

Requisition List

For Magento 2



Table of contents

Introducing Magento 2 Requisition Lists.....	3
Requisition Lists on Backend.....	3
Configuration Options.....	3
Requisition Lists on Frontend.....	4
Quick Bar.....	4
Adding Products.....	5
Creating and Monitoring Requisition Lists.....	8
Editing Requisition Lists.....	10
Integrations.....	15
Company Accounts.....	15
Easy Reorder.....	17

Introducing Magento 2 Requisition Lists

Requisition Lists for Magento 2 is an extension to support customer procurement operations on your Magento 2 stores. It enables customers to collect frequently bought products into multiple requisition lists and use them at a later date to place orders. Each item on a requisition list is associated with a catalog entry and has the following attributes: Product Name, Image, SKU, Size, Color (other configurable parameters of a product), Current Product Price. The extension makes it possible to edit both the requisition lists and the products on the lists. Editing products presumes updating product configuration and quantity, as well as removing products from the list, individually or in bulk. Furthermore, customers are able to move or copy products from list to list. Selected products can be added to Cart in one click. The module can be integrated with Company Accounts and Easy Reorder, the modules that together provide for full-fledged corporate experience in eCommerce procurement. The key-features of the present extension can be shortlisted as follows:

- Multiple requisition lists
- Adding products to lists from various places
- Explicit management options on the storefront
- Updating products individually and in bulk
- Converting list to Cart
- Integration with [Company Accounts](#), [Easy Reorder](#)

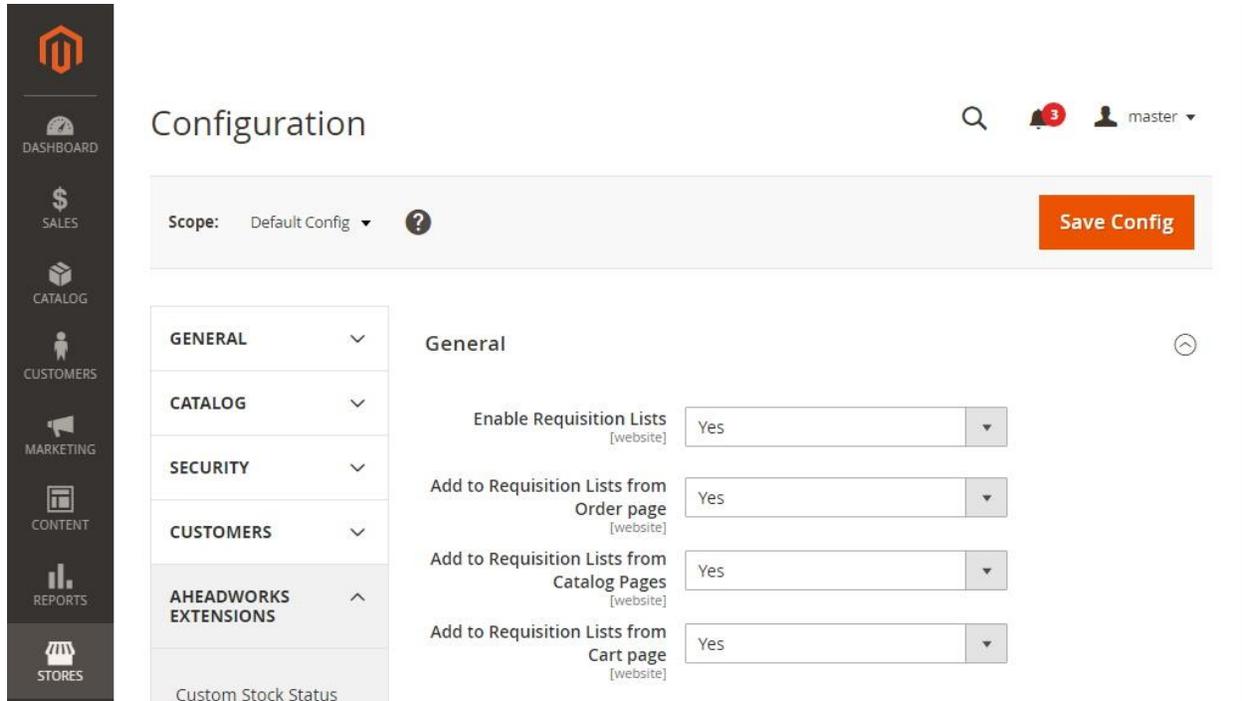
Requisition Lists on Backend

Configuration Options

To enable the extension go to **Stores > Configuration > Aheadworks Extensions > Requisition Lists**.

