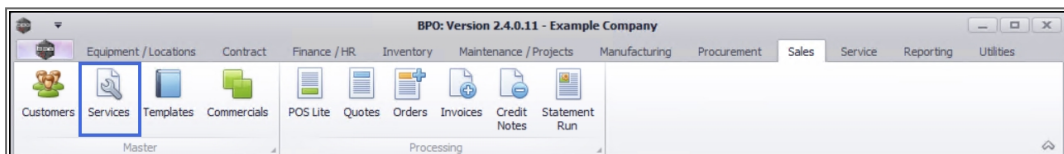


# SALES

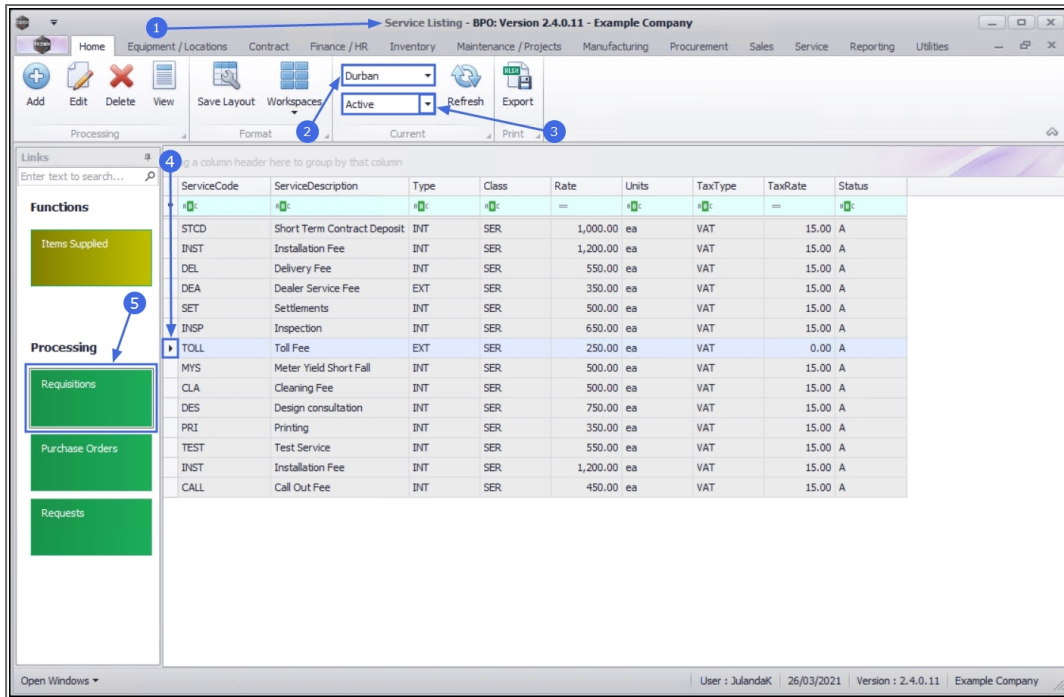
## SERVICES – PURCHASE REQUISITIONS

A Service Request gets raised for a Purchase Requisition and Purchase Order for a Third Party Sub-Contracting Service. For example where a service that a Customer requires, but needs to be performed by another company.

**Ribbon Access:** *Sales > Services*



1. The **Service Listing** screen will be displayed.
2. Select the **Site** where the service can be located.
  - The example has **Durban** selected.
3. Select the **Status** for the service.
  - The example has **Active** selected.
4. Click on the **row** of the **service** you wish to list purchase requisitions for.
5. Click on the **Requisitions** tab.



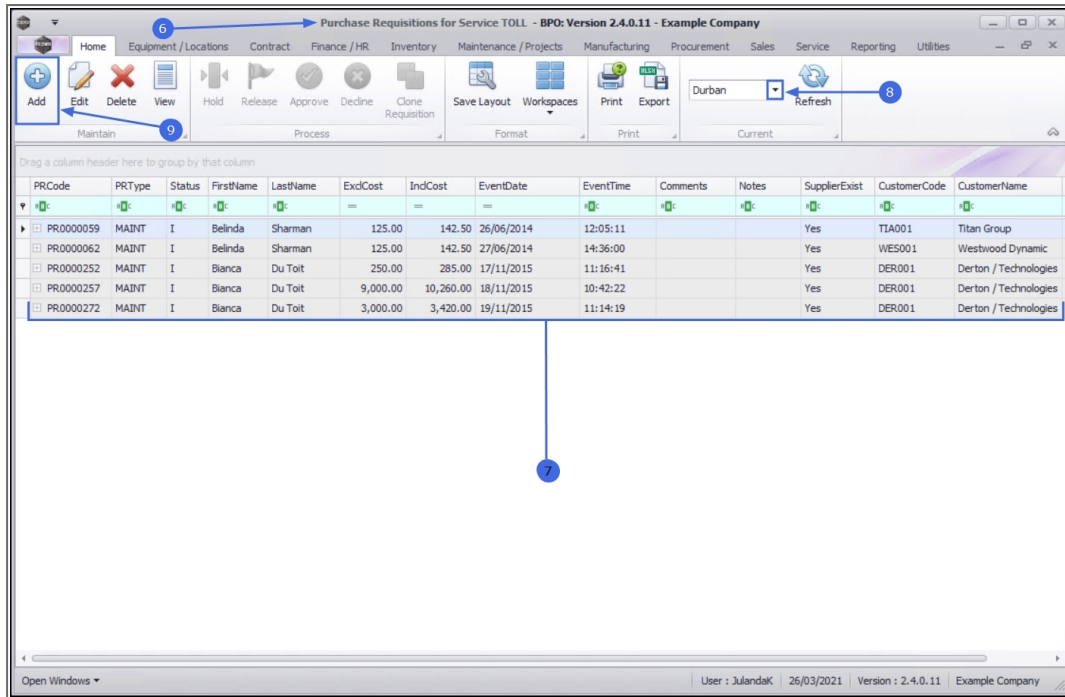
6. The **Purchase Requisitions for Service** [service code] list screen will be displayed.
7. All the services that have been created for the created will display on the screen.
8. Ensure that the correct **Site** has been selected, or
  - Change the **Site** if you wish to add a requisition for a service located on another site.

