

# PROCUREMENT

## REQUISITIONS – ADD, EDIT, DELETE ITEM SUPPLIER

Once you have created a purchase requisition, you may be required to **add**, **edit** or **remove** a supplier, or make changes to the items supplied, **e.g.** change the price.

Linking a supplier to the **purchase requisition**, will pull through the supplier's details to the **procurement** documentation. It will also give you the ability to add the **unit cost** and **lead time** specific to the selected supplier.

If the supplier has not previously been linked to the part, then a supplier will need to be added to the **purchase requisition**.

At least **one** supplier needs to be linked to each requisition item.

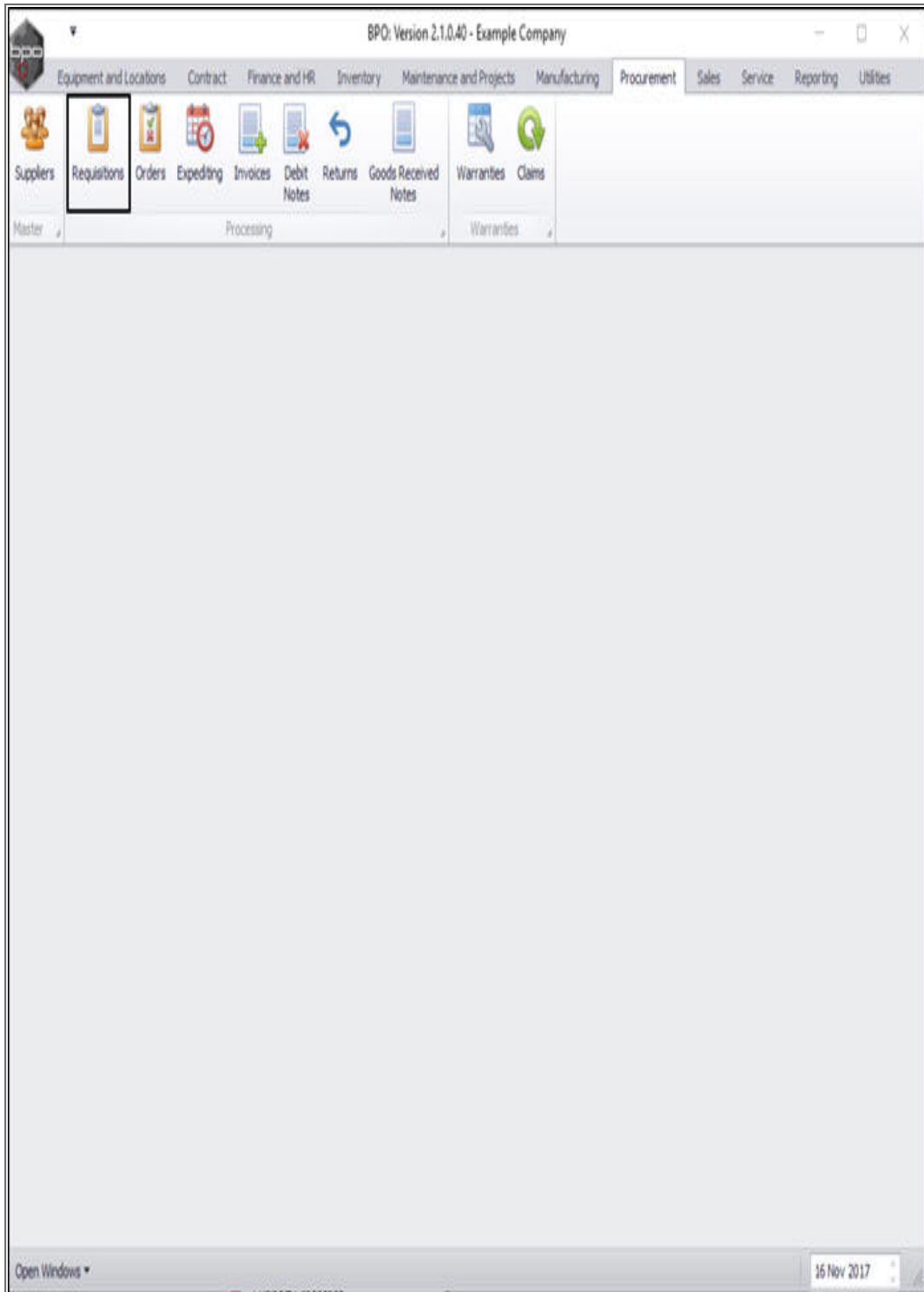
You can link **more than one** supplier to a part, with the main supplier as the default. Ensure that **Selected Supplier** is set to 'Yes' for the supplier you wish to set up as your default supplier.

Before purchasing from a supplier with a currency outside South Africa, ensure that you check the **Exchange Rates** have been set up correctly.

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**Ribbon Access:** *Procurement > Requisitions*

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

Select the Site and Status

- Select the *site*.
- In this image *Durban* has been selected.

