

We are currently updating our site; thank you for your patience.

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.

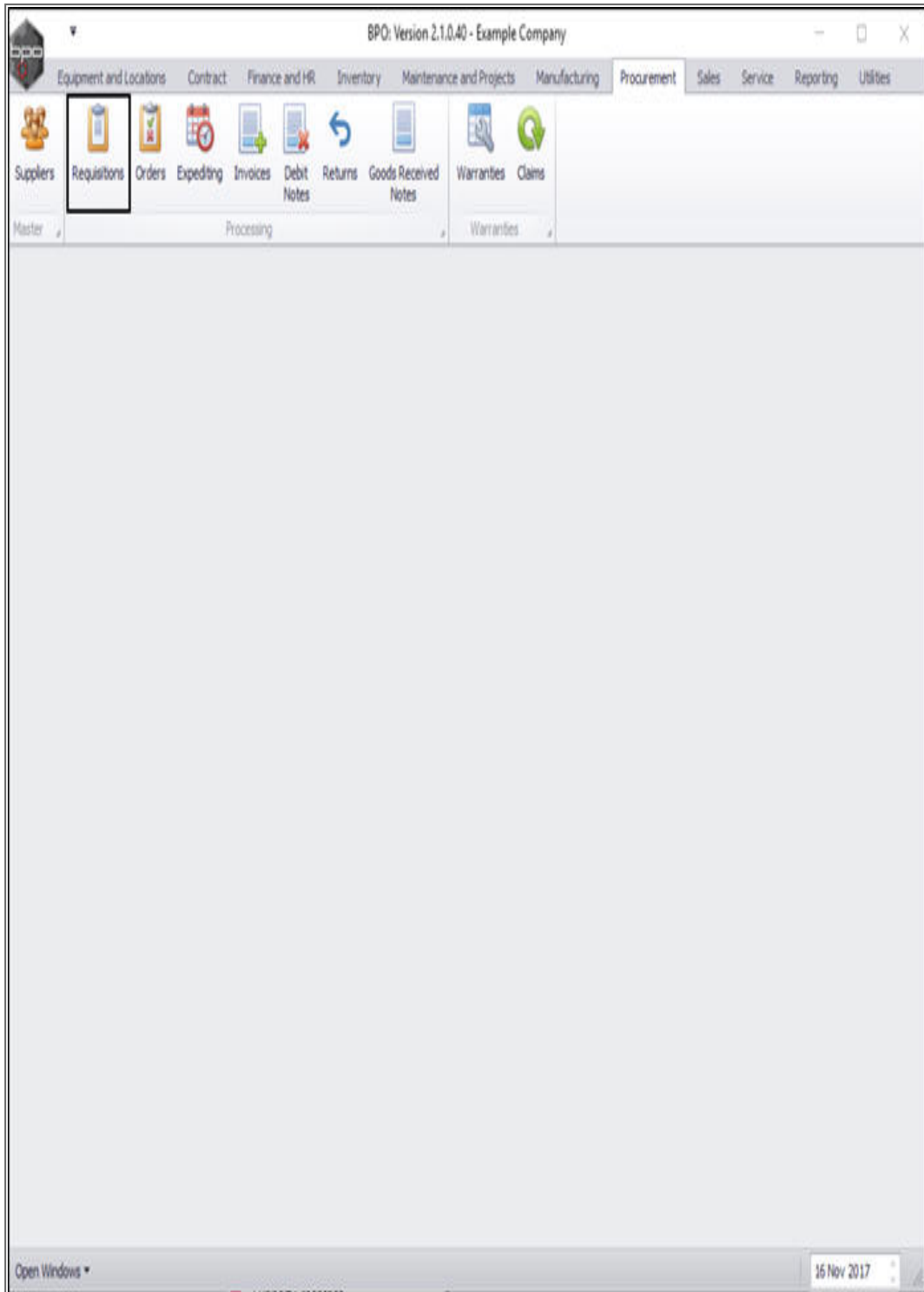
If the supplier has not previously been linked to the part, then a supplier will need to be added to the **purchase requisition**.

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.

Ribbon Access: Procurement > Requisitions



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	ABXYZ123	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**.

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 REQUISITION

- 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

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	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

- 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:

- Form 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: employee@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
- Data Grid:** A table with columns: PartType, PartCode, Description, Priority, WarehouseName, Quantity, UnitCost, ftdTaxRate, ftdVAT, ftdExchangeRate, SerialNo, SupplierCode, SupplierName. It contains two rows:

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
- Summary Table:**

Sub Total	1 600.00
VAT	224.00
Grand Total	1 824.00

- 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 displayed below the form:

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 Add Supplier' (highlighted) and 'Remove Remove Supplier'.

At the bottom right, a summary table shows:

- 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'.

