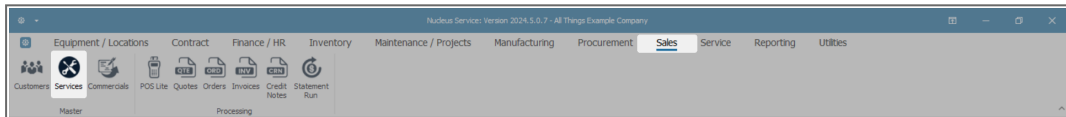


SALES

SERVICES – PURCHASE REQUISITIONS

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

Ribbon Select Sales > Services



- The **Service** listing screen will be displayed.
- The **Site** filter will be set according to your company configuration. If required, select the **Site** where the service can be located.
 - The example has **KwaZulu-Natal** selected.

Note: Refer to [Site Selection](#) for more information.

- The State filter will default to **Active** upon opening and must not be changed for this process.

Note: Refer to [State/Type Selections](#) for more information.

- Select the **row** of the Service you wish to list **purchase requisitions** for.
- Click on the **Requisitions** tile in the **Links** panel.

ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxRate	Status
IMP	Implementations	INT	SER	1,000.00	ea	VAT	15.00	A
INFS	Insurance and Financial Services	INT	SER	1,250.00	ea	VAT	15.00	A
ITDA	IT Database Administration	INT	SER	1,500.00	ea	VAT	15.00	A
ITHS	IT Hardware Services	INT	SER	1,750.00	ea	VAT	15.00	A
ITSDY	IT Software Deployment	INT	SER	2,000.00	ea	VAT	15.00	A
ITSDV	IT Software Development	INT	SER	2,250.00	ea	VAT	15.00	A
ITSA	IT Systems Administration	INT	SER	2,500.00	ea	VAT	15.00	A
LGS	Landscaping and Garden Services	INT	SER	1,000.00	ea	VAT	15.00	A
LA	Legal Aid	INT	SER	1,250.00	ea	VAT	15.00	A
MP	Maintenance Planning	INT	SER	1,500.00	ea	VAT	15.00	A
MAN	Manufacturing Planning	INT	SER	1,750.00	ea	VAT	15.00	A
MB	Marketing and Branding	INT	SER	2,000.00	ea	VAT	15.00	A
NCS	Nutrition Consulting Services	INT	SER	2,250.00	ea	VAT	15.00	A
OP	Operational Planning	INT	SER	2,500.00	ea	VAT	15.00	A
OS	Outsourcing Services	INT	SER	1,000.00	ea	VAT	15.00	A
PP	Project Planning	INT	SER	1,250.00	ea	VAT	15.00	A
QA	Quality Assurance	INT	SER	1,500.00	ea	VAT	15.00	A
REC	Recycling Services	INT	SER	1,750.00	ea	VAT	15.00	A
SAF	Safety Audit	INT	SER	2,000.00	ea	VAT	15.00	A
SAS	Sales Services	INT	SER	2,250.00	ea	VAT	15.00	A
SEC	Security Consulting	INT	SER	2,500.00	ea	VAT	15.00	A
SVH	Server Hosting	INT	SER	1,000.00	ea	VAT	15.00	A
SCO	Service Centre Outsourcing	INT	SER	1,250.00	ea	VAT	15.00	A
SDC	Standards and Certification	INT	SER	1,500.00	ea	VAT	15.00	A
SCC	Stock Control Consulting	INT	SER	1,750.00	ea	VAT	15.00	A
TFC	Technology Platforms Consulting	INT	SER	2,000.00	ea	VAT	15.00	A

- The **Purchase Requisitions for Service []** list screen will be displayed.
- All the services that have been created will display on the screen.
- Click on the drop-down arrow to select the correct **Site**.
 - In this image, **KwaZulu-Natal** has been selected.