Purchase Requisition Listing - BPO: Version 2.1.0.40 - Example Company

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

Add Edit Delete View Hold Release Approve Decline Save Layout Workspaces Print Export **Durban** New Refresh

Drag a column header here to group by that column

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes	SupplierEx
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20	Hope Works	HOP001		Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48	Hope Works	HOP001		Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Hope Works	HOP001	Test 2.1.0.4 Procurement test	Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Hope Works	HOP001		Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Hope Works	HOP001	Please phone with latest pri...	Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	Hope Works	HOP001		Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	Hope Works	HOP001	call procurement v2.1.0.4	Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Hope Works	HOP001		Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001		Yes
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001		Yes
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001		Yes
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001		Yes
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works	HOP001	test	Yes
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group	TIA001		Yes
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works	HOP001		Yes
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co	ABCXYZ123	Generated from sales order ...	Yes
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001		Yes
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001		Yes
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001		Yes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14				Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12				Yes
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11				Yes
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58				Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1...	Yes

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- Select the **status**.
- This should be set to **New**.

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes	SupplierEx
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20	Hope Works	HOP001		Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48	Hope Works	HOP001		Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Hope Works	HOP001	Test 2.1.0.4 Procurement test	Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Hope Works	HOP001		Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Hope Works	HOP001	Please phone with latest pri...	Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	Hope Works	HOP001		Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	Hope Works	HOP001	call procurement v2.1.0.4	Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Hope Works	HOP001		Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001		Yes
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001		Yes
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001		Yes
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001		Yes
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works	HOP001	test	Yes
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group	TIA001		Yes
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works	HOP001		Yes
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co	ABCXYZ123	Generated from sales order ...	Yes
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001		Yes
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001		Yes
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001		Yes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14				Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12				Yes
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11				Yes
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58				Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1...	Yes

## SELECT REQUISITION

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- Select the **row** of the **purchase requisition** where you wish to **add** an item supplier.
- Click on **Edit**.

Purchase Requisition Listing - BPO: Version 2.1.0.40 - Example Company

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

Drag a column header here to group by that column

PRCode	PRTType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes	SupplierEx
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001		Yes
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001		Yes
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11				Yes
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001		Yes
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32				Yes
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co	ABCKY2123	Generated from sales order ...	Yes
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works	HOP001		Yes
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35			Call to confirm order 24 hou...	Yes
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41				Yes
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group	TIA001		Yes
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works	HOP001	test	Yes
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001		Yes
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001		Yes
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001		Yes
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42				Yes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14				Yes
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest	Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12				Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19				Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11				Yes
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53				Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001		Yes
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18				Yes
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40				Yes

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## ADD ITEM SUPPLIER

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- The ***Edit Requisition*** screen will be displayed.
- In the ***Items*** data grid, click on the ***expand [+]*** button next to the ***Item (Part Type)*** you wish to add an item supplier to.

The screenshot shows the 'Edit Requisition' window for 'PRO000459 - BPO: Version 2.1.0.41 - Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are buttons for Save, Back, and Save Layout, along with Process and Format options.

The main form contains several sections:

- General Information:** Type (Maintenance Requisition), Class (Contract Service), Request Date (23 Oct 2017, 10:47:02 AM), Billing Address (Street No and Road Name, Area, City), Phone (000 000 0000), Email (employeea@company.co.za), and Contact Name (Employee A Purchasing Address).
- Origin and Requestor:** Origin Type (Work Order), Origin (1818-1-1 - Check network require...), Related Item (Roof), and Requestor (Sarah Milder).

Below the form is a data grid with the following columns: PartType, PartCode, Description, Priority, WarehouseName, Quantity, UnitCost, ftdTaxRate, ftdVAT, ftdExchangeRate, SerialNo, SupplierCode, and SupplierName. The grid contains two rows of data:

PartType	PartCode	Description	Priority	WarehouseName	Quantity	UnitCost	ftdTaxRate	ftdVAT	ftdExchangeRate	SerialNo	SupplierCode	SupplierName
SERV	DEL	Delivery Fee	3		1.00	800.00	14.00	112.00	1.00		SPR001	Sprint Distributors Local
SERV	INSP	Inspection	3		1.00	800.00	14.00	112.00	1.00		SPR001	Sprint Distributors Local

At the bottom of the window, there is a 'Requisition Info' section and a summary table:

Sub Total	1 600.00
VAT	224.00
Grand Total	1 824.00

The bottom status bar shows 'Open Windows' and the date '28 Nov 2017'.

- The **Item Suppliers** data grid will be expanded.
- Click on the **Search** icon to prioritise this data grid in the screen and make it easier to work in.



- The **Item Suppliers** data grid will now be the only data grid displayed in this screen.
- **Right click** anywhere in a **row** of this data grid to bring up a **Pro-**

*cess* selection box.

- Click on **Add Supplier**.

The screenshot shows the 'Edit Requisition' window for 'PR000459 - BPO: Version 2.1.0.41 - Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are buttons for Save, Back, and Save Layout, along with Process and Format dropdowns.

The main form contains several fields:
 

- Type:** Maintenance Requisition
- Class:** Contract Service
- Request Date:** 23 Oct 2017, 10:47:02 AM
- Billing Address:** Street No and Road Name, Area, City
- Phone:** 000 000 0000
- Email:** employeea@company.co.za
- Contact Name:** Employee A Purchasing Address
- Origin Type:** Work Order
- Origin:** 1818-1-1 - Check netw\*rk require...
- Related Item:** Roof
- Requestor:** Sarah Milder

The 'Item Suppliers' table is visible below the form, with one entry selected:
 

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	800.00	0.00	1.00	ea

A 'Process' menu is open over the table, showing two options:
 

- Add Supplier** (with a plus icon)
- Remove Supplier** (with a minus icon)

At the bottom right, a summary table shows:
 

<b>Sub Total</b>	1 600.00
<b>VAT</b>	224.00
<b>Grand Total</b>	1 824.00

The bottom status bar shows 'Open Windows' and the date '28 Nov 2017'.

