

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

## PROCUREMENT

### ADD A REQUISITION FROM PURCHASING TEMPLATE

Purchasing Templates can be created to preconfigure purchase requisitions to effectively generate bulk orders.

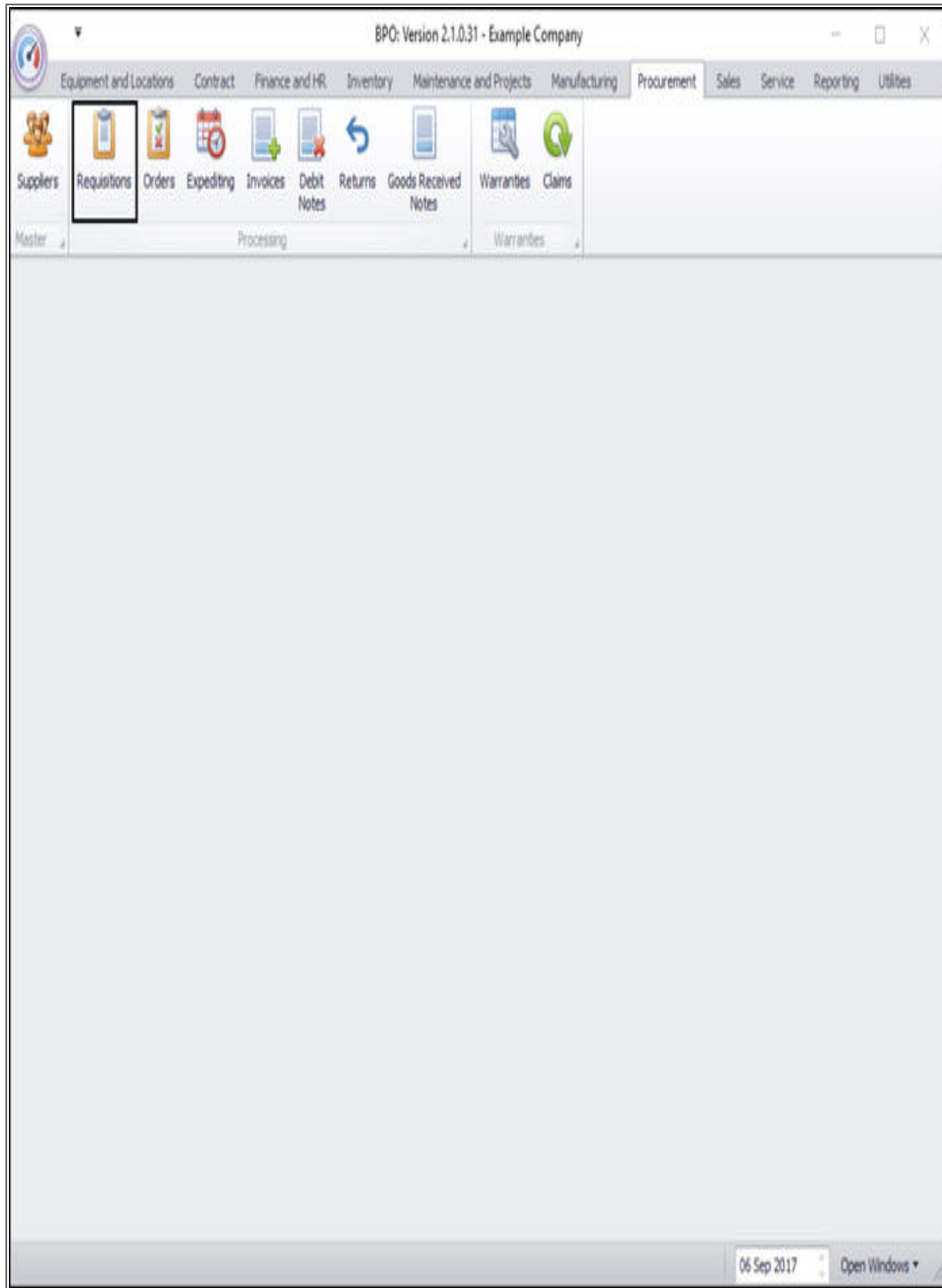


Refer to [Introduction to Purchasing Templates](#) for more information related to creating a Purchasing Template that can be used in the process below.

---

**Ribbon Access:** Procurement > Requisitions

---



Select the Site and Status

- Select the **Site** .
- In this image **Durban** has been selected.

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Custom
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
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
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
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35	
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
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group
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	
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19	
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
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18	
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40	

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

The screenshot shows the 'Purchase Requisition Listing - BPO: Version 2.1.0.40 - Example Company' window. 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 with icons for Add, Edit, Delete, View, Hold, Release, Approve, Decline, Save Layout, Workspaces, Print, and Export. A dropdown menu for 'Status' is open, showing the following options:

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

The main table displays a list of purchase requisitions with the following columns: PRCode, PRType, Status, EmployeeNumber, FirstName, LastName, EventDate, EventTime, and Custom. The table contains 25 rows of data, with the first row (PR0000460) highlighted. The status for all rows is 'N' (New).

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Custom
PR0000460	MADNT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works
PR0000459	MADNT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works
PR0000450	MADNT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11	
PR0000444	MADNT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic WES001
PR0000442	MADNT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32	
PR0000439	MADNT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co ABCXYZ123 Generated from sales order no. OR0001
PR0000434	MADNT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works HOP001
PR0000433	MADNT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35	Call to confirm order 24 hours before es
PR0000431	MADNT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41	
PR0000430	MADNT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group TIA001
PR0000428	MADNT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works HOP001 test
PR0000418	MADNT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works HOP001
PR0000416	MADNT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works HOP001
PR0000410	MADNT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group TIA001
PR0000409	MADNT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42	
PR0000407	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14	
PR0000405	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25	retest
PR0000404	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	
PR0000400	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19	
PR0000398	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11	
PR0000397	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53	
PR0000396	MADNT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works HOP001
PR0000386	MADNT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18	
PR0000385	MADNT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40	

## **ADD PURCHASE REQUISITION**

---

- Click on **Add**.

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:

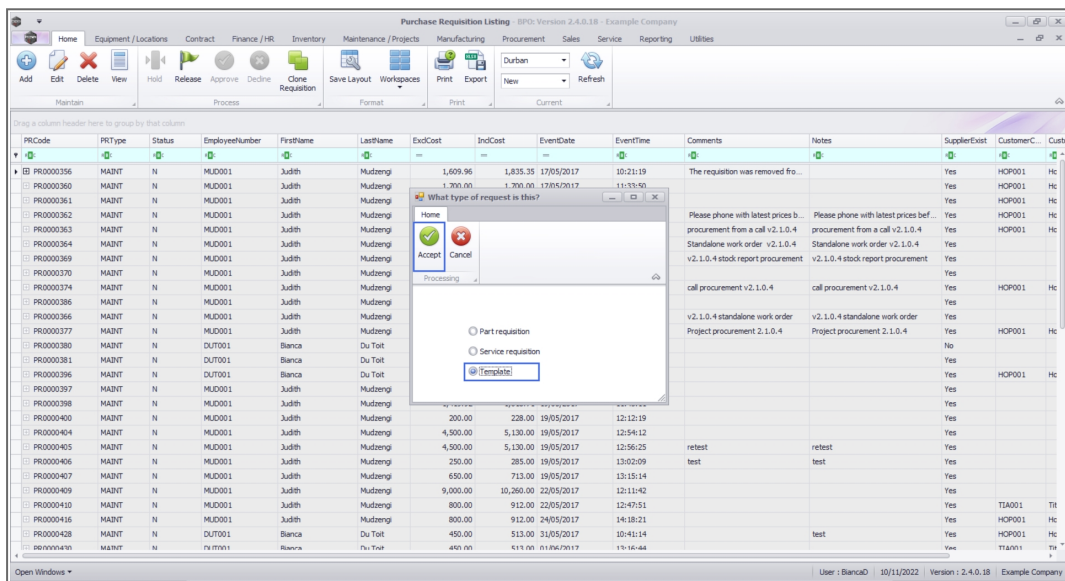
PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works	HOP001	
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works	HOP001	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 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	ABCXYZ123	Generated from sales order no. CR0000
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			
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			
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	
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			