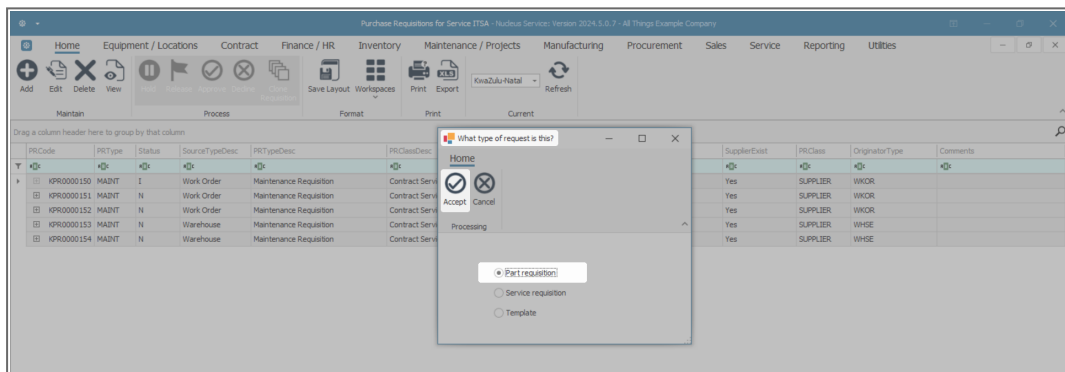
PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	Site	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000130	MAINT	I	Work Order	Maintenance Requestion	Contract Service	4 KwaZulu-Natal	2024 11:58:18	Yes	SUPPLIER	WKOR	
KPR0000131	MAINT	N	Work Order	Maintenance Requestion	Contract Service	5 Limpopo	2024 12:18:56	Yes	SUPPLIER	WKOR	
KPR0000132	MAINT	N	Work Order	Maintenance Requestion	Contract Service	6 Mpumalanga	2024 12:24:08	Yes	SUPPLIER	WKOR	
KPR0000133	MAINT	N	Warehouse	Maintenance Requestion	Contract Service	X Gauteng	2024 12:32:04	Yes	SUPPLIER	WHSE	
KPR0000134	MAINT	N	Warehouse	Maintenance Requestion	Contract Service		2024 12:33:27	Yes	SUPPLIER	WHSE	

ADD PURCHASE REQUISITION FOR SERVICE

- Click on **Add**.

PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	ExcCost	InclCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000130	MAINT	I	Work Order	Maintenance Requestion	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000131	MAINT	N	Work Order	Maintenance Requestion	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000132	MAINT	N	Work Order	Maintenance Requestion	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000133	MAINT	N	Warehouse	Maintenance Requestion	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000134	MAINT	N	Warehouse	Maintenance Requestion	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

- The **What type of request is this?** message will be displayed.
 - Requisition options available on the screen:
 - **Part requisition** - Select this option if you are creating a Part Requisition for a service.
 - **Service requisition** - Select this option if you are creating a Service Requisition.
 - **Template** - Select this option if you use a template to base the requisition on a pre-loaded Requisition Template.
 - Click on the radio **button** of the option you require.
 - The example has **Part requisition** selected.
 - Click on **Accept**.



- The **Add new Requisition** screen will be displayed.
- Complete the Part or Service Requisition and then click on **Save**.



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



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

EDIT PURCHASE REQUISITION

- From the **Purchase Requisitions for Service []** screen -
- Select the **row** of the Purchase Requisition you wish to edit.
- Click on **Edit**.

PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	ExcCost	InvCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MADNT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MADNT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MADNT	N	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:32:27	Yes	SUPPLIER	WHSE	

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



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



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

PartType	PartCode	Description	WarehouseName	Quantity	UnitCost	TaxRate	VAT	ExchangeRate	SerialNo	SupplierCode	SupplierName	SourceType
ITSA		IT Systems Administration		1.00	2,135.00	15.00	320.25	1.00		7021330194	Produce Running Limit	WOSV
DEL		Delivery Fee		1.00	500.00	15.00	75.00			SPR001	Sprint Distributors Local	

