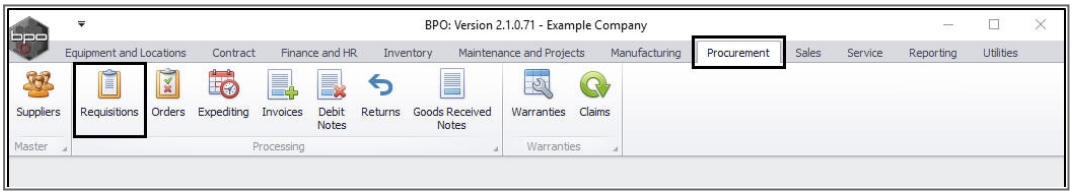
PROCUREMENT

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***.

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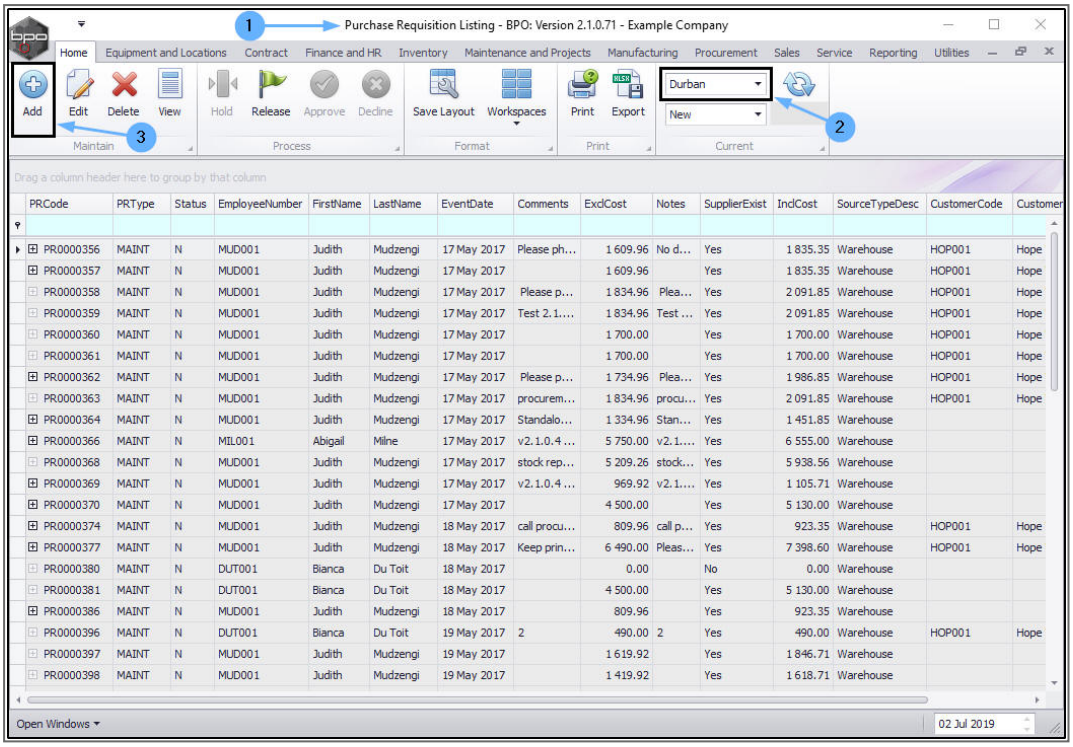

1. A ***What type of request is this?*** screen will pop up.
2. Click on the ***Service requisition*** radio button.
3. Click on ***Accept***.

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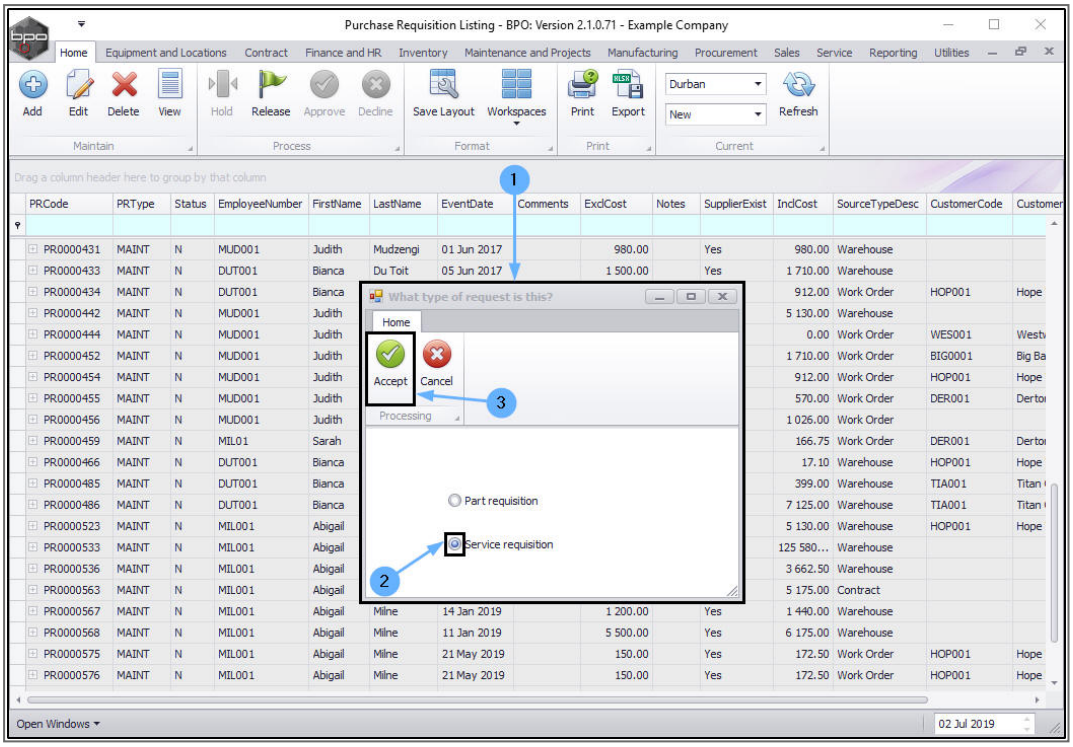

The ***Add new Requisition*** screen will be displayed.

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.

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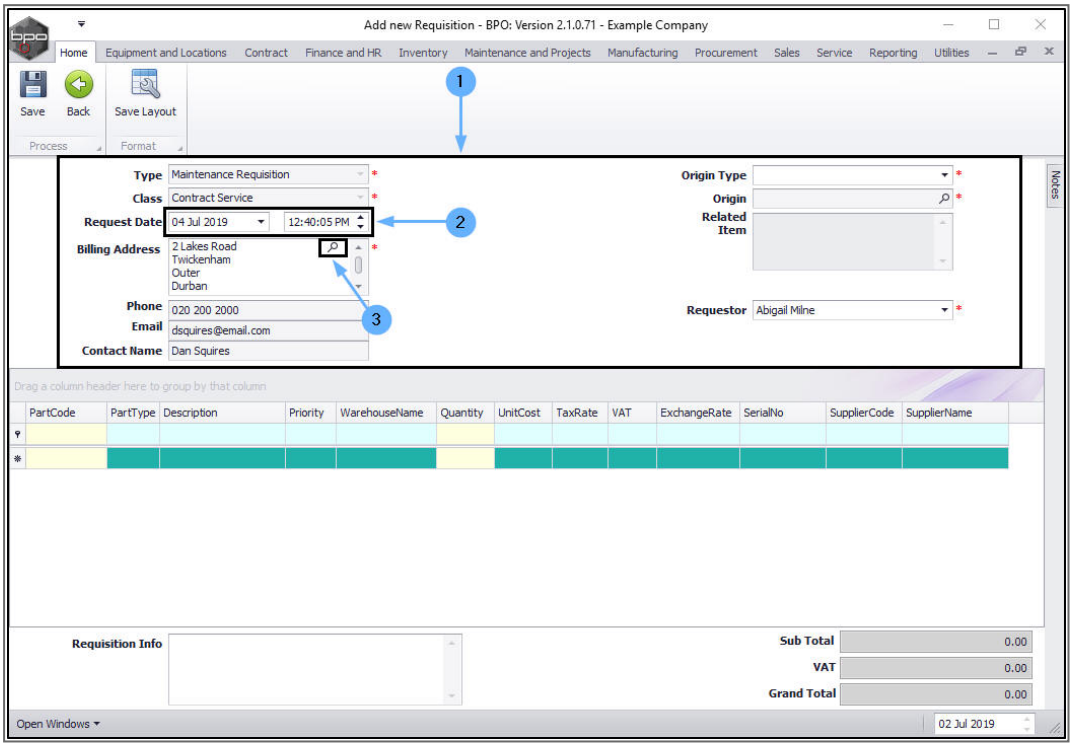
- You can click on the search button and select an alternative address, if required, from the **Select an address for this requisition** pop up screen.