- **Enable Requisition Lists** - set to Yes this option allows customers to add a product to a requisition list on the product page;
- **Add to Requisition Lists from Catalog Pages** - set to Yes to display the **Add to Requisition Lists** button on **Category pages** under every product, the user does not need to open the product page;

- **Add to Requisition Lists from Order page** - set to Yes to display the **Add to Requisition Lists** button on the **Order page** of My Account, after clicking on it, the whole order will be added to Requisition Lists;
- **Add to Requisition Lists from Cart page** - set to Yes to display the **Add to Requisition Lists** button on the **Cart Page** under every item.

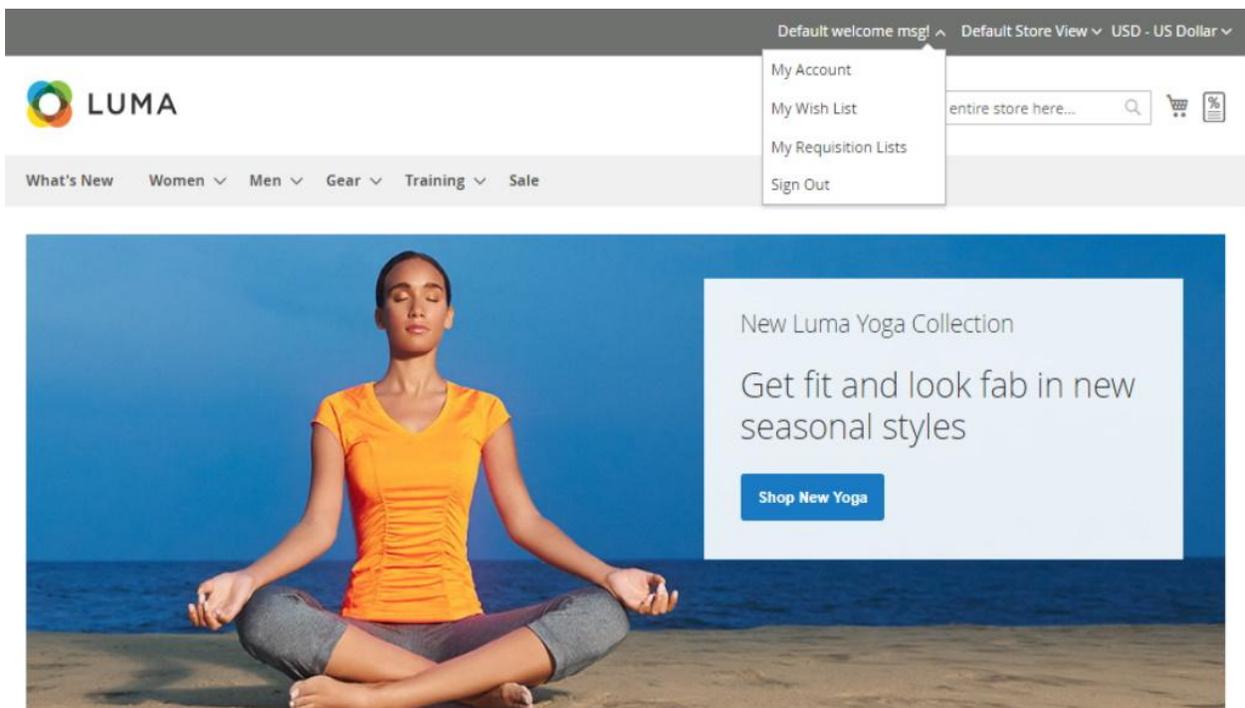


The screenshot shows the 'Configuration' page in a Magento system. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, and Stores. The main content area is titled 'Configuration' and includes a search icon, a notification bell with '3', and a user profile 'master'. Below this is a 'Scope' dropdown set to 'Default Config' and a 'Save Config' button. The 'GENERAL' section is expanded, showing the 'General' configuration. Four settings are visible, each with a dropdown menu set to 'Yes': 'Enable Requisition Lists [website]', 'Add to Requisition Lists from Order page [website]', 'Add to Requisition Lists from Catalog Pages [website]', and 'Add to Requisition Lists from Cart page [website]'. A 'Custom Stock Status' section is partially visible at the bottom.

Requisition Lists on Frontend

Quick Bar

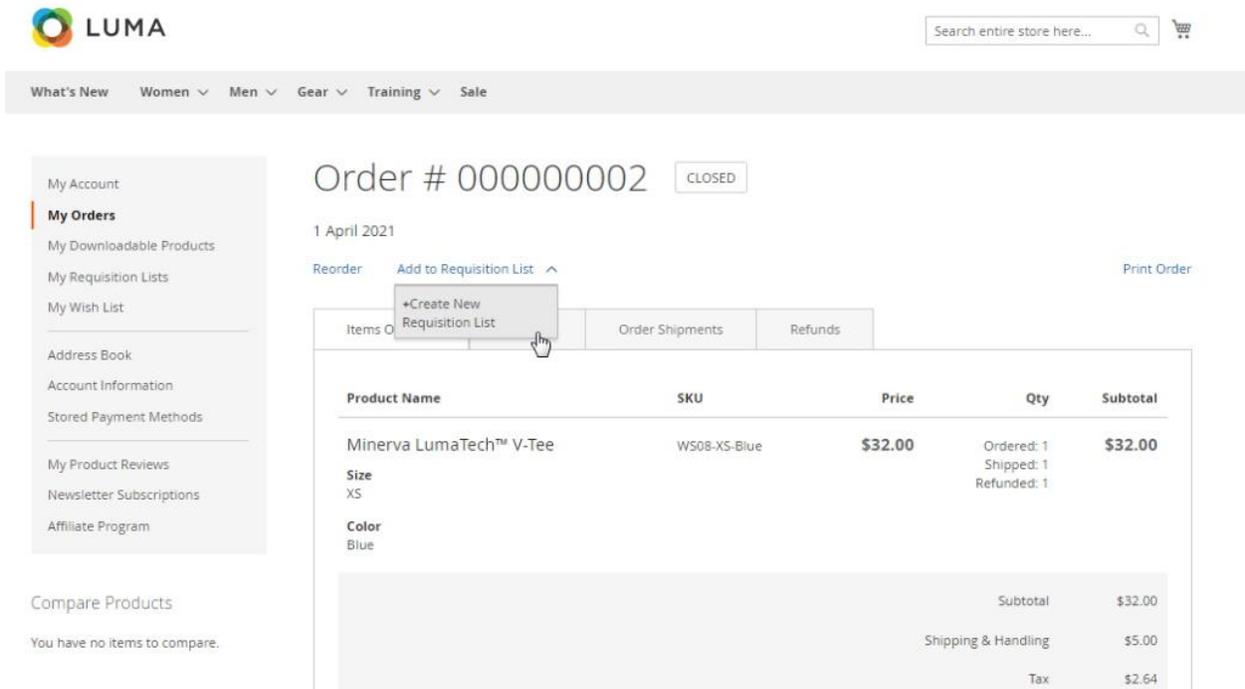
Customers can access the **My Requisition Lists page** from any page on the store using the **Quick Bar**. Clicking on the customer name therein will unfold the list of navigation alternatives, where My Requisition Lists are to be chosen. The Customer will be redirected to the My Requisition Lists page in My Account.