Sub Total	2,635.00
VAT	395.25
Grand Total	3,030.25

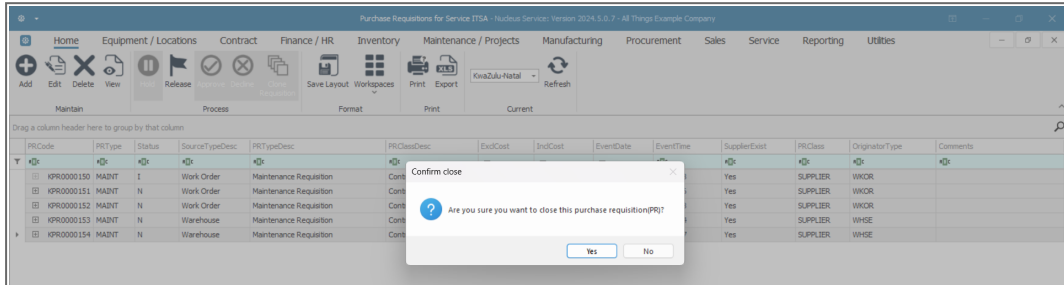
DELETE A PURCHASE REQUISITION

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

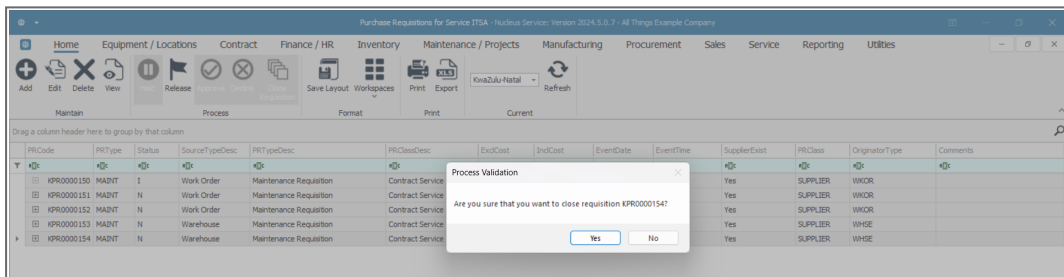
- From the **Purchase Requisitions for Service PR[]** screen -
- Click on the **row** of the Purchase Requisition you wish to close.
- Click on **Delete**.

PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	ExcCost	IncCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MAINT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MAINT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MAINT	N	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

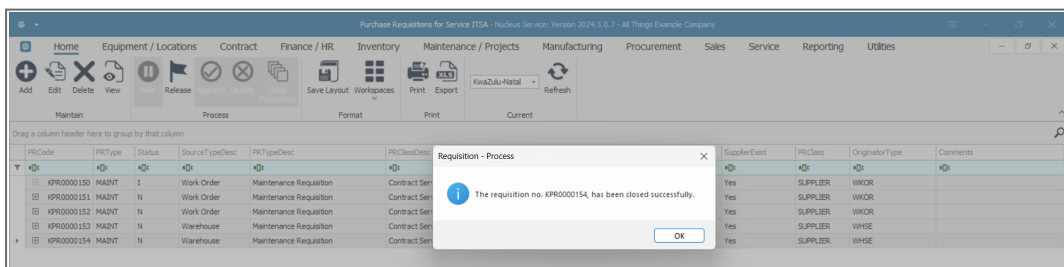
- When you receive the **Confirm close** message -
 - Are you sure you want to close this purchase requisition(PR)?
- Click on **Yes** if you are certain about your selection.



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



- Next, the **Requisition - Process** message will inform you that -
 - The requisition no. [], has been closed successfully.
- Click on **OK**.



- Note the Status has changed to **[C]** to indicate that the Purchase Requisition has been **Closed**.
- Click on **Back** or **Close** the screen to return to the **Service Listing** Screen.

