



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.

Ribbon Access: *Procurement > Requisitions*



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

Select the Site

- 2. Select the *site* in this example, *Durban* is selected.
- 3. Click on Add.



| | ¥ | | | 1— | | chase Rea | quisition Listing - E | PO: Version | 2.1.0.71 - Exar | nple Con | npany | | | - 🗆 | × |
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| | | | | | | | | | | | | | | | |
| PRC | ode | PRType | Status | EmployeeNumber | FirstName | LastNan | ne EventDate | Comments | ExdCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | Custom |
| ٩ | | | | | | | | | | | | | | | |
| • 🗄 PF | R0000356 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | Please ph | 1 609.96 | No d | Yes | 1 835.35 | Warehouse | HOP001 | Hope |
| E PF | R0000357 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | | 1 609.96 | | Yes | 1 835.35 | Warehouse | HOP001 | Hope |
| 🕀 PF | R0000358 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 17 May 2017 | Please p | 1 834.96 | Plea | Yes | 2 091.85 | Warehouse | HOP001 | Hope |
| E PF | 20000359 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 17 May 2017 | Test 2.1 | 1 834.96 | Test | Yes | 2 091.85 | Warehouse | HOP001 | Hope |
| 🖽 PF | 20000360 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | | 1 700.00 | | Yes | 1 700.00 | Warehouse | HOP001 | Hope |
| 🕀 PF | R0000361 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | | 1 700.00 | | Yes | 1 700.00 | Warehouse | HOP001 | Hope |
| E PF | R0000362 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | Please p | 1 734.96 | Plea | Yes | 1 986.85 | Warehouse | HOP001 | Hope |
| 🕀 PF | 20000363 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | procurem | 1 834.96 | procu | Yes | 2 091.85 | Warehouse | HOP001 | Hope |
| E PF | R0000364 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | Standalo | 1 334.96 | Stan | Yes | 1 451.85 | Warehouse | | |
| E PF | 20000366 | MAINT | Ν | MIL001 | Abigail | Milne | 17 May 2017 | v2.1.0.4 | 5 750.00 | v2.1 | Yes | 6 555.00 | Warehouse | | |
| 🕀 PF | 20000368 | MAINT | N | MUD001 | Judith | Mudzen | gi 17 May 2017 | stock rep | 5 209.26 | stock | Yes | 5 938.56 | Warehouse | | |
| E PF | 20000369 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 17 May 2017 | v2.1.0.4 | 969.92 | v2.1 | Yes | 1 105.71 | Warehouse | | |
| E PF | R0000370 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 17 May 2017 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | | |
| E PF | R0000374 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 18 May 2017 | call procu | 809.96 | call p | Yes | 923.35 | Warehouse | HOP001 | Hope |
| 🕀 PF | R0000377 | MAINT | N | MUD001 | Judith | Mudzen | gi 18 May 2017 | Keep prin | 6 490.00 | Pleas | Yes | 7 398.60 | Warehouse | HOP001 | Hope |
| 🕀 PF | 20000380 | MAINT | N | DUT001 | Bianca | Du Toit | 18 May 2017 | | 0.00 | | No | 0.00 | Warehouse | | |
| D PF | R0000381 | MAINT | Ν | DUT001 | Bianca | Du Toit | 18 May 2017 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | | |
| ⊞ PF | 20000386 | MAINT | Ν | MUD001 | Judith | Mudzen | gi 18 May 2017 | | 809.96 | | Yes | 923.35 | Warehouse | | |
| 🗉 PF | R0000396 | MAINT | N | DUT001 | Bianca | Du Toit | 19 May 2017 | 2 | 490.00 | 2 | Yes | 490.00 | Warehouse | HOP001 | Hope |
| 🗄 PF | 20000397 | MAINT | N | MUD001 | Judith | Mudzen | gi 19 May 2017 | | 1 619.92 | | Yes | 1 846.71 | Warehouse | | |
| 🗄 PF | 20000398 | MAINT | N | MUD001 | Judith | Mudzen | gi 19 May 2017 | | 1 419.92 | | Yes | 1618.71 | Warehouse | | |
| - | | | | 2 | | | N. | | | | | | | 0 | |
| Onen M | /indows * | | | | | | | | | | | | | 02 34 2019 | - |

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



| | • | | | | Pur | chase Requ | isition Listing - | BPO: Version | 2.1.0.71 - Exar | nple Co | mpany | | | - 🗆 | \times |
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| Add | Edit | Delete | View | Hold Release | Approve D | edine Sa | ive Layout Wor | kspaces I | Print Export | New | • | Refresh | | | |
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| | | | | | | | (| 1 | | | | | | | |
| PRO | ode | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExdCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | Custon |
| P | | | | | | | | | | | | | | | |
| E F | R0000431 | MAINT | N | MUD001 | Judith | Mudzengi | 01 Jun 2017 | | 980.00 | | Yes | 980.00 | Warehouse | | |
| E F | R0000433 | MAINT | N | DUT001 | Bianca | Du Toit | 05 Jun 2017 | • | 1 500.00 | | Yes | 1 710.00 | Warehouse | | |
| E F | R0000434 | MAINT | N | DUT001 | Bianca | What I | type of reques | t is this? | Ĩ | | | 912.00 | Work Order | HOP001 | Hope |
| E F | R0000442 | MAINT | N | MUD001 | Judith | Home | | | | | | 5 130.00 | Warehouse | | |
| E F | R0000444 | MAINT | N | MUD001 | Judith | Home | ~ | | | | | 0.00 | Work Order | WES001 | Westv |
| E F | R0000452 | MAINT | N | MUD001 | Judith | \checkmark | × | | | | | 1 710.00 | Work Order | BIG0001 | Big Ba |
| E F | R0000454 | MAINT | N | MUD001 | Judith | Accept (| Cancel | | | | | 912.00 | Work Order | HOP001 | Hope |
| E F | R0000455 | MAINT | N | MUD001 | Judith | | | | | | | 570.00 | Work Order | DER001 | Derto |
| e F | R0000456 | MAINT | N | MUD001 | Judith | Processin | g , | | | | | 1 026.00 | Work Order | | |
| e F | R0000459 | MAINT | N | MIL01 | Sarah | | | | | | | 166.75 | Work Order | DER001 | Derto |
| E F | R0000466 | MAINT | N | DUT001 | Bianca | | | | | | | 17.10 | Warehouse | HOP001 | Hope |
| E F | R0000485 | MAINT | N | DUT001 | Bianca | | | | | | | 399.00 | Warehouse | TIA001 | Titan |
| | R0000486 | MAINT | N | DUT001 | Bianca | | O Part req | uisition | | | | 7 125.00 | Warehouse | TIA001 | Titan I |
| E F | R0000523 | MAINT | N | MIL001 | Abigail | | | | | | | 5 130.00 | Warehouse | HOP001 | Hope |
| 1 F | R0000533 | MAINT | N | MIL001 | Abigail | | Service r | equisition | | | | 125 580 | Warehouse | | |
| E F | R0000536 | MAINT | N | MIL001 | Abigail | ~ | | | | | | 3 662.50 | Warehouse | | |
| e F | R0000563 | MAINT | N | MIL001 | Abigail | 2 | | | | | 110 | 5 175.00 | Contract | | |
| e F | R0000567 | MAINT | N | MIL001 | Abigail | Milne | 14 Jan 2019 | 1 | 1 200.00 | | Yes | 1 440.00 | Warehouse | | |
| E F | R0000568 | MAINT | N | MIL001 | Abigail | Milne | 11 Jan 2019 | | 5 500.00 | | Yes | 6 175.00 | Warehouse | | |
| | R0000575 | MAINT | N | MIL001 | Abigail | Milne | 21 May 2019 | | 150.00 | | Yes | 172.50 | Work Order | HOP001 | Hope |
| • F | R0000576 | MAINT | N | MIL001 | Abigail | Milne | 21 May 2019 | | 150.00 | | Yes | 172.50 | Work Order | HOP001 | Hope |
| | | | | | | | | | | | | | | | |
| 100 | 22.22 | | | | | | | | | | | | | | |

The *Add new Requisition* screen will be displayed.