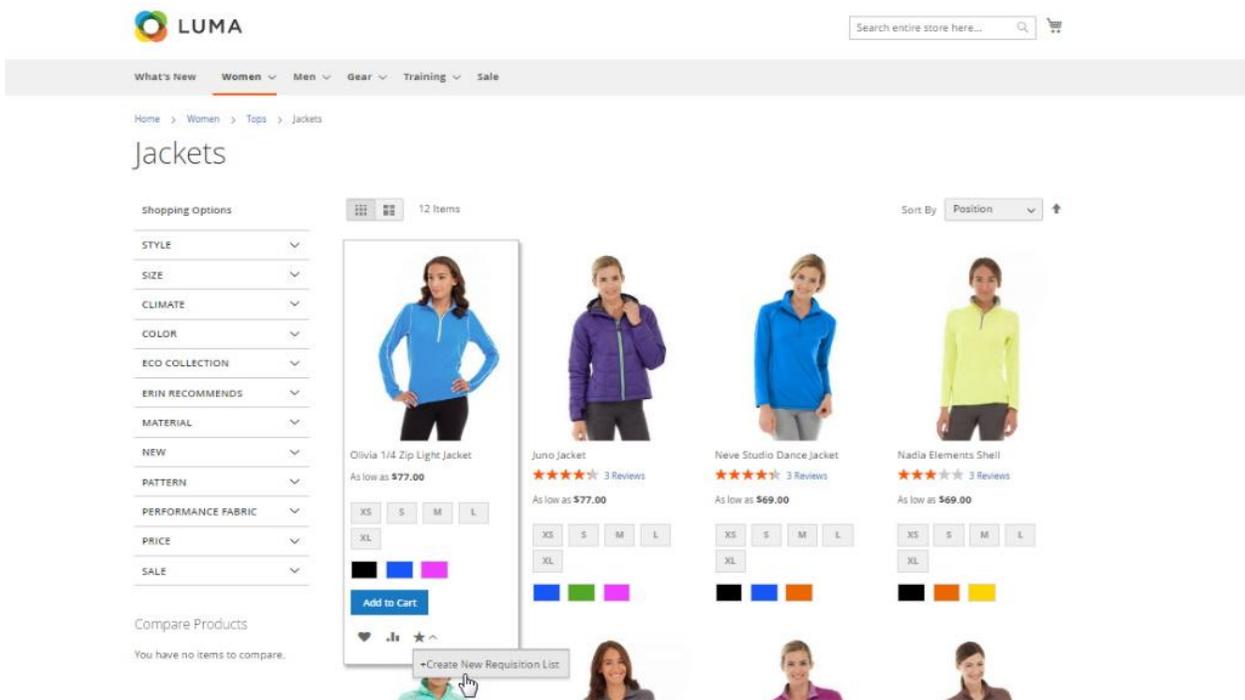
Adding Products

It is possible to get to My Requisitions Lists from the **Order page**, **Catalog Pages**, **Cart page**. When the **Requisition Lists the Order page** option is enabled from the

backend, it will be displayed on the **Order page**.



