

PROCUREMENT

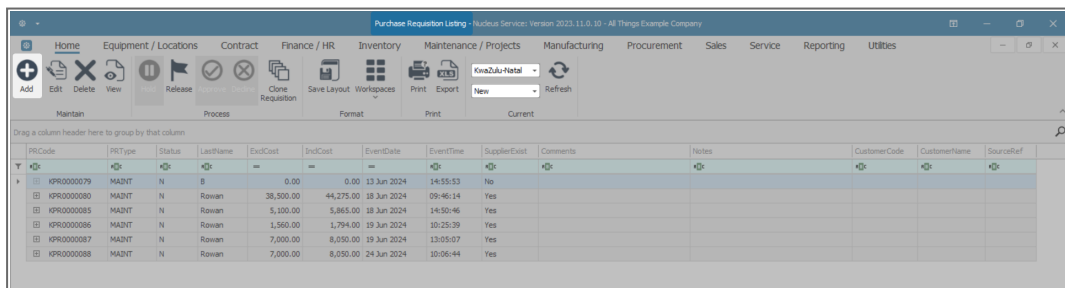
REQUISITIONS – SERVICE REQUISITION FOR SHIPPING COSTS (QUARANTINE)

After goods have been received into the Quarantine Warehouse, a non-stock Service Request must be raised, released and approved for the Shipping Costs to be added to these goods.

The subsequent Purchase Order for these Shipping Costs must be printed before the goods can be revalued and released from Quarantine.
(missing or bad snippet)

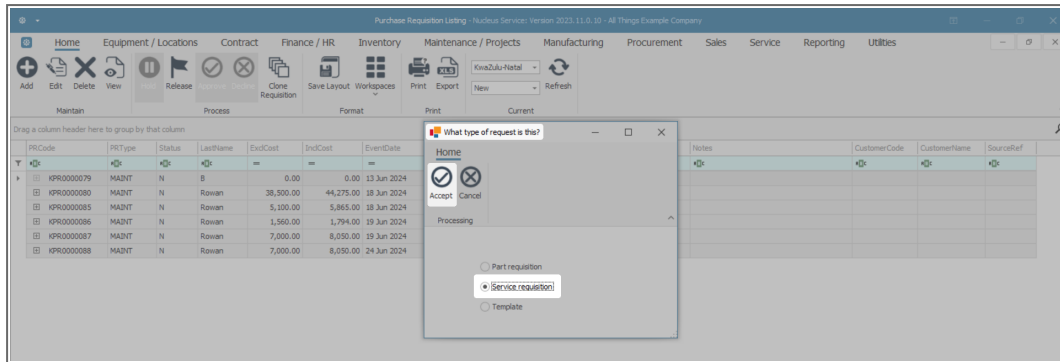
SELECT THE SITE AND STATUS

- In this image **KwaZulu-Natal** has been selected.
- The **State** filter will default to 'New' upon opening. This does not need to be changed.
- Click on **Add**.



PRCode	PRType	Status	Location	ExcCost	IndCost	EventDate	EventTime	SupplierExist	Comments	Notes	CustomerCode	CustomerName	SourceRef
KPR0000079	MAINT	N	B	0.00	0.00	13 Jun 2024	14:55:33	No					
KPR0000080	MAINT	N	Rowan	38,500.00	44,275.00	18 Jun 2024	09:46:14	Yes					
KPR0000085	MAINT	N	Rowan	5,100.00	5,865.00	18 Jun 2024	14:50:46	Yes					
KPR0000086	MAINT	N	Rowan	1,560.00	1,794.00	19 Jun 2024	10:25:39	Yes					
KPR0000087	MAINT	N	Rowan	7,000.00	8,050.00	19 Jun 2024	13:05:07	Yes					
KPR0000088	MAINT	N	Rowan	7,000.00	8,050.00	24 Jun 2024	10:06:44	Yes					

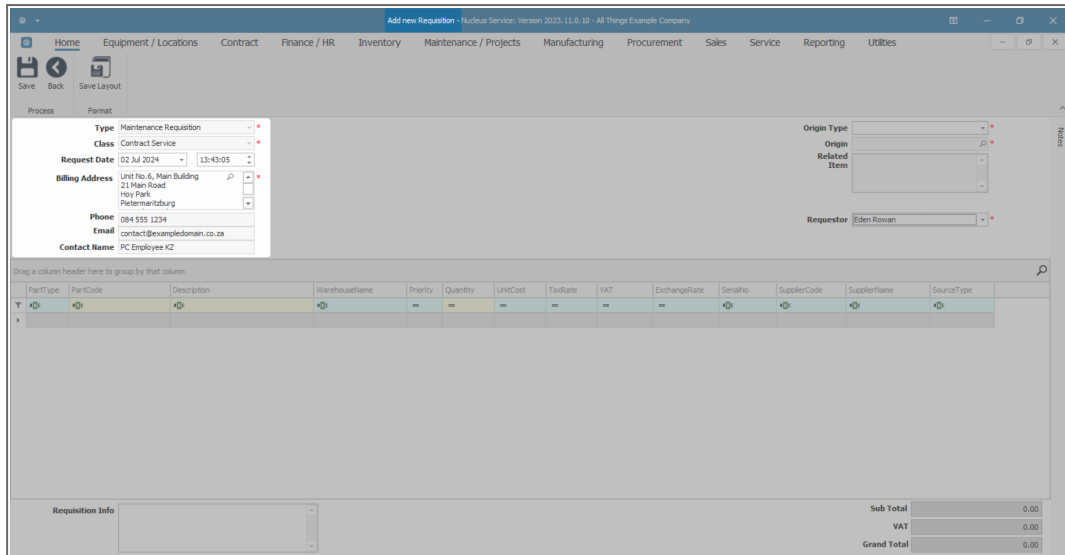
- A **What type of request is this?** screen will pop up.
- Click on the **Service requisition** radio button.
- Click on **Accept**.



- The **Add new Requisition** screen will be displayed.

REQUISITION HEADER INFORMATION

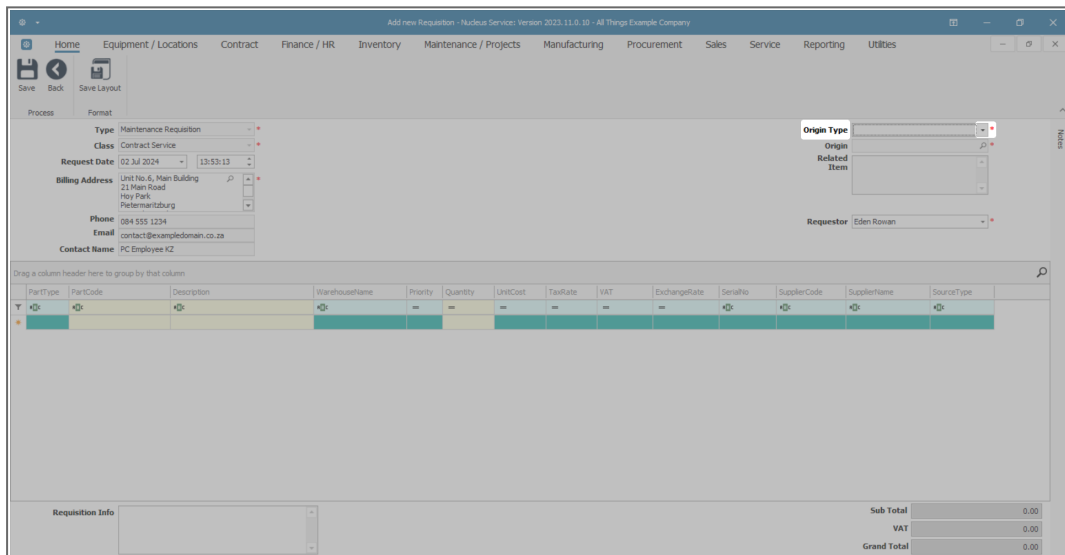
- The Requisition header frame will auto populate with most of the relevant details. Most of these are uneditable fields, except the following:
 - **Request Date and Time:** This will auto populate with the current date and time.
 - **Request Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
 - **Request Time:** You can either type in or use the directional arrows to select an alternative time.
 - **Billing Address:** This will auto populate with the billing address already set up on the system.
 - You can click on the search button and select an alternative address, if required, from the **Select an address for this requisition** pop up screen.



PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType

Sub Total	0.00
VAT	0.00
Grand Total	0.00

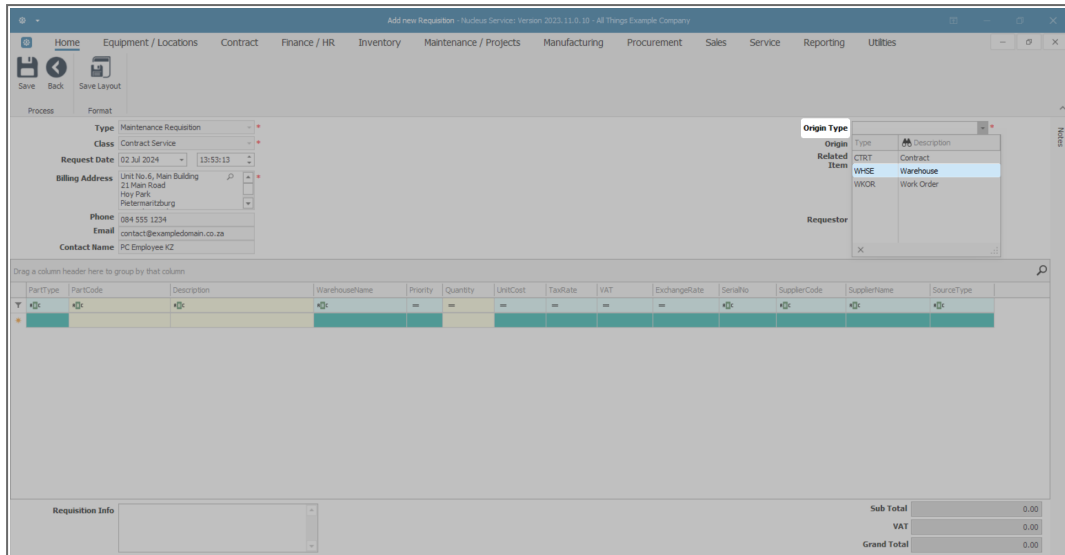
- Click on the drop-down arrow in the **Origin Type** field.



PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType

Sub Total	0.00
VAT	0.00
Grand Total	0.00

- The **Origin Type** menu will be displayed.
- Select from this menu, the **origin** of this Requisition:
 - Contract**
 - Warehouse**
 - Work Order**
 - In this example, **Warehouse** has been selected.



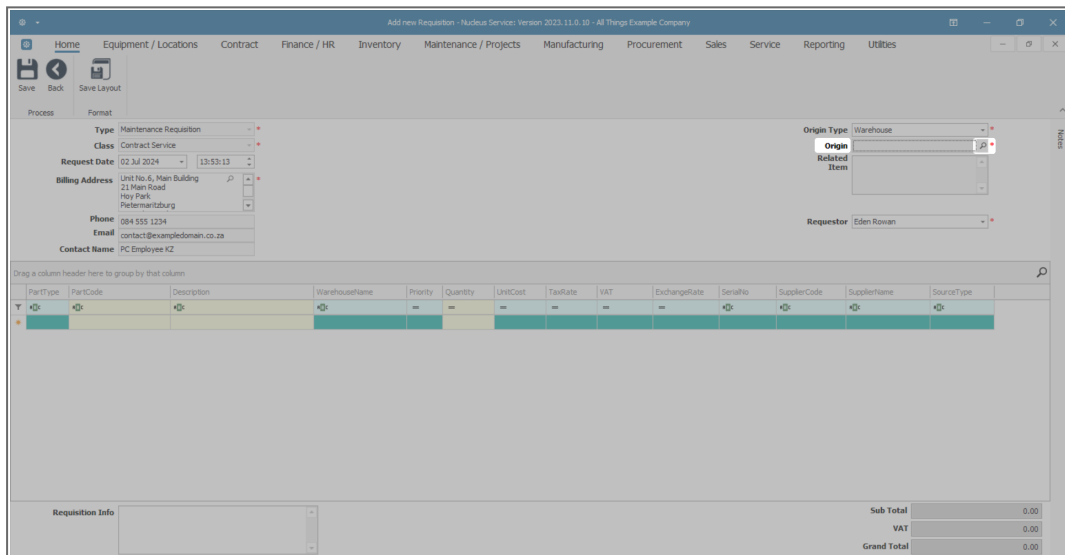
The screenshot shows the 'Add new Requisition' screen in Nucleus Services. The 'Origin Type' dropdown is open, showing options: Warehouse, Contract, and Work Order. The 'Warehouse' option is selected. The 'Request Date' is 02 Jul 2024, and the 'Request Time' is 13:53:13. The 'Billing Address' is Unit No. 6, Main Building, 21 Main Road, Hoy Park, Pietermaritzburg. The 'Phone' is 084 555 1234, and the 'Email' is contact@example.com. The 'Contact Name' is PC Employee KZ.

PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType

Requisition Info

Sub Total	0.00
VAT	0.00
Grand Total	0.00

- Click on the **search** button in the **Origin** field.



The screenshot shows the 'Add new Requisition' screen in Nucleus Services. The 'Origin Type' dropdown is open, showing options: Warehouse, Contract, and Work Order. The 'Warehouse' option is selected. The 'Request Date' is 02 Jul 2024, and the 'Request Time' is 13:53:13. The 'Billing Address' is Unit No. 6, Main Building, 21 Main Road, Hoy Park, Pietermaritzburg. The 'Phone' is 084 555 1234, and the 'Email' is contact@example.com. The 'Contact Name' is PC Employee KZ.

PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType

Requisition Info

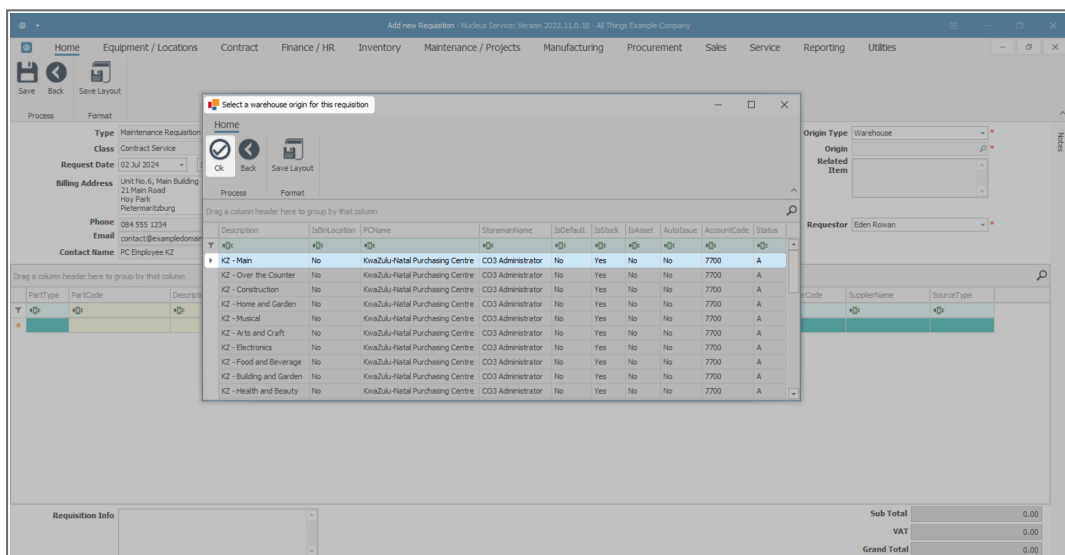
Sub Total	0.00
VAT	0.00
Grand Total	0.00

- The **Select a warehouse origin for this requisition** screen will pop up.

Note: The **Select a...** screen that pops up will be linked to the **Origin Type** selected in the previous step.

For example:

- If **Contract Type** was selected then the Select a contract origin for this requisition screen will pop up.
- If **Work Order Type** was selected then the Select a work order origin for this requisition screen will pop up.
- As **Warehouse Type** was selected then the Select a warehouse origin for this requisition screen has popped up.
- Click on the **row selector** in front of the **warehouse** that is the origin of this requisition.
- Click on **Ok**.



Description	IsInLocation	POName	StoreName	IsDefault	IsStock	IsAsset	AutoIssue	AccountCode	Status
K2 - Main	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Over the Counter	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Construction	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Home and Garden	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Musical	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Arts and Craft	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Electronics	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Food and Beverage	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Building and Garden	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A
K2 - Health and Beauty	No	KwaZulu-Natal Purchasing Centre	CO3 Administrator	No	Yes	No	No	7700	A

- **Related Item:** This field is un-editable.
- **Requestor:** This will populate with the person currently logged on to the system. You can click on the drop-down arrow and select from the menu an alternative person if required.
- **Requisition Info:** Type in any extra information in this text box, if required. This will pull through to the Procurement Report.

Add new Requisition - Nucleus Service Version 2023.11.0.10 - All Things Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout

Process Format

Type Maintenance Requisition
Class Contract Service
Request Date 02 Jul 2024 11:45:11
Billing Address Unit No. 6, Main Building
21 Main Road
Hoy Park
Pietermaritzburg
Phone 084 555 1234
Email contact@exampdomain.co.za
Contact Name PC Employee K2

Origin Type Warehouse
Origin K2 - Main
Related Item
Requestor Eden Rowan

Drag a column header here to group by that column

PartType	PartCode	Description	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName

Requisition Info Add new Requisition-Shipping Costs.

Sub Total 0.00
VAT 0.00
Grand Total 0.00

REQUISITION PARTS DATA GRID

- The following fields will now populate:
 - Part Type:** This will auto populate with **SERV**.
 - Priority:** This will auto populate with **3**.
 - Quantity:** This will auto populate with **1** but can be edited.
 - Unit Cost:** This will auto-populate initially with **0.00** but can be edited.

Add new Requisition - Nucleus Service Version 2023.11.0.10 - All Things Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout

Process Format

Type Maintenance Requisition
Class Contract Service
Request Date 02 Jul 2024 15:48:54
Billing Address Unit No. 6, Main Building
21 Main Road
Hoy Park
Pietermaritzburg
Phone 084 555 1234
Email contact@exampdomain.co.za
Contact Name PC Employee K2

Origin Type Warehouse
Origin K2 - Main
Related Item
Requestor Eden Rowan

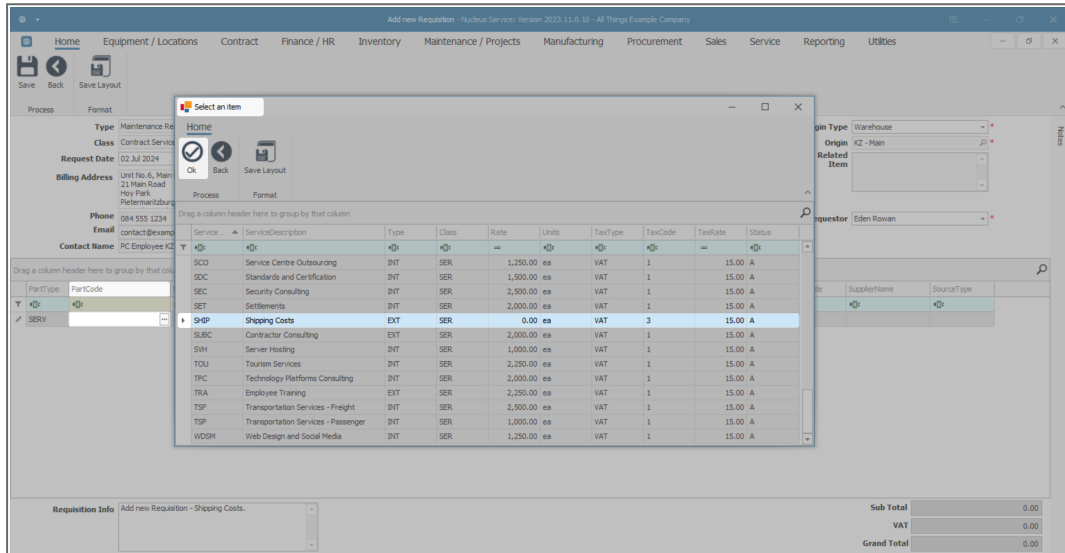
Drag a column header here to group by that column

PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType
SERV				3	1.00	0.00							

Requisition Info Add new Requisition - Shipping Costs.

Sub Total 0.00
VAT 0.00
Grand Total 0.00

- Click in the **Part Code** text box.
- An **ellipsis** button will be revealed.
- Click on the **ellipsis** button.
- A **Select an item** pop up screen will appear.
- Click on the **row** of the item you wish to add.
 - In this example, you are going to be selecting **Shipping Costs**.