REQUISITION HEADER INFORMATION

- 1. The requisition header frame will auto populate with most of the relevant details. Most of these are uneditable fields, except the following:
- 2. **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
- 3. **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.

| | , ₹ | | | | | Add ne | w Requisiti | ion - BP | O: Versior | n 2.1.0.71 - | Example | e Company | | | | | | | × |
|----------|-----------------|---|--|---------------------|----------|-----------------|-------------|----------|------------|--------------|---------|-----------------------------------|--------------|---------------------------|------------|---------------|-------|----------------------|-------|
| 0 | Home | Equipment a | ind Locations | Contract | Finan | ice and HR I | inventory | Mainten | nance and | Projects | Manufac | cturing Procure | ment Sale | Servio | ce Report | ing Utilitie | s) (- | ₽ | х |
| Save | Back | Save Layo | ut | | | | | | | | | | | | | | | | |
| Pro | R Bill Cc | Format Type Class equest Date ling Address Phone Email ontact Name | Maintenance Contract Ser 04 Jul 2019 2 Lakes Roac Twickenham Outer Durban 020 200 200 dsquires@em Dan Squires | Requisition vice | 12:40:05 | PM ↓ PM ↓ A * 3 | | 2 | | | | Origin Ty Orig Relat Ite | or Abigail M | line | | • • • • | | | Notes |
| Par P | tCode | PartType | Description | | Priority | WarehouseN | lame Qua | intity L | JnitCost | TaxRate | VAT | ExchangeRate | SerialNo | Su | pplierCode | SupplierNam | e | | |
| | Req | uisition Info | | | | | | | | | | | Sul Gran | o Total VAT d Total | | | | 0.00 0.00 0.00 | |
| Open | Windows | • | | | | | | | | | | | | | | 02 Ju | 2019 | Å | 1. |

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



| | ₹ | | | | Add n | new Requisitio | n - BPO: Version | n 2.1.0.71 - | Example Co | mpany | | | 27 | | | > |
|----------------|--------------------------|--|---|---------------|-------------|----------------|------------------|--------------|--------------|-------------|-------------------|-------------|--------------|---------|------|---|
| | Home | Equipment ar | nd Locations C | ontract Fin | ance and HR | Inventory M | laintenance and | Projects | Manufacturin | ng Procurem | ient Sales | Service Rep | orting Ut | ilities | - 6 | 1 |
| ve | G Back | Save Layou | ut | | | | | | | | | | | | | |
| roces | s | , Format | 4 | | | | | | | | | | | 1. | | |
| | | Туре | Maintenance Rec | quisition | * * | | | | | Origin Typ | e | | Ľ | | | |
| | 120 | Class | Contract Service | 1 | | | | | | Origi | n d | | ٦ | • | | ł |
| | Re | quest Date | 04 Jul 2019 | • 12:38: | 42 PM 🕌 | | | | | Iter | n | | | | | |
| | Billin | ıg Address | 2 Lakes Road Twickenham Outer Durban | | | | | | | | | | - | 5 | | |
| | | Phone | 020 200 2000 | | | | | | | Requesto | Abigail Miln | e | | • | | |
| | | Email | dsquires@email. | com | | | | | | | | | | | | |
| | Con | ntact Name | Dan Squires | | | | | | | | | | | | | |
| a col | Con Iumn hei | ntact Name | Dan Squires | m | | | are baracere | | liver live | | - | | | | / | |
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- 1. The *Origin Type* menu will be displayed.
- 2. Select from this menu, the *origin* of this requisition:
 - Contract
 - Warehouse
 - Work Order

In this example, *Warehouse* has been selected.



| | ₹ | | | | | Add | new Requ | isition - P | 3PO: Versio | n 2.1.0.71 | - Example | Company | | | | <u>100</u> 2 | | 00.000 | × |
|--------|-----------|--------------|--|---------------|-----------|-------------|----------|-------------|-------------|------------|-----------|-----------------|-----------|---------|-----------|----------------|------|--------|------|
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| Proce | 255 , | Format | | | | | | | | | | | | / | | | | | |
| | | Туре | Maintenance | e Requisition | n | - + | | | | | | Origin Type | e 🔰 | (| | * | | | 7 |
| | | Class | Contract Se | arvice | | - * | | | | | | Origin | Туре | A Des | scription | | | | 0000 |
| | Re | quest Date | 04 Jul 2019 | - | 1:24:33 6 | PM 🗘 | | | | | | Related | d CTRT | Contra | act | | 1 | | |
| | Billir | ıg Address | 2 Lakes Roa Twickenham Outer Durban | id 1 | 2 | * 0 * | | | | | | Iten | WKOR | Work C | Order | | | | |
| | | Phone | 020 200 200 | 00 | | | | | | | | Requesto | r | | | | 1 | 2 | |
| | | Email | dsquires@er | mail.com | | | | | | | | | × | | | 11. | 1 | | |
| | Cor | itact Name | Dan Squires | ß. | | | | | | | | | | | | | | | |
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| Parto | lode | PartType [| Description | | Priority | Warehous | seName (| Quantity | UnitCost | TaxRate | VAT | ExchangeRate | SerialNo | Supplie | erCode | SupplierName | | | |
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| | Requ | isition Info | | | | | | - | | | | | Sub | Fotal | | | ç | 0.00 | 7 |
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| Open W | indows • | | | | | | | | | | | | | | | 02 Jul : | 2019 | - | |

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

| | | | | | | Contraction and Advanced | | | | | | | | | - |
|----------------------------|---------------|---|----------|--------------|--------------|--------------------------|------------|--------------|-------------|---------------|---------------|---------------|----------------|------|-----|
| | | | | Add | new Requisit | tion - BPC | D: Versior | n 2.1.0.71 - | Example C | ompany | | | 1000 | | × |
| Home | Equipment a | nd Locations Contra | ct Finan | nce and HR | Inventory | Maintena | ance and | Projects | Manufacturi | ing Procureme | ent Sales | Service Repor | ting Utilities | 2- | 2 X |
| ave Back | Save Layo | ut | | | | | | | | | | | | | |
| Process . | Format | A Maintenance Requisiti | on | - + | | | | | | Origin Type | Warehouse | | • • | | _ |
| | Class | Contract Service | | ~ . | | | | | | Origin 17ps | YVGI CHOGAC | | | | |
| | Cidss | Contract Service | | | | | | | | Relater | | | ~ | 0 | L |
| Re | equest Date | 04 Jul 2019 🔹 | 1:24:331 | РМ 📮 | | | | | | Item | | | A., | | S |
| Billi | ng Address | 2 Lakes Road Twickenham Outer Durban | | ₽ + | | | | | | | | | | | |
| | Phone | 020 200 2000 | | | | | | | | Requestor | Abigail Milne | | • • | | |
| | Email | dsquires@email.com | | | | | | | | | | | | | |
| Co | ntact Name | Dan Squires | | | | | | | | | | | | | |
| ag a column he PartCode | PartType | proup by that column Description | Priority | Warehous | seName Qu | antity U | InitCost | TaxRate | VAT E | ExchangeRate | SerialNo | SupplierCode | SupplierName | 1 | |
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| Requ | uisition Info | | | | | | | | | | Sub T | otal | | 0. | 00 |
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Help v2.5.0.14 - Pg 6 - Printed: 25/06/2024



1. 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:

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

| | | | Add n | iew nequis | acion - BPO, version 2,1, | 0.71 - Example | Company | | | 100 | · · · · | |
|---|--|-----------|------------|------------|--|--|--|---|---|---|---|--|
| Home Equipmen | t and Locations Contra | act Finan | ice and HR | Inventory | Maintenance and Proje | cts Manufact | turing Procurement | t Sales Servic | e Reporti | ng Utili | ties — | Ð |
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| re back Save La | iyout | | | | | | | | | | | |
| rocess " Forma | t " | | | | | | | | | | | |
| Тур | Maintenance Requisit | ion | * * | | 6 | | Origin Type | Warehouse | | * | * | |
| Clas | ss Contract Service | | × • | | 7 | | Origin | | | Q | • | |
| Request Dat | te 04 Jul 2019 🔹 | 1:24:33 F | PM 🌲 | | / | | Related | | | ÷. | | |
| Billing Addres | 2 Lakes Road Twickenham Outer Durban | , | ۰ ۱ | _ | - | | | | | | | |
| Phor | e 020 200 2000 | | | | Select a warehouse | origin for this | requisition | | | G | | × |
| F | | | | | Home | | | | | | | |
| Ema | dsquires@email.com | | | | Tiome | | | | | | | |
| Contact Nam | Dan Squires | | | | Ok Back Save L | ayout | | | | | | |
| Contact Nan a column header here 1 artCode PartType | dequires@email.com Dan Squires to group by that column conscription | Priority | Warehouse | Name | Ok Back Save L Process Form | ayout | | | | | | 7 |
| Contact Nan a column header here 1 artCode PartType | dequires@email.com Dan Squires to group by that column 2 Description | Priority | Warehouse | eName | Ok Back Save L Process Form | ayout at 3 | at column | | 10.6.4 | I - Ch-d | | |
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| Contact Nan a column header here f artCode PartType | disquires@email.com disquires@email.com disquires or group by that column e Description | Priority | Warehouse | eName | one ok ok Process Form Vrag a column header here Description Main Warehouse | ayout at 3 to group by the IsBinLocation | et column PCName Purchasing Centre | StoremanName Ed Jones | IsDefault | IsStock Yes | IsAsset | Aut |
| Contact Nan a column header here f artCode PartType | disquires@email.com disquires@email.com disquires or group by that column e Description | Priority | Warehouse | eName | Ok Back Save L Process Form Vag a column header here Description Main Warehouse Off Site Warehouse | ayout at 3 to group by the IsBinLocation No No | PCName Purchasing Centre Purchasing Centre | StoremanName Ed Jones Chris Haynes | IsDefault No No | IsStock Yes Yes | IsAsset No No | Aut |
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3. Click on *Ok*.