PRCode	PRType	Status	Source/Type/Desc	PRType/Desc	PRClass/Desc	ExcCost	InoCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MAINT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MAINT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MAINT	C	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

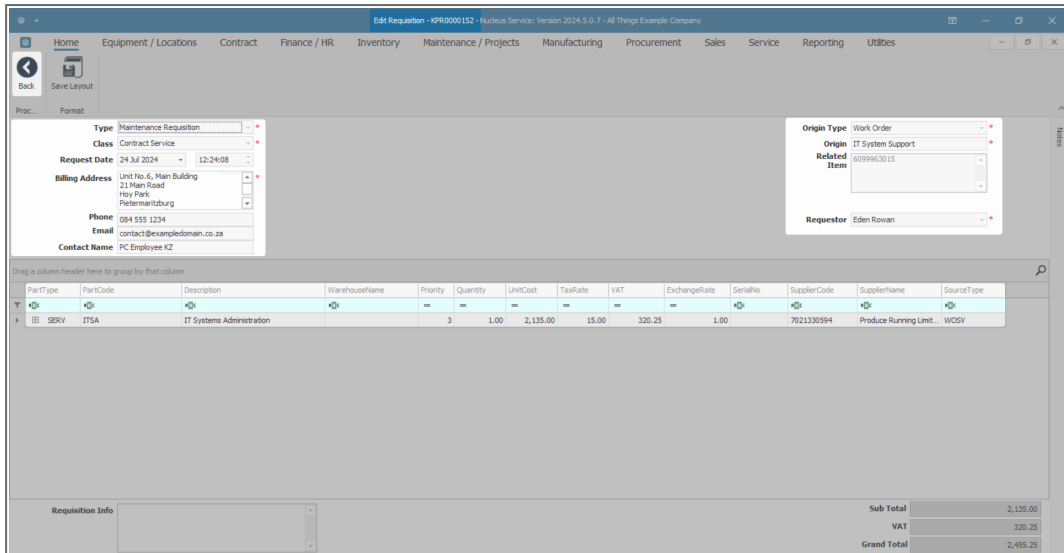
VIEW A PURCHASE REQUISITION

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

- From the **Purchase Requisitions for Service []** screen -
- Click on the **row** of the Purchase Requisition you wish to view.
- Click on **View**.

PRCode	PRType	Status	Source/Type/Desc	PRType/Desc	PRClass/Desc	ExcCost	InoCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MAINT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MAINT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MAINT	C	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

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



PLACE REQUISITION ON HOLD

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

- From the **Purchase Requisitions for Service** [service code] screen
-
- Click on the **row** of the requisition you wish to place on **Hold**.

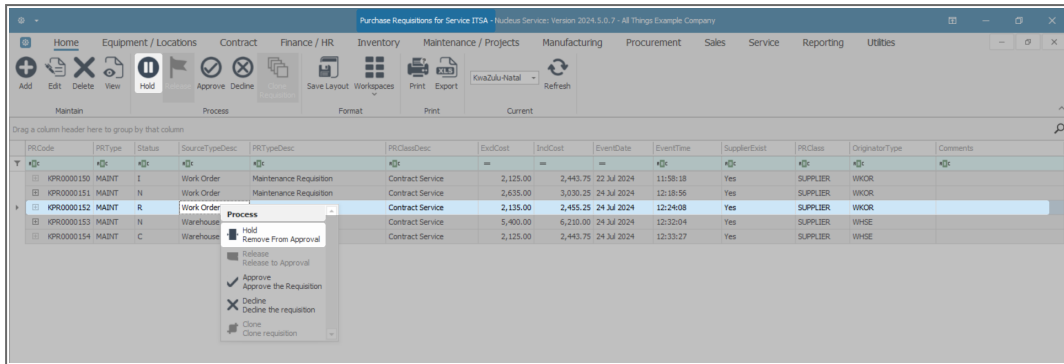


Note the Status for the example as R - Released.

