

 **INBOOKS**
USE CASE**PURCHASE REQUISITION TO PURCHASE ORDER**

The following case is based off of a real customer's process that utilizes INBOOKS's features and capabilities sufficiently.



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Using INBOOKS in Action Every Day



Every day, INBOOKS users gain back hours of time through automation, accessibility and limitless sharing.

This use-case illustrates an actual process configured and refined that helps turn tedious paperwork into a streamlined and efficient method to substantially reduce the time required for the purchasing life-cycle.

A Healthcare Provider uses INBOOKS to turn Purchase Requisitions into Purchase Orders.

Overview

When a purchase is needed, a request is made. In order to get it approved, they complete their internal form through an intranet site they employ. The INBOOKS Email Monitor Utility detects a new form, and it is automatically saved in INBOOKS. The Purchase Requisition is then routed through an extensive approval process with as many as 8 approvers depending on the total amount of the intended purchase. Once approved, an Accounts Payable Representative will open INBOOKS FormSMART and convert the Purchase Requisition to a Purchase Order and that will be pushed into INBOOKS. An INBOOKS user then reviews the Purchase Order and pushes the data into their ERP.

Subject Area

Purchase Requisitions; Purchase Orders

Actor(s)

Employee that found a need for a purchase; Departmental and Purchasing Approvers

Trigger

A purchase request is identified for continuous quality care

Basic Flow

- 1) A User connects to their intranet site and selects a purchase requisition form.
- 2) The form is filled out with the requested items and automatically submitted via an email transport.
- 3) The requisition is pulled into INBOOKS.
- 4) A workflow kicks off for the purchase requisition and starts the review process.
- 5) Approvers are assigned automatically based on dollar thresholds and classification.
- 6) Once all the approvals are received, the Purchase Requisition status is flagged as "Approved."
- 7) The requisition is selected in INBOOKS FormSMART.
- 8) A payables representative reviews the items and account numbers.
- 9) Vendors are selected for the entire P/R or select items on the P/R.
- 10) The Purchase Order is presented on the screen and upon acceptance, gets generated.
- 11) The Purchase Order is reviewed in INBOOKS and the data is pushed into their ERP.
- 12) The information from the P/O document is transferred into their ERP including header and line item details.

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Use Case Flowchart