- 1. **Related Item:** This field is un-editable.
- 2. **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.
- 3. **Requisition Info:** Type in any extra information in this text box, if required. This will pull through to the Procurement Report

| | • | | | | | Add | new Requis | ition - B | PO: Versio | n 2.1.0.71 | - Example C | Company | | | | 100 | | \times |
|--------|--------------|--------------|---|-------------|----------|----------|------------|-----------|------------|------------|-------------|----------------|-----------------|------------|------------|-----------|----|----------|
| | Home | Equipment a | nd Locations | Contract | Financ | e and HR | Inventory | Maint | enance and | Projects | Manufactu | ring Procureme | ent Sales | Service Re | eporting U | Utilities | - | ₽ × |
| Save | Back Back | Save Layo | ut | | | | | | | | | | | | | | | |
| | | Type | Maintenance | Requisition | | | | | | | | Origin Type | Warehouse | e | | • • | | z |
| | | Class | Contract Ser | vice | | × • | | | | | | Origin | Main Wareh | ouse | | 0. | | otes |
| | Re | quest Date | 04 Jul 2019 | - 1 | :24:33 P | м 🛟 | | | | 1 | | Related | 1 | | | - | | |
| | Billi | ng Address | 2 Lakes Road Twickenham Outer Durban | 1 | م | 0 • | | | | | | Iten | 1 | | | * | | |
| | | Phone | 020 200 2000 |) | | | | | | | | Requesto | r Abigail Milne | e | 1 | * * | | |
| | | Email | dsquires@em | ail.com | | | | | | | | | | | | _ | | |
| | Co | ntact Name | Dan Squires | | | | | | | | | | 2 | , | | | | |
| Drag a | | | | | | | | | | | | | | | | | | |
| Part | Code | PartType [| Description | P | riority | Warehous | seName Q | uantity | UnitCost | TaxRate | VAT | ExchangeRate | SerialNo | SupplierCo | de Supplie | erName | | |
| 9 | | - | | | | | | | ti | 12 | | | | | | | | |
| * | | 1 () | | | | | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | | | | | | | |
| | Requ | isition Info | | | | | | | | | | | Sub T | otal | | | 0. | 00 |
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| Open V | Vindows ¬ | | | | | | | | | | | | | | 1 | 02 Jul 20 | 19 | ¢ //. |

You can now move down to the *Parts* data grid.

REQUISITION PARTS DATA GRID

• Click in the *Part Code* text box.



| | | | Ac | Id new Requisition | - BPO: Version 2.1. | 0.71 - Examp | ole Com | pany | | | | 100 | | \times |
|-----------------------------|-----------------|---|-------------------|--------------------|----------------------|--------------|----------|--------------|---------------|----------|------------|-------------|------------|----------|
| Home | Equipment ar | nd Locations Contra | ect Finance and H | R Inventory M | aintenance and Proje | cts Manufa | acturing | Procurement | Sales | Service | Reporting | Utilities | 2 - | 8) |
| Save Back | Save Layor | ut | | | | | | | | | | | | |
| Process , | Format | 4 | | | | | | | | | | | | |
| | Туре | Maintenance Requisit | ion - * | | | | | Origin Type | Varehouse | | | • • | | |
| | Class | Contract Service | × | i. | | | | Origin M | 1ain Wareh | nouse | | • م | | |
| Re | quest Date | 04 Jul 2019 🔹 | 1:24:33 PM 🌲 | | | | | Related | | | | - | | |
| Billir | ng Address | 2 Lakes Road Twickenham Outer Durban | | ŧ | | | | iten. | | | | - | | |
| | Phone | 020 200 2000 | | | | | | Requestor A | Abigail Milne | e | | • • | | |
| | Email | dsquires@email.com | | | | | | | | | | | | |
| | | | | | | | | | | | | /// | | |
| rag a column he PartCode | ader hare to g | roup by that column Description | Priority | WarehouseName | Quantity UnitCos | t TaxRate | VAT | ExchangeRate | e SerialNo | Sup | pplierCode | SupplierNar | ne | |
| rag a column he PartCode | PartType | proup by that column Description | Priority | WarehouseName | Quantity UnitCo: | t TaxRate | VAT | ExchangeRate | : SerialNo | Sup | plierCode | SupplierNar | ne | |
| PartCode | isition Info | Description | Priority | WarehouseName | Quantity UnitCo | t TaxRate | VAT | ExchangeRate | SerialNo | Sup | plierCode | SupplierNar | ne 0. | 20 |
| rag a column he PartCode | eader here to c | Description | Priority | WarehouseName | Quantity UnitCo | t TaxRate | VAT | ExchangeRate | SerialNo | otal VAT | plierCode | SupplierNar | ne 0. | 00 D0 |

- 1. An *ellipsis* button will be revealed.
- 2. The following fields will auto 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 <u>edited</u>.
 - **Unit Cost:** This will auto initially populate with **0.00** but can be <u>edited</u>.



| | | | | A | dd new Requisitio | n - BPO: Ver | sion 2.1.0.7 | I - Example | Company | | | - | | × |
|---------------|--------------|---|-------------|---------------|-------------------|--------------|--------------|-------------|----------------|---------------|------------------|--------------|------|------------|
| Home | Equipment a | nd Locations | Contract | Finance and H | R Inventory M | Maintenance | and Projects | Manufact. | ring Procureme | nt Sales | Service Reportin | g Utilities | - 8 | |
| ave Back | Save Layo | ut | | | | | | | | | | | | |
| Process , | Format | 4 | | | | | | | | | | | | |
| | Туре | Maintenance | Requisition | * | * | | | | Origin Type | Warehouse | | * * | | |
| | Class | Contract Ser | /ice | 7 | • | | | | Origin | Main Wareh | nouse | • م | | |
| Re | quest Date | 04 Jul 2019 | • 1: | 24:33 PM 🌲 | | | | | Related | | | ÷ | | |
| Billir | ng Address | 2 Lakes Road Twickenham Outer Durban | | ، م • | * | | | | | | | - | | |
| | Phone | 020 200 2000 |) | | | | | | Requestor | Abigail Milne | e | - * | | |
| | Email | dsquires@em | ail.com | | | | | | | | | | | |
| PartCode + | PartType | Description | | Priority | WarehouseName | Quantity | UnitCost | TaxRate V | AT ExchangeR | ate SerialNo | SupplierCode | SupplierName | • | |
| | • SERV | | | | 3 | 1.00 | 0.00 | | | | | | | |
| | | | | 2 | | | | | | | | | | |
| Requ | isition Info | | | | | | | | | Sub T | otal | | 0.00 | diaman and |
| | | | | | | | | | | | VAT | | 0.00 | 1 M M |
| | | | | | - | | | | | Grand T | fotal | | 0.00 | |
| nen Windows - | | | | | | | | | | | | 02 Jul 20 | 19 | |

- 1. Click on the *ellipsis* button.
- 2. A *Select an item* pop up screen will appear.
- 3. Click on the *row selector* in front of the item you wish to add.
 - In this example, you are going to be selecting *Shipping*

Costs.

