

PROCUREMENT

REQUISITION NOTES AND COMMENTS

Once you have created your purchase requisition, you may be required to **add** Notes and / or Comments.

- **Comments:** These are internal notes regarding the requisition.
- Notes: These are notes concerning orders to this supplier, which will pull through to the **Purchase Order**.

You <u>cannot</u> delete a Note / Comment. Each note or comment saved will be listed in the lower half of the Notes docking panel.

You <u>cannot</u> edit a current Note / Comment, only add to it.

Ribbon Access: *Procurement > Requisitions*



		¥					BPO:	Version 2.1.0.31 -	Example Co	mpany				-	۵	Х
9	Eq	upment and	Locations	Contract	Finance a	ndHR	Inventory	Maintenance a	nd Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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Supple	ers	Requisitions	_		Invoices	Debit Notes	Returns	Goods Received	Warranties							
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Select the Site and Status

Help v2.5.0.14 - Pg 2 - Printed: 25/06/2024



- Select the *Site*.
 - In this image *Durban* has been selected.
- Select the *Status*.
 - In this image the status has been set to *New*.



Home Equ	ioment and	Locations			-	BPO: Version 2.1.	and the second	Company Procurement Sales Se	nvice Reporting Utility	0 > e - 0
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PRCode *	PRType	Status	EmployeeNumber	FrstName	LastName	EventDate	EventTime	Comments	Notes	SupplerExist
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E PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20			Yes
■ PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48			Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Test 2.1.0.4 Procurem	Test 2.1.0.4 Procure	
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50			Yes
E PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33		Please phone with la	
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	procurement from a c	procurement from a	
E PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde	and the second second states in the	
E PR0000366	MAINT	N	MU0001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone		1.44
E PR0000367	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:34:00	OTC procurement v2		
PR0000368	MAINT	N	MUD001	Mark	Mudderveid	17 May 2017	16:30:38	stock report procurem		
E PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47	v2.1.0.4 stock report	v2.1.0.4 stock repor	Yes
	MAINT	N	MU0001	Mark	Mudderveld	17 May 2017	16:42:55			Yes
E PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	call procurement v2.1	call procurement v2	Yes
■ PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Project procurement 2	Project procurement	Yes
E PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43			No
B PR0000381	MAINT	N	DUT001	Susan	Du Tolt	18 May 2017	12:02:58			Yes
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			Yes
E PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09			Yes
B PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
000000ana	MATHIT	N	M 0001	Mark	Moderald	10 May 2017	17-54-17			Yee



VIEW REQUISITION NOTES AND COMMENTS

Select the row of the row of the *purchase requisition* where you wish to *view* the notes and comments.

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Ŧ	PR0000356	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Please ph	1 609.96	No d	Yes	1 835.35	Warehouse	HOP001
Ŧ	PR0000357	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017		1 609.96		Yes	1 835.35	Warehouse	HOP001
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	PR0000361	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017		1 700.00		Yes	1 700.00	Warehouse	HOP001
Ŧ	PR0000362	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Please p	1 834.96	Plea	Yes	2 091.85	Warehouse	HOP001
	PR0000363	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	procurem	1 834.96	procu	Yes	2 091.85	Warehouse	HOP001
ŧ	PR0000364	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Standalo	1 334.96	Stan	Yes	1 451.85	Warehouse	
	PR0000368	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	stock rep	5 209.26	stock	Yes	5 938.56	Warehouse	
ŧ	PR0000369	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	v2.1.0.4	969.92	v2.1	Yes	1 105.71	Warehouse	
Ŧ	PR0000370	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017		4 500.00		Yes	5 130.00	Warehouse	
Ŧ	PR0000374	MAINT	N	MUD001	Judith	Mudzengi	18 May 2017	call procu	809.96	call p	Yes	923.35	Warehouse	HOP001
Ŧ	PR0000386	MAINT	N	MUD001	Judith	Mudzengi	18 May 2017		809.96		Yes	923.35	Warehouse	
ŧ	PR0000366	MAINT	N	MIL001	Abigail	Milne	17 May 2017	v2.1.0.4	5 750.00	v2.1	Yes	6 555.00	Warehouse	
÷	PR0000377	MAINT	N.	MUD001	Judith	Mudzengi	18 May 2017	Keep prin	6 490.00	Telep	Yes	7 398.60	Warehouse	HOP001
+	PR0000380	MAINT	Ν	DUT001	Bianca	Du Toit	18 May 2017		0.00		No	0.00	Warehouse	
	PR0000381	MAINT	N	DUT001	Bianca	Du Toit	18 May 2017		4 500.00		Yes	5 130.00	Warehouse	
	PR0000396	MAINT	N	DUT001	Bianca	Du Toit	19 May 2017	2	490.00	2	Yes	490.00	Warehouse	HOP001
	PR0000397	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		1 6 19.92		Yes	1 846.71	Warehouse	
	PR0000398	MAINT	N	MUD001	Judith	Mudzengi	19 May 2017		1 419.92		Yes	1 618.71	Warehouse	
	PR0000400	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		200.00		Yes	228.00	Warehouse	
	PR0000404	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		4 500.00		Yes	5 130.00	Warehouse	
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• Click on *View*.