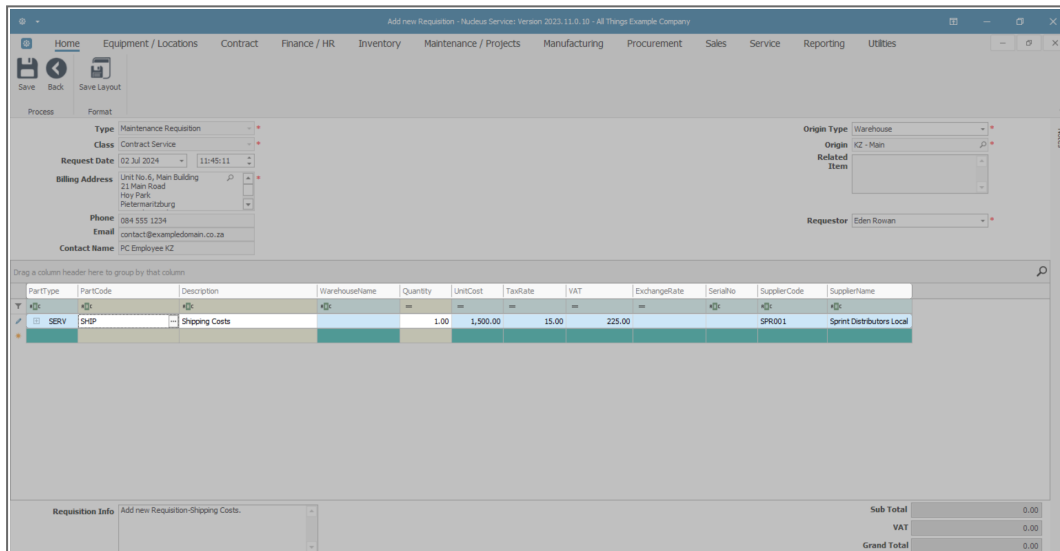


Service	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxCode	TaxRate	Status
SCD	Service Centre Outsourcing	INT	SER	1,250.00	ea	VAT	1	15.00	A
SDC	Standards and Certification	INT	SER	1,500.00	ea	VAT	1	15.00	A
SEC	Security Consulting	INT	SER	2,000.00	ea	VAT	1	15.00	A
SET	Settlements	INT	SER	2,000.00	ea	VAT	1	15.00	A
SHIP	Shipping Costs	EXT	SER	0.00	ea	VAT	3	15.00	A
SLBC	Contractor Consulting	EXT	SER	2,000.00	ea	VAT	1	15.00	A
SVH	Server Hosting	INT	SER	1,000.00	ea	VAT	1	15.00	A
TOU	Tourism Services	INT	SER	2,250.00	ea	VAT	1	15.00	A
TPC	Technology Platforms Consulting	INT	SER	2,000.00	ea	VAT	1	15.00	A
TRA	Employee Training	EXT	SER	2,250.00	ea	VAT	1	15.00	A
TSP	Transportation Services - Freight	INT	SER	2,500.00	ea	VAT	1	15.00	A
TSP	Transportation Services - Passenger	INT	SER	1,000.00	ea	VAT	1	15.00	A
WDSH	Web Design and Social Media	INT	SER	1,250.00	ea	VAT	1	15.00	A

The following fields will now populate:

- **Part Code:** This will populate with the **code** of the part selected in the previous step.
- **Description:** This will populate with the **description** of the part selected in the previous step.
- **Unit Cost:** If there is a **Primary Supplier** set up on this part then this field will populate with the **unit cost** of the part as set by that supplier.
- **Tax Rate:** This field will populate with the current **VAT rate**.
- **VAT:** If there is a **Primary Supplier** set up on this part then this field will populate with the **VAT amount** of the total part cost.

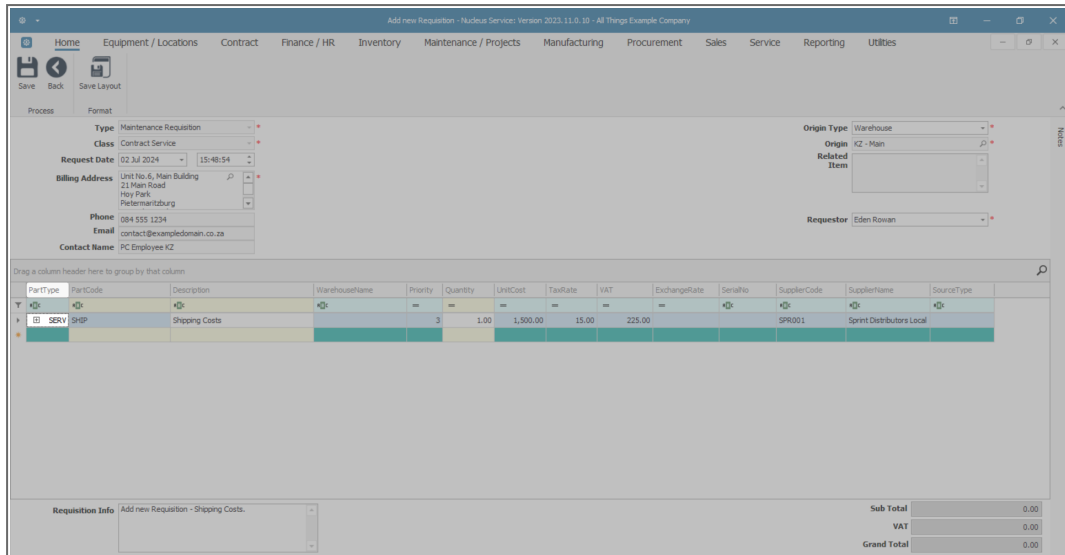
- **Supplier Code:** If there is a **Primary Supplier** set up on this part then this field will populate with the **code** of that primary supplier.
- **Supplier Name:** If there is a **Primary Supplier** set up on this part then this field will populate with the **name** of that selected supplier.
- **Note about Exchange Rate:** This field will only populate if:
 - The currency of the Primary Supplier set up is **different** to your company currency as set up in Nucleus Service.
 - If you manually select a supplier for this part and the currency of that supplier is **different** to your company currency as set up in Nucleus Service.



PartType	PartCode	Description	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName
SERV	SHP	Shipping Costs		1.00	1,500.00	15.00	225.00			SPR001	Sprint Distributors Local

Sub Total	0.00
VAT	0.00
Grand Total	0.00

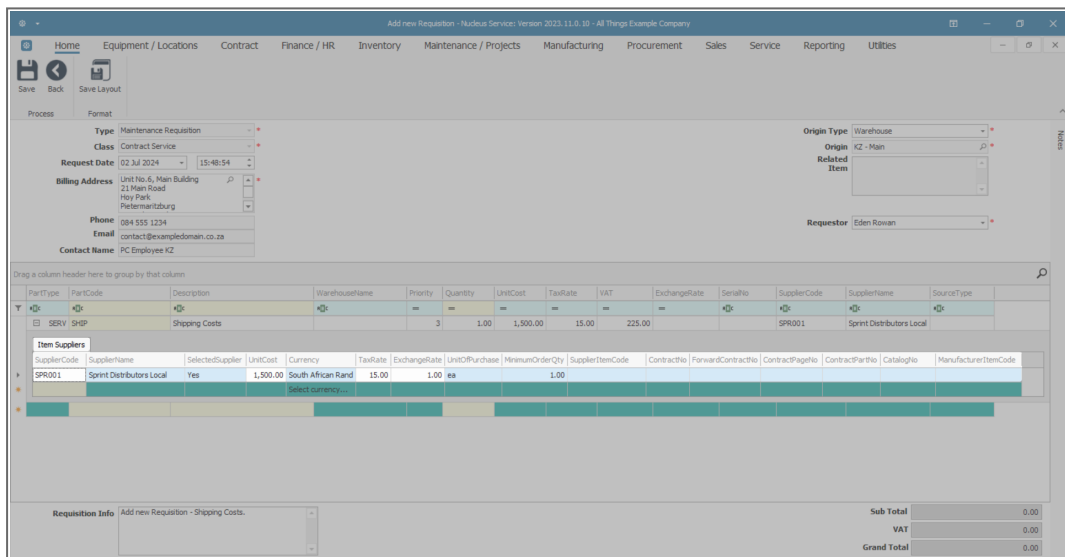
- Click on the **expand** button in the **Part Type** field.



PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType
BI	SERP	SHIP	Shipping Costs		3	1.00	1,500.00	15.00	225.00		SPR001	Sprint Distributors Local	

Sub Total	0.00
VAT	0.00
Grand Total	0.00

- The **Item Suppliers** data grid will be expanded.
- **Note:** You can follow the process to [add and/or edit Items Supplier details](#) in this data grid, if required.

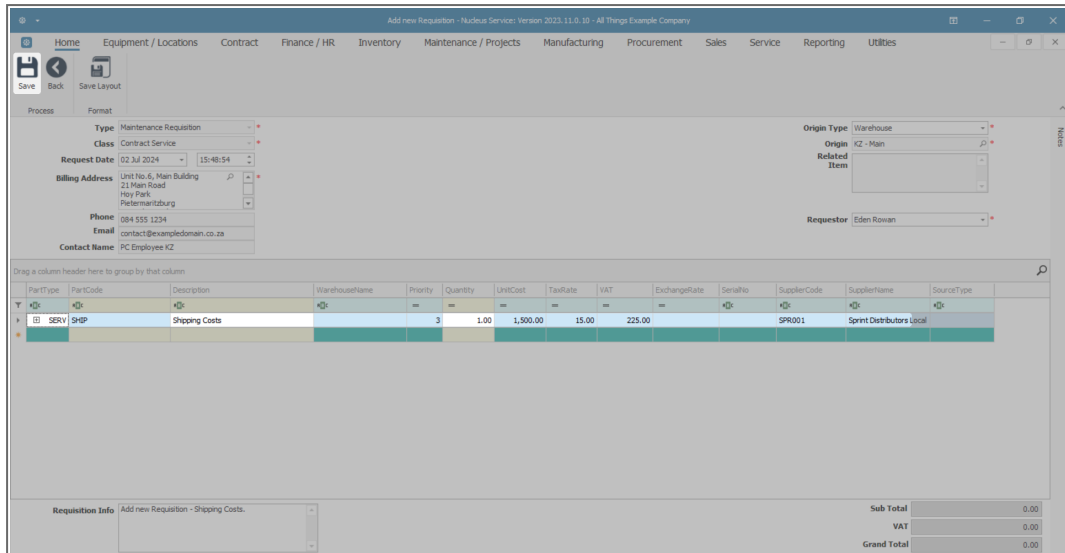


SupplierCode	SupplierName	SelectedSupplier	UnitCost	Currency	TaxRate	ExchangeRate	UnitOfPurchase	MinimumOrderQty	SupplierItemCode	ContractNo	ForwardContractNo	ContractPageNo	ContractPartNo	CatalogNo	ManufacturerItemCode
SPR001	Sprint Distributors Local	Yes	1,500.00	South African Rand	15.00	1.00	ea	1.00							

Sub Total	0.00
VAT	0.00
Grand Total	0.00

SAVE SERVICE REQUISITION

- When you are finished adding and/or editing the details in this screen, click on **Save**.

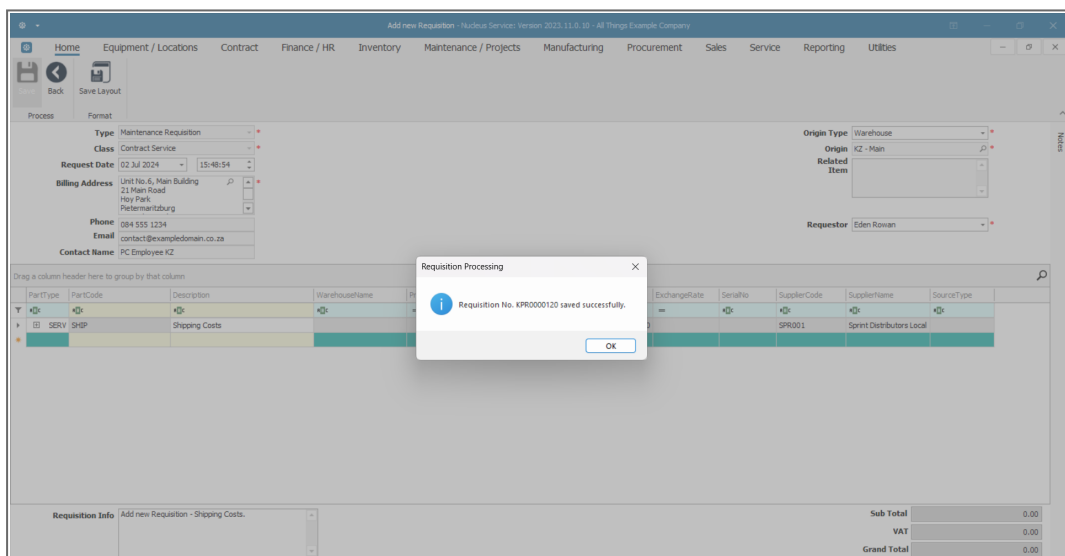


PartType	PartCode	Description	WarehouseName	Priority	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType
SHRP		Shipping Costs			3	1.00	1,500.00	15.00	225.00		SPR001	Sprint Distributors Local	

Requisition Info: Add new Requisition - Shipping Costs.

Sub Total: 0.00
VAT: 0.00
Grand Total: 0.00

- A **Requisition Processing** message box will pop up informing you that -
 - **Requisition No. [] saved successfully.**
- Click on **OK**.



Requisition Processing

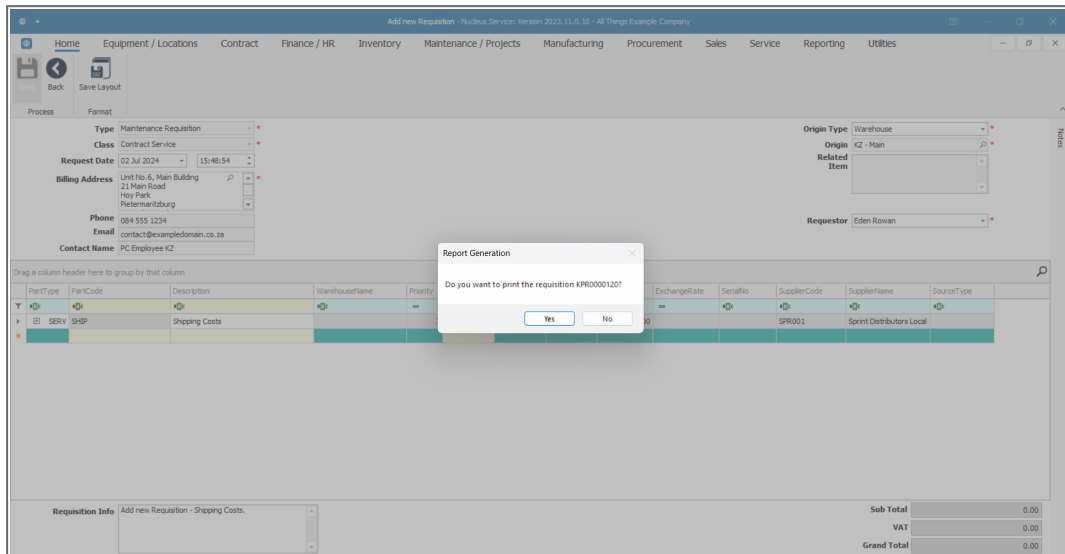
Requisition No. KPR0000120 saved successfully.