4. Click on Ok.



| | Ŧ | | | | Add | new Requisition - BPO: Versi | on 2.1.0. | 71 - Exar | mple Com | npany | | | | | 1772 | | × | |
|--------|-----------|----------------|---|-------------|------------------|---------------------------------|-----------|-----------|------------|-----------|----------|---------|---------|-------------|-------------|------|-----|-----|
| 0 | Home | Equipment a | nd Locations | Contract | Finance and HR | Inventory Maintenance ar | nd Projec | ts Man | ufacturing | Procure | ement | Sales | Service | Reporting | g Utilities | 2 | 8 | × |
| E Save | Back | Save Layo | ut | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| Proc | ess | Format | 4 | | | | | | | | | | | | | | | _ |
| | | Туре | Maintenance | Requisition | - + | | | | | Origin Ty | pe War | ehouse | | | * * | | | NOC |
| | | Class | Contract Ser | rvice | × • | 2 | | | | Ori | gin Mair | n Wareł | nouse | | • م | | | 3 |
| | Re | quest Date | 04 Jul 2019 | • 1 | :24:33 PM 🌲 | | | | | Relat | ed | | | | ÷. | | | |
| | Billi | ng Address | 2 Lakes Road Twickenham Outer Durban | d | ρ | + | | | | | | - | × | | * | | | |
| | | Phone | 020 200 200 | 10 | Select an it | <u></u> | | | | | - | | ~ | | - * | | | |
| | | Email | dsquires@en | mail.com | Home | | | | | | | | | | | | | |
| | Co | ntact Name | Dan Squires | (| | 2 | | | | | | | | | | | | |
| Drag a | column he | ader here to g | group by that | column | Ok Back | Save Layout | | | | | | | | | 1 | | 2) | |
| Parti | Code 🔸 | PartType | Description | (| Process | Format 4 | | | | | | | S | upplierCode | SupplierNa | me | | |
| 9 | | Jorny. | | | Drag a column he | ader here to group by that colu | | | | | | | | | | | | |
| 1 | | - SERV | | | ServiceC • | ServiceDescription | Туре | Class | Rate | Units T | axType | TaxC | ode | | | | | |
| | 1 | | | | Ŷ | | | | | | | | - | | | | | |
| | | | | | TOLL | Toll Fee | EXT | SER | 250.00 | ea V | AT | 1A | | | | | | |
| | 1 | | | | TEST | Test Service | INT | SER | 250.00 | ea V | AT | 1 | | | | | | |
| | | | | | STCD | Short Term Contract Deposit | EXT | SER | 10.00 | ea V | AT | 1 | | | | | | |
| | | | 3 - | | SHIPCOST | Shipping costs | EXT | SER | 0.00 | ea V | AT | 1 | 0 | | | | | |
| | | | | | SET | Settlements | INT | SER | 500.00 | ea V | AT | 1 | | | | | | |
| | | | | | Retest | Retest | INT | SER | 150.00 | ea V | AT | 1 | | | | | 00 | |
| | Requ | isition Info | | | PRI | Printing | INT | SER | 350.00 | ea V | AT | 1 | | | | | .00 | |
| | | | | | MYS | Meter Yield Short Fall | INT | SER | 500.00 | ea V | AT | 1 | | | | (| .00 | |
| | | | | | MRF | Machine Replacement Fee | INT | REP | 190.00 | ea V | AT | 1 | | | | (| .00 | |
| Open V | Vindows • | | | | | | _ | _ | _ | | _ | | | | 02 Jul 2 | 2019 | 4 | |

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 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.
- 1. Note about Exchange Rate: This field will only populate if:
 - i. The currency of the Primary Supplier set up is *different* to your company currency as set up in BPO2.
 - ii. 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 BPO2.
- 2. Click on the *ellipsis* button.

| | ₹ | | | Ad | d new Requisition | - BPO: Vers | sion 2.1.0.7 | 1 - Example | e Company | / | | | | | × |
|---------------|----------|--------------|---|----------------|-------------------|--------------|--------------|-------------|-----------|------------|---------------|--------------|------------------|-----------|-----|
| | Home | Equipment ar | nd Locations Contract | Finance and HR | Inventory M | aintenance a | and Projects | Manufac | turing Pr | ocurement | Sales | Service Rep | orting Utilities | | ₽ X |
| Save Proce | Back | Save Layou | ut | | | | | | | | | | | | |
| | | Туре | Maintenance Reguisition | | | | | | Oria | in Type | Narehouse | | • • | | 1 |
| | | Class | Contract Service | · • | | | | | | Origin | Main Wareh | IOUSE | • م | | |
| | Rec | west Date | 04 Jul 2019 T 1:2 | 4:33 PM | | | | | F | Related | | | - | | 100 |
| | Billin | g Address | 2 Lakes Road Twickenham Outer Durban | • • • | | | | | | Item | | | <u>*</u> | | |
| | | Phone | 020 200 2000 | | | | | 1 | Rec | questor | Abigail Milne | | • | | |
| | | Email | dsquires@email.com | | | | | | | | | | | | |
| | Con | tact Name | Dan Squires | | | | | | | | | | | | |
| | | | | | | | | |) | * | | | | | ~ |
| PartC | ode 🔺 | PartType | Description | Priority | WarehouseName | Quantity | UnitCost | TaxRate | VAT Exc | changeRati | e SerialNo | SupplierCode | SupplierName | | |
|) ⊞ SH | IPCOST | SERV | Shipping costs | 3 | | 1.00 | 150.00 | 15.00 | 22.50 | | | SPR001 | Sprint Distribut | ors Local | |
| 1 | 2 | | | | | | | | | | | | | | |
| | Requi | isition Info | | | | | | | | | Sub T | otal | | 0 | .00 |
| | | | | | | | | | | | | VAT | | 0 | .00 |
| | | | | | 4 | | | | | | Grand T | otal | | 0 | .00 |
| Open Wi | indows - | | | | | | | | | | | | 02 Jul | 2019 | 0 |

- 1. The *Item Suppliers* data grid will be expanded.
 - Note: You can follow the process to <u>add and/or edit Items</u> <u>Supplier details</u> in this data grid, if required.



SAVE SERVICE REQUISITION

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

| | | | 8 | | | | | 1.0 | an san an a | | | | | 181 | |
|----------------------------------|---|------------|-------------|-------------|-------------------|--------------|-------------|-----------|--|--------------|--------------|-------------|----------------|-------|------|
| | | | , | Add new Req | uisition - BPO: V | ersion 2.1. | 0.71 - Exan | nple Col | mpany | | | | - | ш. | 2 |
| Home Equipment | ut | tract Fina | ance and H | IR Invento | ry Maintenanco | e and Projec | ts Manu | ufacturin | g Procuremer | nt Sales | Service | Reporting | Utilities | | P |
| Process J Format | Maintenance Requis | ition | | | | | | | Origin Typ | e Warehou | ise | | • • | | _ |
| Class | Contract Service | | × • | | | | | | Origi | n Main Wai | rehouse | | • م | | |
| Request Date | 04 Jul 2019 🔻 | 1:24:33 | PM 🗘 | | | | | | Relate | d n | | | ~ | | |
| Billing Address | 2 Lakes Road Twickenham Outer Durban | 8 | • • | | | | | | | | | | Ŧ | | |
| Phone | 020 200 2000 | | | | | | | | Requesto | r Abigail M | ilne | | - * | | |
| Email | dsquires@email.com | i, | | | | | | | | | | | | | |
| PartCode + PartType | Description | | Priority | WarehouseN | lame Quantity | UnitCost | TaxRate | VAT | ExchangeRate | SerialNo S | SupplierCode | SupplierN | lame | | |
| SHIPCOST SERV | Shipping costs | | 3 | | 1.00 | 150.00 | 15.00 | 22.50 | | 5 | SPR001 | Sprint Dis | tributors Loca | al l | _ |
| <u>Item Suppliers</u> | lierName | SelectedSu | onlier i In | itCost Cur | repcy 9 | TayDate | Evchance | Data I | eadTime Ouar | tituDarl IOD | UnitOfPure | hace Mini | numOrderOb | Sunni | lior |
| SPR001 Sprin | t Distributors Local | Yes | pict on | 150.00 Sou | ith African Rand | 15.00 | exchange | 1.00 | 1.00 | 1.00 |) ea | 31030 11010 | 1.0 |) | |
| * | | | | Sele | ect currency | | | | | | | | | | |
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| Requisition Info | | | | | ÷ | | | | | Sub | Total | | | 0.0 | 0 |
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| | | | | | | | | | | | | | | | |
| | | | | | 4 | | | | | Grand | d Total | | | 0.0 | 0 |

