

## PROCUREMENT

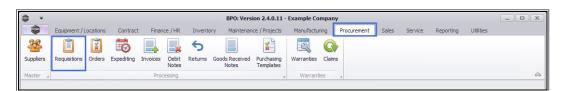
## ADD / EDIT / DELETE ITEMS

Once you have created your Purchase Requisition, you may be required to add or **remove** items, or **make changes** to these items for example, edit the quantity or price.

A Purchase Requisition can <u>only</u> be edited in the **New** status.

If a requisition has already been **released for approval**, <u>remove it</u> from approval by putting it on **Hold**. It will then be moved from the **Released** status back to the **New** status and can then be edited. The requisition can be released again once the new changes have been saved.

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



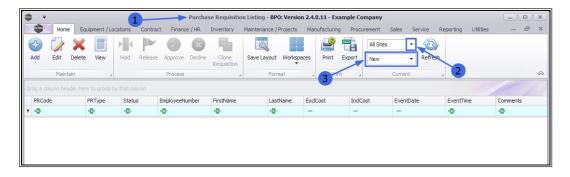
1. The *Purchase Requisition Listing* screen will be displayed.

Select the Site and Status

#### 2. Select the *Site*.

- This screen will open by default with the Site filter set to *All Sites*. Click on the drop-down arrow and select the site that you wish to work in.
- 3. Select the Status.
  - The *Status* will open by default with the filter set to *New*.
     Purchase Requisition can <u>only</u> be edited in the *New* status.





### NOTE ON EDITING 'RELEASED' REQUISITIONS

If the requisition that you require <u>cannot</u> be found in the **New** status - it may already have been **Released**, in which case you will need to move it from this status **back** to New.

A reasons for editing a requisition that has already been *released for Approval* could be; an item price may have changed. It will then need to be brought back to the *New* status for price editing.

# REMOVE REQUISITION FROM RELEASED STATUS TO ENABLE EDITING

- 1. In the *Purchase Requisition Listing* screen,
- Ensure that you have selected the correct *site* and the status is set to *Released*.
- 3. Select the *row* of the *Purchase Requisition* that you wish to move back into the *New* status, for editing.
- 4. Click on *Hold*.



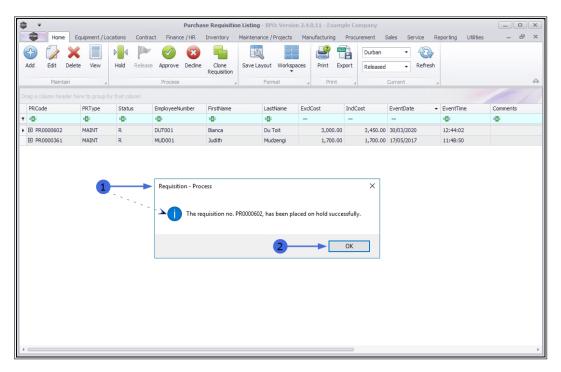
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- 1. A *Hold Comment* message box will pop up.
- 2. Type in the *reason* for placing the Requisition on Hold. For example you can type in:
  - ° "Requisition recalled for item price changes."
- 3. Click on *Save*.



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





- 1. The requisition will be *removed* from the listing screen where the status is set to *Released*.
- 2. Change the screen status to *New*.

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### **EDIT REQUISITION ITEMS**

- 1. The requisition can now be found in the *Purchase Requisition Listing* screen where the status is set to *New*.
  - ° Now you will be able to *edit* the requisition.
- 2. Click on *Edit*.

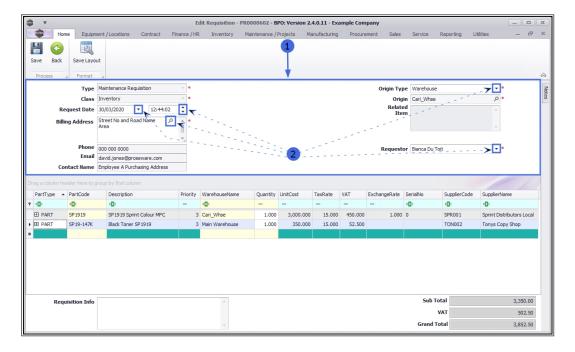
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	PR0000	0518	MAINT	N	Bianca	Du Toit	450.00	517.50	01/03/2018	14:13:16			Yes		



The *Edit Requisition* screen will be displayed.

### **EDIT REQUISITION HEADER INFORMATION**

- 1. In the *Requisition Header* frame, you have to the ability to edit the following fields:
  - Request Date and Time
  - Billing Address
  - Origin Type and Origin
  - Requestor
- Either use the drop-down *arrow* or the *search* button in the relevant field to open a *list* or a '*Select...*' screen from which you can pick an <u>alternative</u> field entry.



### **EDIT REQUISITION ITEMS FRAME**

In the Items Frame, you can edit the following:

Add Item

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Edit Item

Edit Item Supplier

Delete Item

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This Topic page is currently being updated, thank you for your patience. Please check back soon.



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