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

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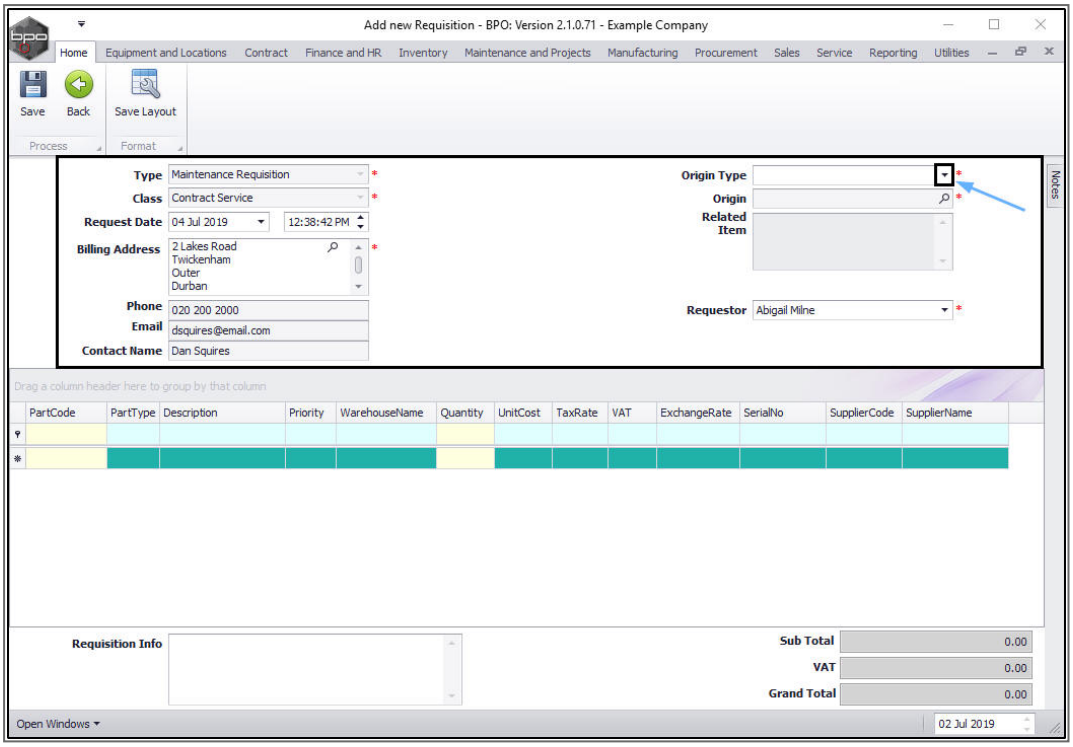

1. The ***Origin Type*** menu will be displayed.
2. Select from this menu, the ***origin*** of this requisition:
    - **Contract**
    - **Warehouse**
    - **Work Order**

    In this example, ***Warehouse*** has been selected.

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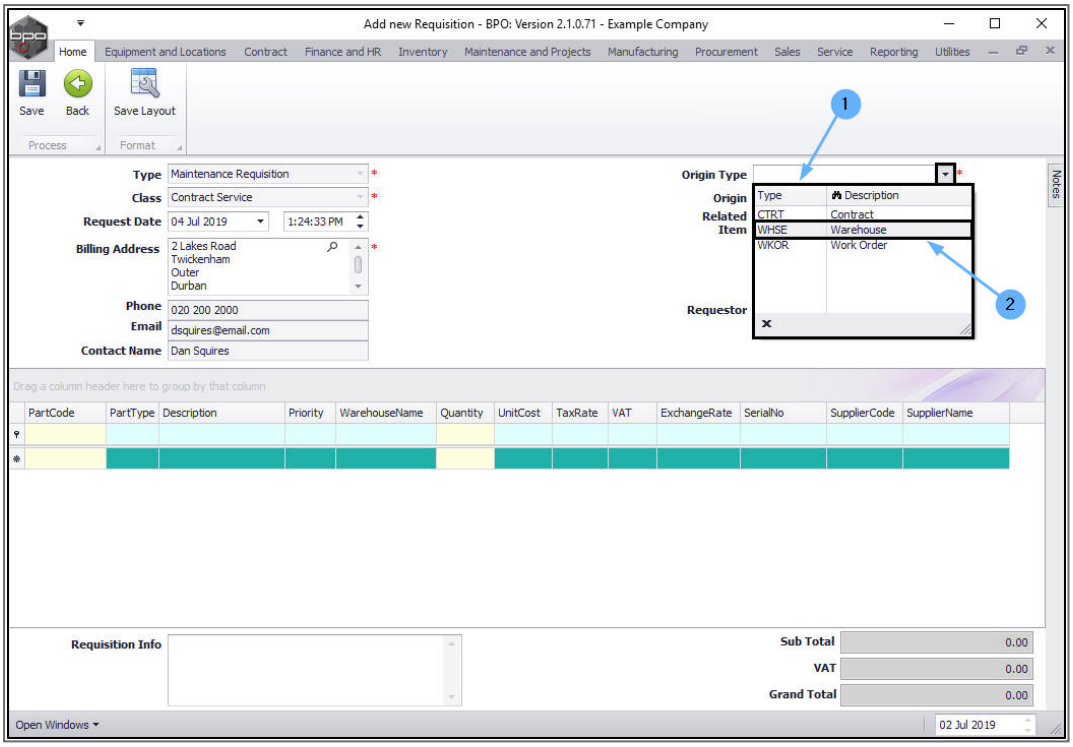
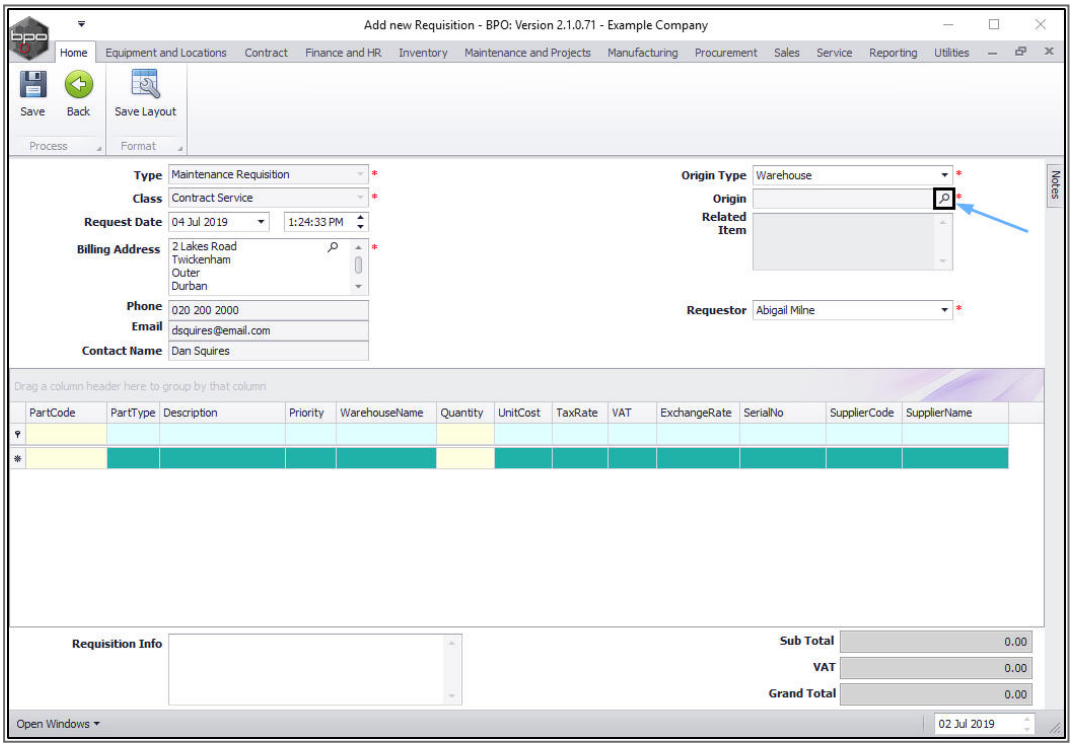


- Click on the ***search*** button in the ***Origin*** field.



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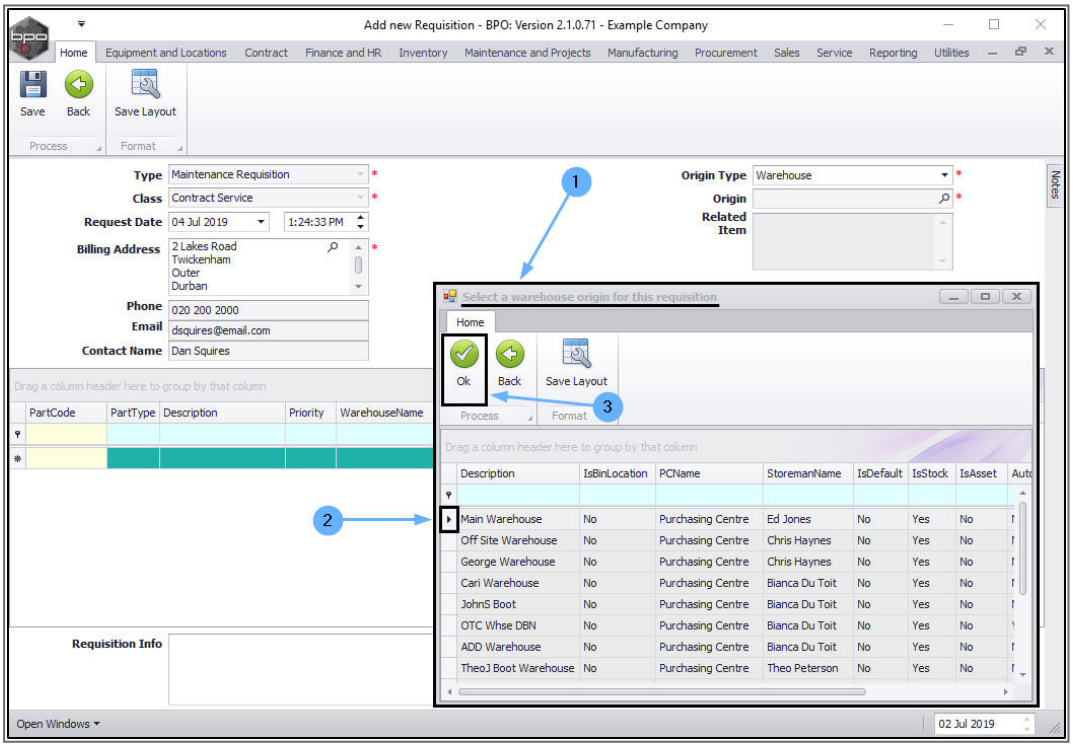
1. The ***Select a warehouse origin for this requisition*** screen will pop up.

