

Procurement — Overview

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Overview

Procurement supports the purchasing lifecycle for goods and services required by the business. Purchasing officers use this area to manage procurement records, material requisitions, and RFQs issued to suppliers.

The area brings together procurement-related records, including RFQs, Offers, and direct purchase orders. It helps teams organise supplier quotation activity and maintain the records required to progress purchasing requirements.

Procurement can also be used with project and warehouse requirements where materials need to be sourced for delivery, stock, or job execution.

What you can do here

- Select **+ RFQ** to create a new RFQ for supplier pricing or terms.
- Open **Tickets** to work with procurement tickets.
- Select **RFQ** to access RFQ-related procurement records.
- Select **Direct P.O.** to create a direct purchase order.
- Use **All**, **RFQs**, and **Offers** to view the relevant procurement record group.
- Select **Save** to save changes to a procurement record.
- Select **Save and Close** to save the record and return to the previous view.
- Select **Select** to choose a relevant procurement item or record.
- Select **Send RFQ To Sub-supplier** to send an RFQ to a sub-supplier.

Related pages

- [Getting Started with Procurement](#)

- [Procurement](#)
- [Procurement — Learning Path](#)
- [Send Inquiry to Suppliers](#)
- [Convert Offer to Purchase Order](#)
- [Initiate Goods Receiving](#)
- [Procurement List](#)
- [Material Requisition](#)
- [For Internal Use](#)
- [List Material Requisitions](#)