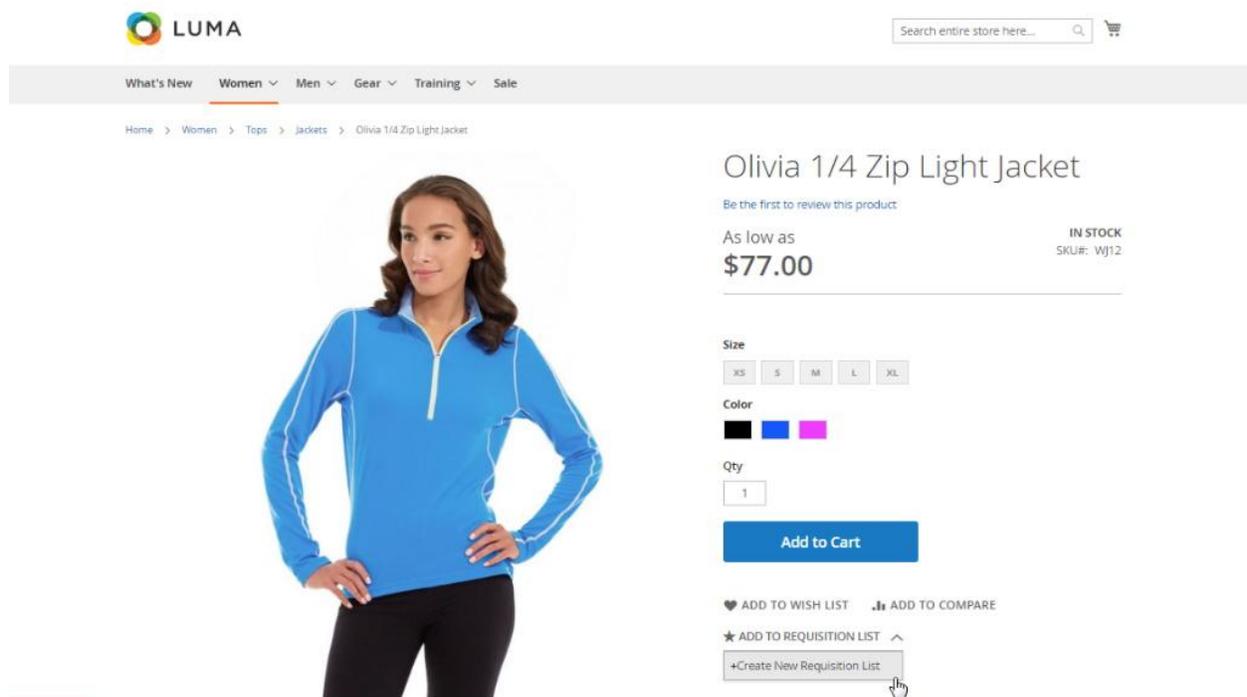
When the **Requisition Lists button on Catalog Pages** is enabled it will be displayed under every product. When a customer clicks on an arrow or icon dropdown with “+Create New Requisition List” and a list of created requisition lists is displayed.



When on a product page customers make use of the **Add to Requisition List** option next to the native Magento Add to Wish List and Add to Compare. It is only on a product page that items can be added to a requisition list when browsing the store. (Other options are available in My Account).

It is essential that customers first configure the product (if any parameters are given) and indicate its quantity. The latter can later be updated on the Requisition List page in My Account. Leaving the configuration options blank will result in a notification on the error ('This field is required') and will not add the product to the requisition list. Clicking on the Add to Requisition List option will unfold a drop-down of **available requisition lists** and the **Create New Requisition List** alternative.

To add a product to a requisition list, customers select a requisition list from the Add to Requisition List drop-down on the product page. The product will be added to the chosen list, leaving the Customer on the product page.



If the Customer is logged out, the Add to Requisition List option will show only the Create New Requisition List alternative. Clicking on it will take the Customer to the Sing-in page. On successful sign-in or registration, the Customer will be redirected to the My Requisition Lists page.

Are the same products merged on a requisition list?

When products are added to a requisition list from a product page, the same products are not merged on the list.

Customers can **Add to Requisition Lists** from the **Cart** page.

The screenshot shows the LUMA Shopping Cart interface. At the top, there is a navigation bar with categories like 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. Below this is the 'Shopping Cart' section. A table lists the items in the cart:

Item	Price	Qty	Subtotal
 Olivia 1/4 Zip Light Jacket Size: S Color: Blue	\$77.00	1	\$77.00

Below the table, there are options to 'Gift options', 'Move to Wishlist', and 'Add to Requisition List'. A dropdown menu is open under 'Add to Requisition List', showing the option '+Create New Requisition List'. To the right, a 'Summary' box displays the following information:

Summary	
Estimate Shipping and Tax	▼
Subtotal	\$77.00
Tax	\$6.35
Order Total	\$83.35

Below the summary, there is a 'Proceed to Checkout' button and a link for 'Check Out with Multiple Addresses'. At the bottom of the cart, there is an 'Update Shopping Cart' button and an 'Apply Discount Code' field.

