012 Maintenance Equip Purch.
- 627020 Computer Software
- 627040 Lab Equipment & Tools
- 627050 Computer Hardware
- 627060 Production & Whse Supplies