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



| | | | | | Add new | Reauisitir | on - BPO: V | ersion 2.1. |).71 - Exan | nple Cor | mpany | | | | _ | |
|-----------------------------|--------------------------|---|------------|------------|------------|------------|-------------|--------------|-------------|-----------|----------|---------------|---------------------|-------------|---------------------------------------|----------|
| Home | Equipment a | nd Locations Cor | ntract Fin | ance and | HR Inve | entory | Maintenance | e and Projec | ts Manu | ufacturin | a Procu | rement Sale | s Service | Reporting | Utilities | _ 8 |
| ave Back | Save Layou | Jt | | | | 9 | 1) | | | | | | | http://ang | C C C C C C C C C C C C C C C C C C C | |
| Process " | Format | 4 Maintenance Requir | eition | | | 1 | | | | | Origin | Tuna Ward | | | | |
| | rype | Contract Service | auon | | | - | | | | | Ungin | Ordele Maint | Nouse | | | |
| | Class | Contract service | | | Requisitio | In Process | sing | | | | Re | Origin Main v | Varenouse | | - 4 | |
| Billin | quest Date 1g Address | 2 Lakes Road Twickenham Outer Durban | 1:24:00 | PM ↓ | 1 | Requisit | tion No. PR | 0000611 sa | ved succes | ssfully. | | Item | | | T | |
| | Phone | 020 200 2000 | | | | | 2 | <u> </u> | | OK | Requ | estor Abigai | Milne | | - • | |
| | Email | dsquires@email.com | n | | | | | 2 | | 0 | 1 | | | | | |
| Con | itact Name | Dan Squires | | | | | | | | | | | | | | |
| og a column her PartCode | ader here to g | roup by that column Description | | Priority | Warehou | useName | Quantity | UnitCost | TaxRate | VAT | Exchange | Rate SerialNo | SupplierCode | SupplierN | lame | 1 |
| E SHIPCOST | SERV | Shipping costs | | 3 | 3 | | 1.00 | 150.00 | 15.00 | 22.50 | | | SPR001 | Sprint Dis | tributors Loca | al |
| Item Sup | ppliers | | | | _ | | | | | | | | | | | |
| ۹ Supplie | erCode Suppl | ierName | SelectedSu | ipplier Ur | nitCost | Currency | | TaxRate | Exchange | Rate L | eadTime | QuantityPerU | OP UnitOfPurc | chase Minir | mumOrderQty | Supplier |
| SPR00 | 1 Sprint | Distributors Local | Yes | | 150.00 | South Afr | rican Rand | 15.00 | | 1.00 | 1.00 | 1 | .00 ea | | 1.00 | 0 |
| * | | | | | | Select cur | rrency | | | | | | | | | |
| ۰ | | | | | | | | | | | | | | | | • |
| | | | | | | | | | | | | | | | | |
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| Requ | isition Info | | | | | | | | | | | | VAT | | | 0.00 |
| Requ | iisition Info | | | | | - | | | | | | Gra | VAT and Total | | | 0.00 |

PRINT SERVICE REQUISITION

(not required)

1. A *Report Generation* message box will pop up asking;

• Do you want to print the requisition [].

2. For the purpose of this manual we have selected **Yes**.



| | Ŧ | | | | 7 | Add new Re | quisition - BPO | : Version 2.1. | 0.71 - Exar | nple Co | mpany | | | | - | | \times |
|--------------|-----------|--------------|---|-------------|------------|------------|-------------------|----------------|-------------|-----------|----------|----------------|---------------|-------------|---------------|---------|----------|
| 0 | Home | Equipment | and Locations Cor | ntract Fina | ance and H | R Invent | ory Maintena | nce and Proje | cts Man | ufacturin | ig Proci | urement Sale | es Service | Reporting | Utilities | - 8 | 3 |
| Bave Save | Back | Save Layr | ut | 1_ | - | Report G | eneration | | | × | 1 | | | | | | |
| Proces | 35 A | Type | A Maintenance Requi | isition | | Dovou | want to print th | a requirition | PR000061 | 17 | Origi | n Type Ware | house | | • • | | 1 |
| | | Class | Contract Service | sidon | | Doyou | want to print th | e requisition | PROUVUUT | 11 | ongi | Onigin Main | Narahaura | | 0. | | |
| | | Ciass | Contract Service | 1,24,22 | DM | | | | i | _ | B | elated | varenouse | | 2 | | |
| | Billin | g Address | 2 Lakes Road Twickenham Outer Durban | 1:24:00 | ρ | | | Yes | No | | | Item | | | T. | | |
| | | Phone | 020 200 2000 | | | | | | | | Req | uestor Abiga | il Milne | | - * | | |
| | | Email | dsquires@email.com | m | | | | | | | | | | | | | |
| | Con | tact Name | Dan Squires | | | | | | | | | | | | | | |
| ag a co | olumn hea | der here to | proup by that column | 1 | | | | | | | | | | | 1 | / | |
| PartCo | ode 🔺 | PartType | Description | | Priority | Warehouse | Name Quantity | UnitCost | TaxRate | VAT | Exchange | eRate SerialNo | SupplierCode | SupplierNa | ume | | |
| E SHO | IPCOST | SERV | Shipping costs | | 3 | | 1.0 | 0 150.00 | 15.00 | 22.50 | í | | SPR001 | Sprint Dist | ributors Loca | - | |
| | Item Sup | pliers | | 1 | | | | | | | | | | | | | |
| ٩ | < Supplie | rCode Supp | lierName | SelectedSup | oplier Uni | tCost Cu | urrency | TaxRate | Exchange | Rate L | .eadTime | QuantityPerU | OP UnitOfPure | chase Minim | numOrderQty | Supplie | rI |
| • | > SPR00 | 1 Sprin | t Distributors Local | Yes | | 150.00 So | outh African Rand | i 15.00 | - | 1.00 | 1.00 | <u> </u> | 00 ea | | 1.00 | 1 | |
| 4 | * | | | | | Se | lect currency | | | | | | | | | | 4 |
| | | | | | | | | | | - | | | | | _ | | <u></u> |
| | | | | | | | | | | | | | | | | | |
| | Requ | isition Info | | | | | | | | | | f | iub Total | | | 0.00 | Ī |
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| | | | | | | | - | | | | | Gr | and Total | | | 0.00 | í |
| | 100 | | | | | | | | | | | | | | 02 34 20 | 10 | 5 |

The *Report Preview* screen will be displayed.

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





1. You will return to the Purchase Requisition Listing screen.

RELEASE SERVICE REQUISITION

- 2. Select the newly raised requisition.
- 3. Click on *Release*.