Open Windows 16 Nov 2017



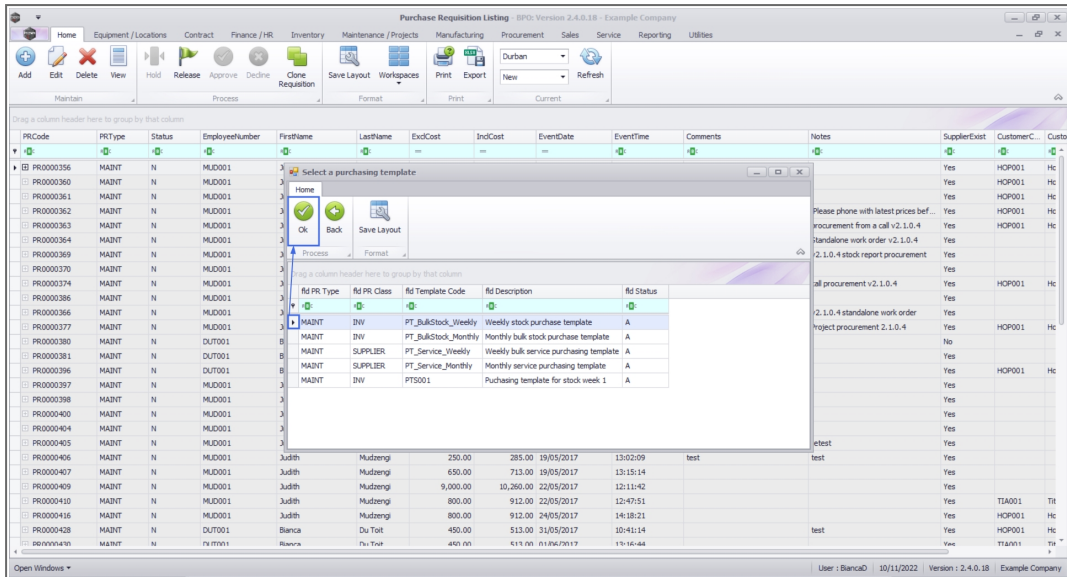
## REQUISITION TYPE

- **A**What type of request is this? pop up screen will appear with two options;
  - **Part** Requisition.
  - **Service** Requisition
  - **Template**
- Click on the **Template** radio button.
- Click on **Accept**.

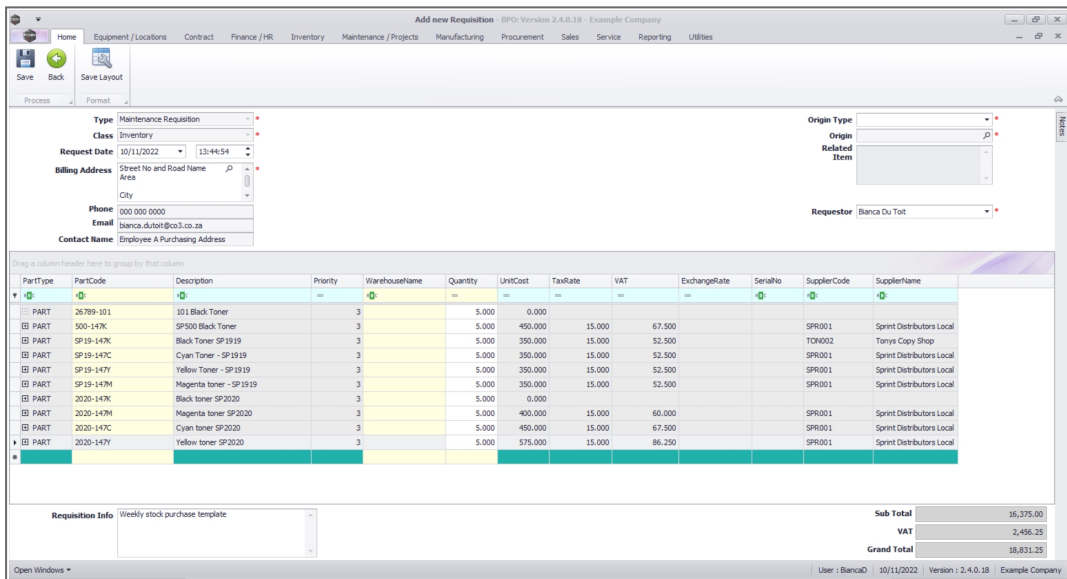


The **Purchasing Template** lookup screen will be displayed.

- Click the **Purchasing Template** you wish to use for this requisition .
- Click on the **Ok** button.



The **Add new Requisition** screen will be displayed, listing all items as configured on the selected purchasing template.



## REQUISITION HEADER INFORMATION

1. The requisition header frame will auto populate with most of the relevant details. Most of these are uneditable fields except the following:

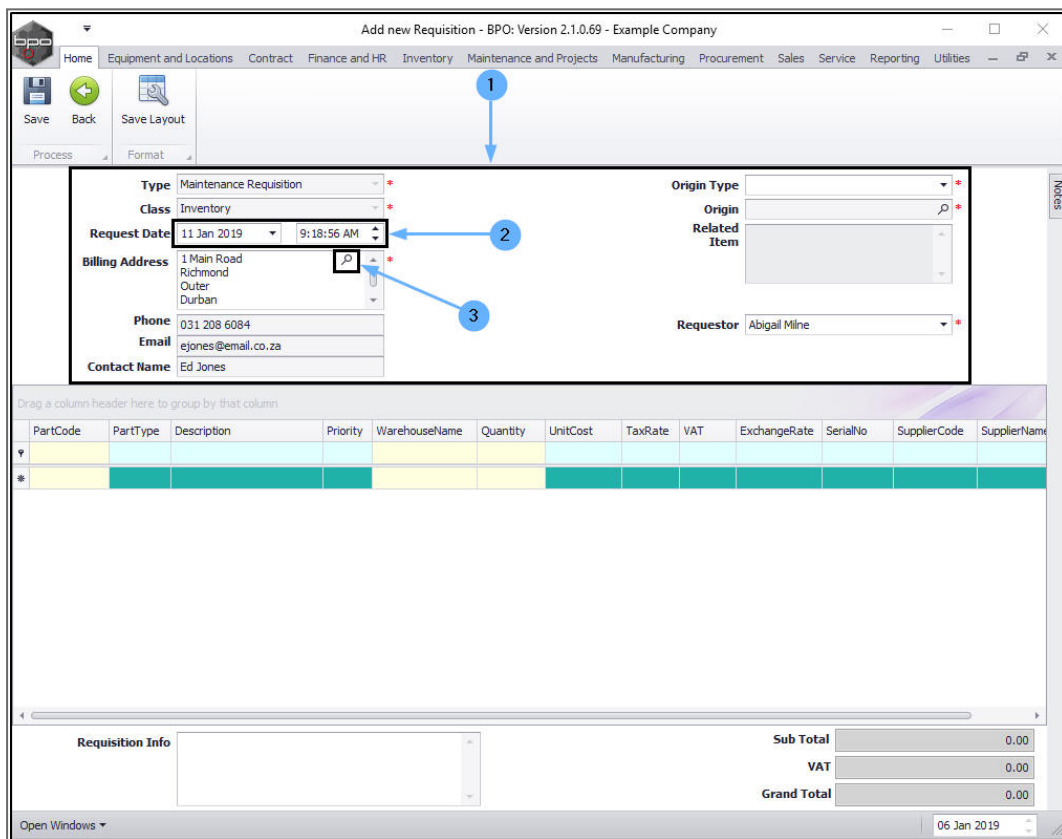


2. **Request Date and Time:** This will auto populate with the current date.