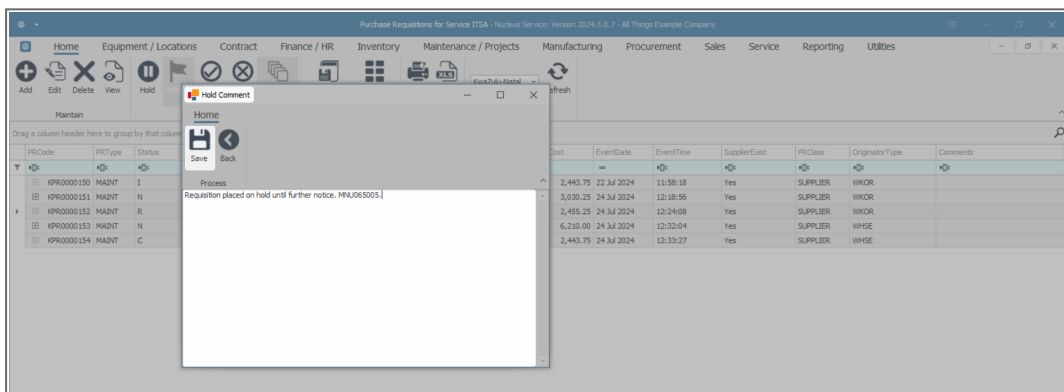
- Click on **Hold**.



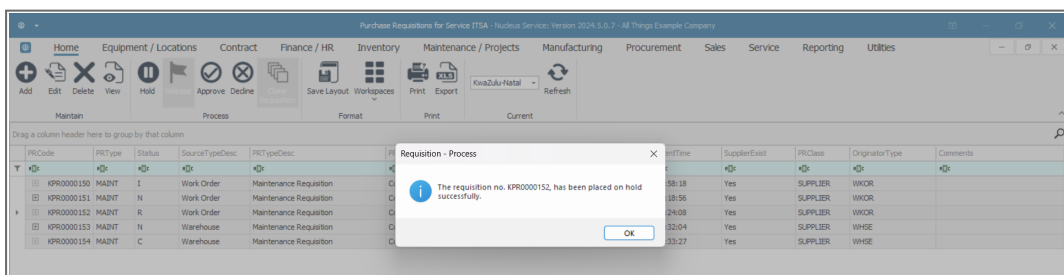
Short cut key: Right click on the selected row to display a **Process** menu, click on **Hold**.



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



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





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

PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	ExcCost	InvCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MADNT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MADNT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MADNT	C	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

RELEASE REQUISITION FOR APPROVAL

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

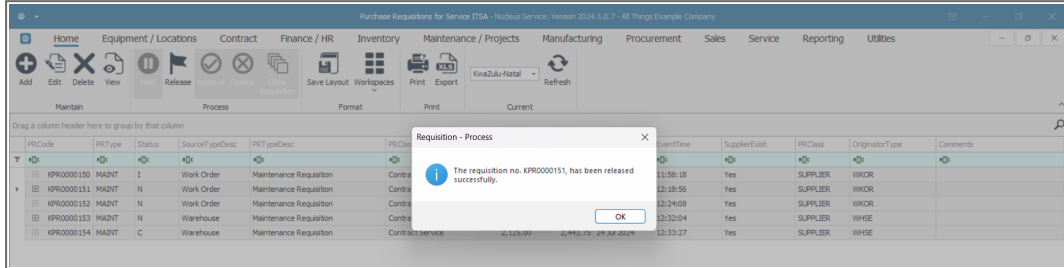
- From the **Purchase Requisitions for Service []** screen -
- Click on the **row** of the requisition you wish to release for approval.
- Click on **Release**.



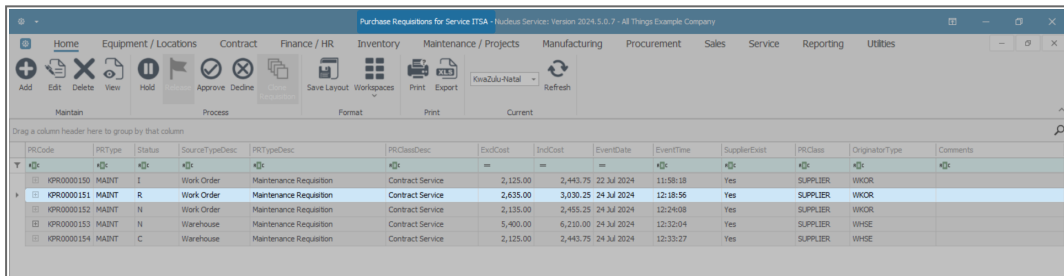
Short cut key: Right click on the selected row to display a **Process** menu, click on **Release**.