| ppo | - | | | 1- | P P | urchase Req | uisition Listing | - BPO: Versi | on 2.1.0.71 - Ex | ample C | ompany | | | - | |
|----------|----------|----------|------------|----------------|------------|-------------|------------------|--------------|------------------|----------|---------------|----------|----------------|---------------|-------------|
| Q | Home | Equipmen | t and Loca | tions Contract | Finance an | d HR Inve | ntory Mainter | nance and Pr | ojects Manuf | acturing | Procurement | Sales | Service Report | ing Utilities | _ & × |
| ¢ | | × | | | | 8 | 2 | | P | Durba | n 🔹 | 23 | | | |
| Add | Edit | Delete | View | Hold Release | Approve D | edine Sav | e Layout Worl | kspaces | Print Export | New | | Refresh | | | |
| | Mainta | 'n | | Proces | | 3 | Format | | Print | | Current | | | | |
| | | | | | | | | | | | | | | 11 | |
| | | | | | | | | | | | | | | | |
| PRC | ode 🔻 | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExclCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNa |
| • | | | | | | | | | | | | | | | |
| D PF | R0000611 | MAINT | N | MIL001 | Abigail | Milne | 04 Jul 2019 | | 150.00 | | Yes | 172.50 | Warehouse | | |
| E PF | R0000610 | MAINT | N | MIL001 | Abigail | Milne | 04 Jul 2019 | | 800.00 | Gene | Yes | 920.00 | Work Order | HOP001 | Hope Work |
| 🗄 PF | R0000593 | MAINT | N | MIL001 | Abigail | Milne | 02 Jul 2019 | | 500.00 | | Yes | 575.00 | Warehouse | | |
| 🕀 PF | R0000577 | MAINT | N | MIL001 | Abigail | Milne | 21 May 2019 | | 800.00 | Inspe | Yes | 800.00 | Work Order | BET0001 | Betties Sur |
| 2 PF | R0000576 | MAINT | N | MIL001 | Abigail | Milne | 21 May 2019 | | 150.00 | | Yes | 172.50 | Work Order | HOP001 | Hope Work |
| PF | R0000575 | MAINT | N | MIL001 | Abigail | Milne | 21 May 2019 | | 150.00 | | Yes | 172.50 | Work Order | HOP001 | Hope Work |
| III PF | R0000568 | MAINT | N | MIL001 | Abigail | Milne | 11 Jan 2019 | | 5 500.00 | | Yes | 6 175.00 | Warehouse | | |
| D PF | R0000567 | MAINT | N | MIL001 | Abigail | Milne | 14 Jan 2019 | | 1 200.00 | | Yes | 1 440.00 | Warehouse | | |
| E PF | R0000563 | MAINT | N | MIL001 | Abigail | Milne | 23 Nov 2018 | | 4 500.00 | | Yes | 5 175.00 | Contract | | |
| E PF | R0000536 | MAINT | N | MIL001 | Abigail | Milne | 07 Sep 2018 | | 3 250.00 | | Yes | 3 662.50 | Warehouse | | |
| E PF | R0000533 | MAINT | N | MIL001 | Abigail | Milne | 28 Aug 2018 | | 109 200.00 | | Yes | 125 580 | Warehouse | | |
| D PF | R0000523 | MAINT | N | MIL001 | Abigail | Milne | 26 Apr 2018 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | HOP001 | Hope Work |
| D PF | R0000486 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 6 250.00 | | Yes | 7 125.00 | Warehouse | TIA001 | Titan Group |
| D PF | 20000485 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 350.00 | | Yes | 399.00 | Warehouse | TIA001 | Titan Group |
| D PF | 20000466 | MAINT | N | DUT001 | Bianca | Du Toit | 25 Jul 2017 | | 15.00 | | Yes | 17.10 | Warehouse | HOP001 | Hope Work |
| 🕀 PF | R0000459 | MAINT | N | MIL01 | Sarah | Milder | 13 Jul 2017 | | 145.00 | | Yes | 166.75 | Work Order | DER001 | Derton Tec |
| E PF | R0000456 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 900.00 | | Yes | 1 026.00 | Work Order | | |
| E PF | R0000455 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 500.00 | | Yes | 570.00 | Work Order | DER001 | Derton Tec |
| E PF | 20000454 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 800.00 | | Yes | 912.00 | Work Order | HOP001 | Hope Work |
| D PF | R0000452 | MAINT | N | MUD001 | Judith | Mudzengi | 04 Jul 2017 | | 1 500.00 | | Yes | 1 710.00 | Work Order | BIG0001 | Big Bargain |
| D PF | 20000444 | MAINT | N | MUD001 | Judith | Mudzengi | 15 Jun 2017 | | 0.00 | | Yes | 0.00 | Work Order | WES001 | Westwood |
| | | | | | | | | | | | | | | | |

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



| | - - | | | | Pu | irchase Re | quisition Listing | - BPO: Vers | ion 2.1.0.71 - E | ample C | ompany | | | - | \Box \times |
|---------|-------------|----------|------------|-----------------|----------------|------------|-------------------|-------------|------------------|-----------|---------------|----------|--|----------------|-----------------|
| Q. | Home | Equipmen | t and Loca | ations Contract | Finance and | HR Inv | entory Mainte | nance and P | rojects Manuf | facturing | Procurement | Sales | Service Report | ting Utilities | - 8 × |
| • | | × | | | | 8 | | | 2 | Durba | an 🔻 | | | | |
| Add | Edit | Delete | View | Hold Release | Approve D | edine Si | ave Layout Wor | * * | Print Export | New | | Refresh | | | |
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| Litoy c | Column ries | | /groop o | y user column | 7 | | | 12 | | | | | | | |
| PR | Code • | PRType | Statu | s EmployeeNumbe | FirstName | LastName | EventDate | Comments | ExclCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNa |
| 7 | | | | | | 10.00 | | | | | | | haar oo ah | | |
| | PR0000611 | MAINT | N | MILOO1 | Abigail | Milne | 04 Jul 2019 | | 150.00 | | Yes | 172.50 | Warehouse | | |
| 111 | *KUUUU610 | MAINT | N | Requisition - P | ocess | | | X | 800.00 | Gene | res | 920.00 | Work Order | HOP001 | Hope Work |
| | *KUUUU593 | MAINT | N | | | | | | 500.00 | - | res | 5/5.00 | warenouse | | |
| | PR0000577 | MAINI | N | The | requisition no | . PR00006 | 11, has been rele | ased | 800.00 | Inspe | Yes | 800.00 | Work Order | BEI0001 | Betties Sur |
| (±)) | PR0000576 | MAINI | N | suci | essfully. | | | | 150.00 | | Yes | 1/2.50 | Work Order | HOP001 | Hope Work |
| | R0000575 | MAINT | N | - | | | | | 150.00 | | Yes | 172.50 | Work Order | HOP001 | Hope Work |
| | R0000568 | MAINT | N | - | | 2 | | OK | 5 500.00 | | Yes | 6 175.00 | Warehouse | | |
| ± 1 | R0000567 | MAINT | N | - | | | | J.K. | 1 200.00 | | Yes | 1 440.00 | Warehouse | | |
| (E) | PR0000563 | MAINT | N | MIL001 | Abigail | Milne | 23 Nov 2018 | | 4 500.00 | | Yes | 5 175.00 | Contract | | |
| E | PR0000536 | MAINT | N | MIL001 | Abigail | Milne | 07 Sep 2018 | | 3 250.00 | | Yes | 3 662.50 | Warehouse | | |
| E | PR0000533 | MAINT | N | MIL001 | Abigail | Milne | 28 Aug 2018 | | 109 200.00 | | Yes | 125 580 | Warehouse | | |
| (Ŧ) | PR0000523 | MAINT | N | MIL001 | Abigail | Milne | 26 Apr 2018 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | HOP001 | Hope Work |
| ± 1 | R0000486 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 6 250.00 | | Yes | 7 125.00 | Warehouse | TIA001 | Titan Group |
| (H) | R0000485 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 350.00 | | Yes | 399.00 | Warehouse | TIA001 | Titan Group |
| | PR0000466 | MAINT | N | DUT001 | Bianca | Du Toit | 25 Jul 2017 | | 15.00 | | Yes | 17.10 | Warehouse | HOP001 | Hope Work |
| (±) I | R0000459 | MAINT | N | MIL01 | Sarah | Milder | 13 Jul 2017 | | 145.00 | | Yes | 166.75 | Work Order | DER001 | Derton Tec |
| (E) | PR0000456 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 900.00 | | Yes | 1 026.00 | Work Order | | |
| + | R0000455 | MAINT | Ν | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 500.00 | | Yes | 570.00 | Work Order | DER001 | Derton Tec |
| ±١ | R0000454 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 800.00 | | Yes | 912.00 | Work Order | HOP001 | Hope Work |
| (E) (| R0000452 | MAINT | N | MUD001 | Judith | Mudzengi | 04 Jul 2017 | | 1 500.00 | | Yes | 1 710.00 | Work Order | BIG0001 | Big Bargain |
| (±) (| R0000444 | MAINT | N | MUD001 | Judith | Mudzengi | 15 Jun 2017 | | 0.00 | | Yes | 0.00 | Work Order | WES001 | Westwood |
| | | | | | | | | | | | | | | | |

- 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.
- 3. Select *Released*.