- **Request Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
- **Request Time:** You can either type in or use the directional arrows to select an alternative time.

3. **Billing Address:** This will auto populate with the billing address already set up on the system.

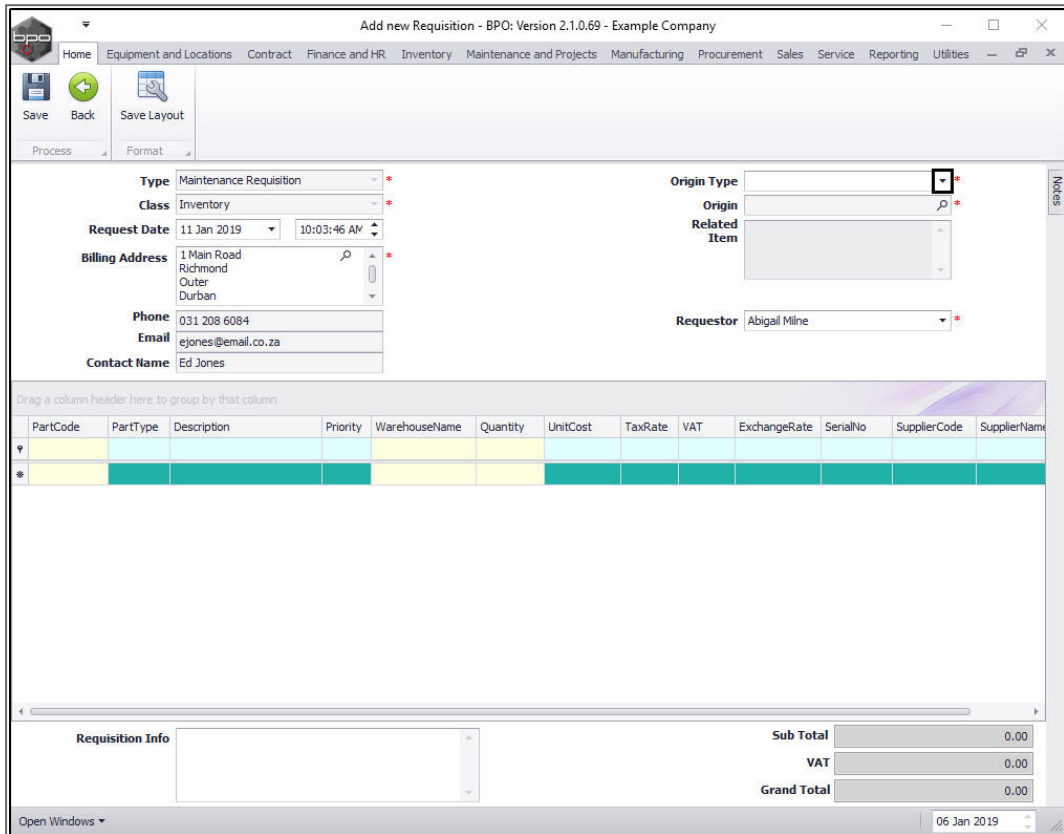
- You can click on the search button and select an alternative address, if required, from the **Select an address for this requisition** pop up screen.



## ORIGIN TYPE AND ORIGIN

This information is mandatory.

- Click on the drop-down arrow in the **Origin Type** field.



The screenshot shows the 'Add new Requisition' form with the following fields and values:

- Type:** Maintenance Requisition \*
- Class:** Inventory \*
- Request Date:** 11 Jan 2019, 10:03:46 AM
- Billing Address:** 1 Main Road, Richmond Outer, Durban \*
- Phone:** 031 208 6084
- Email:** ejones@email.co.za
- Contact Name:** Ed Jones
- Origin Type:** [Dropdown menu with a red box around the arrow]
- Origin:** [Dropdown menu]
- Related Item:** [Dropdown menu]
- Requestor:** Abigail Milne \*

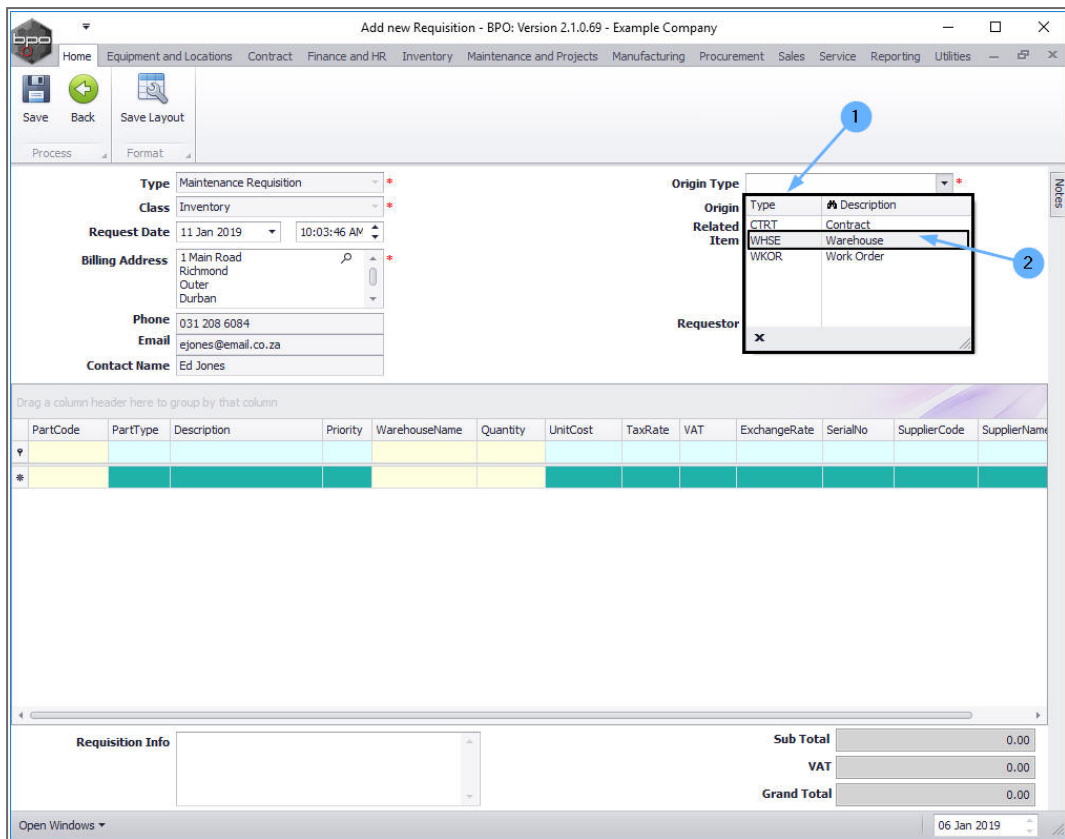
Below the form is a table with the following columns: PartCode, PartType, Description, Priority, WarehouseName, Quantity, UnitCost, TaxRate, VAT, ExchangeRate, SerialNo, SupplierCode, SupplierName. The table is currently empty.