- 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, 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:** Kloof
- Requestor:** Sarah Milder

Below the form is an 'Item Suppliers' table:

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

An 'Input Validation' dialog box is overlaid on the table, asking: 'Are you sure you want to add a supplier to this item INSP?'. The dialog has 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a black border.

At the bottom right, a summary table shows:

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'.

- 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 requisition 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
TOW001	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 - BPO: Version 2.1.041 - 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 the 'Item Suppliers' table, which lists two suppliers: 'SPR001 Sprint Distributors Local' and 'YES001 Young Electric'. The 'YES001' row is highlighted, indicating it is the newly added supplier. At the bottom right, a summary table shows 'Sub Total' (1 600.00), 'VAT' (224.00), and 'Grand Total' (1 824.00). The status bar at the bottom indicates 'Open Windows' and the date '28 Nov 2017'.

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	

Sub Total	1 600.00
VAT	224.00
Grand Total	1 824.00

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.

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 (Save, Back, Save Layout, Process, Format). 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), Contact Name (Employee A Purchasing Address).
- Origin and Requestor:** Origin Type (Work Order), Origin (1818-1-1 - Check netw*rk require...), Related Item (Roof), Requestor (Sarah Milder).
- Item Suppliers Table:** A table with columns: Supplier, SupplierName, SupplierItemCode, Currency, TaxRate, ExchangeRate, SelectedSupplier, UnitCost, LeadTime, QtyPerUOP, UnitOfPurchase. Two suppliers are listed: SPRO01 (Sprint Distributors Local) and YES001 (Young Electric).
- Summary:** Requisition Info, Sub Total (1 300.00), VAT (182.00), 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

- When you have finished adding the new item supplier details, 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

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

Requestor Sarah Milder

Item Suppliers

X	QuantityPerUOP	UnitOfPurchase	MinimumOrderQty	ContractNo	ContractPageNo	ContractPartNo	CatalogNo	BlanketPONo	ForwardContractNo	ManufacturerItemCode
	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

Open Windows
28 Nov 2017

PRINT REQUISITION - NO

- 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**.

The screenshot shows the 'Purchase Requisition Listing - BPO: Version 2.1.0.41 - Example Company' application window. The window has 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 is a toolbar with icons for Add, Edit, Delete, View, Hold, Release, Approve, Decline, Save Layout, Workspaces, Print, and Export. A dropdown menu is set to 'Durban' and a 'Refresh' button is visible.

The main area contains a table with the following columns: PRCode, PRType, Status, EmployeeNumber, FirstName, LastName, EventDate, EventTime, CustomerName, CustomerCode, and Notes. The table lists various requisitions, including those for Sarah Milder and Joseph Timber.

A 'Requisition Processing' dialog box is overlaid on the table, displaying the message: 'Requisition No. PR0000459 saved successfully.' with an 'OK' button.