## ADD PURCHASE REQUISITION FOR SERVICE

9. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



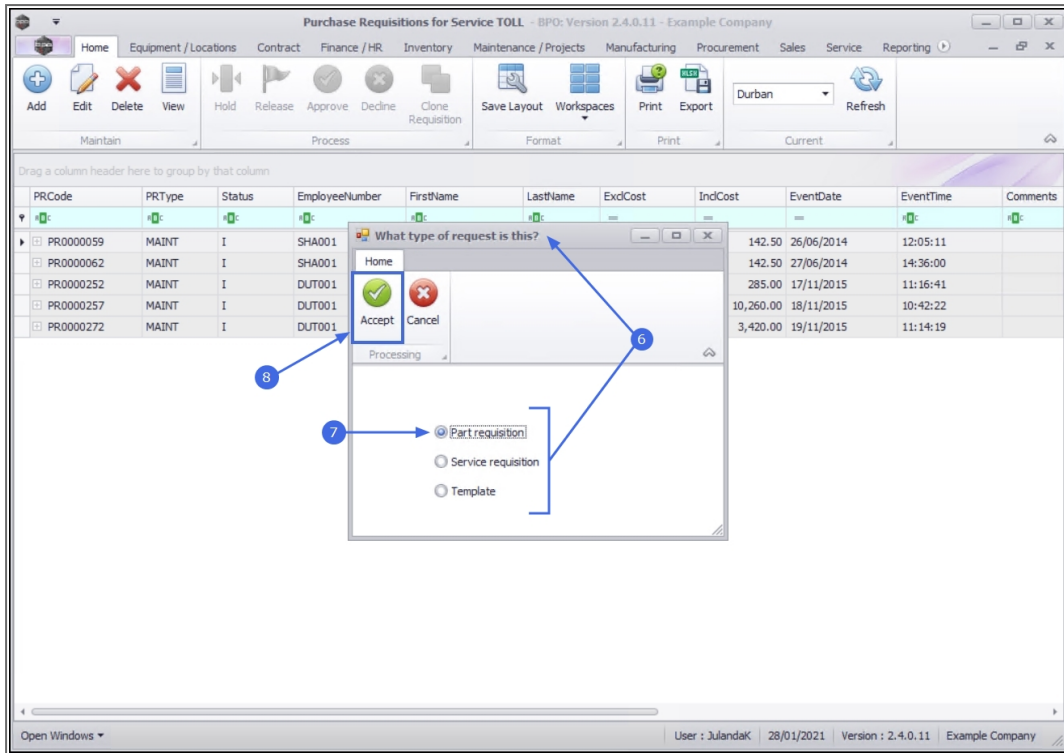
10. The **What type of request is this?** message will be displayed.

- Requisition options available on the screen;
  - **Part requisition** - select this option if you are creating a Part Requisition for a service.
  - **Service requisition** - select this option if you are creating a Service Requisition.
  - **Template** - select this option if you use a template to base the requisition on a preloaded Requisition Template.

11. Click on the radio **button** of the option you require.

- The example has **Part requisition** selected.