The *Edit Requisition* screen will be displayed.

- As you navigated to this screen via the *View* button, you will note that there is only a *Back* processing button here (and no *Save* button) therefore you cannot make or save any changes.
- 2. Click on the *Notes* tab on the right hand side of the screen.



	Ŧ			Edit R	equisition - PR000	0377 - BPO: \	/ersion 2.1.0.6	9 - Example	Company	r		553		×
0	Home	Equipment a	nd Locations Contract	t Finance and	HR Inventory I	Maintenance a	nd Projects M	lanufacturin	g Procure	ment Sales	Service I	Reporting Utilitie	s —	8 3
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		Class	Inventory		* *				Origin	Main Warehou	ise	*		
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		Phone	000 000 0000	_					Pequesto	Judith Mudzer	nai	- *		
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	Co	ntact Name	Employee A Purchasin											
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Parto	Code	PartType	Description	Priority	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	Suppli	ierName
	020-1470	DIDT	Cyan toner SP2020		Main Warehouse	1.00	450.00	14.00	63.00	1.00	0	SPR001		t Distrib
	020-147C		Black toner SP2020		Main Warehouse	4.00			43,40	1.00		SUP001	- Contraction	ack Sup
	P1919	PART	SP 1919 Sprint Colour M		Main Warehouse	4.00			672.00	1.00		SPR001		Distrib
E St	1919	PART	SP 1919 Sprint Colour M	ru 3	Main Warehouse	1.00	4 800.00	14.00	672.00	1.00	0	SPROUI	sprint	DISUID
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- 1. The *Notes* docking panel will be displayed.
- 2. *Expand* this panel to make it easier to work in.



	-			Edit R	Requisition - PR000	00377 - BPO: \	/ersion 2.1.0.69) - Example	2 Company						×	į.
0	Home	Equipment ar	nd Locations Contract	Finance and	HR Inventory	Maintenance ar	nd Projects M	lanufacturin	g Procure	ment Sales	Service	e Reporting	Utilities	- 6	5	×
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			Inventory		* *					Main Warehou		Note			_	
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		ng Address			•	-		2	Item						×	
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		Email	employeea@company.c	co.za							K F	Keep printed o Purchase Orde	opy of PR with er.	1	*	í
	Cor	itact Name	Employee A Purchasing	Address												4
9	PartCode		Description	Priority	WarehouseName	Quantity	UnitCost	TaxRate		ExchangeRate			header here	1		
	± 2020-147C		Cyan toner SP2020		Main Warehouse	1.00				1.00		Version	Comment	S	Not	1
	± 2020-147K		Black toner SP2020		Main Warehouse	4.00				1.00	× .	7				4
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00	en Windows 🔻									draild rot	"L		06 Jan 20	10	*	į

 In the *Notes* docking panel you can view all the *previous* Notes and Comments

Note: These past Notes and Comments <u>cannot</u> be deleted or edited, just viewed for information.

