

How to Submit Material Requisitions from the Field to the Office

Using the TRA-SER and Supplier Xchange Integration



Welcome to a comprehensive guide on field to office purchasing using Procurement MEP. This step-by-step guide will walk you through our TRA-SER and Supplier Xchange integration, encompassing everything from creating a materials favorites list, to requisition generation in the field, to centralized purchasing in the office. As a seasoned procurement professional you can optimize your quote and order workflows and enhance your organization’s operational efficiencies. We hope this guide will equip you with the tools and insights needed to revolutionize your procurement practices with Procurement MEP.



1. The Procurement Manager creates a favorites list of materials.

This list can be created by pulling in items from our materials database, by uploading project specs, or sourcing your purchase history from top suppliers - to name a few. Once you have the items hosted in the web-based quote and order management platform, organize your favorites lists by project, commodity, supplier, and more.

Creating a favorites list allows for easy and reliable item search and selection from the field. Performing this work upfront sets your office and field teams up for improved collaboration throughout and across projects.



2. The Field Supervisor opens applicable favorites list from a laptop with an internet connection.

Search the favorites list and select the items you’re looking for, then add them to a bill of materials to order from your local supplier. Can’t find the item in your favorites list? Search our materials database to find your item and pull it into the BOM.

Once ready, submit that bill of materials to the office to review.



3. The Procurement Manager receives and reviews the requisition from the field.

They can now add any additional missing items to the requisition prior to submission by either searching the Trade Service materials database or by pulling in an item from a separate favorite list.

Once ready to order, run an automatic price update from your local suppliers and select which items will be sent to each supplier.

Submit the order(s) digitally to your connected suppliers.



4. The Procurement Manager reviews the accepted order and syncs into their ERP.

Once the order is accepted by the supplier the procurement manager can review the order and sync the line-item-level details into their ERP system with one click. This allows for better tracking and materials management by the accounting team.