12. Click on **Accepted**.



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

14. Complete the Part or Service Requisition and then click on **Save**.

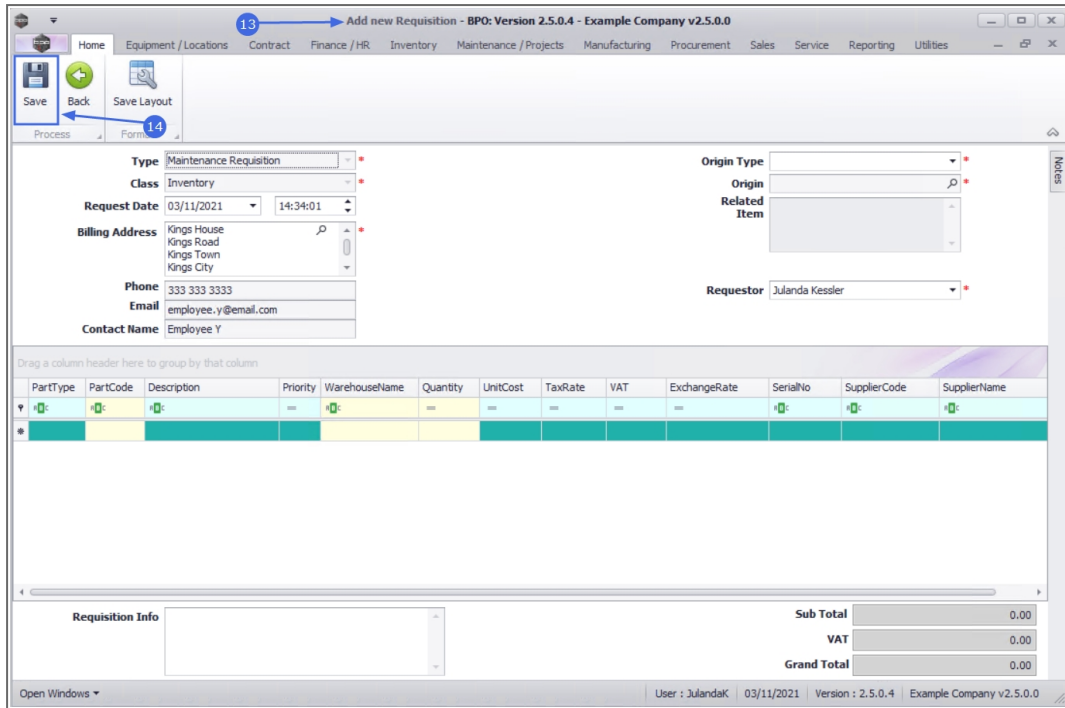


For details on completing the **Part Requisition** refer to [Requisitions - Add, Edit, Delete Item Supplier](#)



For details on completing the **Service Requisition** refer to [Service Requests - Add Service Request](#)





## EDIT PURCHASE REQUISITION

1. From the *Purchase Requisitions for Service [service code]* screen,
2. Click on the **row** of the Purchase Requisition you wish to edit.
3. Click on **Edit**.



Short cut key: **Right click** to display the *Process* menu list. Click on **Edit**.

PRCode	PRTtype	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime	Comm
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	1,000.00	1,140.00	24/05/2017	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	
PR0000576	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	06/09/2018	16:39:04	

4. The **Edit Requisition - [requisition number]** screen will be displayed.
5. The example has a **Delivery Fee** added to the Requisition.
6. After making the relevant changes to the Requisition, click on **Save**.



For details on completing the **Part Requisition** refer to [Requisitions - Add, Edit, Delete Item Supplier](#)



For details on completing the **Service Requisition** refer to [Service Requests - Add Service Request](#)

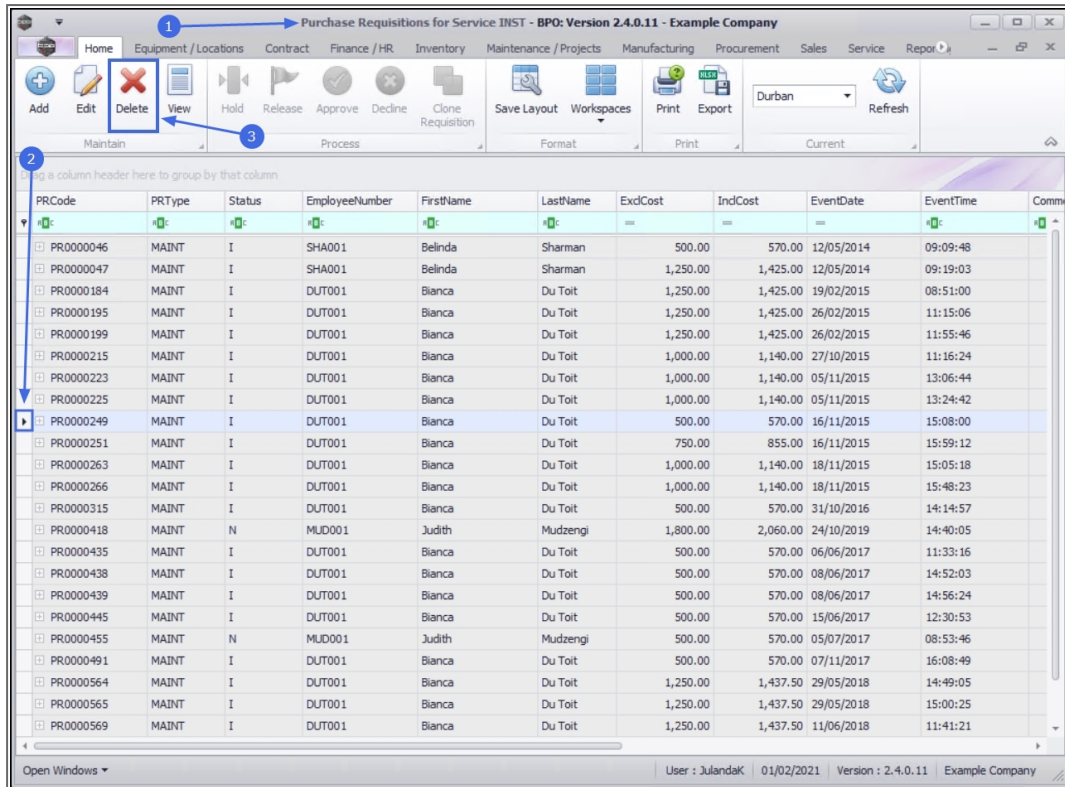
## DELETE A PURCHASE REQUISITION

By deleting a requisition, you are in fact *Closing* the Requisition by changing the Status to C.