- An ***Input Validation*** message box will pop up asking;
  - ***Are you sure you want to add a supplier to this item [ ]?***
- Click on **Yes**.

The screenshot shows the 'Edit Requisition' window for 'PR0000459 - BPO: Version 2.1.0.41 - Example Company'. The interface includes a menu bar (Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities) and a toolbar (Save, Back, Save Layout, Process, Format). The main form contains fields for Type (Maintenance Requisition), Class (Contract Service), Request Date (23 Oct 2017), Billing Address, Phone, Email, Contact Name, Origin Type (Work Order), Origin (1818-1-1 - Check network require...), Related Item (Kloof), and Requestor (Sarah Milder). Below the form is a table of 'Item Suppliers' with columns: SupplierCode, SupplierName, SupplierItemCode, Currency, TaxRate, ExchangeRate, SelectedSupplier, UnitCost, LeadTime, QuantityPerUOP, and UnitPurchase. The table contains one entry: SPR001, Sprint Distributors Local, South African Rand, 14.00, 1.00, Yes, 800.00, 0.00, 1.00 ea. An 'Input Validation' dialog box is overlaid on the table, asking 'Are you sure you want to add a supplier to this item INSP?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box. At the bottom right, a summary table shows: Sub Total: 1600.00, VAT: 224.00, Grand Total: 1824.00. The system date is 28 Nov 2017.

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	800.00	0.00	1.00	ea

Sub Total	1600.00
VAT	224.00
Grand Total	1824.00

- The **Select a supplier to add** screen will pop up.
- Select the **row** of the **supplier** you wish to **add** to this purchase requisition.
- Click on **Ok**.

The screenshot shows the 'Edit Requisition' window for PR0000459. The main form includes fields for Type (Maintenance Requisition), Class (Contract Service), Request Date (23 Oct 2017), Billing Address, Phone, Email, and Contact Name. A 'Select a supplier to add' dialog box is open, displaying a table of suppliers. The 'Ok' button in the dialog is highlighted with a red box. The table in the dialog has the following data:

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo
PR10012	Printer World	Maggie Saggie	GEN	A	PT	13456789
PR1005	Printer World 2	Richard Sage	GEN	A	PT	9807652
PR1007	Printer World Forex	Matthew Sage	SH-PA	A	PT	7685944
SPR002	Sprint International	George Matt...	GEN	A	PS	4562587
TON001	Tony's Copy Shop	Tony	SH-PA	A	PS	9874561
TW1001	Twinkle Office Au...	Gary Maris	GEN	A	SE	9876543
YES001	Young Electric	Grant	GEN	A	PS	3245064

## VIEW ADDED SUPPLIER

- The new supplier will be *added* to the *Item Suppliers* data grid.

The screenshot shows the 'Edit Requisition' window for PR0000459. The interface includes a menu bar, a toolbar with 'Save', 'Back', and 'Save Layout' buttons, and a main form area. The form contains fields for 'Type' (Maintenance Requisition), 'Class' (Contract Service), 'Request Date' (23 Oct 2017), 'Billing Address', 'Phone', 'Email', 'Contact Name', 'Origin Type' (Work Order), 'Origin', 'Related Item', and 'Requestor' (Sarah Milder).

The 'Item Suppliers' data grid is visible below the form, showing two rows:

Supplier	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	Me
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	800.00	0.00	1.00	ea	
YES001	Young Electric		South African Rand	14.00	1.00	No	0.00	1.00	1.00	ea	

At the bottom right, a summary table shows the following values:

Sub Total	1 600.00
VAT	224.00
Grand Total	1 824.00

The status bar at the bottom indicates 'Open Windows' and the date '28 Nov 2017'.

## **ADD OR EDIT SUPPLIER DETAILS**

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Most of the details in the new supplier row will be auto populated according to the details set up when the supplier was initially added to BPO. However, listed below are all the fields in the data grid, including notes on the ones which may need adjusting:

- **Supplier Code:** This will auto populate.
- **Supplier Name:** This will auto populate.
- **Supplier Item Code:** Type in the part number used by the supplier if required. You can update this if the supplier changes their part number - as this will filter through to the Purchase Order
- **Currency:** This will be populated based on the currency set up on the supplier but you can click on the field and select an alternative currency from the menu if required.
- **Tax Rate:** This will be populated based on the tax rate set up on the supplier but you can type in an alternative tax rate or click on the field and use the arrow indicators to adjust the tax rate as required.
- **Exchange Rate:** This will be populated based on the current exchange rate but you can type in an alternative tax rate or click on the field and use the arrow indicators to adjust the tax rate as required.
- **Selected Supplier:** Click in the field, then on the arrow that is revealed, and select **Yes** if this is the primary supplier or **No** if not. Each item can only have **one** primary supplier.
- **Unit Cost:** Type in the cost per unit.
- **Lead Time:** Type in the lead time in days.
- **Qty per UOP:** Type in the quantity per unit of purchase. This ties up with unit of purchase - you can set up the part to procure **1** each or **10** in a box, etc. Usually the default of 1 is used.

