



Web-based Requisition and Purchasing Software



eRequester is a robust web-based requisition and purchasing solution that allows companies to create and approve purchase requests; check budgets; generate request for quotes; send purchase orders to vendors; process receipts and match invoices. eRequester is simple to use, aids compliance with Sarbanes-Oxley reporting requirements and delivers rapid return on investment by reducing purchasing overhead and controlling corporate spending.

“eRequester is a mission critical application. In our first year alone eRequester saved us in excess of \$425K. eRequester is a great product: simple, intuitive and easy-to-use. And the folks at Paperless Business Systems are terrific to work with.”

— **David Miller**
Group Purchasing Manager,
The Spiegel Corporation

Take the Paper Out of Purchasing with eRequester

eRequester enables organizations to define and implement more standardized purchasing practices to streamline and manage their supply chain. Designed to meet the needs of medium to large-sized organizations in both the private and public sectors, eRequester provides tremendous control over the entire purchasing process, including internal purchase requests, notifications, approvals, management of items, projects, general ledger accounts, vendors, creation of purchase orders, receiving, invoice matching and integration with accounting. As a competitively priced strategic investment, eRequester can help your entire organization run more smoothly, while providing internal controls and defined purchasing processes to assist with the reporting requirements under Section 404 of the Federal Sarbanes-Oxley Act of 2002.

How it Works

eRequester uses a web browser to allow employees to request items they need. Users simply login to the applicable eRequester company and enter purchase requisitions into web-based forms. Information such as vendors, items, GL accounts, tax rates, shipping, projects and other information is available for selection on the requisition. Once submitted, requests are routed for approval through eRequester's robust routing engine, which sends out an email notification to the designated approvers in the authorization chain. Approvers can click on a link in the email, log in, review, approve, reject, request more info or require changes. Once approved, requisitions can be posted into purchase orders directly in either eRequester or an integrated PO module. The purchase order can then be sent to the vendor by email or print. With the eRequester Receiving Module, users can create receipts to facilitate the matching of receipts, invoices and purchase orders.

One Point of Data Entry

eRequester eliminates the delay and double entry of traditional, paper-based requisition processes. Orders only need to be entered into the system once, reducing duplicative efforts. The web-based forms have all the required data fields for creating purchase orders, with required information for vendors, items, account numbers, quantities, cost, taxes and more. Plus, any requisition can be saved as a template or duplicated and re-used in a new requisition to avoid reentering data.

Faster Turn-Around On Purchases

Inefficiencies in the purchasing process can cost hundreds of dollars in employee time for even one purchase request. With eRequester, the order entry and approval process is streamlined as there are no paper forms lost in the clutter of a manager's desk and information is readily available to review, process and submit with a simple mouse click.

Online Review of Requisitions

eRequester easily tracks the status of every purchase request. If a requisition is waiting for a manager's approval, email notifications initiate action. Purchasing managers can review orders at every step in the process and have complete visibility over all requisitions in the company. A requisition history is maintained with the authorization chain so there is a solid audit trail available from requester through approvers, to the creator of the PO, along with any comments made along the way. eRequester also has out of office and proxy approver features to eliminate bottlenecks in the approval process.

eRequester Core Features and Benefits

Saves Time and Money

- Centralizes and automates the procurement process
- Reduces errors and duplicative data entry
- Eliminates paperwork while capturing information in a centralized database
- Reduces rogue spending
- Encourages use of preferred vendors, which enables better terms and prices

Easy Requisition Creation

- Assign a unique ID to each requisition for easy search, tracking and reference
- Select requesting departments or cost centers from a drop-down list
- Select an approved vendor or request that a new vendor be added to the list
- Pick items from a catalog or enter unlisted items
- Add items to each requisition, with comments, description, ID, costs, GL accounts, taxes, ship dates and more
- Select or enter a ship location, contact person and ship method
- Submit notes and comments to approvers and vendors
- Attach an unlimited number of scanned documents to each requisition line item
- Review all the details of the requisition on a single screen
- Submit the requisition for approval based on robust routing rules
- Save requisitions as templates for easy re-use, without duplicative data entry
- Split requisitions to multiple vendors into separate POs

