



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 p**urchase requisition**.

At least **one** supplier needs to be linked to <u>each</u> 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.

Ribbon Access: *Procurement > Requisitions*



	¥						BPO: Version 2.1	.0.40 - Example	Compa	ny.				÷.	D	X
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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.

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PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes	Supple
E PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20	Hope Works	HOP001		Yes
E 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
B PR0000361	MAINT	Ň	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Hope Works	HOP001		Yes
E 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
E PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	Hope Works	HOP001	call procurement v2.1.0.4	Yes
E PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Hope Works	HOP001		Yes
PR0000396	MAINT	N	DUT001	Susan	Du Tolt	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 Tolt	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	DuToit	06 Jun 2017	11:32:32	Hope Works	HOP001		Yes
B PR0000439	MAINT	N	DUT001	Susan	DuToit	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	WE5001		Yes
PR0000459	MAINT	N	MIL001	Sarah	Mider	23 Oct 2017	10:47:02	Hope Works	HOP001		Yes
B PR0000460	MAINT	N	MEL001	Sarah	Mider	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
E PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1	Yes



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

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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	Ň	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Hope Works	H0P001		Yes
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PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	Hope Works	HOP001		Yes
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PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works	HOP001		Yes
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PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works	HOP001		Yes
PR0000428	MAINT	N	DUTT001	Susan	Du Tolt	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
E PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works	HOP001		Yes
E 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	MU0001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WE5001		Yes
PR0000459	MAINT	N	MIL001	Sarah	Mider	23 Oct 2017	10:47:02	Hope Works	HOP001		Yes
PR0000460	MAINT	N	MEL001	Sarah	Mider	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	MAJNT	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
	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1	Yes
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SELECT REQUISITION

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



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PR	0000459	MAINT	N	MIL001	Sarah	Mider	23 Oct 2017	10:47:02	Hope Wo		HOP001		Yes
	0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11	2.222.03				Yes
PR	0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwoo	d Dynamic	WE5001		Yes
PR	0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32					Yes
PR	0000439	MAINT	N	DUT001	Susan	DuTot	08 Jun 2017	14:56:24	ABC Shore	Co	ABCXYZ123	Generated from sales order	Yes
PR	0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Wo	rks	HOP001		Yes
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E PR	0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Gro	up	TIA001		Yes
PR	0000428	MAINT	N	DUT001	Susan	DuTot	31 May 2017	10:41:14	Hope Wo	rks	H0P001	test	Yes
PR	0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Wo	da	HOP001		Yes
I PR	0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Wo	rks	HOP001		Yes
· PR	0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Gro	up	TIA001		Yes
E PR	0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42					Yes
PR	0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14					ĭes
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PR	0000398	MAINT	N	MUD001	Mark		19 May 2017	11:45:11					Yes
PR	0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53					Yes
PR	0000396	TALAM	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Wo	rks	HOP001		Yes
E PR	0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18					Yes
I PR	0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40					Yes
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Help v2.5.0.14 - Pg 6 - Printed: 25/06/2024



ADD ITEM SUPPLIER

- 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.



Process Format Process Format Type Maintenance Reguisition • Class Contract Service • Request Date 23 Oct 2017 10:47:02 AV • Billing Address Street No and Road Name • • Origin 1318-1-1 - Check meth®rk regare • Request Date 23 Oct 2017 10:47:02 AV • Billing Address Street No and Road Name • • Oty • • • • Phone 000 000 0000 • • • • Oty • • • • • • • Phone 000 000 0000 •<	h '				Edit Requ	isition - PR	10000459 - BP	O: Version 2.	1.0.41 -	Example Company	1			÷.	Ø	X
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- 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.



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- 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.

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

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- 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*.

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VIEW ADDED SUPPLIER

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

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ADD OR EDIT SUPPLIER DETAILS

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.

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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

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



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PRINT REQUISITION - NO

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



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- 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.

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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 ...



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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.

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Page 1 of 1									wx 🖯 —	

- 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.



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EDIT ITEM SUPPLIER

Select the Site and Status



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

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

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SELECT REQUISITION

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



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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.



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- 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.



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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.



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• Click on the *arrow* that is revealed.



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



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



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

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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 <u>not</u> 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.



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SAVE CHANGES

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

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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.
 - $^{\circ}$ In this example, *No* has been selected.



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- 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.

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DELETE AN ITEM SUPPLIER

- 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*.



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CONFIRM DELETION

- A Delete Row message box will pop up asking,
 - $^\circ~$ 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 <u>another</u> supplier the **Selected Supplier** for this item.



A '					Edit Requ	isition - Pf	0000459 -	BPO: Version 2.1.	0.41 - Example C	ompany				8	0	Х
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SAVE DELETION

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



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PRINT 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 click on Yes to print the requisition.
 - $^{\circ}~$ In this image, **No** has been selected.



A 1					Edit Requ	isition - PR	0000459 -	BPO: Version 2.1	0.41 - Example C	ompany				×.		Х
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- 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.

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PR	0000461	MAINT	N	MIL001	Sarah	Mider	21 Nov 2017	13:30:35								
PR	0000460	MAINT	N	MIL001	Sarah	Mider	07 Nov 2017	11:00:42	Hope V	Vorks	HOP00	į.				
PR	0000459	MAINT	N	MEL001	Sarah	Mider	23 Oct 2017	10:47:02	Hope V	Vorks	HOP00					
E PR	0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11								
E PR	0000444	MAINT	N	MUD001	Mark	Mudderveid	15 Jun 2017	12:29:13	Westw	ood Dynamic	WES00	1				
· PR	0000442	MAINT	N	MUD001 Requisit	ion Processing	j i)								
PR	0000439	MAINT	N	DUT001					ABC St	ioe Co	ABCXY2	123	Generated fro	m sales on	der no. C	R000
PR	0000434	MAINT	N	DUTT001					Hope V	Vorks	HOP00	l.				
. PR	0000433	MAINT	N	DUT001	Requisition	n No. PR0000	459 saved succ	esfully.					Call to confirm	order 241	iours bef	ore ex
E PR	0000431	MAINT	N	MU0001												
PR	0000430	MAINT	N	DUT001			_		Titan G	roup	TIA001					
PR	0000428	MAINT	N	DUT001				OK	Hope V	Vorks	HOP00	1	test			
. PR	0000418	MAINT	N	MU0001					Hope V	Vorks	HOP00					
· PR	0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope V	Vorks	HOP00					
E PR	0000410	MAINT	N	MU0001	Mark	Mudderveid	22 May 2017	12:47:51	Titan G	roup	TIA001					
PR	0000409	MAINT	N	MU0001	Mark	Mudderveld	22 May 2017	12:11:42								
PR	0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14								
E PR	0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25					retest			
E PR	0000404	MAINT	N	MU0001	Mark	Mudderveld	19 May 2017	12:54:12								
PR	0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11								
PR	0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53								
PR	0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope V	Vorks	HOP00	ţ.				
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