1. From the **Purchase Requisitions for Service PR[requisition number]** screen,
2. Click on the **row** of the Purchase Requisition you wish to close.
3. Click on **Delete**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



PRCode	PRTtype	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime	Comm
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

4. When you receive the **Confirm close** message;

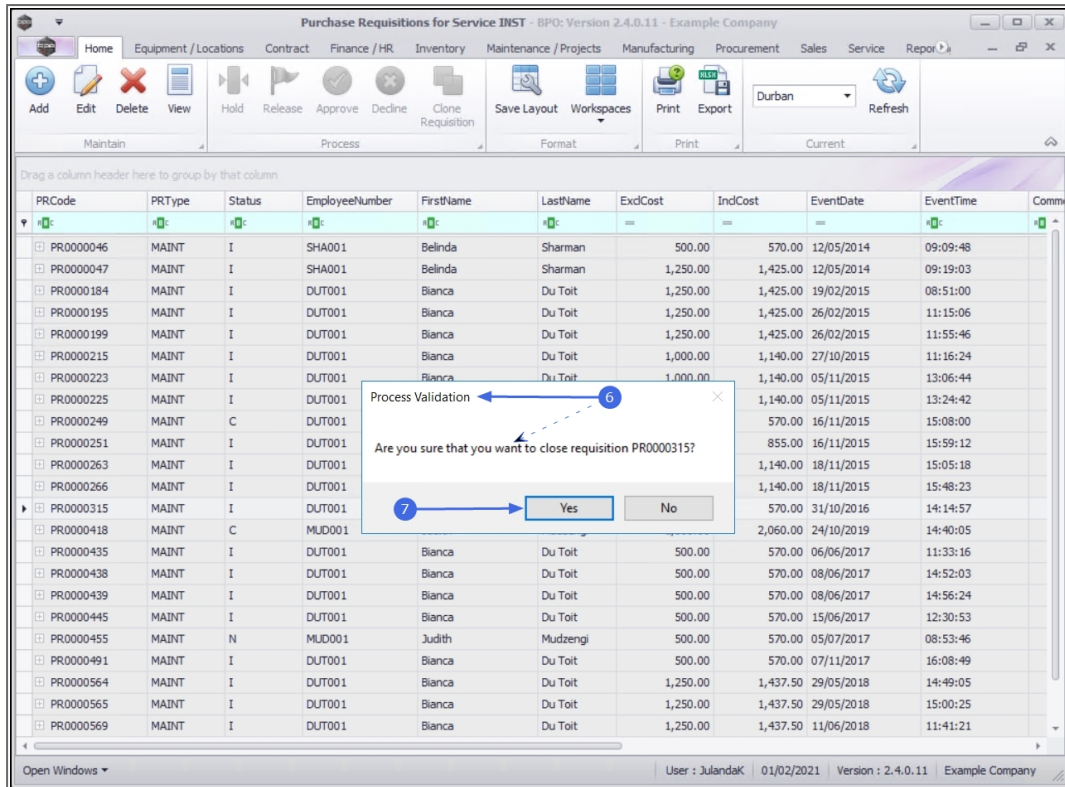
- **Are you sure you want to close this purchase requisition (PR)?**

5. Click on **Yes** if you are certain about your selection.

The screenshot displays the 'Purchase Requisitions for Service INST' application window. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, and Reports. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Hold, Release, Approve, Decline, Clone Requisition, Save Layout, Workspaces, Print, Export, and Refresh. The main area shows a table of purchase requisitions with columns for PRCode, PRTtype, Status, EmployeeNumber, FirstName, LastName, ExclCost, IndCost, EventDate, and EventTime. A confirmation dialog box is overlaid on the table, asking 'Are you sure you want to close this purchase requisition(PR)?' with 'Yes' and 'No' buttons. Blue arrows and numbers (4 and 5) indicate the flow of the process: arrow 4 points to the 'Confirm close' text, and arrow 5 points to the 'Yes' button.

PRCode	PRTtype	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,400.00	1,400.00	05/11/2015	13:06:44
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,400.00	1,400.00	05/11/2015	13:24:42
PR0000249	MAINT	I	DUT001	Bianca	Du Toit	570.00	570.00	16/11/2015	15:08:00
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	855.00	855.00	16/11/2015	15:59:12
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,400.00	1,400.00	18/11/2015	15:05:18
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,400.00	1,400.00	18/11/2015	15:48:23
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	570.00	570.00	31/10/2016	14:14:57
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	360.00	360.00	24/10/2019	14:40:05
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21

6. You will next receive the **Process Validation** message to confirm;
  - **Are you sure that you want to close requisition [requisition number]?**
7. Click on **Yes** if you are certain about your selection.



8. Next, the **Requisition - Process** message will inform you that;

- **The requisition no. [requisition number], has been closed successfully.**

9. Click on **OK**.



Drag a column header here to group by that column

PRCode	PRTtype	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime	Comm
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	570.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	855.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	570.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzengi	060.00	060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

Requestion - Process

The requisition no. PR0000315, has been closed successfully.

OK

User : JulandaK 01/02/2021 Version : 2.4.0.11 Example Company

10. Note the Status has changed to **[C]** to indicate that the Purchase Requisition has been **Closed**.
11. Click the **Close** icon to return to the **Service Listing** Screen.

