

REQUISITIONS

Business Central requisitions that become Purchase Orders

Staff raise requisitions in Cliqo, approvers sign off in Microsoft Teams, and approved requisitions are created as Purchase Orders in Business Central, with accruals handled automatically.

What it does

Requesters create requisitions in Cliqo without a Business Central licence. Your rules route each one for approval, and once fully approved it is created as a Purchase Order in Business Central with no re-keying. When receipts are recorded in Cliqo, a G/L accrual posts for the received cost, for items and G/L account lines alike, and reverses automatically when the invoice arrives.

How it works

- 1 Requester submits.** Requisitions are raised in Cliqo, with no Business Central licence needed.
- 2 Rules route it.** Rules on header and line data, budgets and dimensions, or groupings such as department or vendor class.
- 3 Approved in Teams.** Approvers sign off in Microsoft Teams or by email.
- 4 Purchase Order created.** The approved requisition is created as a Purchase Order in Business Central. Receipts post accruals that reverse on invoice.

Key features

- ✓ **Automatic G/L accruals.** Received-not-invoiced cost accrued on receipt and reversed on invoice, for items and G/L account lines.
- ✓ **No month-end journal.** Your ledger shows the true cost as soon as goods or services are received.
- ✓ **Rules on line details.** Route each line by dimension, such as department or project, as well as amounts and budgets.
- ✓ **Easy to use.** Build rules in minutes, drag them into order and test them before going live.



Lands in Business Central as

Purchase Orders

from approved requisitions

G/L accruals

on receipt, reversed on invoice

Built for

- ✓ Procurement teams raising POs against budget
- ✓ Finance teams who want accruals without a manual journal
- ✓ Requesters who don't need Business Central access

The Cliqo Workflow Engine

Shared by every module. Set your rules up once and use them everywhere.

Easy to use

Rules on line details

Drag-and-drop ordering

Test mode

Full app in Teams

No BC licence for approvers

Entra ID users

Multi-company

See Cliqo with your own scenarios

Book a 30-minute demo, or start with one free sandbox environment.

cliqo.co.uk/book-a-demo