- **Unit of Purchase:** Type in the unit that ties up with the Qty per UOP, e.g. each or box. Usually the default of 'ea' is used.

The screenshot shows the 'Edit Requisition' window for 'Example Company'. The interface includes a menu bar (Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities) and a toolbar with 'Save', 'Back', and 'Save Layout' buttons. The main form contains several sections:

- General Information:** Type (Maintenance Requisition), Class (Contract Service), Request Date (23 Oct 2017, 10:47:02 AM), Billing Address (Street No and Road Name, Area, City), Phone (000 000 0000), Email (employeea@company.co.za), and Contact Name (Employee A Purchasing Address).
- Origin and Requestor:** Origin Type (Work Order), Origin (1818-1-1 - Check netw\*rk require...), Related Item (Roof), and Requestor (Sarah Milder).
- Item Suppliers Table:** A table with columns: Supplier, SupplierName, SupplierItemCode, Currency, TaxRate, ExchangeRate, SelectedSupplier, UnitCost, LeadTime, QtyPerUOP, and UnitOfPurchase. Two suppliers are listed: SPRO01 (Sprint Distributors Local) and YES001 (Young Electric).
- Summary:** A 'Requisition Info' field and a summary table showing Sub Total (1 300.00), VAT (182.00), and Grand Total (1 482.00).

Supplier	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QtyPerUOP	UnitOfPurchase
SPRO01	Sprint Distributors Local		South African Rand	14.00	1.00	No	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	Yes	500.00	4.00	1.00	ea

**Scroll right** if necessary, to display the remaining fields in the data grid;

- **Minimum Order Qty:** This is the minimum the Supplier will supply per order. Usually the default of 1 is used.
- **Contract No:** If you have a contract with the Supplier, type in the contract number. Leave blank if not applicable.
- **Contract Page No:** Type in the contract page number that relates to this part. Leave blank if not applicable.
- **Contract Part No:** Type in the part number agree to on this contract. Leave blank if not applicable.
- **Catalog No:** Type in the part number as per the supplier's catalogue.
- **Blanket PO No:** This is the Purchase Order number relating to the contract if a SLA agreement has been signed with the supplier to procure only from them for a specified period. Leave blank if not applicable
- **Forward Contract No:** Type in the forward contract number if required.
- **Manufacturer Item Code:** Type in the part number used by the manufacturer, if required.

### **SAVE SUPPLIER DETAILS**

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- When you have finished adding the new item supplier details, click on **Save**.



CO3 Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save Back Save Layout

Process Format

Type: Maintenance Requisition  
 Class: Contract Service  
 Request Date: 23 Oct 2017 10:47:02 AM  
 Billing Address: Street No and Road Name, Area, City  
 Phone: 000 000 0000  
 Email: employee@company.co.za  
 Contact Name: Employee A Purchasing Address

Origin Type: Work Order  
 Origin: 1818-1-1 - Check netw\*rk require...  
 Related Item: [Empty]  
 Requestor: Sarah Milder

Quantity	Per UOP	Unit of Purchase	Minimum Order Qty	Contract No.	Contract Page No.	Contract Part No.	Catalog No.	Blanket PO No.	Forward Contract No.	Manufacturer Item Code
1.00	ea		1.00							
1.00	ea		1.00							

Requisition Info

Sub Total: 1 300.00  
 VAT: 182.00  
 Grand Total: 1 482.00

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## **PRINT REQUISITION - NO**

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- A **Report Generation** message box will pop up asking;
  - **Do you want to print the requisition [ ]?**
- If you click on **No...**

- You will return to the **Purchase Requisition** Listing screen.
- A **Requisition Processing** message box will pop up informing you that;

- *Requisition No. [ ] saved successfully.*
- Click on **OK**.

Drag a column header here to group by that column:

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000444	MAINT	N	MUD001					Dynamic	WE5001	
PR0000442	MAINT	N	MUD001							
PR0000439	MAINT	N	DUT001					Co	ABCKY2123	Generated from sales order no. CR0001
PR0000434	MAINT	N	DUT001					ks	HOP001	
PR0000433	MAINT	N	DUT001							Call to confirm order 24 hours before es
PR0000431	MAINT	N	MUD001							
PR0000430	MAINT	N	DUT001					ip	TIA001	
PR0000428	MAINT	N	DUT001					ks	HOP001	test
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001	
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001	
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001	
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001	

Open Windows ▾ 28 Nov 2017

## **PRINT REQUISITION - YES**

---

- If, when the **Report Generation** message box pops up asking;
  - **Do you want to print the requisition [ ]?**
- And you click on **Yes...**

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save
Back
Save Layout

Process
Format

<p><b>Type</b> Maintenance Requisition</p> <p><b>Class</b> Contract Service</p> <p><b>Request Date</b> 23 Oct 2017 10:47:02 AM</p> <p><b>Billing Address</b>            Street No and Road Name            Area            City</p> <p><b>Phone</b> 000 000 0000</p> <p><b>Email</b> employeea@company.co.za</p> <p><b>Contact Name</b> Employee A Purchasing Address</p>	<p><b>Origin Type</b> Work Order</p> <p><b>Origin</b> 1818-1-1 - Check network require...</p> <p><b>Related Item</b> Roof</p> <p><b>Requestor</b> Sarah Milder</p>
---	--

**Item Suppliers**

X	QuantityPerUOP	UnitOfPurchase	MinimumOrderQty	ContractNo	ContractPageNo	ContractPartNo	CatalogNo	BlanketPONo	ForwardContractNo	ManufacturerItemCode
	1.00	ea	1.00							
	1.00	ea	1.00							

Report Generation

Do you want to print the requisition PR0000459?