OK

PRINT SERVICE REQUISITION

(Optional to print.)

- A **Report Generation** message box will pop up asking -
 - **Do you want to print the requisition []?**
- For the purpose of this manual we have selected **Yes**.



The screenshot shows the 'Add new Requisition' screen with a 'Report Generation' dialog box in the center. The dialog box asks 'Do you want to print the requisition KPR0000120?' with 'Yes' and 'No' buttons. The background form contains the following details:

Process: Maintenance Requisition
Class: Contract Service
Request Date: 02 Jul 2024
Billing Address: Unit No. 6, Main Building, 21 Main Road, Hoy Park, Pietermaritzburg
Phone: 084 555 1234
Email: contact@example.com.co.za
Contact Name: PC Employee K2

Origin Type: Warehouse
Origin: K2 - Main
Related Item:
Requestor: Eden Rowan

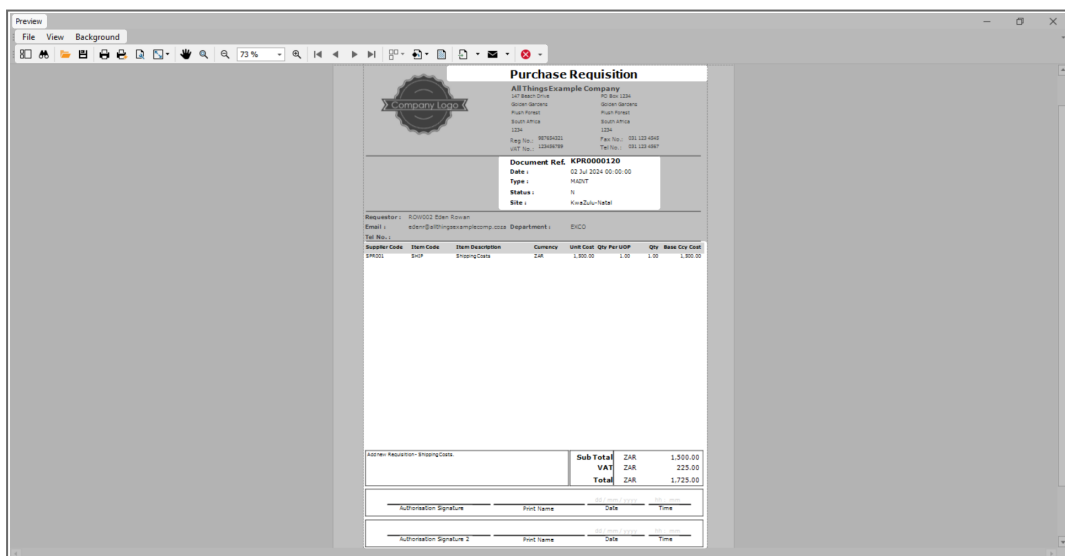
PartType	PartCode	Description	WarehouseName	Priority	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType
SERV	SNIP	Shipping Costs					SPR001	Sprint Distributors Local	

Requisition Info: Add new Requisition - Shipping Costs.

Summary:
 Sub Total: 0.00
 VAT: 0.00
 Grand Total: 0.00

The **Report Preview** screen will be displayed.

- Here you can see that **Shipping Costs** is in the Item Description.
- From this screen you can **View, Print, Export** or **Email** this requisition.
- **Close** the preview screen when you are done.



The screenshot shows the 'Purchase Requisition' report preview screen. It includes the following information:

Company Logo: All Things Example Company
Address: 217 Bessie Drive, PC Park, 2204, Pietermaritzburg, South Africa
Phone: 084 555 1234
Email: contact@example.com.co.za
Department: BICO

Document Ref: KPR0000120
Date: 02 Jul 2024 00:00:00
Type: MAINT
Status: IN
Site: KwaZulu-Natal

Requestor: K000002 Eden Rowan
Email: edenr@example.com.co.za

Supplier Code	Item Code	Item Description	Quantity	Unit Cost	Qty Per Unit	Qty	Basic Cost
SPR001	SNIP	Shipping Costs	2.00	1,500.00	1.00	1.00	1,500.00

Summary:
 Address: Requisition - Shipping Costs
 Sub Total: 2.00, 1,500.00
 VAT: 2.00, 225.00
 Total: 2.00, 1,725.00

Signatures:
 Automation Signature: First Name, Date, Time
 Automation Signature 2: First Name, Date, Time

- You will return to the Purchase Requisition Listing screen.

RELEASE SERVICE REQUISITION

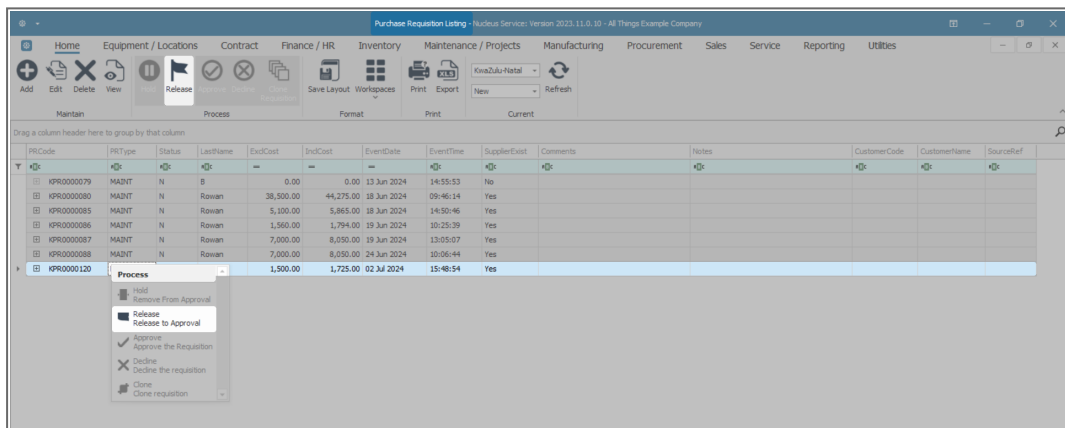
- Select the newly raised requisition.

Method 1

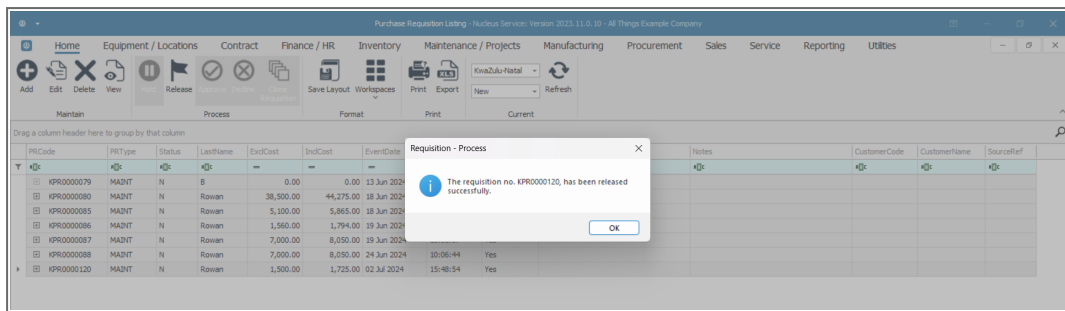
- **Right click** in the row of the **item** that you wish to **release to Approval**.
- A **Process** menu will pop up.
- Click on **Release - Release to Approval**.

