

Purchasing — Overview

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Overview

Purchasing provides a central entry point for procurement activities related to sales jobs and projects. Purchasing officers can use this area to initiate supplier-facing purchasing records and manage the layout used to review purchasing information.

The area supports procurement work that begins with an RFQ (request for quotation) or a direct purchase order. These records help teams manage purchasing commitments, including buyouts required to fulfil sales jobs and project requirements.

Purchasing users can also manage screen layouts and visible columns to present purchasing data in a format appropriate for their operational role.

What you can do here

- Select **RFQ** to create or access request-for-quotation purchasing work.
- Select **Direct P.O.** to create or access a direct purchase order without a preceding quotation process.
- Select **Standard Layout** to use the standard purchasing screen layout.
- Select **Add Layout** to create an additional purchasing screen layout.
- Select **Save** or **Update Current** to save layout changes or update the current layout.
- Select **Delete Current** or **Delete** to remove a layout.
- Select **Columns Chooser** to choose the purchasing columns displayed in the current layout.

Related pages

- **Purchasing**
- [Purchasing — Learning Path](#)