At the bottom right, there is a summary section:

Sub Total	0.00
VAT	0.00
Grand Total	0.00

1. The Origin Type **menu** will be displayed.
2. Select from this menu, the origin of this requisition:
  - **Contract**
  - **Warehouse**
  - **Work Order**

In this image, **Warehouse** has been selected.



- Click on the **search** button in the **Origin** field.

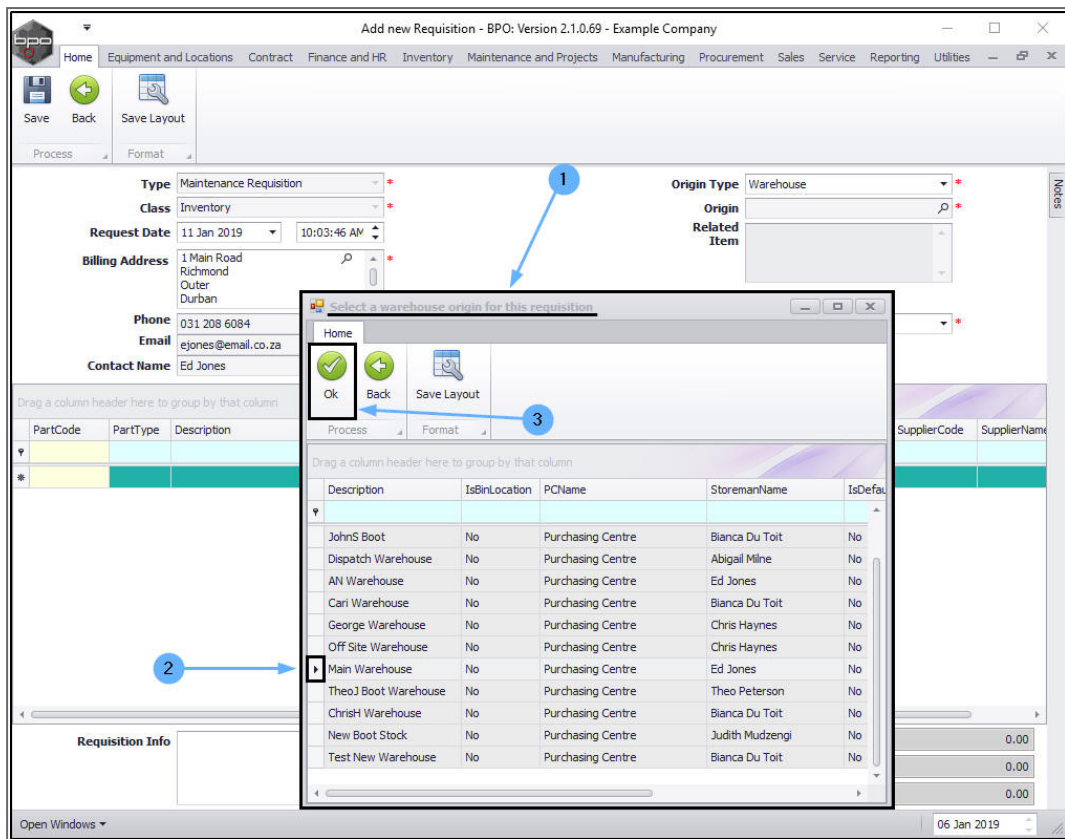
1. The **Select a warehouse origin for this requisition** screen will pop up.

**Note:** The **Select a...** screen that pops up will be linked to the **Origin Type** selected in the previous step. For example:

- i. If **Contract Type** was selected then the Select a contract origin for this requisition screen will pop up.
- ii. If **Work Order Type** was selected then the Select a work order origin for this requisition screen will pop up.
- iii. As **Warehouse Type** was selected then the Select a warehouse origin for this requisition screen has popped up.

2. Select the **row** of the **warehouse** that is the origin of this requisition.

3. Click on **Ok**.



## RELATED ITEMS

1. **Related Item:** This field is uneditable.

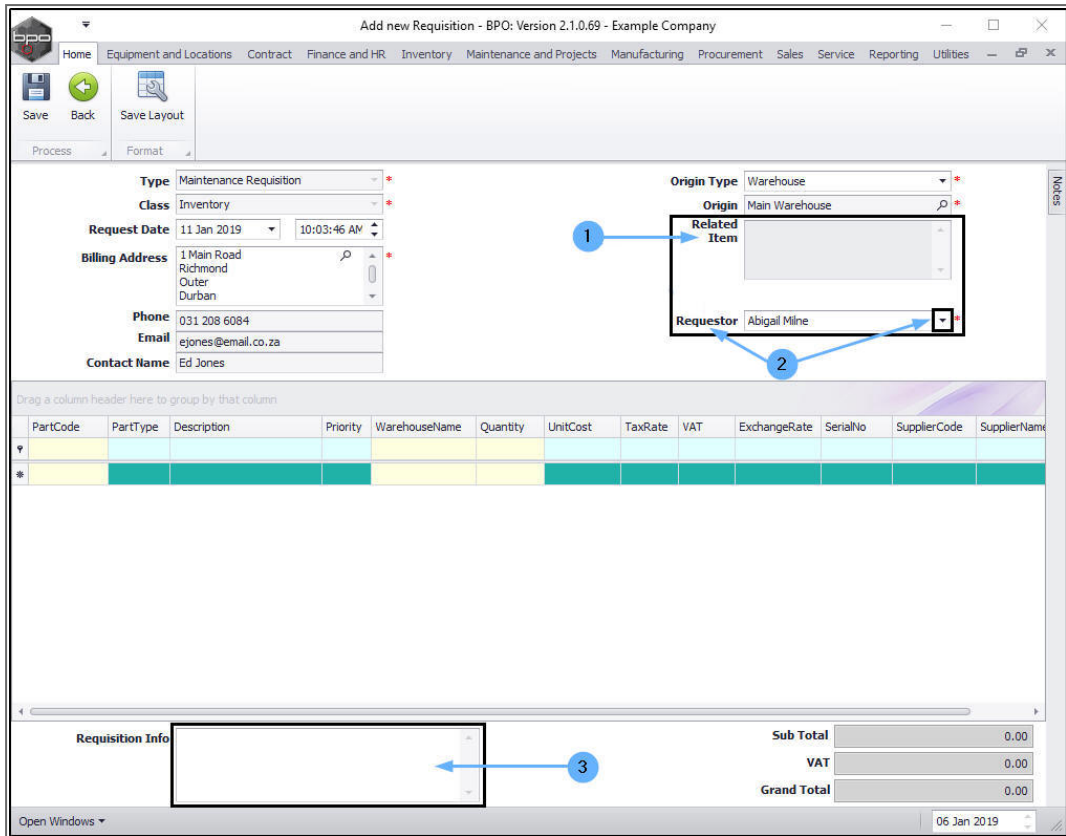
## REQUESTOR

This field is mandatory.

2. **Requestor:** This will populate with the person currently logged on to the system. You can click on the drop-down arrow and select from the menu an alternative person if required.