- 2. In this screen, you can also view the *current* Notes and Comments.
- 3. When you are finished viewing the details, click on *Back* to return to the *Purchase Requisition Listing* screen.



		Edit F	equisition - PR000	0377 - BPO: Version 2.	1.0.69 - Example C	vnsanv	_	
Home Equipment	and Locations Contract		•			Procurement Sales Service	Reporting Utiliti	es - 8
Back Format	-3		inc alvenory	ininternance and in open			reporting Outo	
Ту	Maintenance Requisition	on	* *	Notes				+
Cla	s Inventory		× •	- Note				
Request Da	te 18 May 2017 •	11:48:59 AM	i /	Telephonic confirmat	ion before goods ar	e delivered.		
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Ema		.co.za		Keep printed copy o	PR with Purchase C	order.		
Contact Nan	Employee A Purchasin	g Address						
	Cyan toner SP2020	3	Main Warehouse	Version Comme		Notes	NoteDate	ContactName
	Black toner SP2020	3	Main Warehouse	۲	/	*		
E SP1919 PART	SP 19 19 Sprint Colour M	IFC 3	Main Warehouse	1 Project	procurement 2.1.0.	4 Project procurement 2.1.0.4	18 May 2017	Judith Mud
				2 Project	procurement 2.1.0.	4 Project procurement 2.1.0.4	20 Sep 2018	Abigail Milne
						4 Project procurement 2.1.0.4	20 Sep 2018	Abigail Milne
						Telephonic confirmation before		Abigail Milne
			/			Telephonic confirmation before		Abigail Milne
				Contraction of the second		Telephonic confirmation before		Abigail Milne
						Telephonic confirmation before		Abigail Milne
						Telephonic confirmation before		Abigail Milne
				9 Keep pi	inted copy of PR wil	 Telephonic confirmation before 	10 Jan 2019	Abigail Milne
Requisition In	fo							

ADD REQUISITION NOTES AND COMMENTS

In the *Purchase Requisition Listing* screen,

- Select the *row* of the *purchase requisition* where you wish *add* Comments and/or Notes.
- Click on *Edit*.