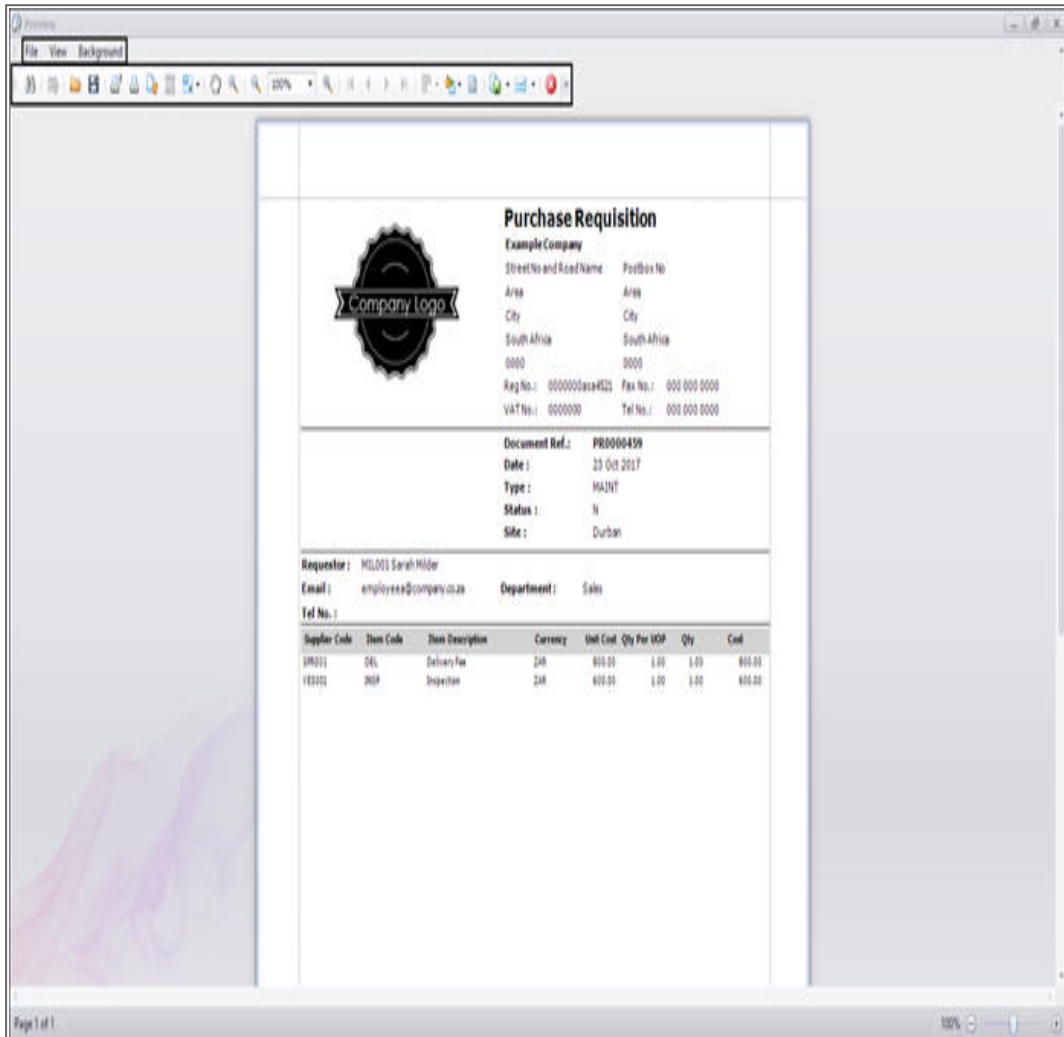
Yes
No

<b>Requisition Info</b>	<b>Sub Total</b> 1 300.00
	<b>VAT</b> 182.00
	<b>Grand Total</b> 1 482.00

Open Windows
28 Nov 2017

## REPORT PREVIEW

- The **Report Preview** screen will be displayed.
- From here you can **View, Print, Export** or **Email** the requisition.
- **Close** the Report Preview screen when done.



- You will return to the **Purchase Requisition Listing** screen.
- A **Requisition Processing** message box will pop up informing you that;
  - **Requisition No. [ ] saved successfully.**
- Click on **OK**.

Purchase Requisition Listing - BPO: Version 2.1.0.41 - Example Company

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

Add Edit Delete View Hold Release Approve Decline Save Layout Workspaces Print Export Durban New Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001	
PR0000442	MAINT	N				14:32				
PR0000439	MAINT	N				16:24	ABC Shoe Co	ABCKYZ123		Generated from sales order no. CR000
PR0000434	MAINT	N				32:32	Hope Works	HOP001		
PR0000433	MAINT	N				59:35				Call to confirm order 24 hours before es
PR0000431	MAINT	N				37:41				
PR0000430	MAINT	N				16:44	Titan Group	TIA001		
PR0000428	MAINT	N				41:14	Hope Works	HOP001		test
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001	
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001	
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001	
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001	

Requisition Processing

Requisition No. PR0000459 saved successfully.