Intuitive Approval Process

eRequester makes purchasing approvals easy and flexible. An unlimited number of approval levels can be created based on the company, dollar amount, department, request type and more. eRequester sends email notifications letting approvers know when they have requisitions waiting for approval so they can easily view the details, edit, approve, reject, require changes or request more information. Designated approvers can also edit requisitions after standard approval routing, route for additional approval and add comments to the requisition history to convey any pertinent information.

eRequester's robust approval routing engine allows for:

- An unlimited number of approval levels
- Flexible routing rules and exceptions for any request type, such as capital, non-budgeted or I.T. requests
- Ability to setup and submit requisitions along any approved routing path
- Carbon copy options that allow requisition details to be reviewed by appropriate personnel
- Proxy approval for unavailable users
- Out of office recognition for approvers on vacation

One-Step Purchase Order Creation

eRequester eases the process of creating purchase orders from approved requisitions by sending an email notification to designated users letting them know that the requisition is ready to be converted to a PO. Users can see all approved requisitions in a list and can either batch post the purchase orders or each requisition can be reviewed individually and posted. Requisitions to the same vendor can be consolidated into a single purchase order. Options are also available for editing approved requisitions and sending the requisitions out for additional approvals along any routing path. Purchase orders can then be printed from eRequester, emailed or sent by fax to vendors for fulfillment.

eRequester's Administrative Console is designated for efficient setup and configuration of:

- Multiple companies
- An unlimited number of approval levels, request types, locations and departments
- User preferences

eRequester has a multitude of additional configuration options, including user defined fields and security settings.

Visit the website to see the demo: www.erequester.com/demo.php



eRequester Advantages

- Built-in multi-company support for different business entities
- Uses a SQL Server database or MSDE for easy access to data for reporting purposes
- Extensive search features with a wide variety of parameters for easy tracking of requisitions and POs
- An elegant and easy to use web interface
- Real-time integration with any ODBC compliant accounting systems
- Detailed matrices allow auditing of the user and company setup at a glance
- Can use Active Directory to facilitate user names and passwords
- Robust approval routing engine

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Optional Modules

In addition to the core requisition, approval and purchase order system, eRequester offers the following optional modules:

Web Based Receiving Module

- Displays an easy-to-use web form that simplifies the receiving process
- Provides remote, distributed access to PO and receiving information for easy matching of PO lines with receipts and invoices
- Allows receiving information, such as quantity and cost, to be entered by any specified receivers
- Allows invoice number and invoice date to be added
- Mark receipt lines as paid
- Allows for an unlimited number of multiple partial receipts
- Allows for system-wide limits to prevent receiving over approved PO amounts
- Allows under-receiving
- Saves receipts to supported PO and/or AP modules for easy 3-way matching

Project Module

- Set up project codes by description and ID, and tie them to purchases
- Provides real-time access to project accounting information with supported accounting systems
- Associates project accounting information such as project, phase, and task with requested line items
- Tracks purchase orders and requisitions by project for better control over expenditures

Budget Checking Module

- “Red flags” line items that are over-budget
- Shows a budget to actual comparison for each line item or account
- Additional approval can be required for requisitions that are over-budget
- Security features allow control over who can see budget information and corresponding accounts

Budget Report shows in real-time:

- Actual year-to-date expenses
- Committed year-to-date purchase orders
- Budgeted annual expenses for the current fiscal year
- Variances between total expenses and budgeted expenses for each period and the current fiscal year

Request for Quote Module

Allows for easy creation of an RFQ document that can be sent to selected vendors by email or hard copy. Once the responses to the RFQ have come in, the requisition can be edited and sent for additional approvals, or posted into a purchase order and sent to the awarded vendor for fulfillment. Responses can be attached for historical purposes.

Hiring Module

Streamlines hiring by allowing users to login and easily request new job positions and route them for approval through a defined approval chain, capturing all relevant information in a single system for easy search, review and reporting.

The module also provides:

- Efficient management and control over the hiring process
- Internal controls over new hire requests
- An easy-to-use interface
- Reduction in data errors and lost paperwork

“Companies seeking an efficient way to process purchasing will find a good solution in Paperless Business System, Inc.’s eRequester...”
— eWeek