

PROCUREMENT

ADD / EDIT / DELETE ITEMS

Once you have created your Purchase Requisition, you may be required to add or **remove** items, or **make changes** to these items for example, edit the quantity or price.

A Purchase Requisition can <u>only</u> be edited in the **New** status.

If a requisition has already been **released for approval**, <u>remove it</u> from approval by putting it on **Hold**. It will then be moved from the **Released** status back to the **New** status and can then be edited. The requisition can be released again once the new changes have been saved.

Ribbon Access: *Procurement > Requisitions*



1. The *Purchase Requisition Listing* screen will be displayed.

Select the Site and Status

2. Select the *Site*.

- This screen will open by default with the Site filter set to *All Sites*. Click on the drop-down arrow and select the site that you wish to work in.
- 3. Select the Status.
 - The *Status* will open by default with the filter set to *New*.
 Purchase Requisition can <u>only</u> be edited in the *New* status.





NOTE ON EDITING 'RELEASED' REQUISITIONS

If the requisition that you require <u>cannot</u> be found in the **New** status - it may already have been **Released**, in which case you will need to move it from this status **back** to New.

A reasons for editing a requisition that has already been *released for Approval* could be; an item price may have changed. It will then need to be brought back to the *New* status for price editing.

REMOVE REQUISITION FROM RELEASED STATUS TO ENABLE EDITING

- 1. In the *Purchase Requisition Listing* screen,
- Ensure that you have selected the correct *site* and the status is set to *Released*.
- 3. Select the *row* of the *Purchase Requisition* that you wish to move back into the *New* status, for editing.
- 4. Click on *Hold*.



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- 1. A *Hold Comment* message box will pop up.
- 2. Type in the *reason* for placing the Requisition on Hold. For example you can type in:
 - ° "Requisition recalled for item price changes."
- 3. Click on *Save*.



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- A *Requisition Process* message box will pop up informing you that;
 The requisition no. [] has been placed on hold successfully.
- 2. Click on OK.





- 1. The requisition will be *removed* from the listing screen where the status is set to *Released*.
- 2. Change the screen status to *New*.

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EDIT REQUISITION ITEMS

- 1. The requisition can now be found in the *Purchase Requisition Listing* screen where the status is set to *New*.
 - ° Now you will be able to *edit* the requisition.
- 2. Click on *Edit*.

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D PR	0000628	MAINT	N	Mary	Thompson	450.00	517.50	31/03/2019	13	2:17:59			Yes		
E PR	0000627	MAINT	N	Kame	Pillay	175,000.00	201,250.00	11/05/2020	1	1:22:18			Yes		
• PR	0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	1	5:11:26		test test t	Yes	HOP001	н
· PR	0000625	MAINT	N	Andile	Khumalo	0.00	0.00	06/05/2020	13	3:33:42			No		
D PR	0000622	MAINT	N	Kame	Pillay	10.00	11.50	23/04/2020	14	4:18:37			Yes		
D PR	0000621	MAINT	N	Kame	Pillay	875,000.00	1,006,250.00	23/04/2020	1	1:49:41			Yes		
D PR	0000610	MAINT	N	Andile	Khumalo	0.00	0.00	16/04/2020	10	0:16:19			No	APP0001	A
E PR	0000602	MAINT	N	Bianca	Du Toit	3,000.00	3,450.00	30/03/2020	12	2:44:02			Yes	WES001	N
D PR	0000601	MAINT	N	Bianca	Du Toit	0.00	0.00	30/03/2020	12	2:42:41			No		
D PR	0000597	MAINT	N	Bianca	Du Toit	450.00	517.50	31/07/2019	12	2:42:09			Yes	HOP001	н
D PR	0000587	MAINT	N	Bianca	Du Toit	0.00	0.00	19/11/2018	13	3:36:27			No	HOP001	н
• PR	0000583	MAINT	N	Bianca	Du Toit	350.00	402.50	13/09/2018	1	5:07:26			Yes		
· PR	0000574	MAINT	N	Bianca	Du Toit	350.00	402.50	06/09/2018	15	5:28:54			Yes	TIA001	Ti
• PR	0000557	MAINT	N	Bianca	Du Toit	55,000.00	62,700.00	25/05/2018	1	1:38:47			Yes		
🗄 PR	0000548	MAINT	N	Bianca	Du Toit	15,600.00	17,784.00	25/04/2018	13	3:58:22			Yes	HOP001	н
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• PR	0000541	MAINT	N	Bianca	Du Toit	25,875.00	29,497.50	17/04/2018	14	4:26:37			Yes		
🗄 PR	0000527	MAINT	N	Bianca	Du Toit	190,950.00	219,592.50	29/03/2018	14	4:07:16			Yes		
• PR	0000522	MAINT	N	Bianca	Du Toit	0.00	0.00	08/03/2018	16	5:25:56			Yes	OFF001	0
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🗄 PR	0000518	MAINT	N	Bianca	Du Toit	450.00	517.50	01/03/2018	14	4:13:16			Yes		



The *Edit Requisition* screen will be displayed.

EDIT REQUISITION HEADER INFORMATION

- 1. In the *Requisition Header* frame, you have to the ability to edit the following fields:
 - Request Date and Time
 - Billing Address
 - Origin Type and Origin
 - Requestor
- Either use the drop-down *arrow* or the *search* button in the relevant field to open a *list* or a '*Select...*' screen from which you can pick an <u>alternative</u> field entry.



EDIT REQUISITION ITEMS FRAME

In the Items Frame, you can edit the following:

Add Item



Edit Item

Edit Item Supplier

Delete Item

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This Topic page is currently being updated, thank you for your patience. Please check back soon.



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