Managing Material Requisitions

August 18, 2026

Understanding Material Requisitions and Their Status

A **Material Requisition** (MRQ) is the Pams record used to request the materials needed for a specific **Project** or **Orders**. It gives purchasing and warehouse users a clear, traceable request for the items, quantities, and dates required to complete work or meet customer demand.

Use a project-linked MRQ when materials are required for work managed through a **Project**, such as project installation, production, or delivery activities. Select the relevant **Project** so the requirement remains connected to the correct project records, BOM, and purchasing activity.

Use an order-linked MRQ when the materials are required to fulfill a particular customer order. Select the related **Orders** so the requested items can be tracked against that customer demand. Choose the reference that best identifies why the materials are needed; this makes it easier to review material demand later from the Project or Orders.

The **MRQs** list, including **Current MRQs**, helps you monitor open requirements across your work. Each record shows the requested materials and lets you review the remaining demand as fulfillment progresses. Use the list to identify requests that still need stock, purchasing activity, or follow-up before the required date.

An MRQ normally moves through these operational stages:

- You enter the requirement with the correct **Project** or **Orders**, material lines, quantities, and required date.
- The request is saved for review, with **Draft** used when details are not yet final.
- The materials are checked against available stock or handled through purchasing when stock is not available.
- Material quantities are issued, received, or otherwise fulfilled against the request.
- The MRQ is complete when no required quantities remain outstanding, or it is cancelled when the work is no longer needed.

[SCREENSHOT: The MRQs list showing several material requisitions with Project, Orders, Responsible, required date, and status information.]

Preparing the Project or Order Requirement

Before creating an MRQ, confirm that the material requirement already belongs to an existing **Project** or **Orders** in Pams. The MRQ should support a real piece of work or customer demand, not serve as a general reminder to obtain materials. Using the correct source reference keeps the requirement visible to everyone reviewing the related Project or Orders.

Collect the material details before opening the MRQ form. For each required item, identify the **Item**, **Quantity**, and **Unit**. If the item needs clarification, prepare a clear **Material Description**, **Description**, or **Note** so the people fulfilling the request understand what is required. Check whether different materials are needed on different dates; this helps you avoid grouping urgent and non-urgent requirements without clear notes.

Review available stock before requesting additional materials. Check the relevant stock information, such as **Stock By Products**, when you need to understand whether the item is already available. If stock exists, the MRQ can reflect the planned material issue. If stock is unavailable or insufficient, the remaining requirement can be handled through purchasing.

Have the following information ready for the MRQ:

- The related **Project** or **Orders**
- The person shown in **Responsible**
- The required date, using **Required Receiving Date** where applicable
- The intended **Delivery Destination** or material issue location
- Each required **Item**, **Quantity**, and **Unit**
- Any useful **Note** about the material requirement, delivery timing, or work purpose

If the requirement comes from a BOM, compare the BOM material list with the actual work requirement before creating the MRQ. This helps ensure that quantities requested in Pams match the materials needed for the project or order. For more guidance on preparing BOM material lists, see Managing Bills of Material.

[SCREENSHOT: A Project or Orders with the material requirement details available before an MRQ is created.]

Creating a Material Requisition

1. Open the **MRQs** or **Current MRQs** list in Pams and choose the option to create a new **Material Requisition**. Start the request only after you have confirmed the correct Project or Orders reference and the materials required.
2. Complete the header details. Select the relevant **Project** for project work or the relevant **Orders** for customer-order demand. Enter the person in **Responsible**, select the appropriate **MRQ type** when shown, and enter the required date. Use **Required Receiving Date** when the date represents when the materials must be available. Select the **Delivery Destination** or issue location where the materials are needed.
3. Add one material line for each required item. Select the **Item**, enter the **Quantity**, and verify the **Unit**. Add a **Material Description**, **Description**, or **Note** when the item needs further explanation. For example, use a note to identify a project area, a package requirement, or an important timing detail.
4. Review every line before saving. Confirm that the selected items, quantities, and units match the Project, Orders, or BOM requirement. Check stock availability where relevant, and make sure the MRQ does not duplicate an existing open request for the same materials.
5. Click **Save** to keep the MRQ open for further review, or click **Save and Close** when the details are complete. Keep the record as **Draft** while quantities, dates, or references still need confirmation. Once the requirement is confirmed, save the completed MRQ so it can be used for material fulfillment and purchasing follow-up.

