

## 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 **01/02/2025** To **06/02/2025** **This month**

Include requisitions with these statuses: ☒ Suggested (sg) ☒ Confirmed (cn) ☐ Finalised (fn)

☐ Include lines that have been fully supplied

☐ Issued quantity accounts only for confirmed and finalised customer invoices

**Item filter...**

Item code **starts with**

and **Category 1** **is**

and **VEN Category** **Don't Care**

and **Department is** **Don't Care**

and **is on Master List** **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*.

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.

## Example output

These are examples of what the requisition reports like 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))

### 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
	4000	1235	COTRIMOXAZOLE, 200mg, tab	R296	sg	request	11/11/17	1	22	4	18
	3000	1236	PARACETAMOL, 500mg, tab	R245	sg	request	04/12/17	20	750	70	680
	2000	1237	AMOXICILLIN, 500mg, tab	R233	sg	request	12/12/17	15	600	450	150
Customer 2	5000	1244	ALBENDAZOLE, 200mg, tab	R235	sg	request	10/11/17	0	500	100	400
	4000	1245	COTRIMOXAZOLE, 200mg, tab	R297	sg	request	11/11/17	1	22	4	18
	3000	1246	PARACETAMOL, 500mg, tab	R246	sg	request	04/12/17	20	750	70	680
	2000	1247	AMOXICILLIN, 500mg, tab	R236	sg	request	12/12/17	15	600	450	150

Previous: **13.04. Purchasing reports** | | Next: **13.09. Customer ordered shortfall report**

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