Creating and Monitoring Requisition Lists

When on the My Requisition Lists page in My Account, customers are able to monitor and browse their requisition lists, as well as to create new ones. The page collects existing requisition lists into a grid of the following columns:

- **Name** - the name of a requisition list;
- **Description** - the description of a requisition list;
- **Qty of Items** - the number of items on a list;
- **Last Update** - the date of the last update made to a list;
- **Action** - the Edit active link to lead to a Requisition List page.



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✓ Requisition List was successfully saved.

Requisition Lists [Create New Requisition List](#)

5 item(s)

Name	Description	Qty of Items	Last Update	Action
Item Requisition	Stocking up on assorted monthly supplies. Can be split onto multiple POs, consolidated with other requisitions or routed to be filled from stock.	2	04/04/2020	Edit
Purchase Requisitions	Purchase Requisition remains intact and cannot be filled from stock. Specific Purchase Order is to be created.	0	04/04/2020	Edit
Inventory Replenishment Requisitions	Assorted monthly purchases. Min-max planning, reorder point planning, subinventory replenishment, and Kanban replenishment.	0	04/04/2020	Edit
Internal Requisitions	For internal use.	0	04/04/2020	Edit
Off-Catalog Requisitions		0	04/04/2020	Edit

- My Account
- My Orders
- My Downloadable Products
- My Requisition Lists**
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- My Product Reviews
- Newsletter Subscriptions
- Quick Order
- My Quotes
- My Previous Purchases

To create a requisition list, click on the [Create New Requisition List](#) active link above the grid. The **New Requisition List pop-up** will emerge. The pop-up will prompt customers to fill-in two fields: List Name (mandatory) and Description (optional and empty by default). On completing the fields, click the **Create** button in the bottom left corner of the pop-up. The new list will appear on the My Requisition Lists grid, and a notification ('Requisition List was successfully saved') will appear on the top of the page.

New Requisition List ✕

List Name *

Description

Create

Editing Requisition Lists

To reach to the Requisition List page, click on the Edit active link in the corresponding cell of the Actions column of the My Requisition Lists grid.

The **Requisition List page** will feature the following:

- the name of the list;
- the description of the list;
- the Edit (Requisition List) active link;
- the Delete Requisition Link button;
- the grid of products on the list;
- the number of items on the list;
- The Remove / Move / Copy Selected options to process selected products in a chosen way;
- Update (Product) Quantity and Add to Cart buttons.



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[My Account](#)

[My Orders](#)

[My Downloadable Products](#)

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[My Wish List](#)

[Address Book](#)

[Account Information](#)

[Stored Payment Methods](#)

[My Product Reviews](#)

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[Quick Order](#)

[My Quotes](#)

[My Previous Purchases](#)

[My Subscriptions](#)

Item Requisition [Edit](#)

[Delete Requisition List](#)

Stocking up on assorted monthly supplies. Can be split onto multiple POs, consolidated with other requisitions or routed to be filled from stock.

3 item(s)

[Remove Selected](#) [Move Selected](#) [Copy Selected](#)

<input type="checkbox"/>	Product	Qty	Current Product Price	
<input type="checkbox"/>	 Energy Coffee SKU: Energy Coffee	<input type="text" value="50"/>	\$30.00	
<input type="checkbox"/>	 Proteus Fitness Jackshirt SKU: MJ12 Size: S Color: Blue	<input type="text" value="1"/>	\$45.00	 
<input type="checkbox"/>	 Montana Wind Jacket SKU: MJ03 Size: S Color: Green	<input type="text" value="1"/>	\$49.00	 

[Compare Products](#)

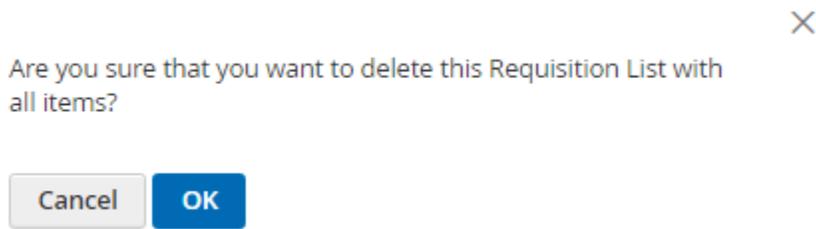
You have no items to compare.