Purchase Requisitions for Service INST - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Report

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

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTtype	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime	Comm
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

Open Windows User : Julandak 01/02/2021 Version : 2.4.0.11 Example Company

## VIEW A PURCHASE REQUISITION

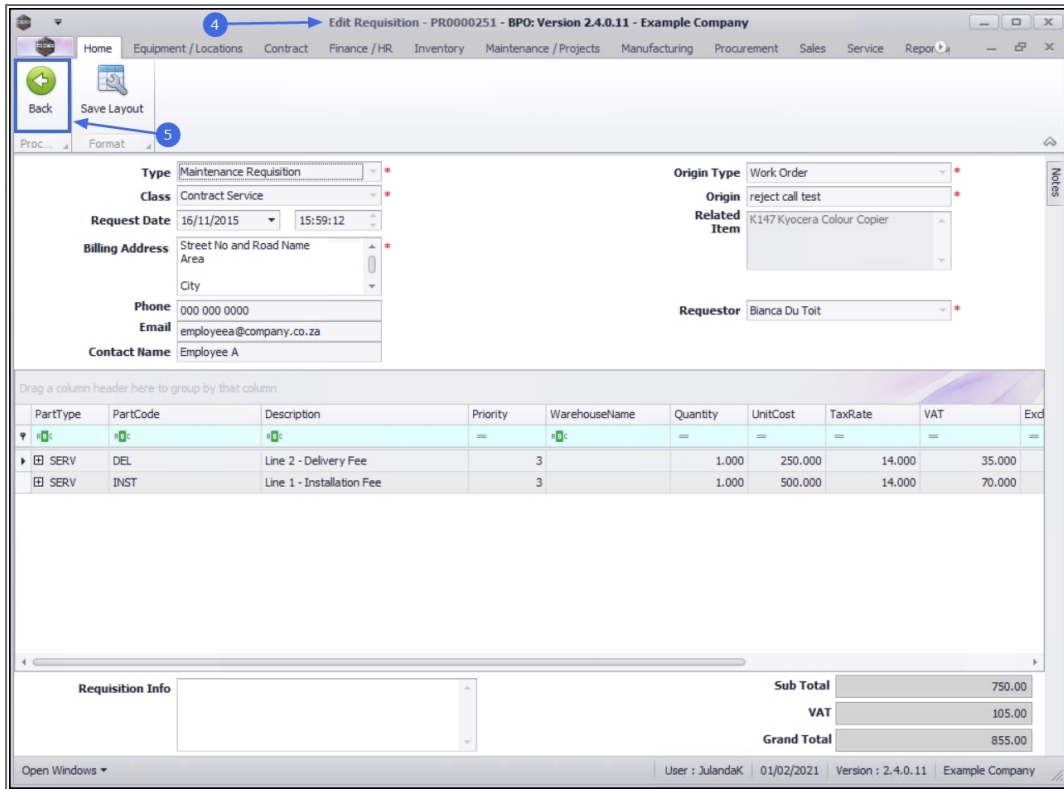
When viewing a purchase requisition, no changes can be made to the requisition information, it is view only.

1. From the **Purchase Requisitions for Service [requisition number]** screen,
2. Click on the **row** of the Purchase Requisition you wish to view.
3. Click on **View**.



PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExclCost	IndCost	EventDate	EventTime	Comm
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

- The **Edit Requisition - [requisition number]** screen will display the Requisition information for the requisition you have selected.
- Click on **Back** to return to the **Service Listing** screen.



## PLACE REQUISITION ON HOLD

A Purchase Requisition can only be placed on Hold when in the *Released* or *Approved* Status.

1. From the **Purchase Requisitions for Service** [service code] screen,
2. Click on the **row** of the requisition you wish to release for approval.