[SCREENSHOT: A Material Requisition form showing Project, Orders, Responsible, Required Receiving Date, Delivery Destination, and material lines with Item, Quantity, and Unit.]

Reviewing and Updating Requisition Lines

Open an MRQ from the **MRQs** list whenever the Project scope, Orders demand, or required date changes. Review the header first to confirm that the **Project** or **Orders** is still correct. Then review each material line to compare the original **Quantity** with the quantity that remains to be fulfilled. Where Pams shows **Remaining** information, use it to identify the part of the request that still needs action.

Update material lines as soon as you receive confirmed changes from the project or sales work. You may need to:

- Increase or reduce the **Quantity**
- Change the **Unit** when the approved requirement uses a different unit
- Update the required date, including **Required Receiving Date**
- Add or revise a **Note** or **Material Description**
- Correct an **Item** selected in error before fulfillment begins

When a new item is required for the same Project or Orders, add it to the existing MRQ rather than creating a separate request with the same purpose. Keeping related material lines together makes the record easier to review and reduces the risk of duplicate purchasing or duplicate material issues.

Remove or cancel lines that are no longer required before they are fulfilled. Do not leave obsolete items on an active MRQ, because they can be treated as real demand by the people checking stock or arranging purchasing. If the full request is no longer needed, update the MRQ so it is no longer included with active requirements and can be recognized as a cancelled request.

Save your changes with **Save**, or use **Save and Close** when you have finished reviewing the MRQ. Reopen the saved record from **Current MRQs** to make sure the remaining quantities and material notes reflect the current requirement.

[SCREENSHOT: An MRQ detail screen with multiple material lines, including requested quantities, remaining quantities, notes, and the linked Project or Orders.]

Tracking Materials Against Projects and Orders

Use the **MRQs** list to monitor active material requirements across Projects and Orders. Start with **Current MRQs** when you need to focus on requests that still require attention. Use the available list filters to narrow the records by **Project**, **Orders**, **Responsible**, required date, or current status.

Filtering is particularly useful when several projects are active at the same time. For example, filter by a specific **Project** before reviewing its material demand, or filter by **Required Receiving Date** to identify materials needed soon. Use the **Responsible** field to identify the person associated with the request when you need clarification on quantities, descriptions, or delivery destination.

Open an MRQ and use its linked **Project** or **Orders** reference to verify that the materials are assigned to the correct work or customer demand. This check is important when similar materials are used across several customer orders or projects.

The linked reference provides the context needed to decide whether the request is still valid and whether its required date remains realistic.

Monitor the material lines for three practical quantities:

- The quantity originally requested in the MRQ
- The quantity fulfilled through material issue, stock, or purchasing activity
- The quantity still outstanding, often shown as **Remaining**

An MRQ with outstanding quantities may require follow-up if its required date is close. Check the relevant stock information and purchasing records before changing the MRQ. A fulfilled request should not remain mixed with open demand, while a cancelled request should be clearly separated from active material requirements.

[SCREENSHOT: The Current MRQs list filtered by Project and Required Receiving Date, showing active requests with remaining quantities.]

Resolving Common MRQ Issues

If an MRQ is linked to the wrong **Project** or **Orders**, correct the source reference before any materials are issued or purchasing activity begins. Open the MRQ, confirm the intended Project or Orders with the requester, update the reference, and click **Save**. Review all material lines afterward to ensure that the items and quantities still match the corrected requirement.