## REQUISITION INFO

3. **Requisition Info:** Type in any extra information in this text box, if required. This will pull through to the Procurement Report



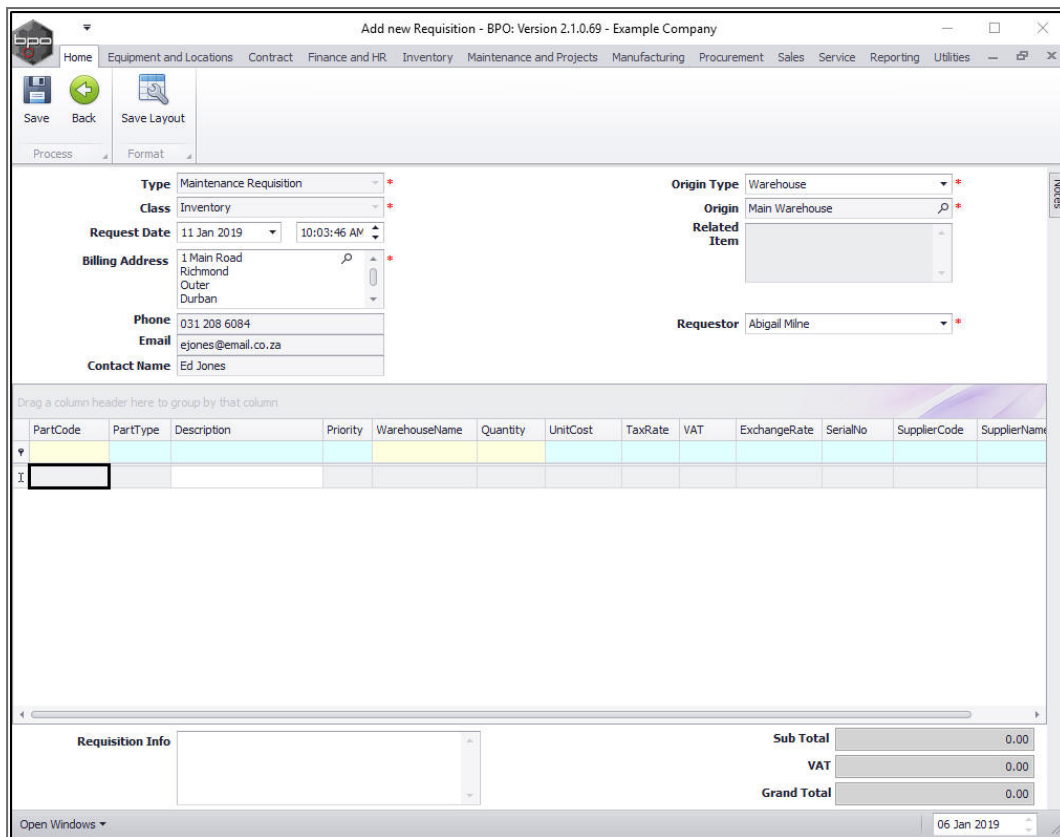
You can now move down to the **Parts** data grid.

## REQUISITION ITEMS DATA GRID

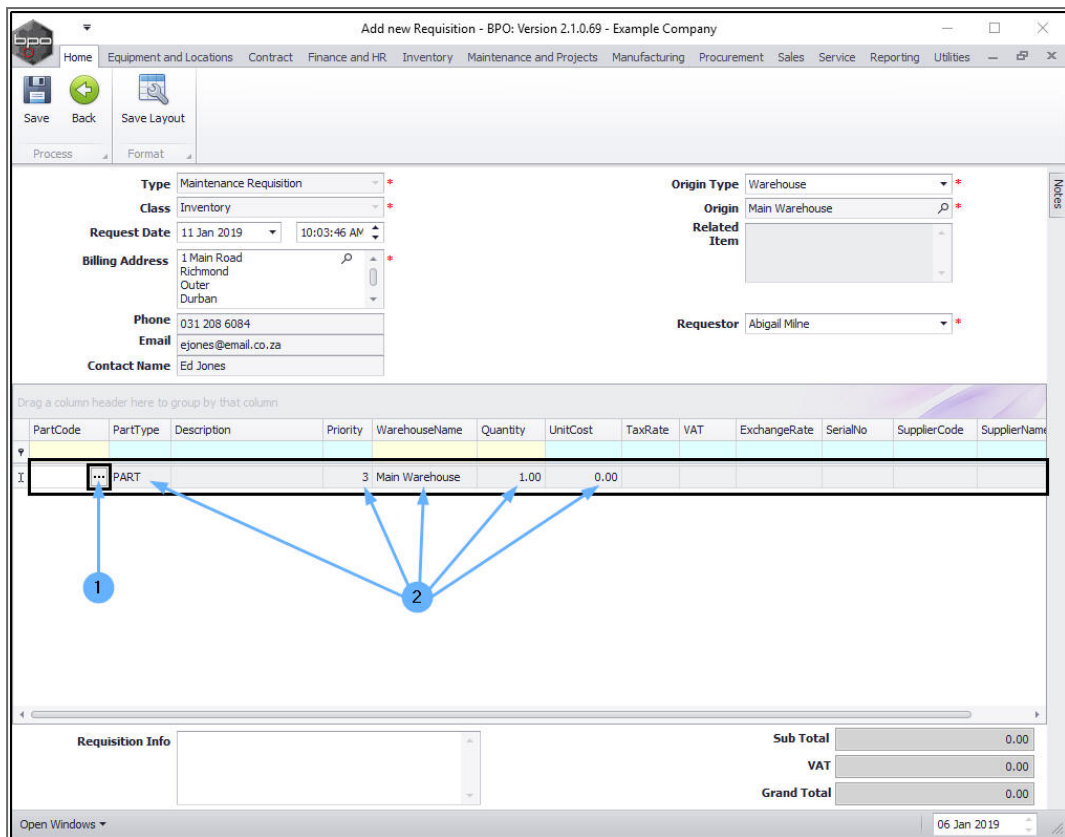
### ITEM

- Click in the **Part Code** text box.