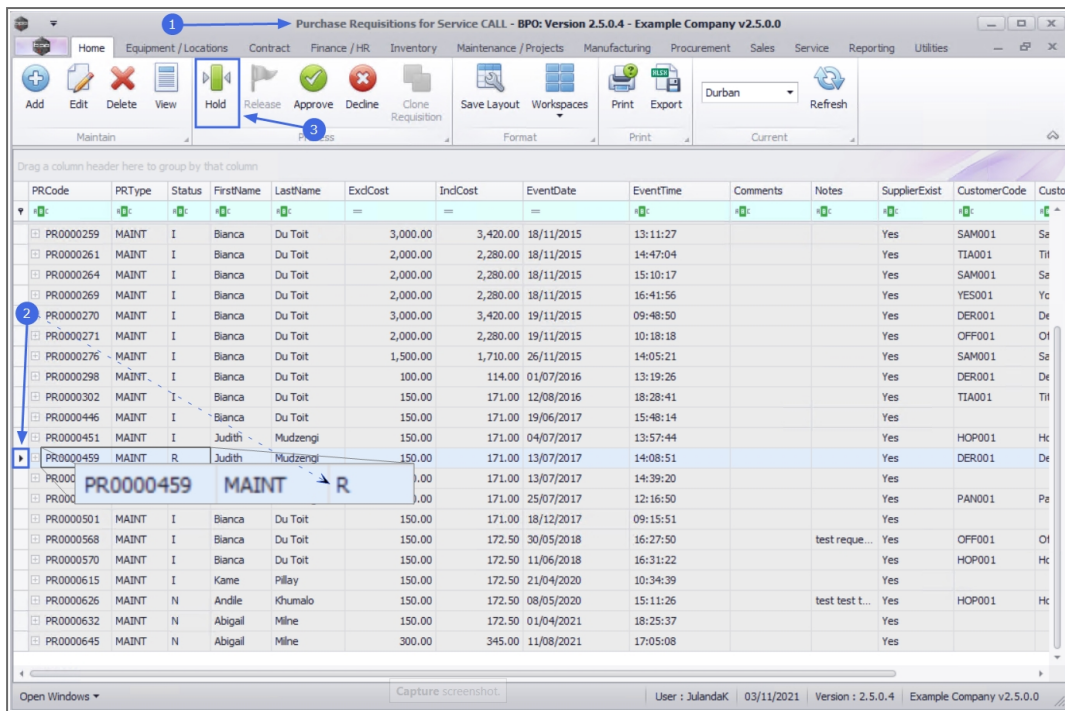


Note the Status for the example as R - Released

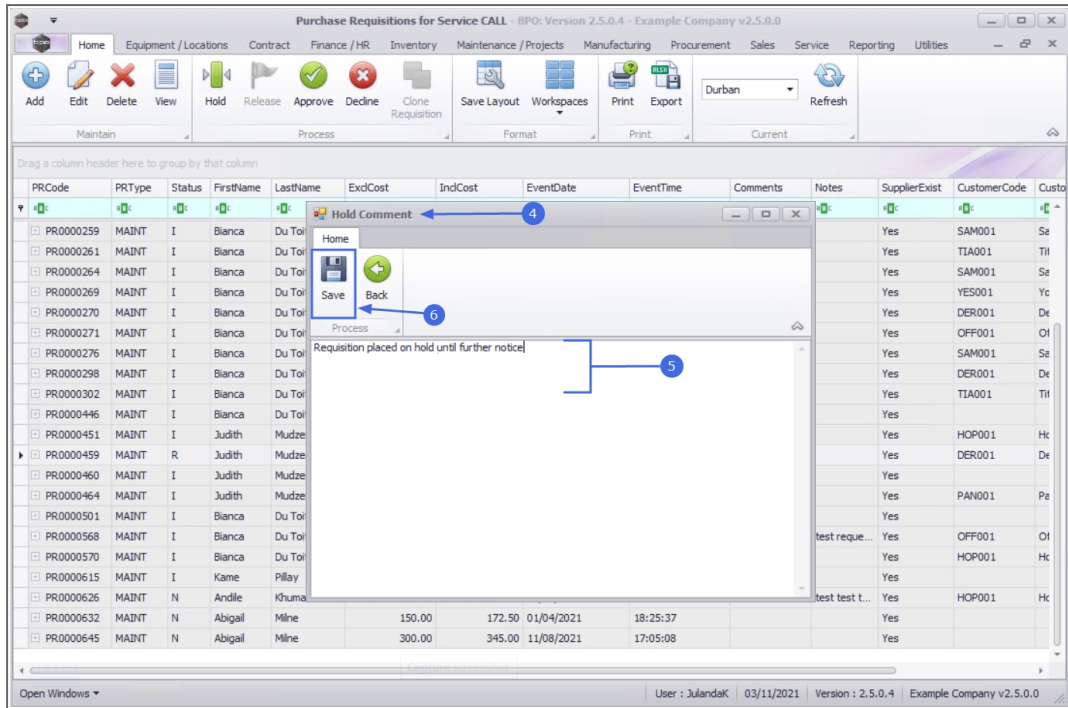
3. Click on **Hold**.



Short cut key: **Right click** on the row to display **Process** menu, click on **Hold**



4. When you receive the **Hold Comment** screen,
5. Click in the **text area** to type a **comment** or **reason** for placing the requisition on hold.
6. Click on **Save**.



7. When you receive the **Requisition - Process** message to confirm;
  - **The requisition no. [requisition number], has been placed on hold successfully.**
8. Click on **OK**.



Note the Status for the requisition that you have placed on *Hold* has changed to *New*.

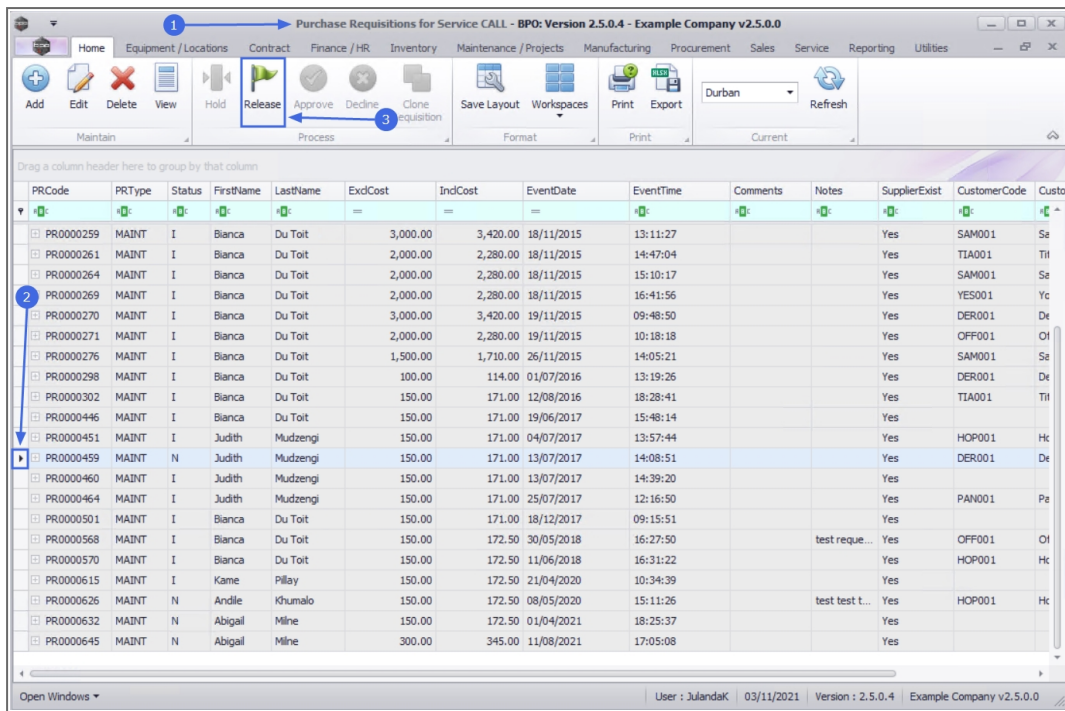
## RELEASE REQUISITION FOR APPROVAL

A Purchase Requisition can only be released for approval when the *total value* is more than R0, the items have a *quantity* greater than 0 and all *parts* have a supplier cost linked.