Ho	ome Equ	uipment ar	id Location	ns Contract Fir	nance and H	R Inventor	ry Maintenance	and Projects	Manufacturin	g Proci	irement Sale	s Service	Reporting Utilitie	s – 🗗
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Add	Edit D	elete V	iew I	Hold Release /	Approve D	edine Sa	ve Layout Work	spaces P	rint Export	New	•	Refresh		
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PRCode		PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	Comments	ExdCost	Notes	SupplierExist	IndCost	SourceTypeDesc	CustomerCoo
E PR00	00356	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Please ph	1 609.96	No d	Yes	1 835.35	Warehouse	HOP001
	00357	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017		1 609.96		Yes	1 835.35	Warehouse	HOP001
🗉 PR00	00358	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Please p	1 834.96	Plea	Yes	2 091.85	Warehouse	HOP001
B PR00	00359	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	Test 2.1	1 834.96	Test	Yes	2 091.85	Warehouse	HOP001
B PROO	00360	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017		1 700.00		Yes	1 700.00	Warehouse	HOP001
PR00	00361	MAINT	Ν	MUD001	Judith	Mudzengi	17 May 2017		1 700.00		Yes	1 700.00	Warehouse	HOP001
	00362	MAINT	Ν	MUD001	Judith	Mudzengi	17 May 2017	Please p	1 834.96	Plea	Yes	2 091.85	Warehouse	HOP001
E PROO	00363	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	procurem	1 834.96	procu	Yes	2 091.85	Warehouse	HOP001
	00364	MAINT	Ν	MUD001	Judith	Mudzengi	17 May 2017	Standalo	1 334.96	Stan	Yes	1 451.85	Warehouse	
E PROO	00368	MAINT	Ν	MUD001	Judith	Mudzengi	17 May 2017	stock rep	5 209,26	stock	Yes	5 938.56	Warehouse	
	00369	MAINT	N	MUD001	Judith	Mudzengi	17 May 2017	v2.1.0.4	969.92	v2.1	Yes	1 105.71	Warehouse	
	00370	MAINT	Ν	MUD001	Judith	Mudzengi	17 May 2017		4 500.00		Yes	5 130.00	Warehouse	
	00374	MAINT	Ν	MUD001	Judith	Mudzengi	18 May 2017	call procu	809.96	call p	Yes	923.35	Warehouse	HOP001
	00386	MAINT	Ν	MUD001	Judith	Mudzengi	18 May 2017		809.96		Yes	923.35	Warehouse	
	00366	MAINT	Ν	MIL001	Abigail	Milne	17 May 2017	v2.1.0.4	5 750.00	v2.1	Yes	6 555.00	Warehouse	
	00377	MAINT	N	MUD001	Judith	Mudzengi	18 May 2017	Keep prin	6 490.00	Telep	Yes	7 398.60	Warehouse	HOP001
PR00	00380	MAINT	Ν	DUT001	Bianca	Du Toit	18 May 2017		0.00		No	0.00	Warehouse	
PR00	00381	MAINT	N	DUT001	Bianca	Du Toit	18 May 2017		4 500.00		Yes	5 130.00	Warehouse	
PR00	00396	MAINT	N	DUT001	Bianca	Du Toit	19 May 2017	2	490.00	2	Yes	490.00	Warehouse	HOP001
B PR00	00397	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		1 6 19.92		Yes	1 846.71	Warehouse	
B PROO	00398	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		1 419.92		Yes	1 6 18.71	Warehouse	
B PR00	00400	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		200.00		Yes	228.00	Warehouse	
B PR00	00404	MAINT	Ν	MUD001	Judith	Mudzengi	19 May 2017		4 500.00		Yes	5 130.00	Warehouse	
B PR00	00405	MAINT	N	MUD001	Judith	Mudzengi	19 May 2017	retest	4 500.00	retest	Yes	5 130.00	Warehouse	
DD DD DD	00407	MAINT	N	MUD001	Judith	Mudzenci	10 May 2017		650.00		Ver	713 00	Warehouse	

The *Edit Requisition* screen will be displayed.

- As you navigated to this screen via the *Edit* button, you will note that there is now a *Save* processing button here as well as a *Back* button. You can make and save changes in this screen.
- 2. Click on the *Notes* tab on the right hand side of the screen.



	-			Edit R	equisition - PR000	00377 - BPO: \	/ersion 2.1.0.6) - Example	Company	1				\times
Q	Home	Equipment an	d Locations Contract Fi	nance and	HR Inventory	Maintenance a	nd Projects M	lanufacturin	g Procure	ement Sales	Service Re	eporting Utilities	-	5
Sa	ave Back	Save Layo	ut									2		
		Туре	Maintenance Requisition		* *			C	rigin Type	Warehouse		•	-	-
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	Cor	ntact Name	Employee A Purchasing Add	dress										
1	PartCode	PartType	Description	Priority	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	Supplie	rName
	± 2020-147C	PART	Cyan toner SP2020	3	Main Warehouse	1.00	450.00	14.00	63.00	1.00	0	SPR001	Sprint	Distrib
E	± 2020-147K		Black toner SP2020	3	Main Warehouse	4.00	310.00	14.00	43.40	1.00	0	SUP001	Buy Ba	
E	± SP1919	PART	SP 1919 Sprint Colour MFC	3	Main Warehouse	1.00	4 800.00	14.00	672.00	1.00	0	SPR001	Sprint [Distrib
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- 1. The *Notes* docking panel will be displayed.
- 2. *Expand* this panel to make it easier to work in.