PRCode	PRType	Status	SourceTypeDesc	PRTypeDesc	PRClassDesc	ExcCost	InvCost	EventDate	EventTime	SupplierExist	PRClass	OriginatorType	Comments
KPR0000150	MADNT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	
KPR0000151	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MADNT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000153	MADNT	N	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	
KPR0000154	MADNT	C	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	

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



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

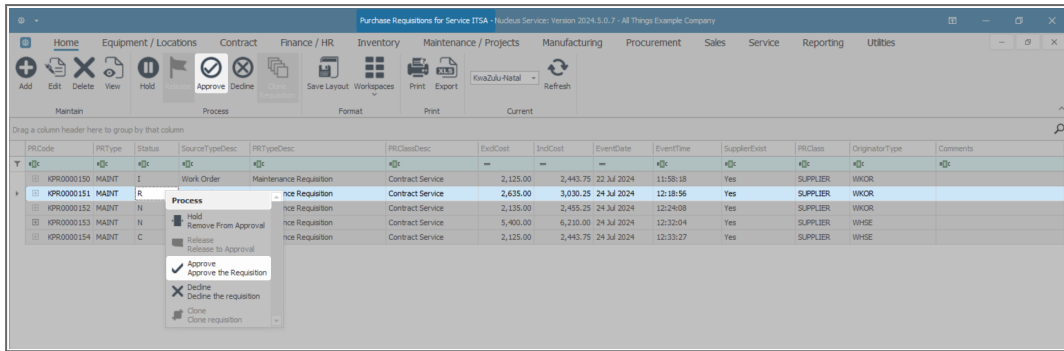


APPROVE REQUISITION

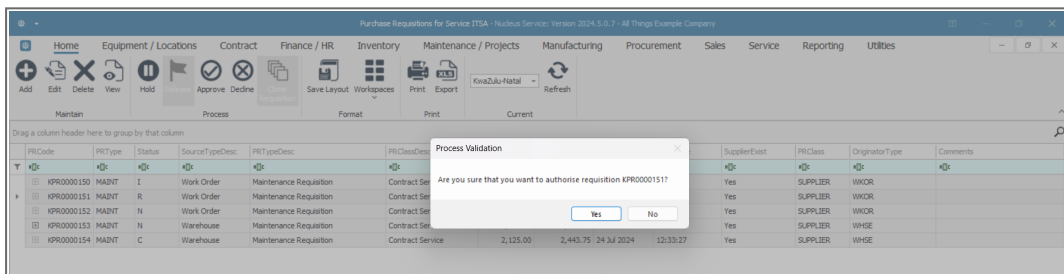
- From the **Purchase Requisitions for Service []** screen -
- Click on the **row** of the requisition you wish to approve.
- Click on **Approve**.



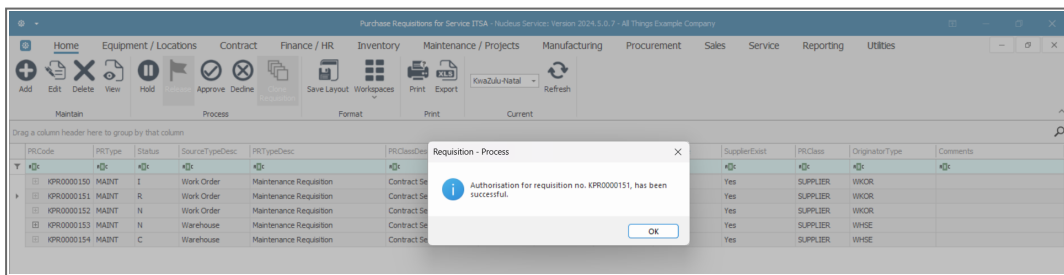
Short cut key: Right click on the selected row to display a **Process** menu, click on **Approve**.