OK

Open Windows 28 Nov 2017

## EDIT ITEM SUPPLIER

Select the Site and Status



- In the **Purchase Requisition Listing** screen,
- Select the **site**.
  - In this image **Durban** has been selected.

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Custom
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35	
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works HOP001
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works HOP001
PR0000450	MAINT	N	TJM	Joseph	Timber	08 Sep 2017	13:38:11	
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic WES001
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32	
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co ABCXYZ123 Generated from sales order no. OR0001
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works HOP001
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35	Call to confirm order 24 hours before es
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41	
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group TIA001
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works HOP001 test
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works HOP001
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works HOP001
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group TIA001
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42	
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14	
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25	retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11	
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53	
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works HOP001

- Select the **status**.
- This must be set to **New**.

PRCode	PRTYPE	Status	EmployeeNumber	Firstname	LastName	EventDate	EventTime	Custom
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35	
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope V
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works HOP001
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11	
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic WES001
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32	
PR0000439	MAINT	N	DUT001	Susan	Du Tot	08 Jun 2017	14:56:24	ABC Shoe Co ABCY2123 Generated from sales order no. CR000
PR0000434	MAINT	N	DUT001	Susan	Du Tot	06 Jun 2017	11:32:32	Hope Works HOP001
PR0000433	MAINT	N	DUT001	Susan	Du Tot	05 Jun 2017	14:59:35	Call to confirm order 24 hours before es
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41	
PR0000430	MAINT	N	DUT001	Susan	Du Tot	01 Jun 2017	13:16:44	Titan Group TIA001
PR0000428	MAINT	N	DUT001	Susan	Du Tot	31 May 2017	10:41:14	Hope Works HOP001 test
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works HOP001
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works HOP001
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group TIA001
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42	
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14	
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25	retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11	
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53	
PR0000396	MAINT	N	DUT001	Susan	Du Tot	19 May 2017	11:31:09	Hope Works HOP001

## SELECT REQUISITION

---

- Select the **row** of the **purchase requisition** you wish to **edit** the item supplier for.
- Click on **Edit**.

Purchase Requisition Listing - BPO: Version 2.1.0.41 - Example Company

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

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001	
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32			
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co	ABCKYZ123	Generated from sales order no. CR000
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works	HOP001	
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35			Call to confirm order 24 hours before es
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41			
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group	TIA001	
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works	HOP001	test
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001	
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001	
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001	
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001	

Open Windows ▾ 28 Nov 2017

The **Edit Requisition** screen will be displayed.

## EXPAND THE ITEMS DATA GRID

---

- In the *Items data grid*;
  - Click on the **expand [+]** button next to the *Item (Part Type)* where you wish to **edit** an item supplier.

- The **Item Suppliers** data grid will be expanded.
- Click on the **Search** icon to prioritise this data grid in the screen and make it easier to work in.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company
Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout

Process Format

**Type** Maintenance Requisition

**Class** Contract Service

**Request Date** 23 Oct 2017 10:47:02 AM

**Billing Address** Street No and Road Name Area City

**Phone** 000 000 0000

**Email** employee@company.co.za

**Contact Name** Employee A Purchasing Address

**Origin Type** Work Order

**Origin** 1818-1-1 - Check netw\*rk require... P

**Related Item** Roof

**Requestor** Sarah Milder

Drag a column header here to group by that column

PartType	PartCode	Description	Priority	WarehouseName	Quantity	UnitCost	fldTaxRate	fldVAT	fldExchangeRate	SerialNo	SupplierCode	SupplierName
SERV	DEL	Delivery Fee	3		1.00	800.00	14.00	112.00	1.00		SPR001	Sprint Distributors Local
SERV	INSP	Inspection	3		1.00	600.00	14.00	84.00	1.00		YES001	Young Electric

Item Suppliers

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	No	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	Yes	600.00	4.00	1.00	ea

**Requisition Info**

**Sub Total** 1 400.00

**VAT** 196.00

**Grand Total** 1 596.00

Open Windows 28 Nov 2017

## EDIT SELECTED SUPPLIER

---

- The *Item Suppliers* data grid will now be the only data grid displayed in this screen.
- In the row of the *Item Supplier* that you wish to edit the detail of, click in the field below the column header.
  - In this example, the *Selected Supplier* field has been selected to be edited.



The screenshot shows the 'Edit Requisition' window for 'PR0000459 - BPO: Version 2.1.0.41 - Example Company'. The interface includes a menu bar, a toolbar with 'Save', 'Back', and 'Save Layout' buttons, and a main form area. The form contains fields for 'Type' (Maintenance Requisition), 'Class' (Contract Service), 'Request Date' (23 Oct 2017), 'Billing Address', 'Phone', 'Email', 'Contact Name', 'Origin Type' (Work Order), 'Origin', 'Related Item', and 'Requestor' (Sarah Milder).

Item Suppliers										
SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	No	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	Yes	600.00	4.00	1.00	ea

Below the table is a 'Requisition Info' section with a 'Sub Total' of 1 400.00, 'VAT' of 196.00, and a 'Grand Total' of 1 596.00. The bottom status bar shows 'Open Windows' and the date '28 Nov 2017'.

