

## Requisitions / Workflows

*AccuFund Anywhere Online*

### **Streamline Your Purchase Order and Payment Request Processes**

AccuFund's browser based system 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 online outing system, you can scan, attach, and forward documents to the right people, so reviewers can quickly comment on, approve, or return requests.

### **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.

### **Requisitions / Workflows Onsite Version**

Looking for the onsite version of this module?

[Show Me the Onsite Version](#)

Group	St	Requisi...	Department	Date ↓	Lookup	Name	Description	Purpose	Amount
All Requisitions (14)		14	<none>	06-02-2018	ACC001	AccuFund, Inc.	software	Payment	2,500.00
My Requisitions (5)		13	<none>	02-28-2018	ACC001	AccuFund, Inc.	software	PO	2,000.00
Needs Routing (3)		9	Clinic	12-20-2017	CCD001	Colorado Custom Decks	repair youth deck	PO	7,575.00
Needs Approval (1)		10	MainStHo...	12-20-2017	OMAX	Office Max	paper	PO	99.80
To Be Ordered		6	Administra...	12-18-2017	ACC001	AccuFund, Inc.	new Requisition Software	PO	2,495.00
On Order (1)		7	Administra...	12-18-2017	MID001	Mideast Lab Supply		PO	10.00
Completed		8	Clinic	12-18-2017	MID001	Mideast Lab Supply		PO	85.50
Disapproved		3	Clinic	12-04-2017	OMAX	Office Max	Office Supplies	PO	50.50
Cancelled		4	Research	12-04-2017	MME	Manny's Mouse Emporium	Lab Rats	PO	250.00
On Hold		5	MainStHo...	12-04-2017	ADV001	Advantage Laser Products	Toner Cartridge	PO	45.00
Initial Approver (3)		2	Administra...	11-09-2017	ACC001	AccuFund, Inc.	software	PO	3,000.00
Admin (3)		12	<none>	06-30-2017	ACC001	AccuFund, Inc.	software	Payment	2,400.00

Total count: 14

## 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

Requisition	Activity	Notes	Images	Routing
<p>Comment: <input type="text" value="Great choice!"/></p> <p>Vendor: <input type="text" value="ACC001"/></p> <p>Name: <input type="text" value="AccuFund, Inc."/></p> <p>Description: <input type="text" value="software"/></p> <p>Pay From: <input type="text" value="&lt;any&gt;"/></p>	<p>Approve <input type="radio"/></p> <p>Disapprove <input type="radio"/></p>	<p>Cancel Date: <input type="text"/></p>	<p>Requisition: <input type="text" value="14"/></p> <p>Type: <input type="text" value="&lt;none&gt;"/></p> <p>Date: <input type="text" value="06/02/2018"/></p> <p>Reference: <input type="text"/></p> <p>Purpose: <input type="text" value="Payment"/></p> <p>Invoice: <input type="text"/></p> <p>Amount: <input type="text" value="2,500.00"/></p>	

## Enjoy Greater Convenience with Built-in Integrations

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

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- 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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### AccuFund SOC2 Certification for Cloud Service Offerings

*SOC (System and Organization Controls) certifications offer an AICPA auditor's opinion on the effectiveness of a service organization's controls relevant to security, availability, processing integrity, confidentiality, or privacy. AccuFund has received SOC 1 Type 2 certification for its cloud offerings.*