> **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 contract origin for this requisition screen will pop up.
ii. If ***Work Order Type*** was selected then the Select a work order origin for this requisition screen will pop up.
iii. As ***Warehouse Type*** was selected then the Select a warehouse 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.
3. Click on ***Ok***.



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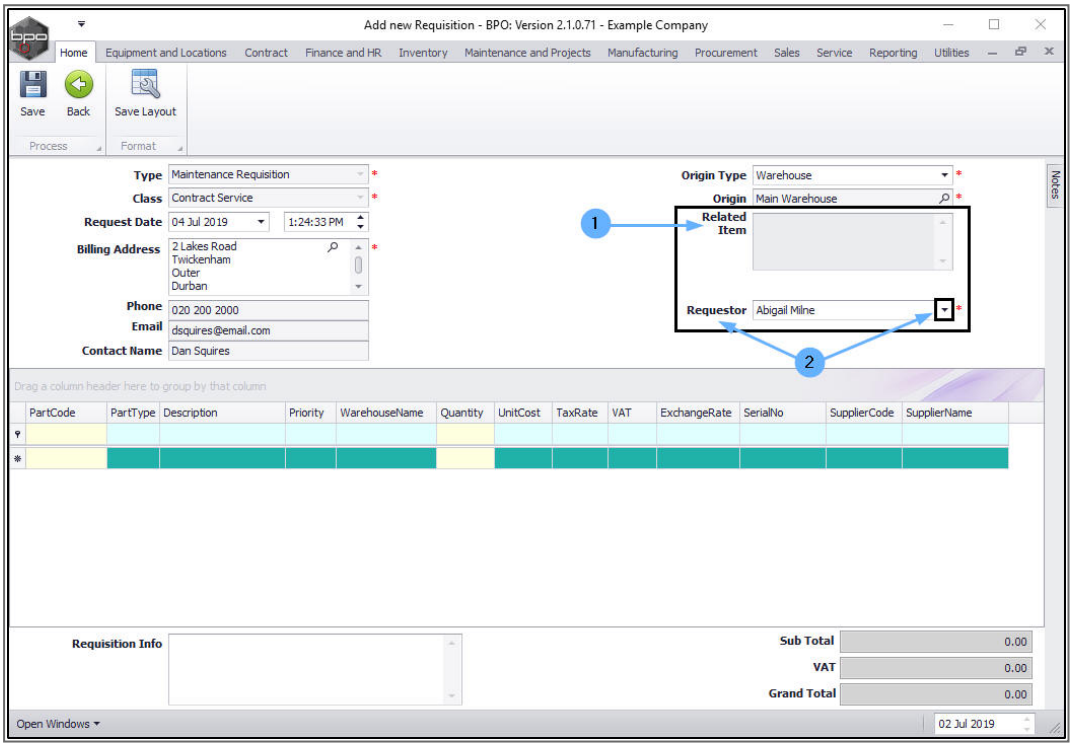
1. **Related Item:** This field is un-editable.
2. **Requestor:** This will populate with the person currently logged on to the system. You can click on the drop-down arrow and select from the menu an alternative person if required.
3. **Requisition Info:** Type in any extra information in this text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



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

REQUISITION PARTS DATA GRID

- Click in the ***Part Code*** text box.

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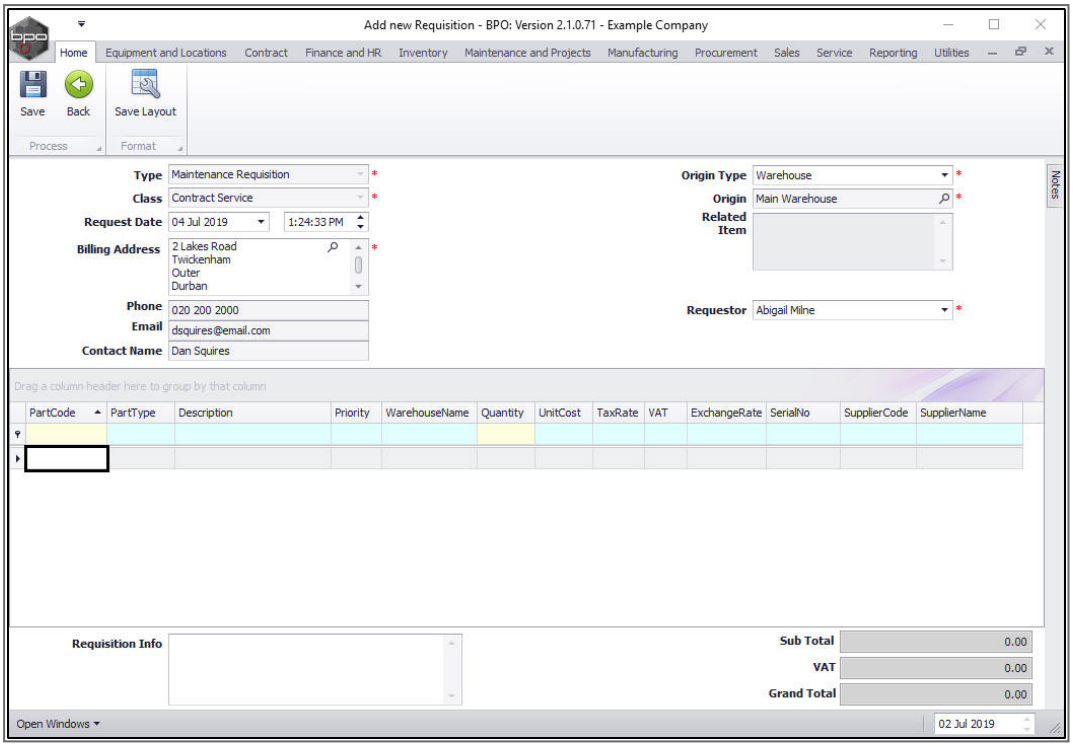

1. An ***ellipsis*** button will be revealed.
2. The following fields will auto populate:
    - **Part Type:** This will auto populate with **SERV**.
    - **Priority:** This will auto populate with **3**.
    - **Quantity:** This will auto populate with **1** but can be edited.
    - **Unit Cost:**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

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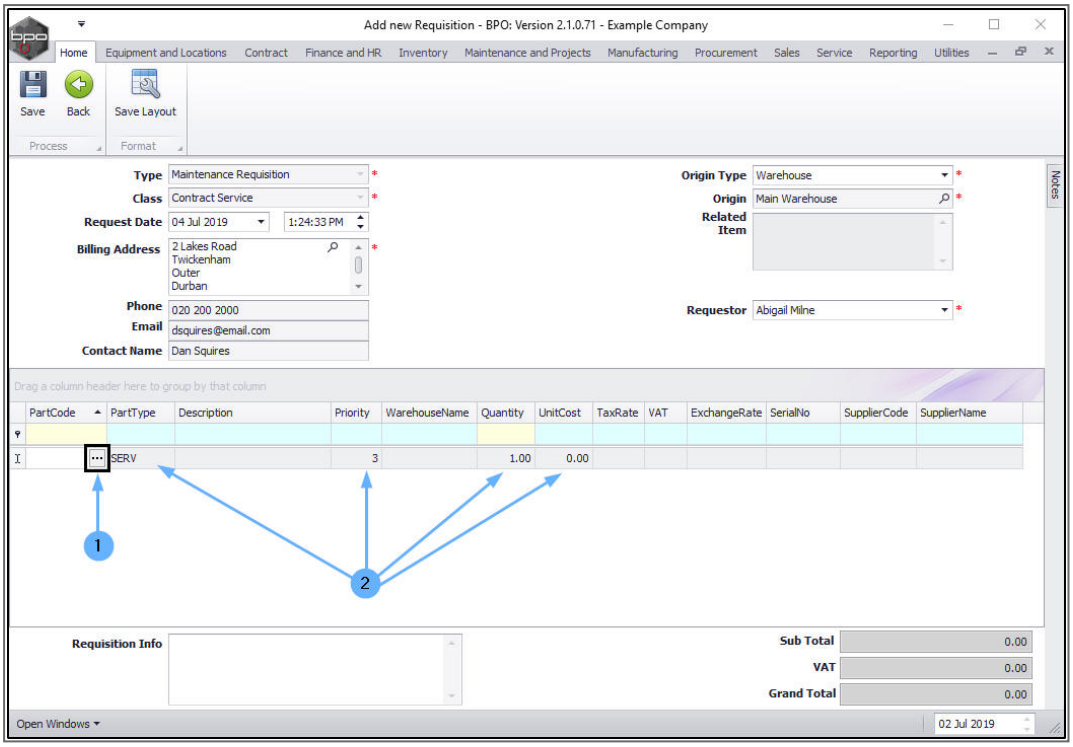

1. Click on the ***ellipsis*** button.
2. A ***Select an item*** pop up screen will appear.
3. Click on the ***row selector*** in front of the item you wish to add.
    - In this example, you are going to be selecting ***Shipping Costs***.
4. Click on ***Ok***.