- Click on the **arrow** that is revealed.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save | Back | Save Layout

Process | Format

Type: Maintenance Requisition  
 Class: Contract Service  
 Request Date: 23 Oct 2017 10:47:02 AM  
 Billing Address: Street No and Road Name, Area, City  
 Phone: 000 000 0000  
 Email: employeea@company.co.za  
 Contact Name: Employee A Purchasing Address

Origin Type: Work Order  
 Origin: 1818-1-1 - Check network require...  
 Related Item: Roof  
 Requestor: Sarah Milder

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	No	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	Yes	600.00	4.00	1.00	ea

Requisition Info

Sub Total: 1 400.00  
 VAT: 196.00  
 Grand Total: 1 596.00

Open Windows | 28 Nov 2017

- A **Change Supplier** message box will pop up asking;
  - **Do you want to change the selected supplier from [ ] for this item?**
- Click on **Yes**.

**Item Suppliers**

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	M
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	No	800.00	0.00	1.00	ea	
YES001	Young Electric		South African Rand	14.00	1.00	Yes	600.00	4.00	1.00	ea	

<b>Sub Total</b>	1,400.00
<b>VAT</b>	196.00
<b>Grand Total</b>	1,596.00

- **Yes** will now be recorded in the **Selected Supplier** field for that particular item supplier.

**Note:** As there can only be one selected supplier, if another supplier was previously the 'selected one', the Selected Supplier field in their row will auto change and populate with 'No'.

The screenshot shows the 'Edit Requisition' window for 'PR0000459 - BPO: Version 2.1.0.41 - Example Company'. The interface includes a menu bar, a toolbar with 'Save', 'Back', and 'Save Layout' buttons, and a main form area. The form contains fields for 'Type' (Maintenance Requisition), 'Class' (Contract Service), 'Request Date' (23 Oct 2017), 'Billing Address', 'Phone', 'Email', 'Contact Name', 'Origin Type' (Work Order), 'Origin', 'Related Item', and 'Requestor' (Sarah Milder).

Below the form is a table titled 'Item Suppliers' with the following data:

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea

At the bottom of the window, there is a 'Requisition Info' section and a summary table:

Sub Total	1 600.00
VAT	224.00
Grand Total	1 824.00

The status bar at the bottom shows 'Open Windows' and the date '28 Nov 2017'.

## EDIT SUPPLIER DETAILS

---

In the row of the item supplier you wish to edit,

- Click in the **Tax Rate** text box and either type in, or use the directional arrows to change the Tax Rate as required.
- Click in the **Exchange Rate** text box and either type in, or use the directional arrows to change the Exchange Rate as required. (This will only apply if the supplier does not work with the same currency as your company).
- Click in the **Unit Cost** text box and either type in, or use the directional arrows to change the Unit Cost as required.
- Click in the **Lead Time** text box and either type in, or use the directional arrows to change the Lead Time as required.
- Click in the **Quantity Per UOP** text box and either type in, or use the directional arrows to change the Quantity Per Unit of Purchase as required.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save | Back | Save Layout

Type: Maintenance Requisition | Class: Contract Service | Request Date: 23 Oct 2017 10:47:02 AM | Billing Address: Street No and Road Name Area | City | Phone: 000 000 0000 | Email: employeea@company.co.za | Contact Name: Employee A Purchasing Address

Origin Type: Work Order | Origin: 1818-1-1 - Check netw\*rk require... | Related Item: Kloof | Requestor: Sarah Milder

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	800.00	0.00	1.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea

Requisition Info

Sub Total	1600.00
VAT	224.00
Grand Total	1824.00

Open Windows | 28 Nov 2017

## SAVE CHANGES

- When you have finished editing the item supplier details, click on **Save**.

The screenshot shows the 'Edit Requisition' window for 'PR0000459 - BPO: Version 2.1.0.41 - Example Company'. The 'Save' button in the top-left toolbar is highlighted with a red box. The main form contains the following details:

- Type:** Maintenance Requisition
- Class:** Contract Service
- Request Date:** 23 Oct 2017, 10:47:02 AM
- Origin Type:** Work Order
- Origin:** 1818-1-1 - Check network require...
- Related Item:** (Empty)
- Requestor:** Sarah Milder
- Billing Address:** Street No and Road Name, Area, City
- Phone:** 000 000 0000
- Email:** employeea@company.co.za
- Contact Name:** Employee A Purchasing Address

Below the form is a table titled 'Item Suppliers':

X	SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	M
	SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	900.00	5.00	4.00	ea	
	YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea	

At the bottom right, a summary table shows:

Sub Total	1 700.00
VAT	238.00
Grand Total	1 938.00

The bottom status bar shows 'Open Windows' and the date '28 Nov 2017'.

## PRINT EDITED REQUISITION

---

- A **Report Generation** message box will pop up asking;
  - **Do you want to print the requisition [ ]?**
- Follow the directions as above if you wish to **print the requisition**.
  - In this example, **No** has been selected.



**Item Suppliers**

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	900.00	5.00	4.00	ea
YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea

**Report Generation**

Do you want to print the requisition PR0000459?

Yes No

**Requisition Info**

Sub Total	1 700.00
VAT	238.00
Grand Total	1 938.00

Open Windows ▾ 28 Nov 2017

- You will return to the **Purchase Requisition Listing** screen.
- A **Requisition Processing** message box will pop up informing you that;

- **Requisition No. [ ] saved successfully.**
- Click on **OK**.