			Edit R	equisition - PR00	00377 - BPO: \	√ersion 2.1.0.6	9 - Example	Company				- 🗆	\times
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Cor	tact Name	Employee A Purchasin		-						P	urchase o	irder.	
PartCode		Description		WarehouseName		UnitCost			ExchangeRate	1		umn header here to gro	wer
E 2020-147C	PART	Cvan toner SP2020	3	Main Warehouse	1.00	450.00	14.00	63.00	1.00	0	Version	Comments	
	PART	Black toner SP2020	3	Main Warehouse	4.00	310.00	14.00	43.40	1.00	0 9	,		
⊞ SP1919	PART	SP 1919 Sprint Colour M	IFC 3	Main Warehouse	1.00	4 800.00	14.00	672.00	1.00	0,	1	Project procurement	2.1.
		i									2	2 Project procurement	2.1.
											3	Project procurement	2.1.
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											8	8 Keep printed copy of	PRI
												Keep printed copy of	PR 1
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Requ	isition Info				A								
									VA	AT			
									Grand Tot	al	\sim	-	+
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ADD TO EXISTING NOTES AND/OR COMMENTS

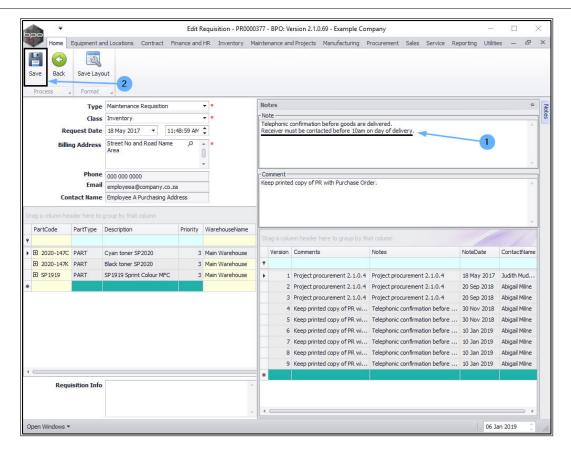
- 1. In this images you can see that there is <u>already</u> text in the current frames.
- If you wish to keep these current and *add* to them, place your *cursor* at the end of the existing text in the relevant frame. Either start typing there or press *Enter* on your keyboard to move onto a new line.



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- 1. In this image the *new* text has been typed on the next line.
- 2. Click on *Save*.





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



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- A *Report Generation* message box will pop up asking;
 - Do you want to print the requisition []?
- Click on **Yes** or **No** as required.



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CREATE NEW NOTE AND/OR COMMENT

In the *Purchase Requisition Listing* screen.

- Select the row of the *purchase requisition* where you wish to add a *new* Note and/or Comment.
- Click on *Edit*.



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The *Edit Requisition* screen will be displayed.



- As you navigated to this screen via the *Edit* button, you will note that there is now a *Save* processing button here as well as a *Back* button. You can make and save changes in this screen.
- 2. Click on the *Notes* tab on the right hand side of the screen.

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- 1. The *Notes* docking panel will be displayed.
- 2. *Expand* this panel to make it easier to work in.



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1. In this image you can see that there is <u>already</u> text in the current frames.

To *remove* this text and create a *new* Note or Comment,

Either

- 2. *highlight* the text and press *Delete* on your keyboard
- 3. or place your *cursor* at the end of the existing text in the relevant frame and press *Backspace* on your keyboard until you have deleted the required text.



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- 1. The *lower* frame will keep a record of all Notes and Comments.
- Place your *cursor* in the now empty frame and type in the new Note and/ or Comment.



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SAVE NOTE/COMMENT

- 1. When you have finished typing in the *new* Note and/or Comment,
- 2. click on Save.



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



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PRINT REQUISITION

- A *Report Generation* message box will pop up asking;
- Do you want to print the requisition[]?
- Click on *Yes* or *No* according to your requirements.
 - Yes: Follow the Print Purchase Requisition process.
 - No: You will return to the *Purchase Requisition Listing* screen.



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