Method 2

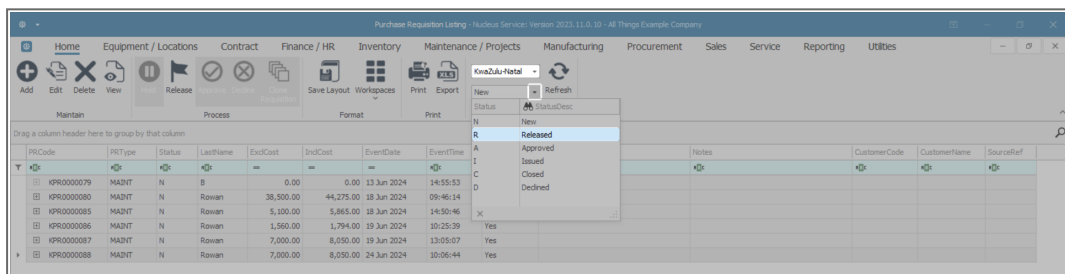
- Select the row of the **item** that you wish to **release to Approval**, then click on **Release**.



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



- The selected requisition will be **removed** from this screen where the status is set to **New**.
- Click on the **drop-down arrow** in the status field to bring up the **Status Description** list.
- Select **Released**.



- The Listing screen will now display all the requisitions in the **Released** status.

APPROVE SERVICE REQUISITION

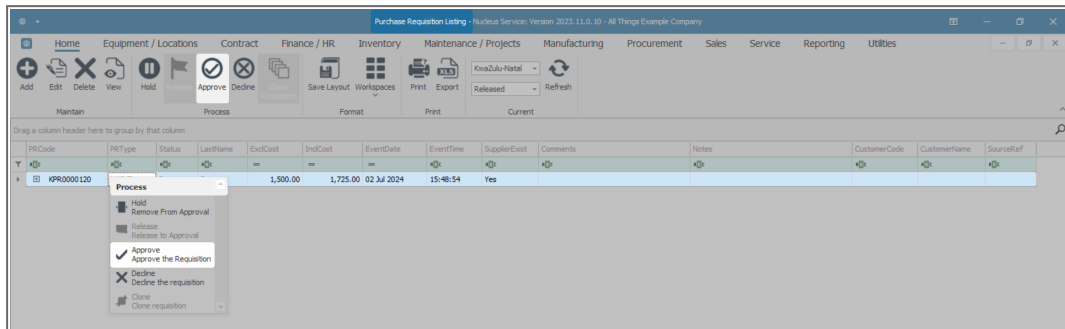
- Select the requisition created for shipping costs.

Method 1

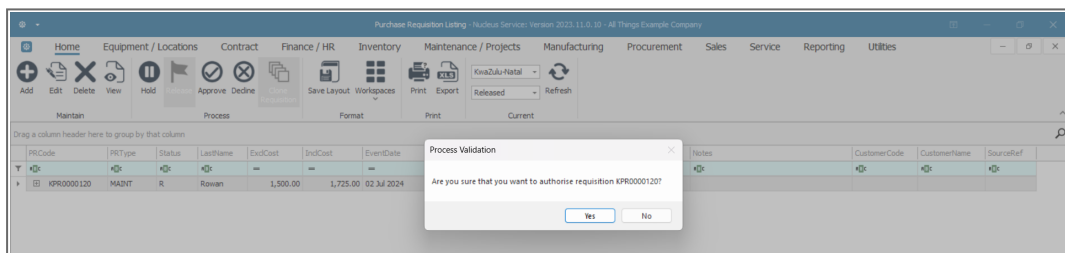
- **Right click** in the row of the **item** that you wish to **Approve**.
- A **Process** menu will pop up.
- Click on **Approve - Approve the Requisition**.

Method 2

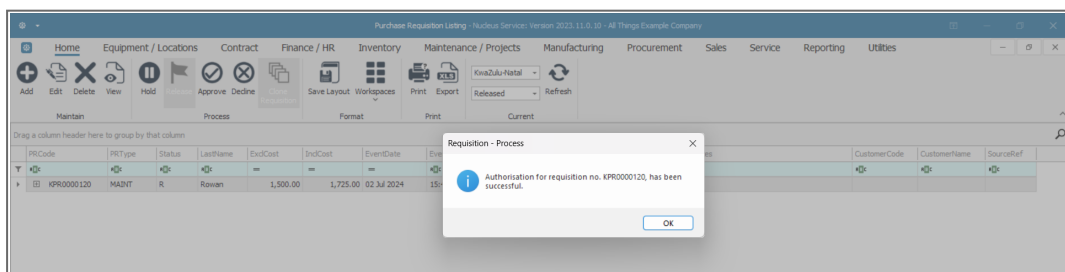
- Select the row of the **item** that you wish to **Approve**, then click on **Approve**.



- A **Process Validation** message box will pop up asking -
 - **Are you sure that you want to authorise requisition []?**
- Click on **Yes**.

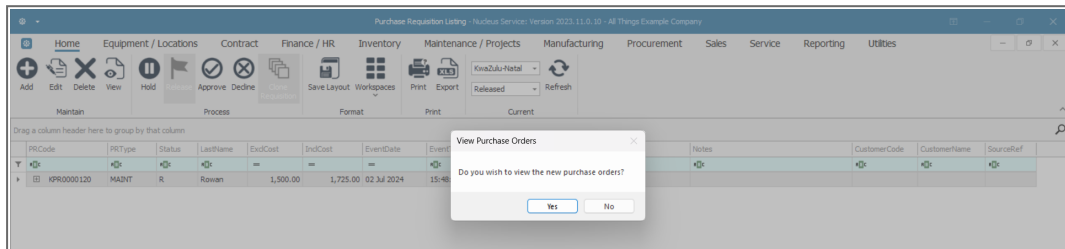


- A **Requisition - Process** message box will pop up informing you that -
 - **Authorisation for requisition no. [] has been successful.**
- Click on **OK**.



VIEW GENERATED SERVICE PURCHASE ORDER

- A **View Purchase Orders** message box will pop up asking -
 - **Do you wish to view the new purchase orders?**
- Click on **Yes**.