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001	
PR0000442	MAINT	N	MUD001							
PR0000439	MAINT	N	DUT001					ABC Shoe Co	ABCKYZ123	Generated from sales order no. CR000
PR0000434	MAINT	N	DUT001					Hope Works	HOP001	
PR0000433	MAINT	N	DUT001							Call to confirm order 24 hours before es
PR0000431	MAINT	N	MUD001							
PR0000430	MAINT	N	DUT001					Titan Group	TIA001	
PR0000428	MAINT	N	DUT001					Hope Works	HOP001	test
PR0000418	MAINT	N	MUD001					Hope Works	HOP001	
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001	
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001	
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001	

## DELETE AN ITEM SUPPLIER

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- In the *Item Suppliers* data grid, click anywhere in the *row* of the item supplier you wish to delete.
- A *Process* selection box will pop up.
- Click on *Remove Supplier*.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save Back Save Layout

Process Format

**Type** Maintenance Requisition

**Class** Contract Service

**Request Date** 23 Oct 2017 10:47:02 AM

**Billing Address** Street No and Road Name Area City

**Phone** 000 000 0000

**Email** employeea@company.co.za

**Contact Name** Employee A Purchasing Address

**Origin Type** Work Order

**Origin** 1818-1-1 - Check network require...

**Related Item** Roof

**Requestor** Sarah Milder

Item Suppliers

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	M
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	900.00	5.00	1.00	ea	
YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea	

Process

Add Add Supplier

Remove Remove Supplier

Requisition Info

**Sub Total** 1 700.00

**VAT** 238.00

**Grand Total** 1 938.00

Open Windows

28 Nov 2017

## CONFIRM DELETION

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- A **Delete Row** message box will pop up asking,
  - **Are you sure you want to delete this row for item [ ]?**
- Click on **Yes**.

**Note:** If you have deleted the Selected Supplier, you will need to make another supplier the **Selected Supplier** for this item.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company

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

Save Back Save Layout

Process Format

**Type** Maintenance Requisition

**Class** Contract Service

**Request Date** 23 Oct 2017 10:47:02 AM

**Billing Address** Street No and Road Name Area City

**Phone** 000 000 0000

**Email** employeea@company.co.za

**Contact Name** Employee A Purchasing Address

**Origin Type** Work Order

**Origin** 1818-1-1 - Check netw\*rk require...

**Related Item** idool

**Requestor** Sarah Milder

Item Suppliers

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	M
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	900.00	5.00	1.00	ea	
YES001	Young Electric		South African Rand	14.00	1.00	No	600.00	4.00	1.00	ea	

Delete Row

?

Are you sure you want to delete this row for item YES001?

Yes
No

Requisition Info

**Sub Total** 1 700.00

**VAT** 238.00

**Grand Total** 1 938.00

Open Windows ▾ 28 Nov 2017

## SAVE DELETION

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- The item supplier will now be **removed** from the item suppliers data grid.
- Click on **Save**.

Edit Requisition - PR0000459 - BPO: Version 2.1.0.41 - Example Company
[-] [ ] [X]

Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
[?] [X]

Save

Back

Save Layout

Process
Format

**Type** Maintenance Requisition

**Class** Contract Service

**Request Date** 23 Oct 2017 10:47:02 AM

**Billing Address**  
Street No and Road Name  
Area  
City

**Phone** 000 000 0000

**Email** employeea@company.co.za

**Contact Name** Employee A Purchasing Address

**Origin Type** Work Order

**Origin** 1818-1-1 - Check netw\*rk require... P

**Related Item**  
Roof

**Requestor** Sarah Milder

Item Suppliers

SupplierCode	SupplierName	SupplierItemCode	Currency	TaxRate	ExchangeRate	SelectedSupplier	UnitCost	LeadTime	QuantityPerUOP	UnitOfPurchase	M
SPR001	Sprint Distributors Local		South African Rand	14.00	1.00	Yes	900.00	5.00	1.00	ea	

Requisition Info

**Sub Total** 1 700.00

**VAT** 238.00

**Grand Total** 1 938.00

Open Windows
28 Nov 2017



## PRINT REQUISITION

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- A **Report Generation** message box will pop up asking;
  - **Do you want to print the requisition [ ]?**
- Follow the directions as above if you wish to click on **Yes** to **print the requisition**.
  - In this image, **No** has been selected.

- You will return to the **Purchase Requisition Listing** screen.
- A **Requisition Processing** message box will pop up informing you that;

- **Requisition No. [ ] saved successfully.**
- Click on **OK**.

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000480	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001	
PR0000442	MAINT	N	MUD001					ABC Shoe Co	ABCXYZ123	Generated from sales order no. CR000
PR0000439	MAINT	N	DUT001					Hope Works	HOP001	
PR0000434	MAINT	N	DUT001							Call to confirm order 24 hours before es
PR0000433	MAINT	N	DUT001							
PR0000431	MAINT	N	MUD001					Titan Group	TIA001	
PR0000430	MAINT	N	DUT001					Hope Works	HOP001	test
PR0000428	MAINT	N	DUT001					Hope Works	HOP001	
PR0000418	MAINT	N	MUD001							
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works	HOP001	
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001	
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001	

MNU.053.001