| - | | | | | Pu | urchase Req | uisition Listing | - BPO: Vers | ion 2.1.0.71 - Ex | ample Co | ompan | y | | | <u>23</u> 5 | | × |
|------|--------------|------------|------------|----------------|-------------|-------------|------------------|-------------|-------------------|----------|-------|---------------|------------|----------|--------------|-----------|------|
| 0 | Home | Equipmen | t and Loca | tions Contract | Finance and | d HR Inve | ntory Mainter | nance and P | ojects Manuf | acturing | Proc | irement Sales | Service R | eporting | g Utilities | - 8 | x |
| 3 | | × | | | | 8 | 2 | | P | Durba | n | • 🚯 | | - | 2 | | |
| Ad | d Edit | Delete | View | Hold Release | Approve D | ecline Sav | e Layout Worl | spaces | Print Export | New | | - | | / | | | |
| | Mainta | in | | Proces | s | | Format | | Print | Statu | s | M StatusDesc | | | | | |
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| Dray | a counin nea | uer nere u | a Group of | that country | 1 | 1 | 12 | Lanover | - | A | | Approved | | | | 1 | |
| P | RCode • | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExclCost | C | | Closed | el | Desc (| CustomerCode | Custome | .rNa |
| T | | | - 1 | | | | | | | D | | Declined | 3 | | | | |
| • E | PR0000610 | MAINT | N | MILOOI | Abigail | Milne | 04 Jul 2019 | | 800.00 | x | | | er . | • | 100001 | Hope Wo | ork |
| | PR0000593 | MAINT | IN N | MILOO1 | Abigail | Milee | 02 Jul 2019 | | 500.00 | Incon | Vee | 800.00 | Week Order | | ETOODI | Pattian C | |
| | PR0000377 | MAINT | N | MILOO1 | Abigail | Milne | 21 May 2019 | | 150.00 | mspe | Vec | 172.50 | Work Order | - | | Hone W/ | ork |
| | PR0000575 | MAINT | N | MILOO1 | Abigail | Milne | 21 May 2019 | | 150.00 | | Yes | 172.50 | Work Order | | HOP001 | Hope We | ork |
| | PR0000568 | MAINT | N | MILOO1 | Abigail | Milne | 11 Jan 2019 | | 5 500 00 | | Yes | 6 175 00 | Warehouse | | 101 001 | nope ne | |
| | PR0000567 | MAINT | N | MILOO1 | Abigail | Milne | 14 Jan 2019 | | 1 200.00 | | Yes | 1 440.00 | Warehouse | | | | |
| | PR0000563 | MAINT | N | MIL001 | Abigail | Milne | 23 Nov 2018 | | 4 500.00 | | Yes | 5 175.00 | Contract | | | | |
| | PR0000536 | MAINT | N | MIL001 | Abigail | Milne | 07 Sep 2018 | | 3 250.00 | | Yes | 3 662.50 | Warehouse | | | | |
| | PR0000533 | MAINT | N | MIL001 | Abigail | Milne | 28 Aug 2018 | | 109 200.00 | | Yes | 125 580 | Warehouse | | | | |
| | PR0000523 | MAINT | N | MIL001 | Abigail | Milne | 26 Apr 2018 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | H | HOP001 | Hope Wo | ork |
| | PR0000486 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 6 250.00 | | Yes | 7 125.00 | Warehouse | 1 | TIA001 | Titan Gro | ouj |
| | PR0000485 | MAINT | N | DUT001 | Bianca | Du Toit | 26 Oct 2017 | | 350.00 | | Yes | 399.00 | Warehouse | 1 | TIA001 | Titan Gro | DUI |
| | PR0000466 | MAINT | N | DUT001 | Bianca | Du Toit | 25 Jul 2017 | | 15.00 | | Yes | 17.10 | Warehouse | H | HOP001 | Hope Wo | ork |
| | PR0000459 | MAINT | N | MIL01 | Sarah | Milder | 13 Jul 2017 | | 145.00 | | Yes | 166.75 | Work Order | 0 | DER001 | Derton T | iec |
| | PR0000456 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 900.00 | | Yes | 1 026.00 | Work Order | | | | |
| | PR0000455 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 500.00 | | Yes | 570.00 | Work Order | | DER001 | Derton T | ec |
| | PR0000454 | MAINT | N | MUD001 | Judith | Mudzengi | 05 Jul 2017 | | 800.00 | | Yes | 912.00 | Work Order | H | HOP001 | Hope Wo | ork |
| | PR0000452 | MAINT | N | MUD001 | Judith | Mudzengi | 04 Jul 2017 | | 1 500.00 | | Yes | 1 710.00 | Work Order | E | 3IG0001 | Big Barga | ain |
| | PR0000444 | MAINT | N | MUD001 | Judith | Mudzengi | 15 Jun 2017 | | 0.00 | | Yes | 0.00 | Work Order | 8 - A | WES001 | Westwoo | bo |
| | PR0000442 | MAINT | N | MUD001 | Judith | Mudzengi | 15 Jun 2017 | | 4 500.00 | | Yes | 5 130.00 | Warehouse | | | | |
| | | | | | | | | | | | | | | | | | |

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

APPROVE SERVICE REQUISITION

- 2. Select the requisition created for shipping costs.
- 3. Click on *Approve*.



| - | and the second second | - | | | PL | Irchase Kequ | iisition Listing | BPO: versio | on 2.1.0.71 - Exa | ampie C | .ompany | - Color | | - | |
|----------------|-----------------------|-----------|-------------|----------------|-------------|--------------|------------------|---------------|-------------------|----------|---------------|----------|----------------|---------------|------------|
| 0 | Home | Equipment | : and Locat | ions Contract | Finance and | 1 HK Inver | itory Malmer | lance and Pro | ojects Manun | acturing | Procurement | sales | Service Report | ing Utilities | |
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| Add | Edit | Delete | View | Hold Release / | Approve D | ecline Sav | e Layout Work | spaces P | Print Export | Relea | ased 🔹 | Refresh | - | | |
| | Maladal | | | L | | | 3 | • | Duint | - | Constants | | -1 | | |
| _ | Mairran | 1. | .4 | FIULES | s | - | Format | 4 | PTITIC | <u>.</u> | Cufrenc | | | | |
| | | | | | | | | | | | | | | | |
| PRC | ode 🔻 | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExdCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNa |
| | | | | | | | | | | | | | | | |
| E P | R0000611 | MAINT | R | MIL001 | Abigail | Milne | 04 Jul 2019 | | 150.00 | | Yes | 172.50 | Warehouse | | |
| ⊕ PI | R0000595 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 500.00 | | Yes | 575.00 | Warehouse | | |
| ⊞ P | R0000594 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 8 000.00 | | Yes | 9 200.00 | Warehouse | WES001 | Westwood D |
| ⊞ P | R0000581 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 197.40 | | Yes | 197.40 | Warehouse | | |
| ⊞ PI | R0000580 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 500.00 | | Yes | 500.00 | Warehouse | | |
| ⊞ Pi | R0000550 | MAINT | R | MIL001 | Abigail | Milne | 25 Sep 2018 | | 1 700.00 | | Yes | 1 955.00 | Contract | | |
| 2 | | | | | | | | | | | | | | | |
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- 1. A *Process Validation* message box will pop up asking;
 - Are you sure that you want to authorise requisition []?
- 2. Click on Yes.



| 1000 | 100 | | | | PL | Jrchase Keqi | Jisition Listing | - BPO: versi | on 2.1.0.71 - Ex | ampie C | .ompany | | | - | |
|------|---------|-----------|-----------|----------------|-------------|----------------|------------------|--------------|------------------|------------|---------------|----------|----------------|---------------|------------|
| - | Home | Equipment | and Locat | ions Contract | Finance and | d HR Inve | ntory Mainter | nance and Pr | ojects Manuf | acturing | Procurement | Sales | Service Report | ing Utilities | - 8 × |
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| PRCo | de 🔻 | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExdCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNa |
| | | | | | | | | | | | | | | | |
| | 0000611 | MAINT | R | MIL001 | Abigail | Milne | 04 Jul 2019 | | 150.00 | | Yes | 172.50 | Warehouse | | |
| ⊞ PR | 0000595 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 500.00 | | Yes | 575.00 | Warehouse | | |
| ⊞ PR | 0000594 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 8 000.00 | | Yes | 9 200.00 | Warehouse | WES001 | Westwood D |
| E PR | 0000581 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 197.40 | | Yes | 197.40 | Warehouse | | |
| | 0000580 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 500.00 | | Yes | 500.00 | Warehouse | | |
| E PR | 0000550 | MAINT | R | MIL001 | Abigail | Milne | 25 Sep 2018 | | 1 700.00 | | Yes | 1 955.00 | Contract | | |
| | | | | | | | | | | | | | | | |
| | | | | | Are yo | ou sure that : | you want to aut | thorise requ | isition PR00006 | 11? | | | | | |
| | | | | | Are yo | ou sure that g | you want to aut | thorise requ | isition PR00006 | 511? D | | | | | |
| | | | | | Are yo | ou sure that y | you want to au | thorise requ | isition PR00006 | o | | | | | |
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| | | | | | Are yo | 2 | you want to au | thorise requ | isition PR00006 | o | | | | | |

