

13.05. Requisition reports

You can report on requisitions in 2 ways:

- grouped by item, showing which customers the item was requisitioned by, what has been sent and what is outstanding or
- grouped by customer, showing which items a customer has requisitioned, what has been sent and what is outstanding.

You can access the reports from the *Reports > Requisitions* menu option or by clicking on the *Requisitions* option on the Reports tab of the navigator:



Whichever way you choose, the requisition report options filter is displayed:

Requisition Report options

Report type: **Grouped By Item**

Requisition filter

Entry date is from: 01/09/19 To: 19/09/2019 This month

Include requisitions with these statuses:

- ☒ Suggested (sg)
- ☒ Confirmed (cn)
- ☐ Finalised (fn)
- ☐ Include lines that have been fully supplied

Item filter...

Item code starts with

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

Requisition customer filter

Name contains

and Category 1 is

and Category 1 is

and Customer group is Don't Care

Cancel OK

Use the **Report type** drop down list to select which type of report you would like: *Grouped by item*, *Grouped by Item (Pivot table/Excel friendly)* or *Grouped by customer*.

Grouped by item and *Grouped by Item (Pivot table/Excel friendly)* reports have the same contents, they are just formatted slightly differently. The *Grouped by Item (Pivot table/Excel friendly)* format is made to be immediately usable as a pivot table in Excel; a blank row between the column headers and the data, no gaps in the data and no total rows (see screenshots below).

The **Requisition filter** settings enable you to select which requisitions you want to include in the reports, based on their entry date (this month so far is set by default but note the quick date selection drop down list and the date pickers to enable quick selection of reporting dates) or status.

If you leave the **Include lines that have been fully supplied** checkbox unchecked, the report will only include lines where not all the stock requested has been sent to the customer i.e. outstanding requisition lines only. If you check the checkbox, all requisition lines will be included in the report.

The **Item filter** section allows you to select which items will appear in the report (only requisition lines for items matching these filters will be included in the report. If you don't set any of these, there will be no filtering by item).

Finally, the **Requisition customer filter** section allows you to select the customers whose requisitions will be included in the report. If you don't set anything in this section, requisitions for all customers will be included in the report.

Output

The Type column tells you what type of requisition the information came from:

- **response (from purchase order):** a requisition created from a purchase order made in the customer's store.
- **response (from requisition):** a requisition created from an internal order (request requisition) made in the customer's store.
- **response:** a requisition made for the customer in the supplier's store.

The other fields are all self explanatory and are shown in the screenshots below.

Examples

These are examples of what the requisition reports look like: **Grouped by item**

Requisitions grouped by item for requisitions entered from "From date" to "To date"											
Item name	Our stock on hand	Requisition ID	Customer name	Requisition comment	Status	Type	Requisition Date	Their stock on hand	Quantity requested	Quantity already issued	To be Supplied
ALBENDAZOLE, 200mg, tab	5000	1234	CPi	R234	sg	request	10/11/17	0	500	100	400
		1235	Metta	R296	sg	request	11/11/17	1	22	4	18
		1236	DRC-Mindat	R245	sg	request	04/12/17	20	750	70	680
		1237	DRC-Madupi	R233	sg	request	12/12/17	15	600	450	150
				Total				36	1,872	624	1,248
COTRIMOXAZOLE, 200mg, tab	5000	1234	CPi	R234	sg	request	10/11/17	0	500	100	400
		1235	Metta	R296	sg	request	11/11/17	1	22	4	18
		1236	DRC-Mindat	R245	sg	request	04/12/17	20	750	70	680
		1237	DRC-Madupi	R233	sg	request	12/12/17	15	600	450	150
				Total				36	1,872	624	1,248

Grouped by item (Pivot table/Excel friendly))

Requisitions grouped by item for requisitions entered from "From date" to "To date"													
Item Code	Item name	Our stock on hand	Requisition ID	Customer name	Requisition comment	Status	Type	Requisition Date	Their stock on hand	Quantity Requested	Quantity already issued	Quantity to be Supplied	
AR33197	ABACAVIR / LAMIVUDINE 60/30 MG CP	10,709	380	Customer 1	From request requisition 97 (Urgent)	sg	Response (from requisition)	26/08/2019	420	300	0	300	
AR33197	ABACAVIR / LAMIVUDINE 60/30 MG CP	10,709	371	Customer 1	From request requisition 91 (urgent)	sg	Response (from requisition)	20/08/2019	420	420	0	420	
AM13020	ACETYLSALICYLIC ACID 100 MG CP	230	320	Customer 1	From request requisition 16	sg	Response (from requisition)	06/08/2019	0	500	0	500	
AM13020	ACETYLSALICYLIC ACID 100 MG CP	230	699	Customer 1	From request requisition 20	sg	Response (from requisition)	10/10/2019	5,243	5,000	0	5,000	
AM13020	ACETYLSALICYLIC ACID 100 MG CP	230	837	Customer 2	From request requisition 24	sg	Response (from requisition)	04/12/2019	620	3,000	0	3,000	

Grouped by customer

Requisitions grouped by name for requisitions entered from "From date" to "To date"											
Customer name	Our stock on hand	Requisition ID	Item name	Requisition comment	Status	Type	Requisition Date	Their stock on hand	Quantity requested	Quantity already issued	To be Supplied
Customer 1	5000	1234	ALBENDAZOLE, 200mg, tab	R234	sg	request	10/11/17	0	500	100	400
		1235	COTRIMOXAZOLE, 200mg, tab	R296	sg	request	11/11/17	1	22	4	18
		1236	PARACETAMOL, 500mg, tab	R245	sg	request	04/12/17	20	750	70	680
		1237	AMOXICILLIN, 500mg, tab	R233	sg	request	12/12/17	15	600	450	150
				Total				36	1,872	624	1,248
Customer 2	5000	1244	ALBENDAZOLE, 200mg, tab	R235	sg	request	10/11/17	0	500	100	400
		1245	COTRIMOXAZOLE, 200mg, tab	R297	sg	request	11/11/17	1	22	4	18
		1246	PARACETAMOL, 500mg, tab	R246	sg	request	04/12/17	20	750	70	680
		1247	AMOXICILLIN, 500mg, tab	R236	sg	request	12/12/17	15	600	450	150
				Total				36	1,872	624	1,248

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