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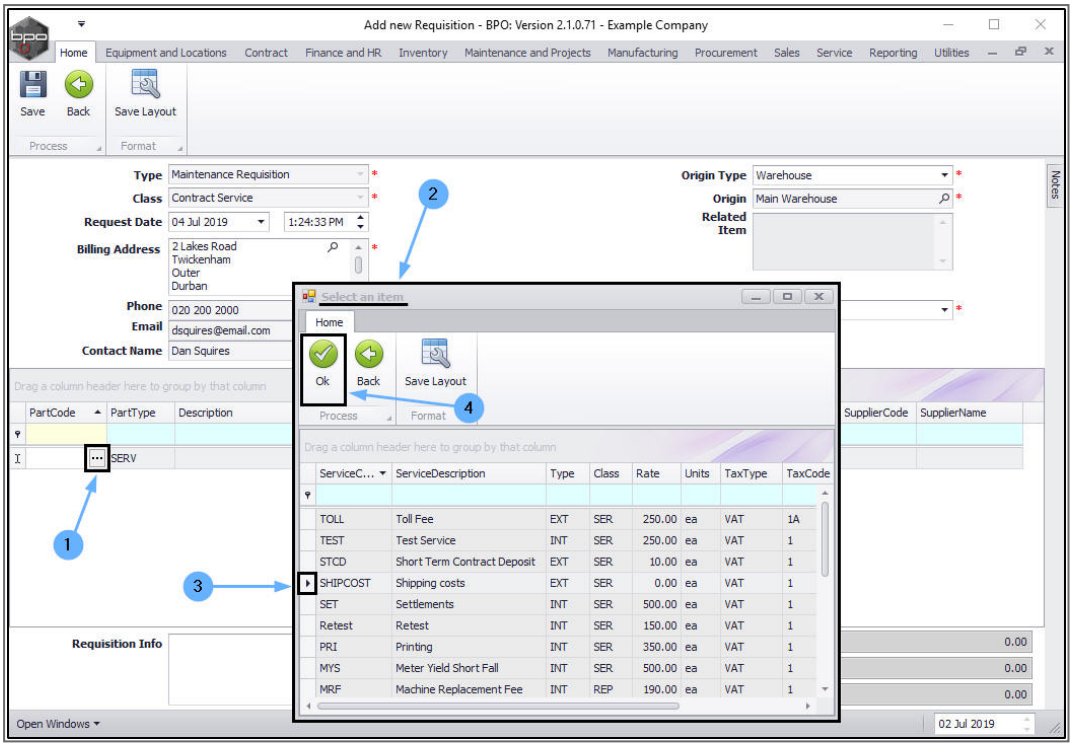

The following fields will now populate:

- **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.

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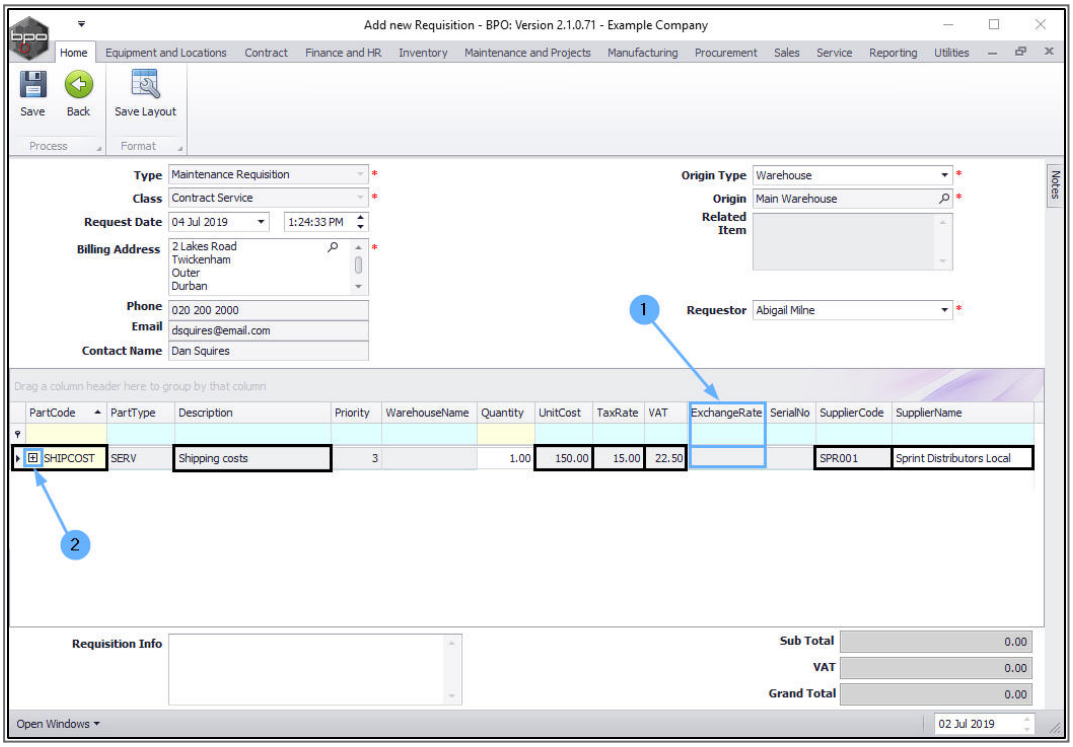
- **Supplier Name:** If there is a Primary Supplier set up on this part then this field will populate with the ***name*** of that selected supplier.

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.



1. 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.

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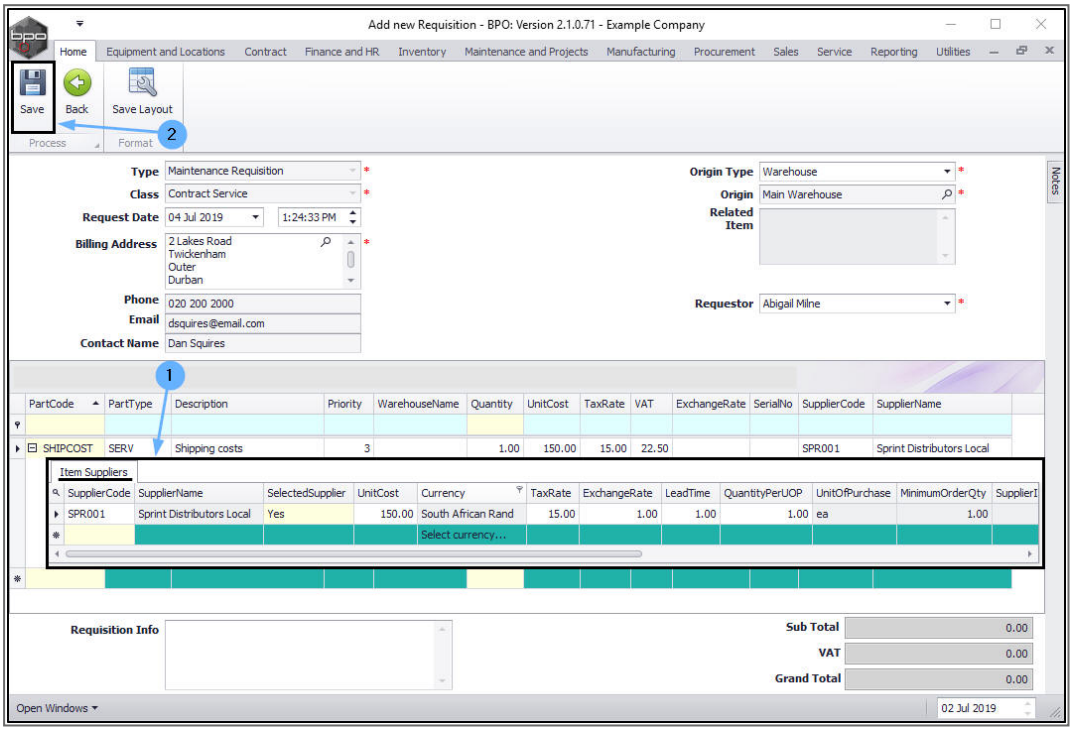
SAVE SERVICE REQUISITION

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



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

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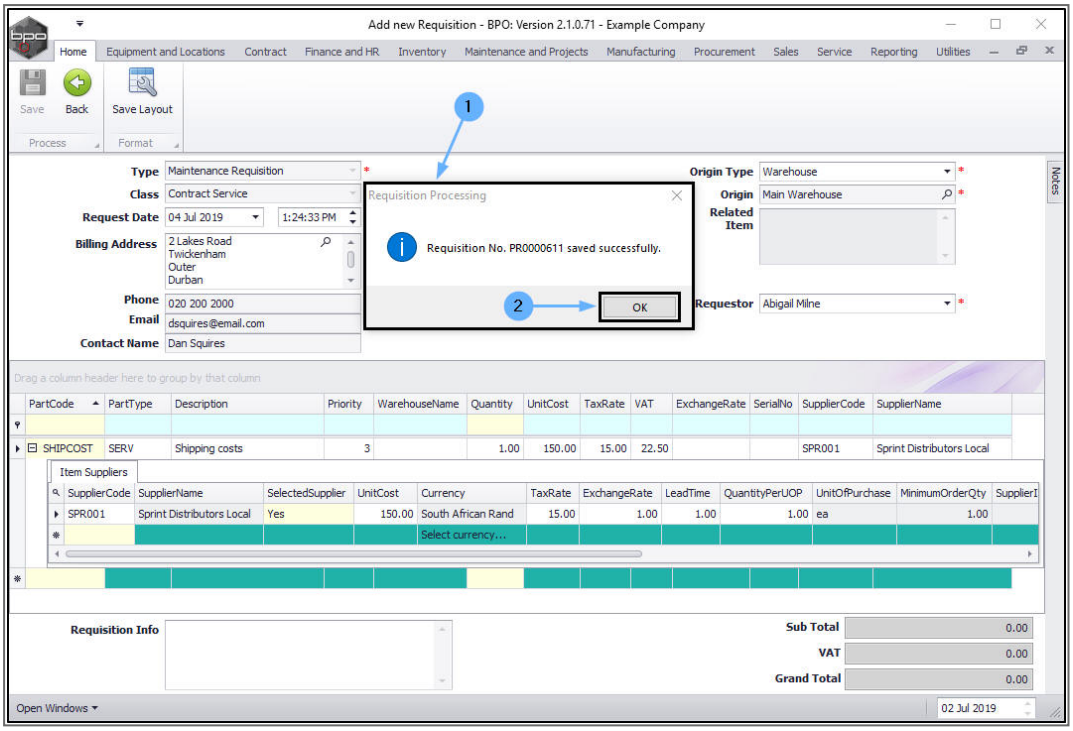

PRINT SERVICE REQUISITION

(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***.