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



| | Ŧ | | | | P | urchase Re | quisition Listing | - BPO: Ver | sion 2.1.0.71 - | Examp | ple Co | mpany | | | | |
|----------|-----------|-----------|-----------|----------------|------------|--------------------|----------------------------|------------|-----------------|---------|--------|---------------|----------|----------------|----------------|-------------|
| | Home | Equipment | and Locat | ions Contract | Finance an | d HR Inv | ventory Mainter | nance and | Projects Ma | nufactu | uring | Procurement | Sales | Service Repor | ting Utilities | – & × |
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| Drag a c | | | | | | | | | | | | | | | | |
| PRC | de 🔻 | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comment | ts ExclCost | Not | otes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNam |
| ٩ | | | | | | | | | | | | | | | | |
| ▶ 🗄 PF | 0000611 | MAINT | R | MIL001 | Abigail | Milne | 04 Jul 2019 | | 150. | 00 | | Yes | 172.50 | Warehouse | | |
| ⊞ PF | 0000595 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 500. | 00 | | Yes | 575.00 | Warehouse | | |
| ⊞ PF | 0000594 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 8 000. | 00 | | Yes | 9 200.00 | Warehouse | WES001 | Westwood D. |
| ⊞ PF | 0000581 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 197. | 40 | | Yes | 197.40 | Warehouse | | |
| ⊞ PF | 0000580 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 500. | 00 | | Yes | 500.00 | Warehouse | | |
| E PF | 0000550 | MAINT | R | MIL001 | Abigail | Milne | 25 Sep 2018 | | 1 700. | 00 | | Yes | 1 955.00 | Contract | | |
| | | | | | | Authori success | sation for requisi ful. | tion no. P | R0000611, has | OK | | | | | | |
| 4 C | /indows ▼ | | | | | | | | | | | | | | 02 Jul 20 | 19 |

VIEW GENERATED SERVICE PURCHASE ORDER

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



| | Ŧ | | | | Pu | urchase Rec | quisition Listing | - BPO: Vers | ion 2.1.0.71 - Ex | ample (| Company | | | _ | |
|-----------|-----------|-----------|-----------|----------------|-------------|-------------|-------------------|-------------|-------------------|----------|---------------|----------|----------------|----------------|-------------|
| 0 | Home | Equipment | and Locat | ions Contract | Finance and | d HR Inv | entory Mainter | nance and P | rojects Manuf | acturing | Procurement | Sales | Service Report | ting Utilities | - & × |
| Add | Edit | X [| View | Hold Release | Approve D | ecline Sa | ave Layout Worl | kspaces | Print Export | Durb | an 🔻 | Refresh | | | |
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| | | | | | | | | | | | | | | | |
| PRCo | ide 🔻 | PRType | Status | EmployeeNumber | FirstName | LastName | EventDate | Comments | ExclCost | Notes | SupplierExist | IndCost | SourceTypeDesc | CustomerCode | CustomerNam |
| 9 | | | | | | | | | | | | | | | |
| | 10000611 | MAINT | R | MIL001 | Abigail | Milne | 04 Jul 2019 | | 150.00 | | Yes | 172.50 | Warehouse | | |
| E PR | (0000595 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 500.00 | | Yes | 575.00 | Warehouse | | |
| ⊕ PR | (0000594 | MAINT | R | MIL001 | Abigail | Milne | 02 Jul 2019 | | 8 000.00 | | Yes | 9 200.00 | Warehouse | WES001 | Westwood D. |
| ⊞ PR | 10000581 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 197.40 | | Yes | 197.40 | Warehouse | | |
| E PR | 10000580 | MAINT | R | MIL001 | Abigail | Milne | 28 May 2019 | | 500.00 | | Yes | 500.00 | Warehouse | | |
| | | | | | 2 | you wish t | io view the new p | purchase or | ders? No | | | | | | |
| 4 Copen W | /indows 🔻 | | | | | | | | | | | | | 02 Jul 20 | 19 |

- 1. The *Purchase Orders for Requisition []* screen will be displayed.
- 2. Here you can view the newly created Purchase Order for the Shipping Costs.

PRINT SERVICE PURCHASE ORDER

(required)

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





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



| - - | | | | Purchase O | rders for Re | quisition | PR00006 | 11 - BPO: Ver | sion 2.1.0.7 | 1 - Exampl | le Compa | ny | | | - | | \times |
|-------------------|-------------|---------------|--------------|---------------|--------------|-----------|-------------|---------------|--------------|---------------|-----------|-----------------------------|---------|--------------|----------------|-------------|----------|
| Home | Equipment a | nd Locations | Contract | Finance and H | R Invent | tory Ma | aintenance | and Projects | Manufac | turing Pr | rocuremen | it Sales | Service | e Reporting |) Utilities | - 8 | × |
| View Order Del | K 🚳 Ap | prove | tock Collect | tion Save La | ayout Worl | kspaces | Print Co | lection Prin | t Export | Durban New | 1 | Refresh | 1 | | | | |
| Maintain | | Process | Agen | 3 | Format | | VOUC | Print | | | Current | | | | | | |
| Links | ų | Drag a column | | | | | | | | | | | | | | | |
| Enter text to sea | irch P | POCode | POType | POClass | ItemType | Originat | orType | OriginCode | Origin | nDesc | Status | RequestorN | lame | SupplierCode | SupplierNam | le | Eve |
| Functions | | Ŷ | | | | | | | | | | | | | | | |
| Notor | | ▶ PO000052 | 7 MAINT | SUPPLIER | | WHSE | | Main Warehou | se Main | Warehouse | e N | Abigail Milne | : | SPR001 | Sprint Distrib | outors Loca | al 04. |
| Delivery Inst | ructions | | | | Do you | want to p | print the p | Yes | r PO00052 | 277 | | | | | | | |
| Open Windows * | | | | | | | | | | | | | | | 02 101 21 | 019 | |

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





The *Report Preview* screen will be displayed

- 1. Here you can see that 'Shipping Costs' has pulled through on the Item Code and Description.
- 2. From here you can; *ViewPrintEmail* and *Export* the purchase order.
- 3. *Close* the Preview screen when you are done.



| Preview | | | | | | | | | |
|-----------------|--|--|---|---|-----------------------|---|----------------------------------|---------------------------|---------|
| File View Backg | ground | | | | | | | | · · |
| H H 🗠 🗁 🗎 | 8' 8 📭 🗐 | i 🖪 • I 🖏 🔍 I 🔍 | 100% - | • • • | | P - 約 - 🛛 | à 🗋 - 🖻 | - 8 | 3 |
| 2 | | mpany Logo | E S A C S O R V V | Purchase Example Compa Street No and Ros Area City South Africa South Africa B0000 Leg No.: 00000 (AT No.: 00000 | Order ny d Name | PO Box 1234 New Town Durban South Africa 1234 Fax No.: (Tel No.: (| 4 031 12 4545 031 123 4567 | | |
| | | | D | ocument Ref.: | P0000 | 0527 | | | |
| | | | D |)ate : | 04 Jul : | 2019 | | | |
| | | | D | description : | | | | | |
| | Your Details : Company Name : Company Code : Contact Name : Tel No. : Fax No. : Email : Address : | : Sprint Distributors Loc SPR001 Harry Jackson 0319875643 Ex 0319871000 HJackson@noemai.com PO Box 123 PO Box 124 Forest Hills | al 1 | 23 | | | | | |
| | Postal Code : | Durban 1234 | | | | | | | |
| | Province : | KZN Co | untry: 5 | iouth Africa | | | | | |
| | ID Item | Code Supplier Code | Item Desc | cription | Currency | Unit Cost | Qty | Cost | |
| 1 | 1 SHIPC | .051 | Shipping c | osts | Sub 1 | Total ZAR VAT ZAR | 1 | 150.00 150.00 22.50 | |
| | | | | | 1 | Total ZAR | 2 | 172.50 | |
| Page 1 of 1 | | | | | | | | 100% 🔾 | · · · · |

• Complete the Quarantine process by <u>Revaluing and Releasing the</u> <u>goods from Quarantine</u> into the receiving warehouse.

Related Topics

- <u>Receive Goods into Quarantine Warehouse</u>
- <u>Revalue and Release Goods into Store from Quarantine</u>
- <u>Return Goods to Supplier from Quarantine Warehouse</u>

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