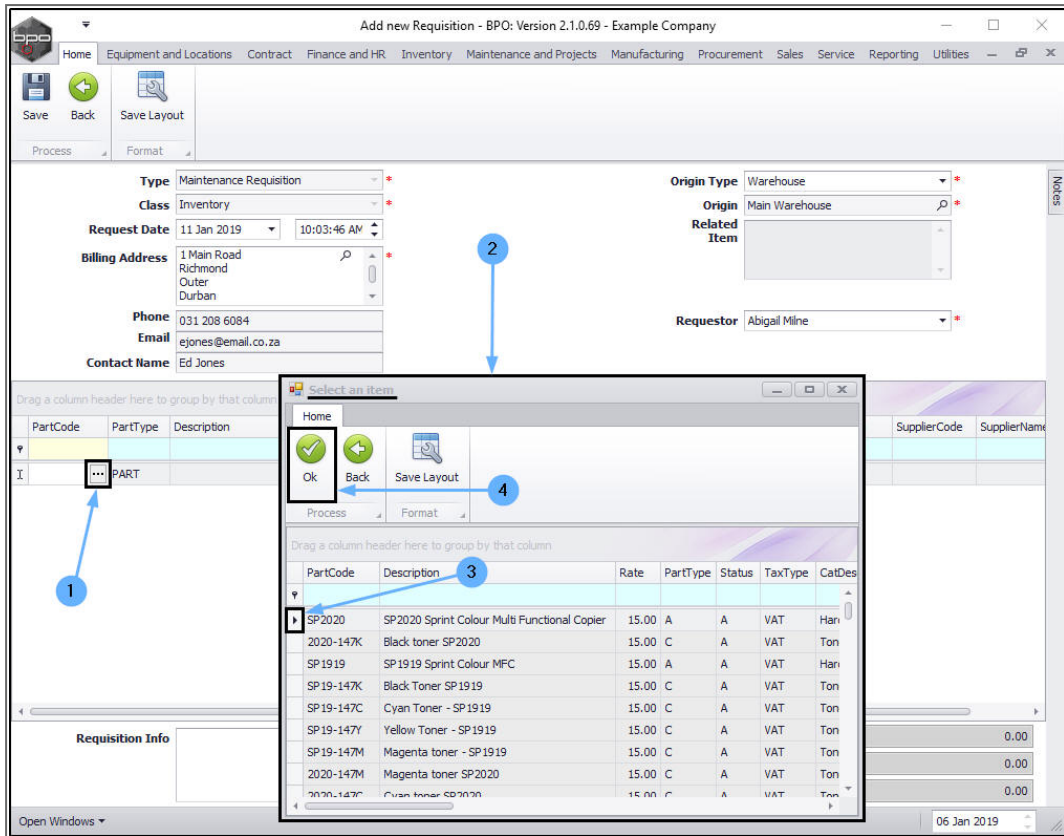




1. An **ellipsis** button will be revealed.
2. The following fields will auto populate:
  - **Part Type:** This will auto populate with **PART**.
  - **Priority:** This will auto populate with **3**.
  - **Warehouse Name:** This will only auto populate if the Origin Type selected is **Warehouse**. Then it will populate with the same Origin (Warehouse Name).
  - **Quantity:** This will auto populate with **1** but can be edited as explained further in the manual.
  - **Unit Cost:** This will auto initially populate with **0.00** but can be edited as explained further in the manual.



1. Click on the **ellipsis** button.
2. A **Select an item** pop up screen will appear.
3. Select the **row** of the item you wish to add.
4. Click on **Ok**.



## ITEM DETAILS

The following fields will now populate:

- **Part Code:** This will populate with the **code** of the part selected in the previous step.
- **Description:** This will populate with the **description** of the part selected in the previous step.
- **Unit Cost:** If there is a **Primary Supplier** set up on this part then this field will populate with the **unit cost** of the of the part as set by that supplier.
- **Tax Rate:** This field will populate with the current **VAT rate**.
- **VAT:** If there is a **Primary Supplier** set up on this part then this field will populate with the **VAT amount** of the total part cost.

- **Supplier Code:** If there is a **Primary Supplier** set up on this part then this field will populate with the **code** of that primary supplier.
- **Supplier Name:** If there is a **Primary Supplier** set up on this part then this field will populate with the **name** of that selected supplier.

**Note about Exchange Rate:** This field will only populate if:

- The currency of the Primary Supplier set up is **different** to your company currency as set up in BPO2.
- If you manually select a supplier for this part and the currency of that supplier is **different** to your company currency as set up in BPO2.

Add new Requisition - BPO: Version 2.1.0.69 - 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: Inventory \*  
 Request Date: 11 Jan 2019 10:03:46 AM  
 Billing Address: 1 Main Road, Richmond, Outer, Durban \*  
 Phone: 031 208 6084  
 Email: ejones@email.co.za  
 Contact Name: Ed Jones

Origin Type: Warehouse \*  
 Origin: Main Warehouse \*  
 Related Item:  
 Requestor: Abigail Milne \*

PartCode	PartType	Description	Priority	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName
SP2020	PART	SP2020 Sprint Colour ...	3	Main Warehouse	1.00	4 500.00	15.00	675.00			TON002	Tonys Copy Shop

Requisition Info

Sub Total: 0.00  
 VAT: 0.00  
 Grand Total: 0.00

Open Windows 06 Jan 2019

## ITEM SUPPLIERS

- Click on the **expand** button in the **Part Code** field.

1. The **Item Suppliers** frame will be expanded. Follow the process to **add / edit an item supplier** for this item as required.
2. **Collapse** the **Item Suppliers** frame when you are done.

## LINK ADDITIONAL ITEMS

- The **Item Suppliers** frame will be **hidden** again.
- Click in the **Part Code** field of the new row, to display the **ellipsis** button and continue to [add A, B or C-Class items](#) in this way until you have finished adding items to the requisition.



Add new Requisition - BPO: Version 2.1.0.69 - 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: Inventory \*  
 Request Date: 11 Jan 2019 10:03:46 AM  
 Billing Address: 1 Main Road, Richmond Outer, Durban \*  
 Phone: 031 208 6084  
 Email: ejones@email.co.za  
 Contact Name: Ed Jones

Origin Type: Warehouse \*  
 Origin: Main Warehouse \*  
 Related Item: [Empty]  
 Requestor: Abigail Milne \*

Drag a column header here to group by that column

PartCode	PartType	Description	Priority	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName
SP2020	PART	SP2020 Sprint Colour ...	3	Main Warehouse	1.00	4 500.00	15.00	675.00			TON002	Tonys Copy Shop

Requisition Info: [Empty]

Sub Total: 4 500.00  
 VAT: 675.00  
 Grand Total: 5 175.00

Open Windows | 06 Jan 2019

1. In this image a **Black toner SP2020** has also been added to the Parts data grid.

## SAVE REQUISITION

2. When you have finished adding items, click on **Save**.

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

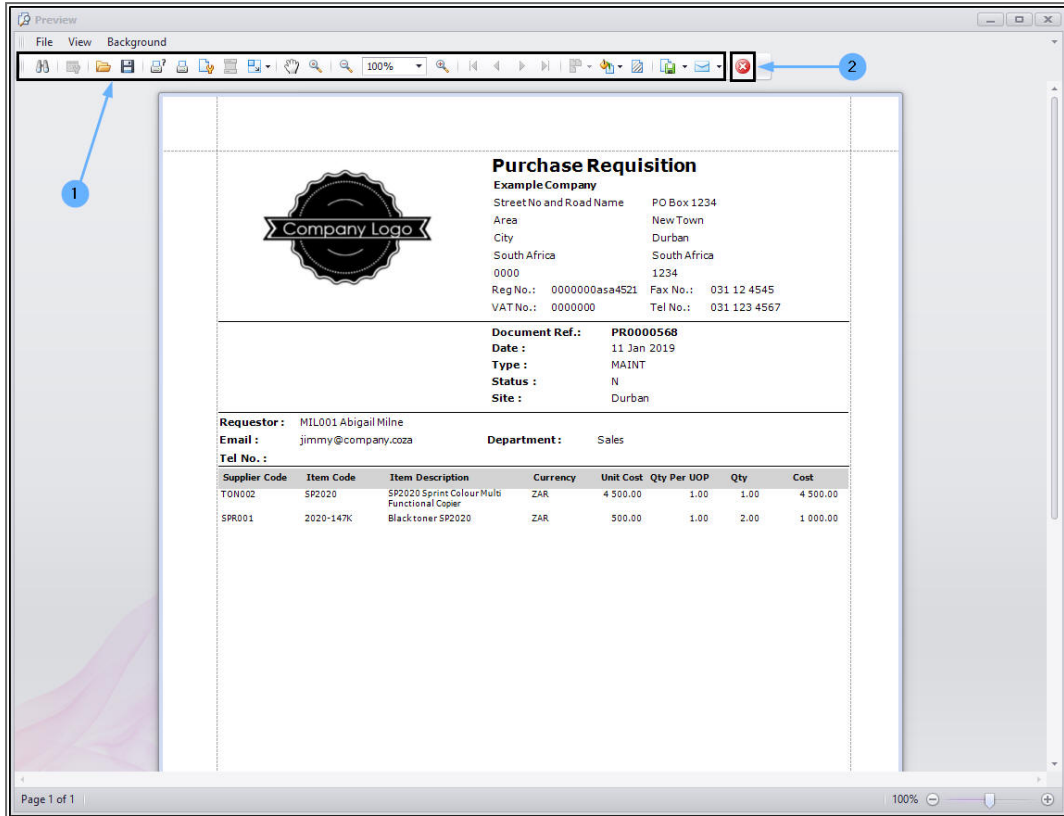
## PRINT REQUISITION

- A **Report Generation** message box will pop up asking;
  - **Do you want to print the requisition [ ]?**
- Click on **Yes**.