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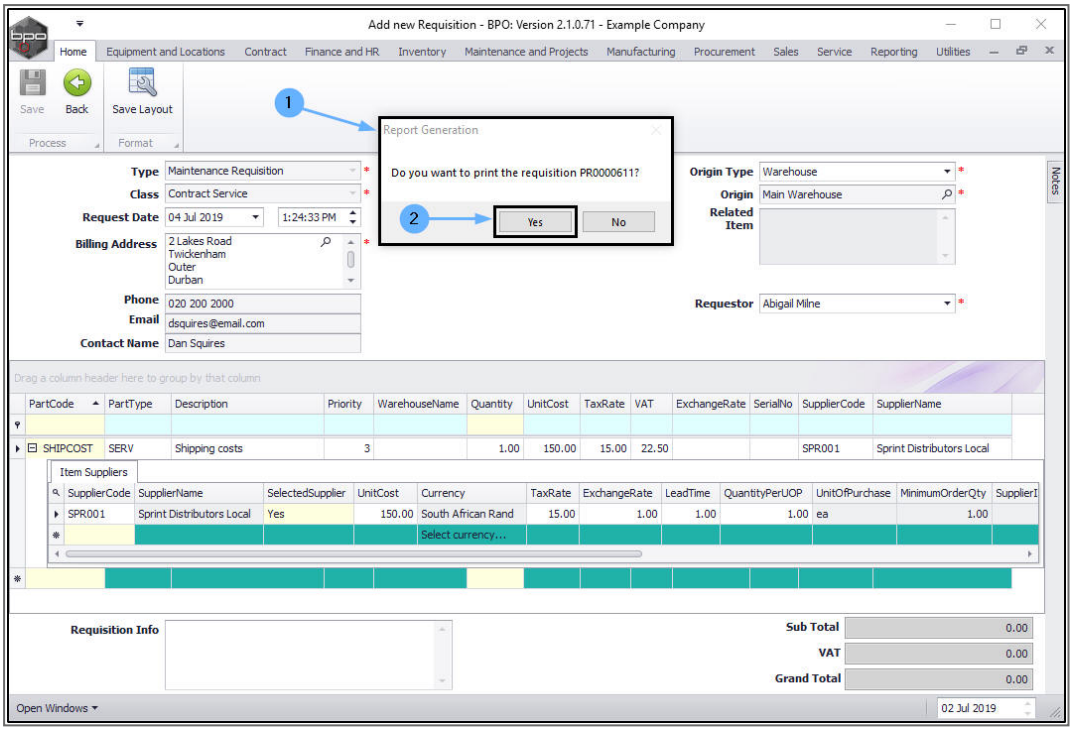

The ***Report Preview*** screen will be displayed.

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.

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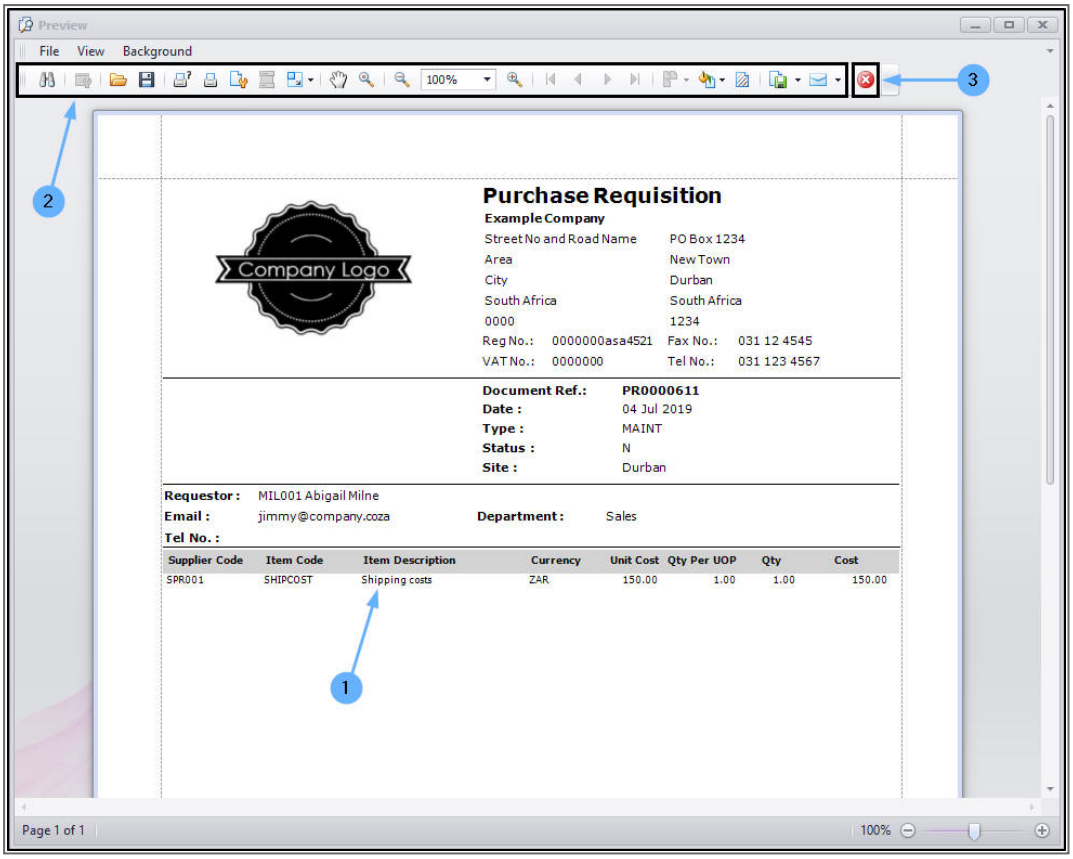

1. You will return to the Purchase Requisition Listing screen.

RELEASE SERVICE REQUISITION

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

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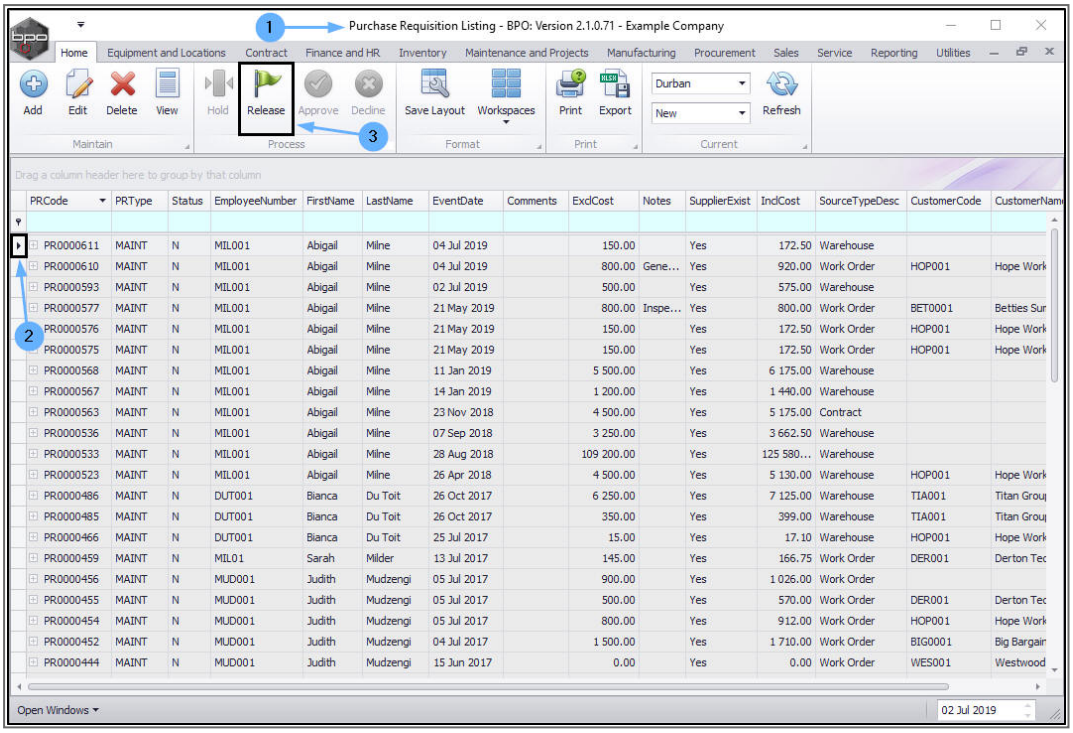

1. A ***Requisition - Process*** message box will pop up informing you that;
    - ***The requisition no. [ ] has been released successfully.***
2. Click on ***OK***.