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	

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

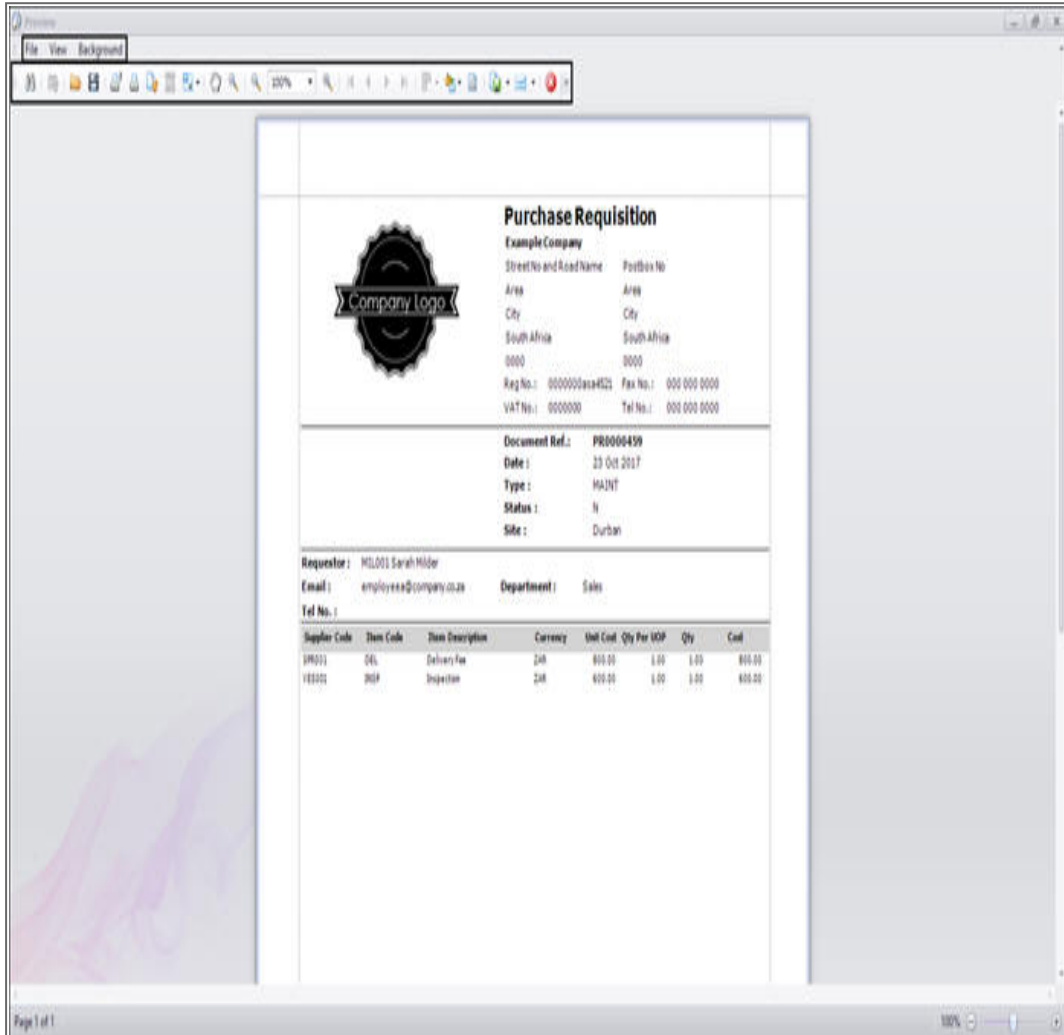
Yes
No

Requisition Info	Sub Total 1 300.00
	VAT 182.00
	Grand Total 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.



Purchase Requisition

Example Company

Street No and Road Name PostBox No
 Area Area
 City City
 South Africa South Africa
 0000 0000
 Reg No.: 0000000000000000 Fax No.: 000 000 0000
 VAT No.: 00000000 Tel No.: 000 000 0000

Document Ref.: PR0000439
 Date: 23 Oct 2017
 Type: MAINT
 Status: N
 Site: Durban

Requestor: MLO01 Sarah Milder
 Email: employee@company.co.za Department: Sales
 Tel No.:

Supplier Code	Item Code	Item Description	Currency	Unit Cost	Qty Per MOP	Qty	Cost
SP001	DEL	Delivery Fee	ZAR	800.00	1.00	1.00	800.00
YB001	IMP	Injection	ZAR	600.00	1.00	1.00	600.00

Page 1 of 1

- 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. CR0000
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.

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

Maintain Process Format Print

Drag a column header here to group by that column

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

Open Windows 28 Nov 2017

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

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

Status StatusDesc

- A Approved
- C Closed
- D Declined
- I Issued
- N New
- R Released

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
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 ABCY2123 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

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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	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	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 screenshot shows the 'Edit Requisition' window for 'PRO000459 - 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 several sections:

- Form 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 network require...
 - Related Item: Roof
 - Requestor: Sarah Milder
- Data Grid:**

Drag a column header here to group by that column

PartType	PartCode	Description	Priority	WarehouseName	Quantity	UnitCost	tdTaxRate	tdVAT	tdExchangeRate	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
- Summary Table:**

Requisition Info	Sub Total	1 400.00
	VAT	196.00
	Grand Total	1 596.00

- 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

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 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 several sections: '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), 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	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	

At the bottom right, a summary section shows:

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

The status bar at the bottom indicates '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

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

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 Table:

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

Summary Table:

Sub Total	1,400.00
VAT	196.00
Grand Total	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 network 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 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. A toolbar contains 'Save', 'Back', and 'Save Layout' buttons. The main form area is divided into several sections:

- 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:** (Empty field)
- Requestor:** Sarah Milder

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

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.

The screenshot shows the 'Edit Requisition' window for requisition 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).

Below the form is the 'Item Suppliers' table:

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	

A 'Report Generation' dialog box is open in the center, asking: 'Do you want to print the requisition PR0000459?'. It has 'Yes' and 'No' buttons.

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'.

- 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	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	

Open Windows | 28 Nov 2017

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**.

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 Supplier

Remove Supplier

Requisition Info

Sub Total 1 700.00

VAT 238.00

Grand Total 1 938.00

Open Windows ▾ 28 Nov 2017

CONFIRM DELETION

- 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

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

- 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

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

- 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
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PR0000434	MAINT	N	DUT001					Titan Group	TIA001	
PR0000433	MAINT	N	DUT001					Hope Works	HOP001	test
PR0000431	MAINT	N	MUD001					Hope Works	HOP001	
PR0000430	MAINT	N	DUT001					Hope Works	HOP001	
PR0000428	MAINT	N	DUT001					Hope Works	HOP001	
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	

MNU.053.001