## REPORT PREVIEW

The **Report Preview** screen will be displayed.

1. From here you can **View**, **Print**, **Export** or **Email** the requisition.
2. **Close** the preview screen when you are done.



You will return to the **Purchase Requisition** Listing screen.

## VIEW REQUISITION

- Here you can view the **new requisition** has been added to the list.
- **Close** the preview screen when you are done.

**Note:** The requisition will need to be **released and approved**.

Purchase Requisition Listing - BPO: Version 2.1.0.69 - 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	Comments	ExdCost	Notes	SupplierExist	IndCost	SourceTypeDesc	CustomerCode
PR0000416	MAINT	N	MUD001	Judith	Mudzengi	24 May 2017		800.00		Yes	912.00	Work Order	HOP001
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	24 May 2017		1 000.00		Yes	1 140.00	Work Order	HOP001
PR0000421	MAINT	N	MUD001	Judith	Mudzengi	24 May 2017		800.00		Yes	912.00	Work Order	HOP001
PR0000428	MAINT	N	DUT001	Bianca	Du Toit	31 May 2017		450.00	test	Yes	513.00	Work Order	HOP001
PR0000429	MAINT	N	DUT001	Bianca	Du Toit	31 May 2017		450.00	test	Yes	513.00	Work Order	HOP001
PR0000430	MAINT	N	DUT001	Bianca	Du Toit	01 Jun 2017		450.00		Yes	513.00	Work Order	TIA001
PR0000431	MAINT	N	MUD001	Judith	Mudzengi	01 Jun 2017		980.00		Yes	980.00	Warehouse	
PR0000433	MAINT	N	DUT001	Bianca	Du Toit	05 Jun 2017		1 500.00		Yes	1 710.00	Warehouse	
PR0000434	MAINT	N	DUT001	Bianca	Du Toit	06 Jun 2017		800.00		Yes	912.00	Work Order	HOP001
PR0000442	MAINT	N	MUD001	Judith	Mudzengi	15 Jun 2017		4 500.00		Yes	5 130.00	Warehouse	
PR0000444	MAINT	N	MUD001	Judith	Mudzengi	15 Jun 2017		0.00		Yes	0.00	Work Order	WES001
PR0000452	MAINT	N	MUD001	Judith	Mudzengi	04 Jul 2017		1 500.00		Yes	1 710.00	Work Order	BIG0001
PR0000454	MAINT	N	MUD001	Judith	Mudzengi	05 Jul 2017		800.00		Yes	912.00	Work Order	HOP001
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	05 Jul 2017		500.00		Yes	570.00	Work Order	DER001
PR0000456	MAINT	N	MUD001	Judith	Mudzengi	05 Jul 2017		900.00		Yes	1 026.00	Work Order	
PR0000459	MAINT	N	MIL01	Sarah	Milder	13 Jul 2017		145.00		Yes	166.75	Work Order	DER001
PR0000466	MAINT	N	DUT001	Bianca	Du Toit	25 Jul 2017		15.00		Yes	17.10	Warehouse	HOP001
PR0000485	MAINT	N	DUT001	Bianca	Du Toit	26 Oct 2017		350.00		Yes	399.00	Warehouse	TIA001
PR0000486	MAINT	N	DUT001	Bianca	Du Toit	26 Oct 2017		6 250.00		Yes	7 125.00	Warehouse	TIA001
PR0000523	MAINT	N	MIL001	Abigail	Milne	26 Apr 2018		4 500.00		Yes	5 130.00	Warehouse	HOP001
PR0000533	MAINT	N	MIL001	Abigail	Milne	28 Aug 2018		109 200.00		Yes	125 580.00	Warehouse	
PR0000536	MAINT	N	MIL001	Abigail	Milne	07 Sep 2018		3 250.00		Yes	3 662.50	Warehouse	
PR0000563	MAINT	N	MIL001	Abigail	Milne	23 Nov 2018		4 500.00		Yes	5 175.00	Contract	
PR0000567	MAINT	N	MIL001	Abigail	Milne	14 Jan 2019		1 200.00		Yes	1 440.00	Warehouse	
PR0000568	MAINT	N	MIL001	Abigail	Milne	11 Jan 2019		5 500.00		Yes	6 175.00	Warehouse	

Open Windows ▾ 06 Jan 2019

## DELETE A REQUISITION

Select the Site and Status

- Select the **Site**.
  - In this image **Durban** has been selected.



PRCode	PRTYPE	Status	EmployeeNumber	Firstname	LastName	EventDate	EventTime	Custom
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20	Hope Works
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48	Hope Works
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Hope Works
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Hope Works
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Hope Works
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	Hope Works
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	Hope Works
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Hope Works
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Hope Works
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group
PR0000416	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:18:21	Hope Works
PR0000418	MAINT	N	MUD001	Mark	Mudderveld	24 May 2017	14:40:05	Hope Works
PR0000428	MAINT	N	DUT001	Susan	Du Toit	31 May 2017	10:41:14	Hope Works
PR0000430	MAINT	N	DUT001	Susan	Du Toit	01 Jun 2017	13:16:44	Titan Group
PR0000434	MAINT	N	DUT001	Susan	Du Toit	06 Jun 2017	11:32:32	Hope Works
PR0000439	MAINT	N	DUT001	Susan	Du Toit	08 Jun 2017	14:56:24	ABC Shoe Co
PR0000444	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic
PR0000459	MAINT	N	MIL001	Sarah	Milder	23 Oct 2017	10:47:02	Hope Works
PR0000460	MAINT	N	MIL001	Sarah	Milder	07 Nov 2017	11:00:42	Hope Works
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14	
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11	
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58	
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	

- Select the **status**.
  - This must 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	Custom			
PR0000460	MADNT	N	ML001	Sarah	Milder	07 Nov 2017	11:00:42	Hope V			
PR0000459	MADNT	N	ML001	Sarah	Milder	23 Oct 2017	10:47:02	Hope V			
PR0000450	MADNT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11				
PR0000444	MADNT	N	MUD001	Mark	Mudderveld	15 Jun 2017	12:29:13	Westwood Dynamic	WES001		
PR0000442	MADNT	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	ABC1Y2123	Generated from sales order no. OR000	
PR0000434	MADNT	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	MADNT	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	MADNT	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	MADNT	N	MUD001	Mark	Mudderveld	22 May 2017	12:47:51	Titan Group	TIA001		
PR0000409	MADNT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42				
PR0000407	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14				
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest	
PR0000404	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12				
PR0000400	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19				
PR0000398	MADNT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11				
PR0000397	MADNT	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		
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18				
PR0000385	MADNT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40				

Open Windows 20 Nov 2017

Select Requisition

- Select the **row** of the **purchase requisition** you wish to **delete**.
- Click on **Delete**.