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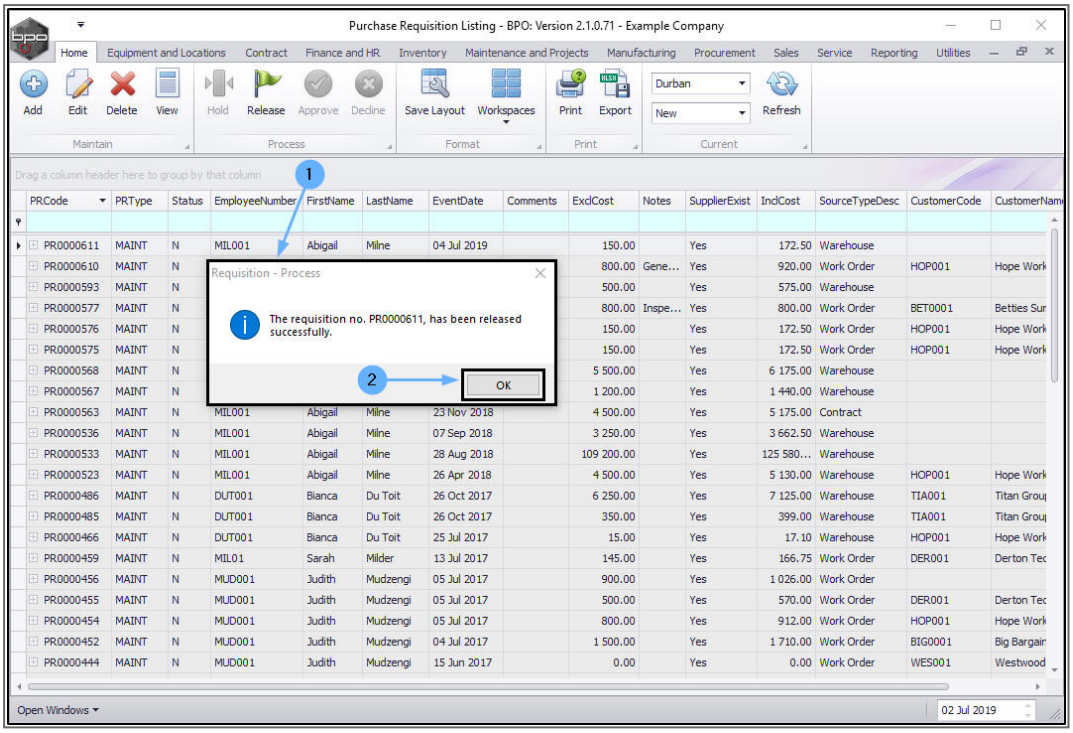

1. The selected requisition will be ***removed*** from this screen where the status is set to ***New***.
2. Click on the ***drop-down arrow*** in the status field to bring up the ***Status Description*** list.
3. Select ***Released***.

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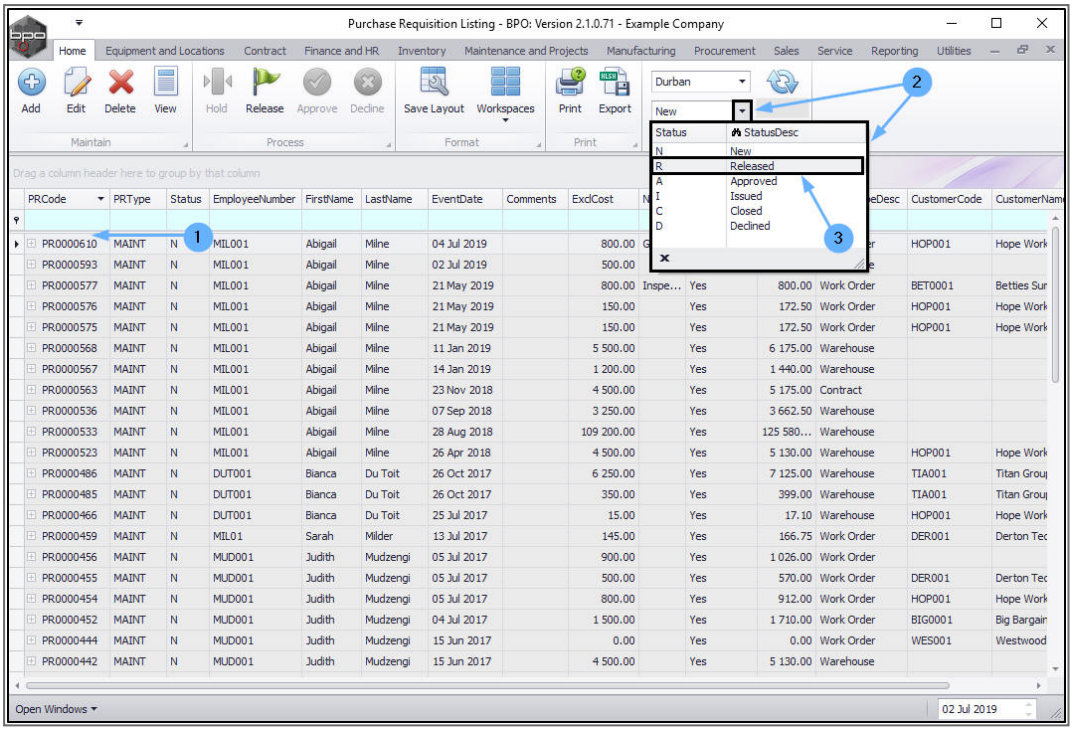

1. The Listing screen will now display all the requisitions in the ***Released*** status.

APPROVE SERVICE REQUISITION

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

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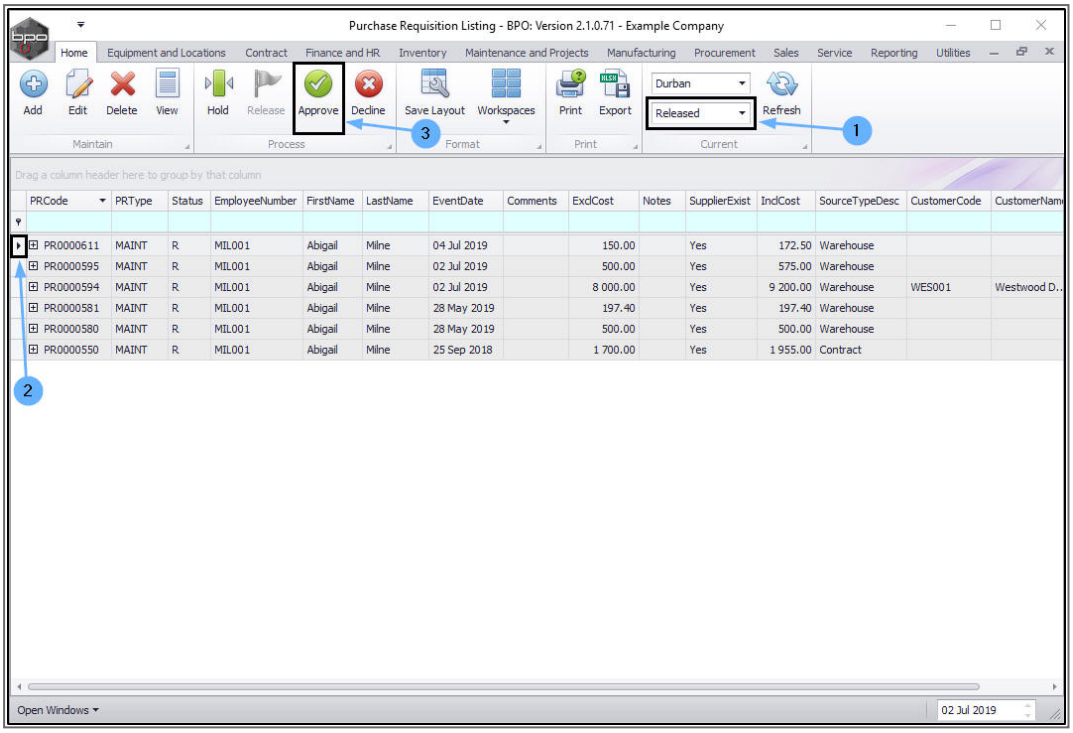

1. A ***Process Validation*** message box will pop up asking;
    - Are you sure that you want to authorise requisition [ ]?
2. Click on ***Yes***.