When a line shows an outstanding quantity, investigate the reason before creating another request. Check:

- Whether the item is available in stock through **Stock By Products**
- Whether part of the quantity has already been fulfilled
- Whether the required date in **Required Receiving Date** is still accurate
- Whether the **Item**, **Quantity**, or **Unit** was entered correctly
- Whether purchasing activity is needed for the remaining quantity

Prevent duplicate MRQs by searching **Current MRQs** before creating a new request. Filter by the same **Project** or **Orders**, then review existing lines for the required **Item**. If the item is already on an open MRQ, update that line or add a related line to the existing request instead of creating a second MRQ for the same demand.

When project work changes or a customer order is cancelled, update the MRQ immediately. Reduce quantities that are no longer needed, remove unneeded material lines, or cancel the request when no materials should be fulfilled. For requests already being handled by purchasing or the warehouse, use a **Task** or **Activity** to communicate the change to the person shown in **Responsible** or the relevant purchaser. Include the MRQ reference, the affected item, and the revised quantity or cancellation decision in the activity details.

Do not use an active MRQ to represent materials that are no longer required. Keeping cancelled or obsolete demand out of **Current MRQs** protects stock planning and purchasing decisions.

Overview

Material Requisitions give Pams users one place to record and follow the materials needed for Projects and Orders. Each **MRQ** connects a material requirement to a business purpose: completing project work, fulfilling customer demand, or preparing materials identified through a **BOM**.

The MRQ form brings together the details that fulfillment teams need to act on a request. These include the related **Project** or **Orders**, the person in **Responsible**, the **Required Receiving Date**, the **Delivery Destination**, and the material lines. Each line identifies an **Item**, **Quantity**, and **Unit**, with **Description** or **Note** fields available when extra clarification is needed.

Use MRQs to make material demand visible before it creates a delay. A clear MRQ helps you identify whether an item can be supplied from existing stock, whether purchasing is required, and how much material remains outstanding. The **MRQs** list and **Current MRQs** view support ongoing review of open requirements, while the linked Project and Orders references help users check the business context behind each request.

An MRQ is part of the procurement and delivery workflow rather than a replacement for the Project, Orders, or BOM:

- Use the **BOM** to identify the components required for a project or order.
- Use the **MRQ** to request the required materials.
- Use purchasing records when materials must be obtained from a Sub-supplier.
- Use warehouse and receiving records when materials are received, stored, or issued.

Keeping these records connected in Pams makes it easier to understand the current state of each material requirement without relying on separate lists or informal messages.

Prerequisites

Before creating or updating a **Material Requisition**, make sure the information needed to identify and fulfill the requirement is available in Pams. An MRQ is most useful when its Project or Orders reference, material lines, dates, and destination are complete from the start.

Prepare the following before opening the **MRQs** list:

- An existing **Project** or **Orders** that explains why the materials are needed. Confirm the correct reference with the person responsible for the work or customer demand.
- The required material details for every line: **Item**, **Quantity**, and **Unit**. Prepare a **Material Description** or **Note** where the item name alone does not explain the requirement.
- A realistic required date. Use **Required Receiving Date** when you need to record the date by which the materials must be available for the Project or Orders.
- The correct **Delivery Destination** or material issue location. This should identify where the materials are required, not simply where the request was created.
- The person to enter in **Responsible**, so the request has a clear owner for questions and updates.
- A stock check for items that may already be available. Review **Stock By Products** before requesting additional quantities, particularly for frequently used items.
- Any related BOM information when the material list comes from a project BOM. Compare the BOM with the actual requirement so the MRQ reflects current quantities rather than an outdated material list.

Also search **Current MRQs** for the same Project or Orders before creating a new request. Updating an existing active MRQ is usually clearer than creating a second request for the same item and requirement.

After the MRQ identifies the confirmed material demand, continue with Managing Supplier Offers to request and review Offers from Sub-suppliers when purchasing is required.