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

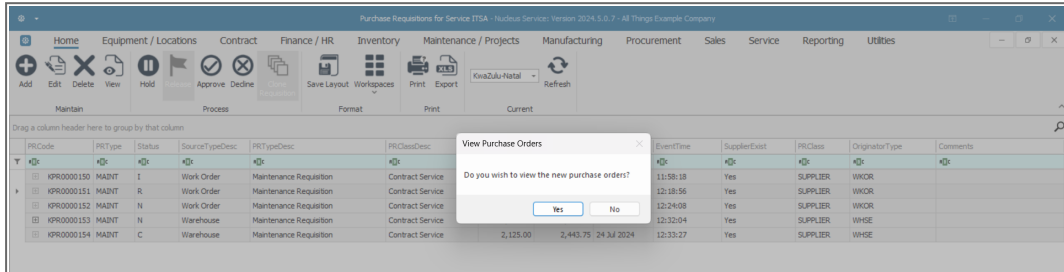


- When you receive the **Requisition - Process** message to confirm -
 - **Authorisation for requisition no. [], has been successful.**
- Click on **OK**.



- A **View Purchase Orders** message appear asking -
 - **Do you wish to view the new purchase order?**

- Click on **Yes** if you want a quick link to the newly raised purchase order in order to view or print the order.
- Click on **No** if you want to remain in the **Purchase Requisition** listing screen.



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

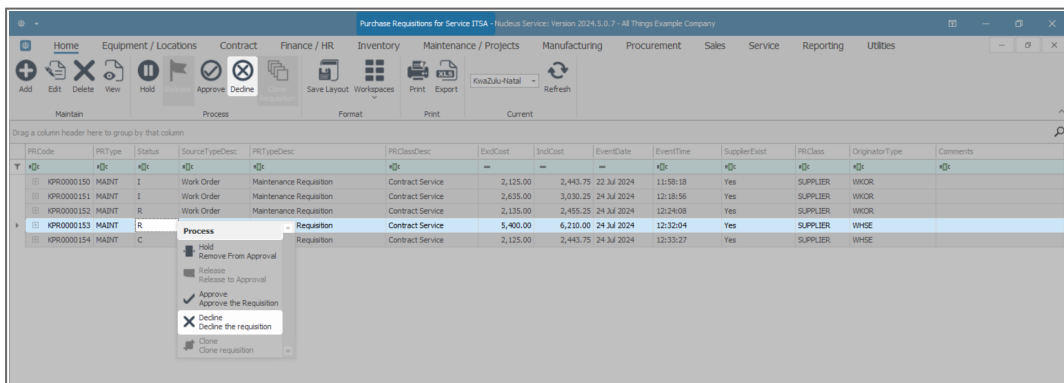
DECLINE A PURCHASE REQUISITION

A Purchase Requisition can only be Declined when in the Released Status.

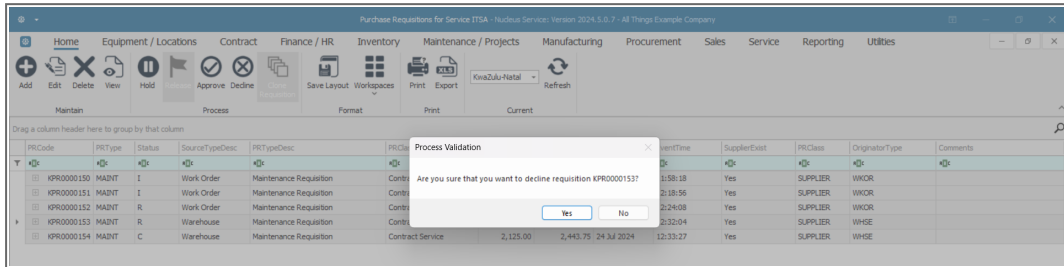
- From the **Purchase Requisitions for Service** screen -
- Select the **row** of the requisition you wish to decline.
- Click on **Decline**.