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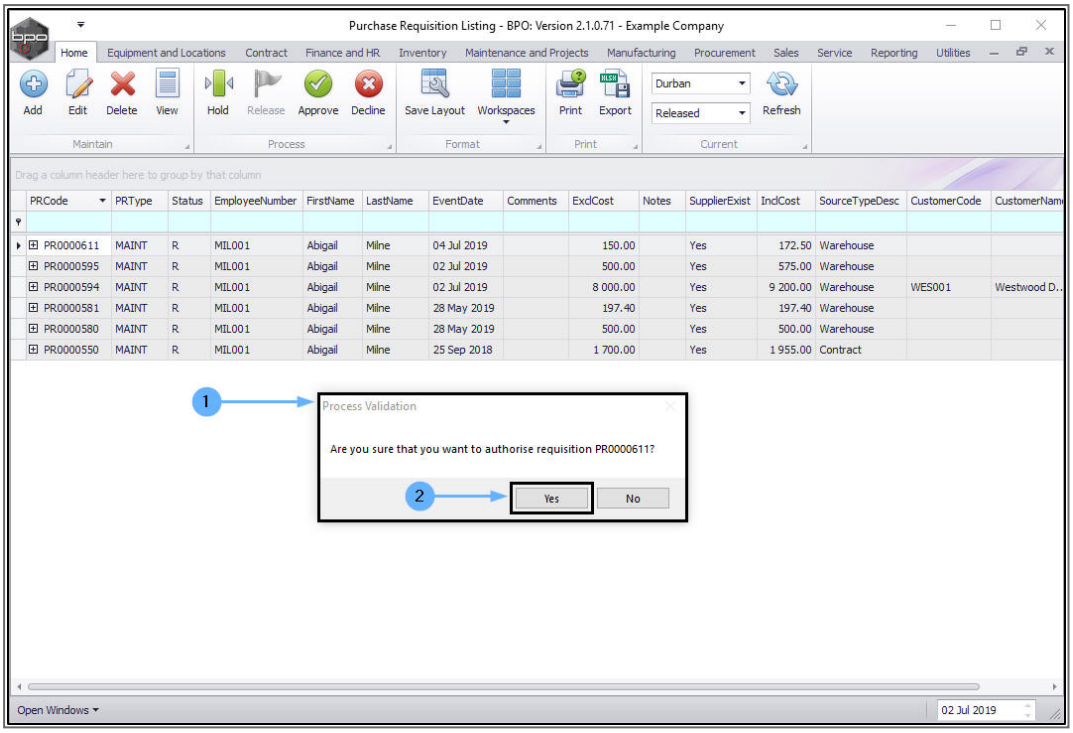

1. A ***Requisition - Process*** message box will pop up informing you that;
    - Authorisation for requisition no. [ ] has been successful.
2. Click on ***OK***.

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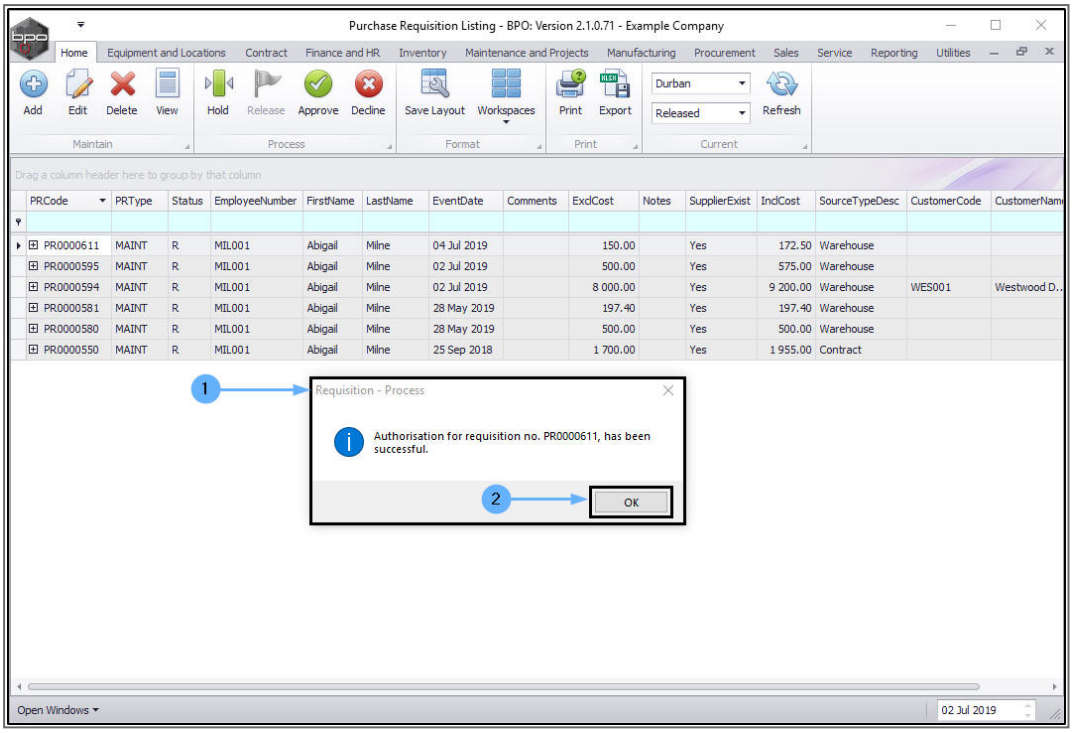

VIEW GENERATED SERVICE PURCHASE ORDER

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

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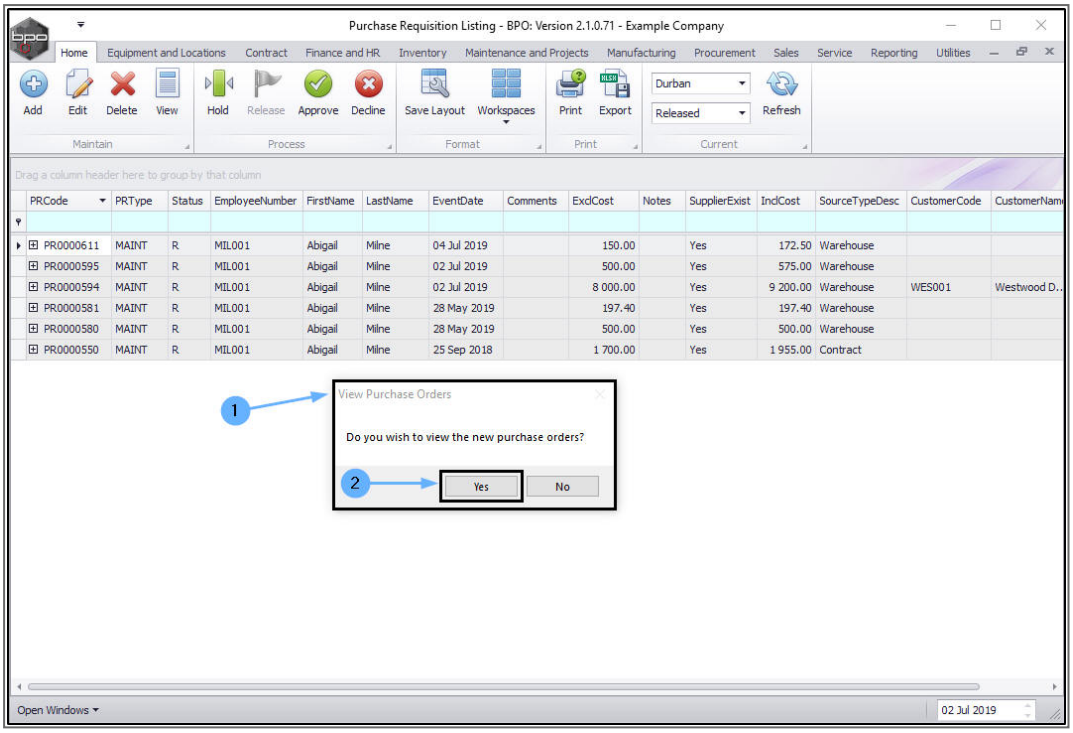

1. The ***Purchase Orders for Requisition [ ]*** screen will be displayed.
2. Here you can view the newly created Purchase Order for the Shipping Costs.

PRINT SERVICE PURCHASE ORDER

(required)

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

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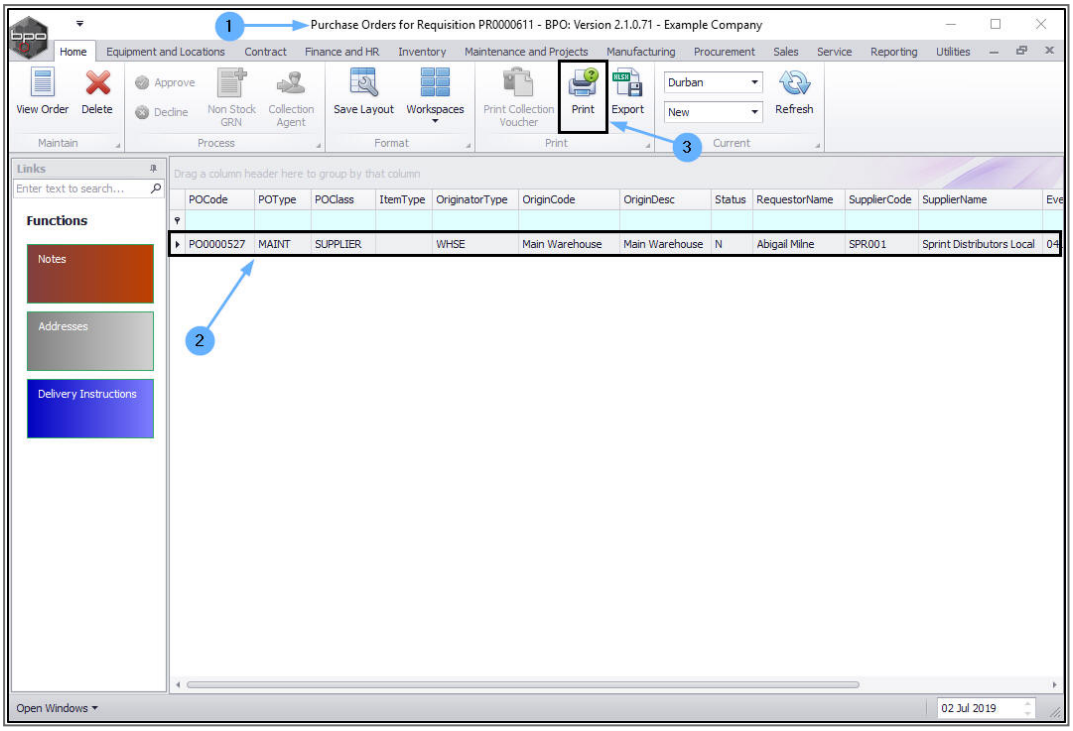

1. A ***Report Generation*** message box will pop up asking;
    - Do you want to print the purchase order [ ]?
2. Click on ***Yes***.