1. From the *Purchase Requisitions for Service [service code]* screen,
2. Click on the *row* of the requisition you wish to release for approval.
3. Click on *Release*.



Short cut key: *Right click* on the row to display *Process* menu, click on *Release*



4. When you receive the **Requisition - Process** message to confirm;
  - **The requisition no. [requisition number], has been released successfully.**
5. Click on **OK**.



**Purchase Requisitions for Service CALL - BPO: Version 2.5.0.4 - Example Company v2.5.0.0**

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

Add | Edit | Delete | View | Hold | Release | Approve | Decline | Clone Requisition | Save Layout | Workspaces | Print | Export | Durban | Refresh

Drag a column header here to group by that column

PRCode	PRType	Status	FirstName	LastName	ExcdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Sa
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Oi
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Sa
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes	HOP001	Hc
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Oi
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigal	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigal	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

Requisition - Process

The requisition no. PR0000459, has been released successfully.

OK

User : JulandaK | 03/11/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

6. The requisition status has changed from **N - New** to **R - Released**.

**Purchase Requisitions for Service CALL - BPO: Version 2.5.0.4 - Example Company v2.5.0.0**

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

Add | Edit | Delete | View | Hold | Release | Approve | Decline | Clone Requisition | Save Layout | Workspaces | Print | Export | Durban | Refresh

Drag a column header here to group by that column

PRCode	PRType	Status	FirstName	LastName	ExcdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Sa
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Oi
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Sa
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes	HOP001	Hc
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Oi
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigal	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigal	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

User : JulandaK | 03/11/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

## APPROVE REQUISITION

1. From the **Purchase Requisitions for Service [service code]** screen,
2. Click on the **row** of the requisition you wish to approve.
3. Click on **Approve**.

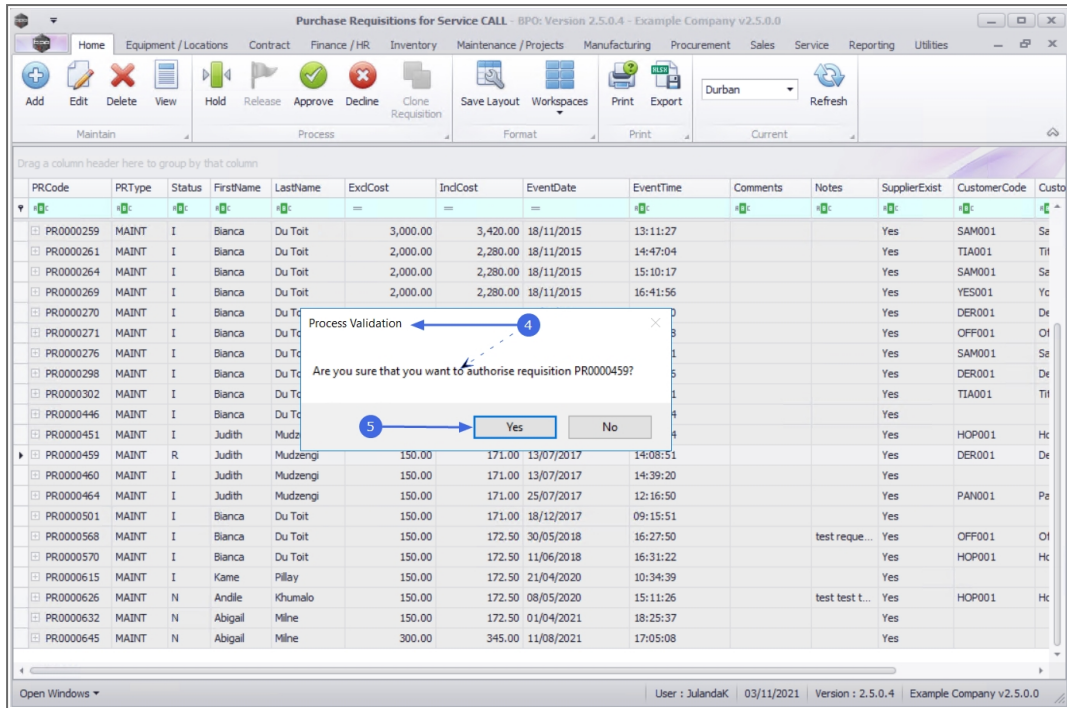
Short cut key: **Right click** on the row to display **Process** menu, click on **Approve**

PRCode	PRTType	Status	FirstName	LastName	ExclCost	InclCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Oi
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes		
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000460	MAINT	I	Judith	Mudzengi	150.00	171.00	13/07/2017	14:39:20			Yes		
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Oi
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigal	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

4. When you receive the **Process Validation** message to confirm;
  - **Are you sure that you want to authorise requisition PR [requisition number]?**
5. Click on **Yes**.