[Add To Cart](#)

[Update Qty](#)

To edit the list, click on the edit active link on the right of the name of the list. The **Edit Requisition List pop-up** will emerge, similar to the Create Requisition List one but featuring relevant data on the chosen requisition list. On completing the update, click the Save button at the bottom of the pop-up.

To delete the list, click on the Delete Requisition list button on the right of the Edit active link. A pop-up will appear for the Customer to confirm his/her action.



On clicking the **OK** button, the requisition list will be removed from the grid and will no longer be available on the storefront too. Currently, it is not possible to recover deleted requisition lists.

The **grid of products** on a requisition list contains the following columns:

- **Product** - to feature a thumbnail image of the product, product name (active link to the corresponding Product page, SKU and product configuration)
- **Qty** - the text-box to bear a whole numeric value indicating the quantity of a product on the list;
- **Current Product Price** - the up-to-date price of the product in the currency of the store-view;
- **Bucket Icon** - the active icon to remove an item from the list;
- **Pencil Icon** - the active icon to edit an item (if the chosen product is configurable).

The extension allows for **bulk operations** with products on a requisition list. Customers use the **check-boxes** on the left of the product thumbnail image to select the products they wish to apply a mass action to. The check-boxes are available in the product grid on a Requisition List page.

Customers can do the following operations with the items selected on a requisition list:

- **Remove selected items** → Click the “Remove Selected” button to delete selected items from the list → A success message will appear: “*{Number} items have been successfully removed from {Name of current Req. List} list*”.

- **Move selected items to another Requisition list** → Click on the “Move Selected” button → A drop-down with all available requisition lists will appear → Choose a list → The items selected will be moved to this list and removed from the original (current) one -> A success message will appear: “*{Number} items have been successfully moved to {Name of new Req. List} list*”.
- **Copy selected items to another Requisition list** → Click on the “Copy Selected” button → A drop-down with all available requisition lists will appear → Choose a list → The items selected will be copied to this list → A success message will appear: “*{Number} items have been added to {Name of new Req. List} list*”.

To update the quantity of a product on a requisition list, customers alter the whole numeric value of the Qty text-box and click on the Update Qty button below the grid to confirm the change. Only on clicking the Update Qty button will the changes take place. A success message will appear: “*{Number} items have been updated in {Name of current Req. List} list*”.

To delete an item from the requisition list, click on the Bucket icon below the price of the product.

To change product configuration or product options, click on the Pencil icon next to the Bucket icon. A popup will appear prompting customers to select product configuration/options. On completing the configuration, click on the Confirm button at the bottom of the pop-up.

Configure Proteus Fitness Jackshirt ×



Size S



Color Blue



Confirm

The pop-up will close, and the product configuration will get updated on the requisition list. A success message will appear: “*{Name of item} item has been successfully updated in {Name of current Req. List} list*”.

What options of product configuration are available on the pop-up?

The pop-up will feature most options of product configuration but for those of the following types of an attribute:

- file
- checkbox / multiselect / dropdown
- date and time

To add items to Cart, select items on the requisition list and click on the Add to Cart button. The items will be copied to Cart, the customer will be redirected to Cart. A success message will appear: “*{Number of items copied} of {Number of items selected}*”

item(s) successfully added to Cart". The requisition list will remain integral, no items will be removed.

Are the same products merged in Cart?

When selected on a requisition list items are added to Cart, same products are merged in Cart.

Integrations

Company Accounts

Install the [Magento 2 Company Accounts](#) module to enable corporate customers to share requisition lists between company sub-accounts, and see who updated the lists last.

When Company Accounts is installed two columns are added to the My Requisition Lists grid:

- **Owner** - displays the Name of the person who created the list;
- **Updated By** - displays Name of the person who updated this list last time.