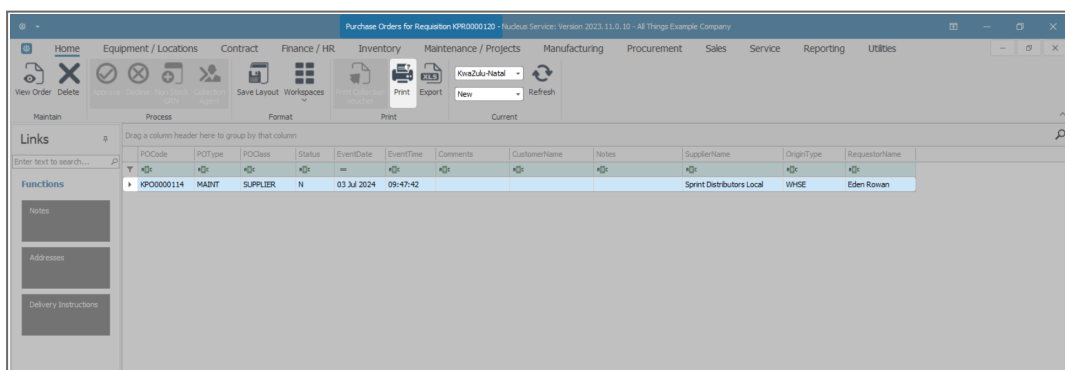


- The **Purchase Orders for Requisition []** screen will be displayed.
- Select the correct **Site**.
- The **Status** will remain at **New**.
- Here you can view the newly created Purchase Order for the Shipping Costs.

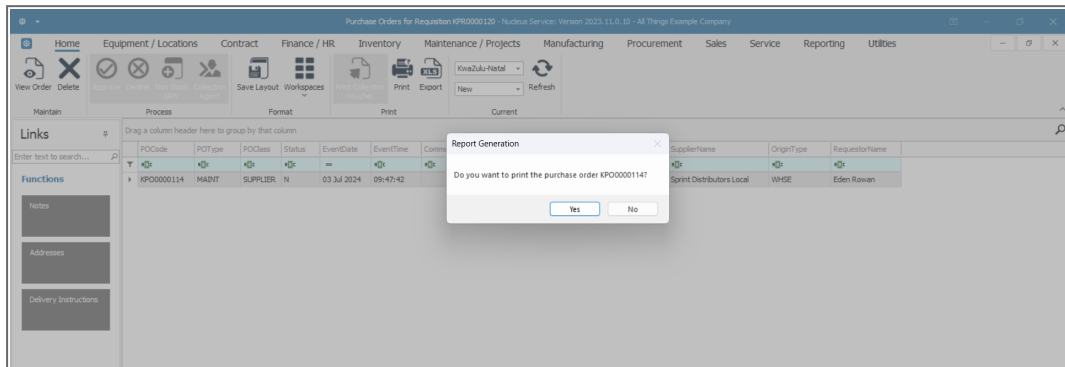
PRINT SERVICE PURCHASE ORDER

(Print required)

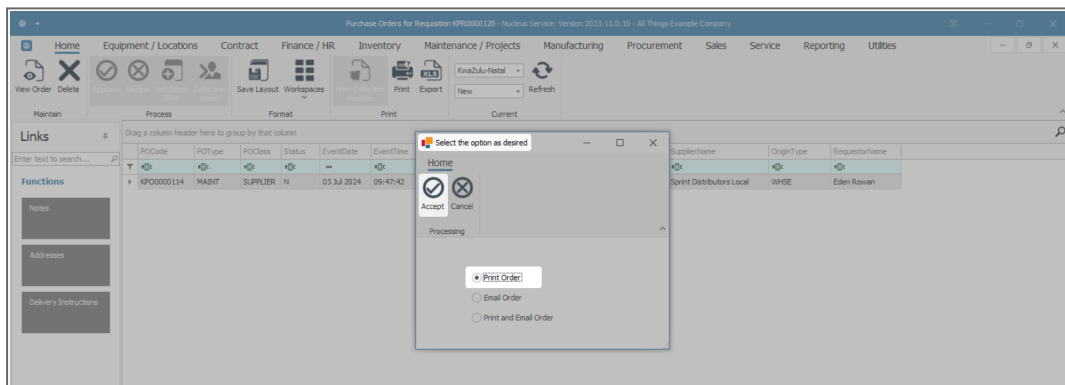
- This must be **printed** to activate goods receiving against this purchase order. (In this case you are receiving **Services - Shipping Costs**.)



- A **Report Generation** message box will pop up asking -
 - **Do you want to print the purchase order []?**
- Click on **Yes**.

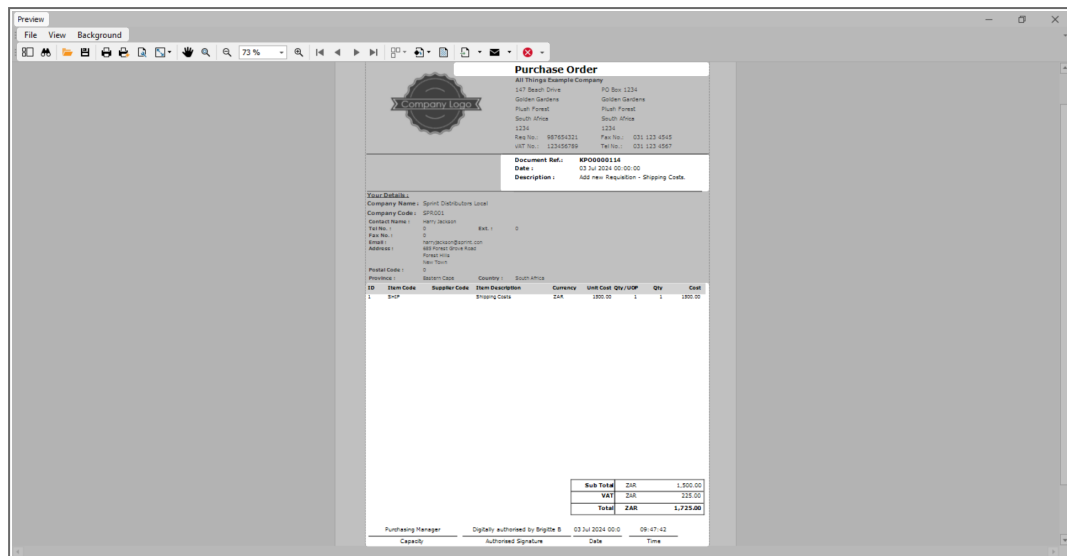


- A **select the option as desired** screen will pop up.
- Select **Print Order**.
- Click on **Accept**.



The **Report Preview** screen will be displayed.

- Here you can see that 'Shipping Costs' has pulled through on the Item Code and Description.
- From here you can - **View**, **Print**, **Email**, and **Export** the purchase order.
- **Close** the Preview screen when you are done.



Purchase Order

Company Name: Sprint Distributors Local
 Company Code: SP0001
 Contact Name: Mimi Jackson
 Tel No: 0
 Fax No: 0
 Email: mimi.jackson@sprint.co.za
 Address: 480 Spring Street East, Pretoria, South Africa

Product Code: 0
 Previous: 0
 Country: South Africa

ID	Item Code	Supplier Code	Item Description	Currency	Unit Cost	Qty/Unit	Qty	Cost
1	Ship		Shipping Costs	ZAR	1,900.00	1	1	1,900.00

Sub Total	ZAR	1,900.00
VAT	ZAR	228.00
Total	ZAR	2,128.00

Purchasing Manager: Digitally authorized by Brigitte R. 03 Jul 2024 09:00 09:47:42

Capacity: Authorized Signature: Date: Time:

- Complete the Quarantine process by Revaluing and Releasing the goods from Quarantine into the receiving warehouse.

Related Topics

- Receive Goods into Quarantine Warehouse
- Revalue and Release Goods into Store from Quarantine
- Return Goods to Supplier from Quarantine Warehouse

MNU.030.005