For a detailed handling of the topic refer to [Release for or Remove from Approval](#)



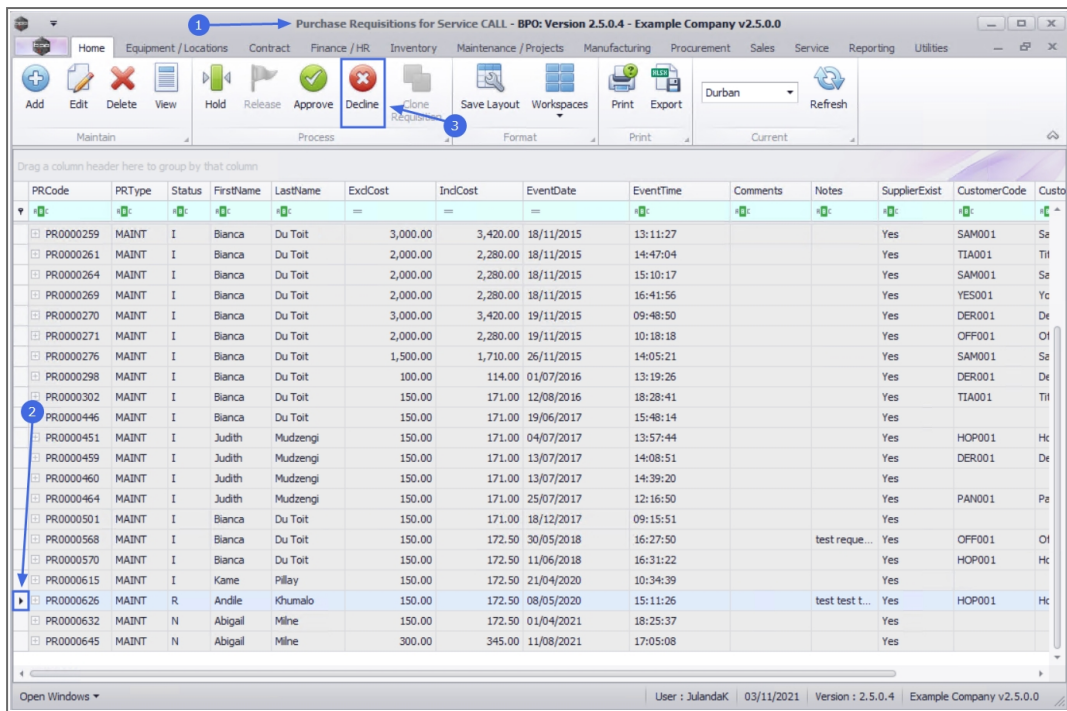


## DECLINE A PURCHASE REQUISITION

1. From the *Purchase Requisitions for Service [service code]* screen,
2. Click on the **row** of the requisition you wish to decline.
3. Click on **Decline**.



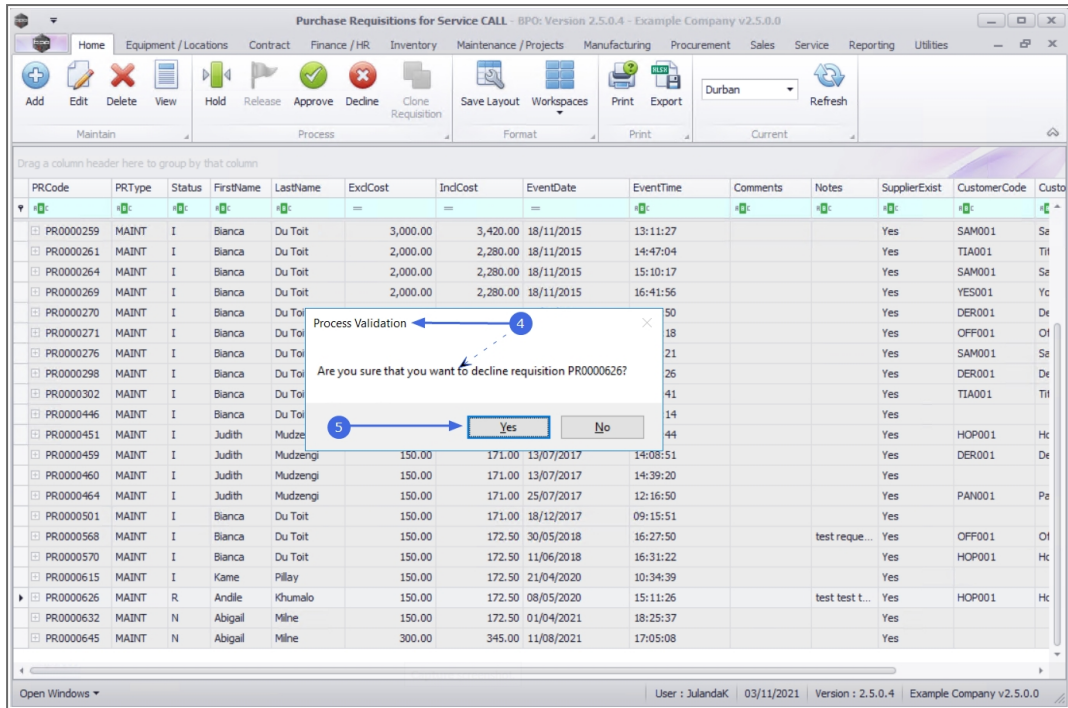
Short cut key: **Right click** on the row to display **Process** menu, click on **Decline**



4. When you receive the **Process Validation** message to confirm;
  - **Are you sure that you want to decline requisition [requisition number]?**
5. Click on **Yes**.



For a detailed handling of the topic refer to [Release for or Remove from Approval](#)



## CLONE REQUISITION

Only requisitions that originated from the Stock Status screen can be cloned.



Refer to [Parts - Requisitions - Clone Requisition](#) for information on how to Clone a Requisition.

MNU.065.005