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My Account

My Orders

My Downloadable Products

My Requisition Lists

My Wish List

Address Book

Account Information

Stored Payment Methods

My Product Reviews

Newsletter Subscriptions

Requisition Lists [Create New Requisition List](#)

4 item(s)

Name	Description	Qty of Items	Owner	Updated By	Last Update	Action
Internal Requisitions		0	John Doe		04/04/2020	Edit
Purchase Requisitions	For regular purchase of products on stock demand. Requires a PO number.	9	John Doe		04/04/2020	Edit
Items Requisitions	Assorted supplies in demand. Admin to confirm the items, sort out the list and move items to appropriate RL's for timely orders.	0	John Doe		04/04/2020	Edit
Monthly Procurement - East		3	Anna Malakova	John Doe	06/04/2020	Edit

The **Company Account Admin** has absolute rights over the requisition lists created by company members.

The Admin can edit the lists of the members like his/her own ones. It means that the Admin can change the quantity of the products, product options, delete and add new products; change the name of the list; share or hide the list for the members.

To share a requisition list between the company members, the Customer proceeds to the Edit Requisition List pop-up and ticks the **Shared** checkbox. The Company Admin will have access to all requisition lists, whether they were shared or not.

×

Edit Requisition List

New Requisition List Name *

New Description

Shared

Save

When the Company Admin is browsing the store, the **Add to Requisition List option** on a product page will feature all requisition lists created within the company (both those of the Admin and company members). The requisition lists owned by the Admin will be at the the top of the Add to Requisition List drop-down. Company sub-accounts will see the lists they own, as well as the lists that were shared among the company.

Easy Reorder

Install the [Magento 2 Easy Reorder](#) module to let customers add products to requisition lists from the My Previous Purchases grid.

When Easy Reorder is installed, the My Previous Purchases page will display the **Add to Requisition List active link** next to the Add All Selected to Cart button. Clicking on the link will open a drop-down to feature Customer's requisition lists. Next, clicking on a requisition list will add the items selected to the list.



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- My Account
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- My Wish List

- Address Book
- Account Information
- Stored Payment Methods

- My Product Reviews
- Newsletter Subscriptions

- My Previous Purchases**

My Previous Purchases

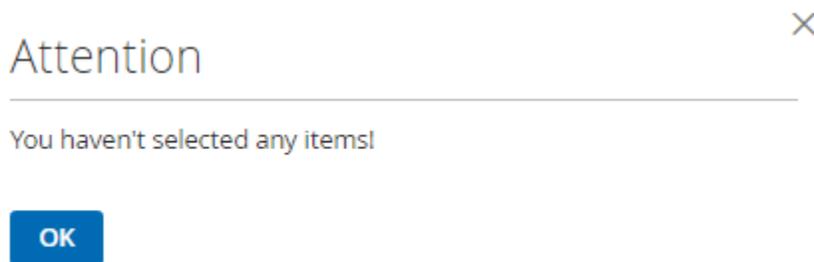
9 records found (9 selected)

<input checked="" type="checkbox"/>	Product Name	SKU	Qty	Last Date	Last Ordered Price	Current Product Price	Number Of Orders
<input checked="" type="checkbox"/>	Sprite Yoga Companion Kit	24-WG080-24-WG081- blue- Sprite Stasis Ball	1	06/03	\$610.00	\$61.00	4
<input checked="" type="checkbox"/>	10 x Sprite Stasis Ball	24-WG084-24-WG085- 55 cm					
<input checked="" type="checkbox"/>	Sprite Foam Yoga Brick	24-WG088					
<input checked="" type="checkbox"/>	10 x Sprite						

[Add to Requisition List](#) [Add All Selected To Cart](#)

- Item Requisition
- Purchase Requisitions**
- Inventory Replenishment Requisitions
- Internal Requisitions

If no items are selected and the Customer clicks on the Add to Requisition List active link, a popup with the title “Attention” and text “You haven’t selected any items” will appear. Clicking the OK button at the bottom of the pop-up will close the pop-up.



For an in-depth look visit Requisition List demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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