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

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	Firstname	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1.0.4
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55			
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32			
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35			Call to confirm order 24 hours before es
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38			stock report procurement
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41			
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			
PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43			
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000366	CAP	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09			v2.1.0.4 standalone work order
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47			v2.1.0.4 stock report procurement
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			

Open Windows | 20 Nov 2017

## CONFIRM DELETION

---

- A **Confirm Close** message box will pop up asking;
  - **Are you sure you want to close this purchase requisition ( )?**
- Click on **Yes**.



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
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000450	MAINT	N	TJM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1.0.4
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000405	MAINT	N								retest
PR0000370	MAINT	N								
PR0000442	MAINT	N								
PR0000433	MAINT	N								Call to confirm order 24 hours before es
PR0000368	MAINT	N								stock report procurement
PR0000385	MAINT	N								
PR0000397	MAINT	N								
PR0000431	MAINT	N								
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			
PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43			
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42			
PR0000366	CAP	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09			v2.1.0.4 standalone work order
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47			v2.1.0.4 stock report procurement
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			

Open Windows 20 Nov 2017

- A **Process Validation** message box will pop up asking;
  - **Are you sure that you want to close requisition [ ]?**

- Click on **Yes**.

The screenshot shows a software application window titled "Purchase Requisition Listing - BPO: Version 2.1.0.40 - 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 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 another to "New", with a "Refresh" button. The main area contains a table with the following columns: PRCode, PRType, Status, EmployeeNumber, FirstName, LastName, EventDate, EventTime, CustomerName, CustomerCode, and Notes. A dialog box titled "Process Validation" is overlaid on the table, asking "Are you sure that you want to close requisition PR0000400?". The dialog has "Yes" and "No" buttons. The "Yes" button is highlighted with a black border. The table data includes various requisition records with details like PRCode, PRType (MAINT), Status (N), EmployeeNumber, and EventDate.

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	CustomerName	CustomerCode	Notes
PR0000407	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000404	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000450	MAINT	N	TJM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			
PR0000364	MAINT	N	MJD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1.0.4
PR0000461	MAINT	N	MIL001	Sarah	Hilder	21 Nov 2017	13:30:35			
PR0000398	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000405	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000370	MAINT	N	MJD001	Mark	Mudderveld	17 May 2017	16:42:55			
PR0000442	MAINT	N	MJD001	Mark	Mudderveld	15 Jun 2017	11:14:32			
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35			Call to confirm order 24 hours before es
PR0000368	MAINT	N	MJD001	Mark	Mudderveld	17 May 2017	16:30:38			stock report procurement
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			
PR0000397	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000431	MAINT	N	MJD001	Mark	Mudderveld	01 Jun 2017	14:37:41			
PR0000400	MAINT	N	MJD001	Mark	Mudderveld	19 May 2017	12:12:19			
PR0000380						May 2017	12:00:43			
PR0000409						May 2017	12:11:42			
PR0000366						May 2017	15:10:09			v2.1.0.4 standalone work order
PR0000369						May 2017	16:38:47			v2.1.0.4 stock report procurement
PR0000386						May 2017	14:58:18			

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



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

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
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14			
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12			
PR0000450	MAINT	N	TIM	Joseph	Timber	08 Sep 2017	13:38:11			
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25			Standalone work order v2.1.0.4
PR0000461	MAINT	N	MIL001	Sarah	Milder	21 Nov 2017	13:30:35			
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25			retest
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55			
PR0000442	MAINT	N	MUD001	Mark	Mudderveld	15 Jun 2017	11:14:32			
PR0000433	MAINT	N	DUT001	Susan	Du Toit	05 Jun 2017	14:59:35			Call to confirm order 24 hours before es
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38			stock report procurement
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			
PR0000431	MAINT	N	MUD001	Mark	Mudderveld	01 Jun 2017	14:37:41			
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			
PR0000380							12:00:43			
PR0000409							12:11:42			
PR0000366							15:10:09			v2.1.0.4 standalone work order
PR0000369							16:38:47			v2.1.0.4 stock report procurement
PR0000386							14:58:18			

Requisition - Process

The requisition no. PR0000400, has been closed successfully.

OK

Open Windows 20 Nov 2017

## **VIEW DELETED (CLOSED) REQUISITION**

---

- The deleted requisition can now be viewed in the **Purchase Requisition Listing** screen where the **status** is set to **Closed**.

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

Maintain Process Format Print

Durban Closed Refresh

Status: A Approved, C Closed, D Declined, I Issued, N New, R Released

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Custom
PR0000238	MAINT	C	DUT001	Susan	Du Toit	10 Nov 2015	16:04:50	Hope V
PR0000282	CAP	C	DUT001	Susan	Du Toit	15 Jun 2016	14:39:07	
PR0000285	CAP	C	DUT001	Susan	Du Toit	22 Jun 2016	12:02:20	
PR0000290	CAP	C	DUT001	Susan	Du Toit	23 Jun 2016	13:22:58	
PR0000321	MAINT	C	MUD001	Mark	Mudderveld	07 Mar 2017	14:10:07	Hope Works HOP001
PR0000323	MAINT	C	MUD001	Mark	Mudderveld	07 Mar 2017	14:18:34	
PR0000324	MAINT	C	MUD001	Mark	Mudderveld	07 Mar 2017	14:19:35	Hope Works HOP001
PR0000325	MAINT	C	MUD001	Mark	Mudderveld	07 Mar 2017	14:35:46	Hope Works HOP001
PR0000326	MAINT	C	MUD001	Mark	Mudderveld	07 Mar 2017	16:50:05	
PR0000329	MAINT	C	DUT001	Susan	Du Toit	15 Mar 2017	14:32:34	
PR0000331	MAINT	C	DUT001	Susan	Du Toit	15 Mar 2017	16:18:03	Hope Works HOP001
PR0000338	MAINT	C	DUT001	Susan	Du Toit	11 Apr 2017	09:39:59	Hope Works HOP001
PR0000338	MAINT	C	DUT001	Susan	Du Toit	11 Apr 2017	09:39:59	Samanthas Diner SAM001
PR0000344	MAINT	C	DUT001	Susan	Du Toit	18 Apr 2017	08:42:29	
PR0000345	MAINT	C	MUD001	Mark	Mudderveld	19 Apr 2017	16:08:30	Hope Works HOP001
PR0000346	MAINT	C	MUD001	Mark	Mudderveld	24 Apr 2017	14:41:35	
PR0000351	MAINT	C	DUT001	Susan	Du Toit	04 May 2017	12:02:26	
PR0000371	MAINT	C	MUD001	Mark	Mudderveld	18 May 2017	09:00:06	
PR0000330	MAINT	C	DUT001	Susan	Du Toit	15 Mar 2017	14:55:50	
PR0000378	MAINT	C	MUD001	Mark	Mudderveld	18 May 2017	11:55:57	Hope Works HOP001
PR0000400	MAINT	C	MUD001	Mark	Mudderveld	19 May 2017	12:12:19	
PR0000401	MAINT	C	MUD001	Mark	Mudderveld	19 May 2017	12:14:35	
PR0000352	MAINT	C	DUT001	Susan	Du Toit	04 May 2017	13:28:55	
PR0000353	MAINT	C	DUT001	Susan	Du Toit	04 May 2017	14:19:30	

Open Windows 20 Nov 2017

MNU.053.011