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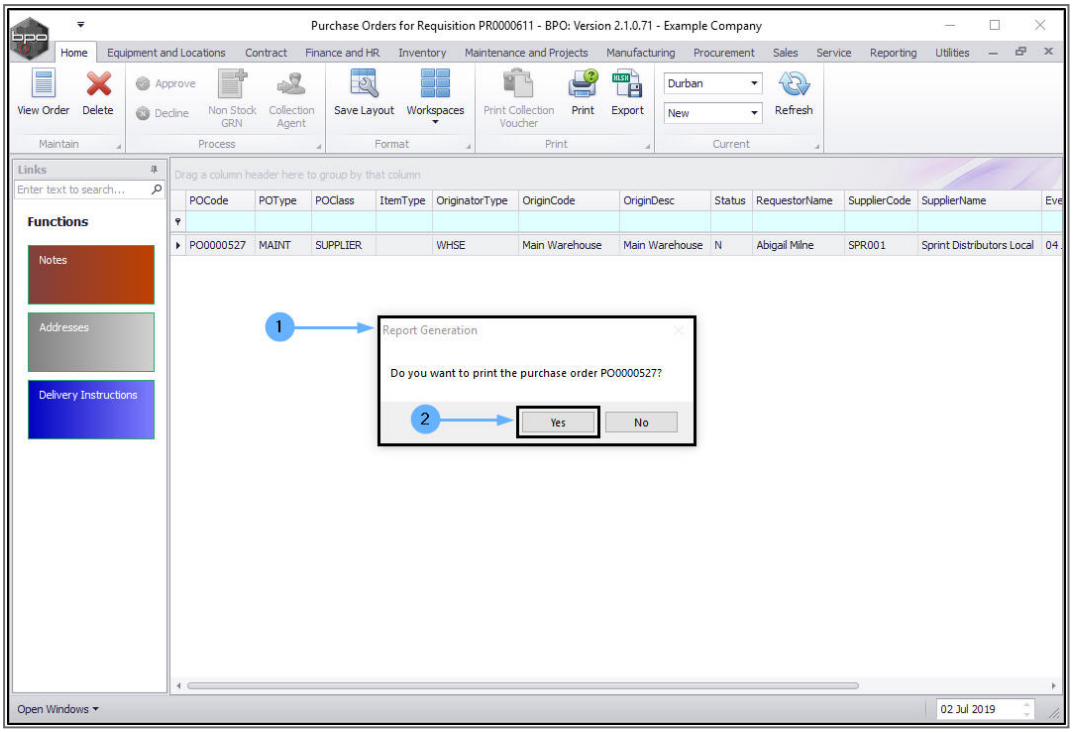

1. A ***select the option as desired*** screen will pop up.
2. Select ***Print Order***.
3. Click on ***Accept***.

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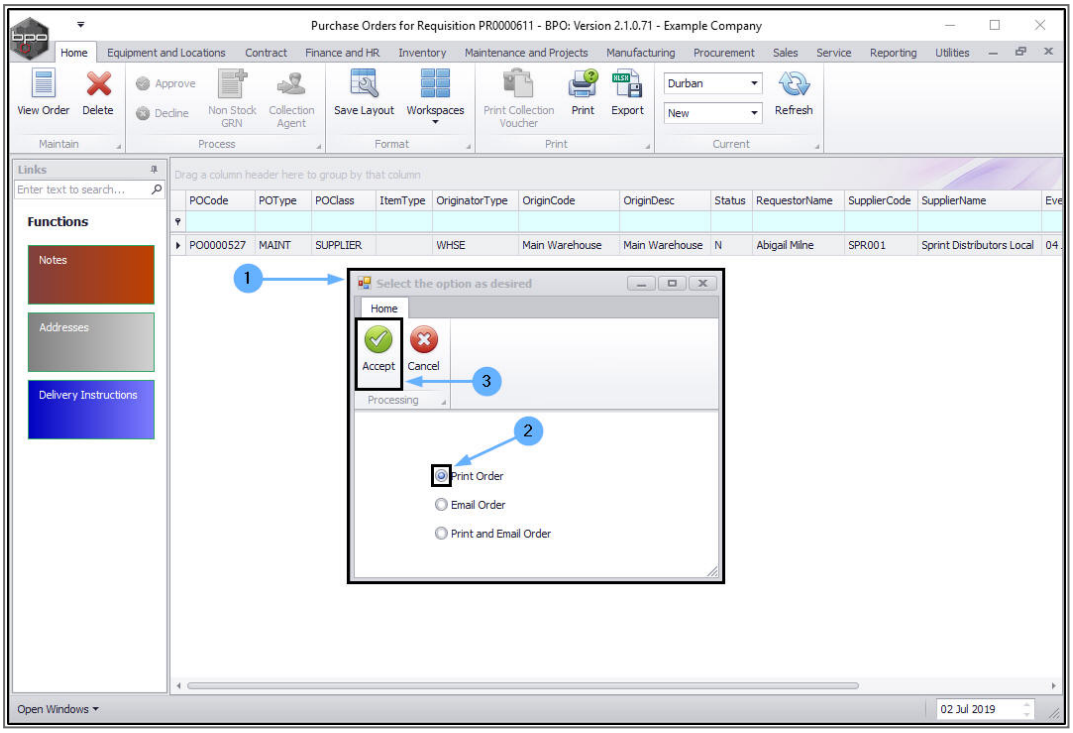

The ***Report Preview*** screen will be displayed

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.

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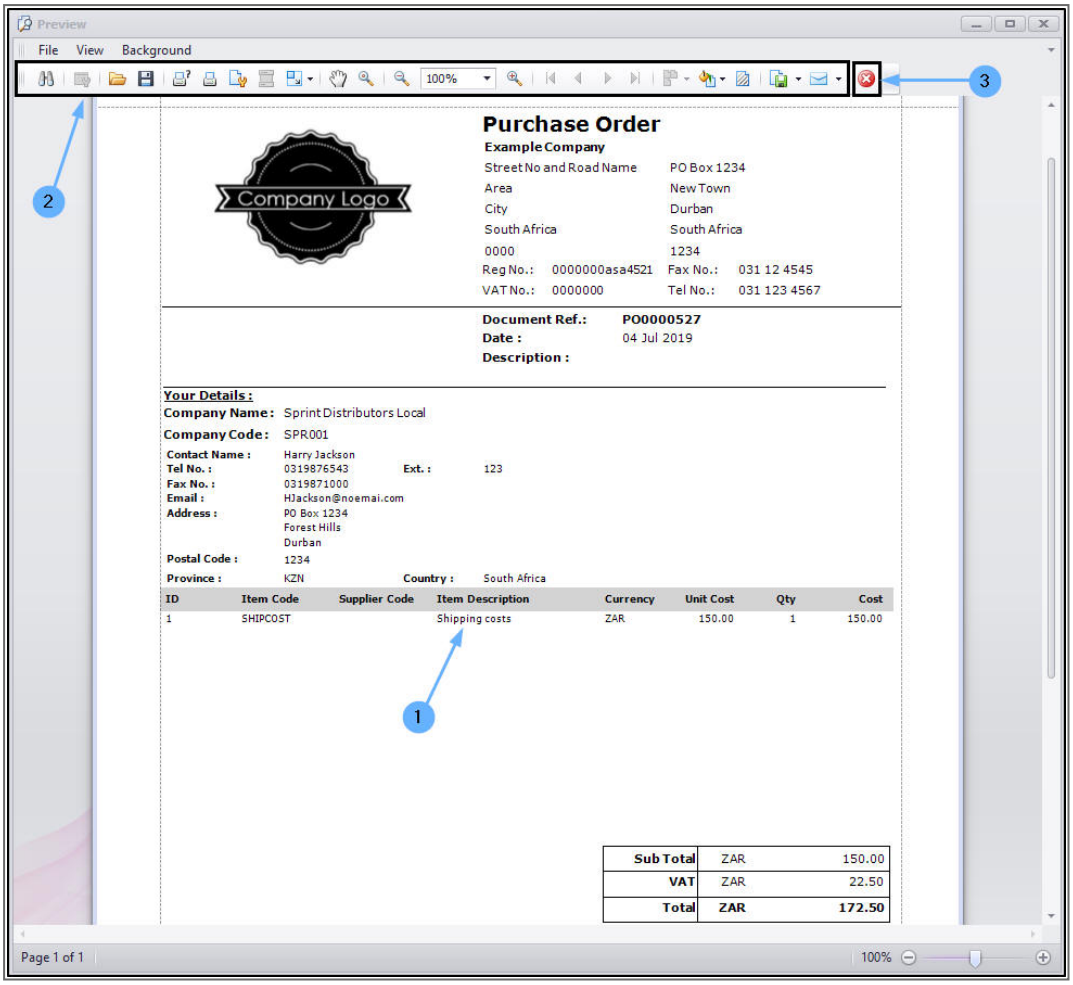

- Complete the Quarantine process by Revaluing and Releasing the goods from Quarantine into the receiving warehouse.

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

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