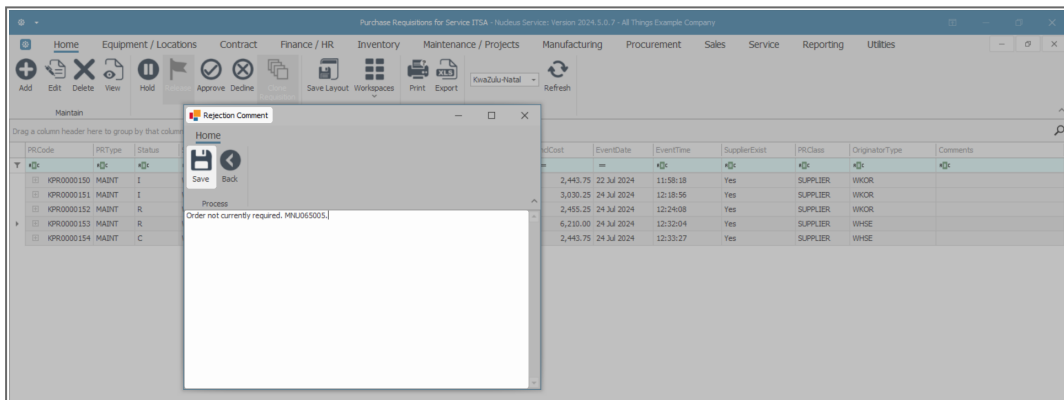
Short cut key: Right click on the selected row to display a **Process** menu, click on **Decline**.



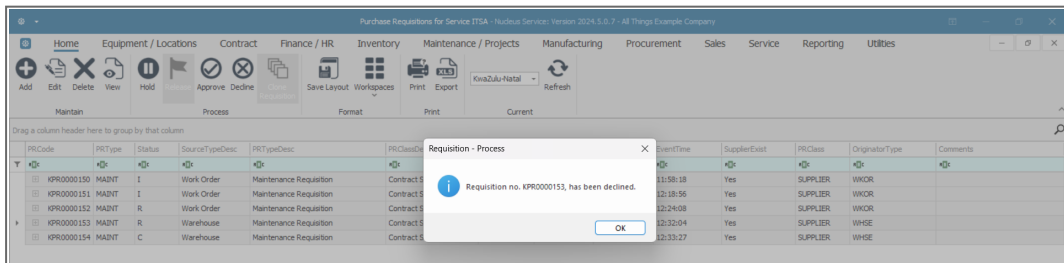
- When you receive the **Process Validation** message to confirm -
 - **Are you sure that you want to decline requisition []?**
- Click on **Yes**.



- When you receive the **Rejection Comment** screen -
- Click in the **text area** to type a **comment** or **reason** for declining the requisition.
- Click on **Save**.



- When you receive the **Requisition - Process** message to confirm -
 - **The requisition no. [], has been declined.**
- Click on **OK**.



- The requisition status has changed from **R - Released** to **D - Declined**.

PRCode	PRType	Status	SourceTypeDesc	PRTypDesc	PRClassDesc	ExtCost	InvCost	EventDate	EventTime	SupplierEst	PRClass	OriginatorType	Comments
KPR0000151	MAINT	I	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR	
KPR0000152	MAINT	R	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR	
KPR0000154	MAINT	C	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE	
KPR0000153	MAINT	D	Warehouse	Maintenance Requisition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE	Order not currently required. MNU065005. The Purchase Requisition was declined by Brigitte...
KPR0000150	MAINT	I	Work Order	Maintenance Requisition	Contract Service	2,125.00	2,443.75	22 Jul 2024	11:58:18	Yes	SUPPLIER	WKOR	



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

CLONE REQUISITION

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



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

Related Topics

[Sales Services - Add a Service](#)

[Sales Services - Edit a Service](#)

[Sales Services - Delete a Service](#)

[Sales Services - View a Service](#)

[Sales Services - Link a Supplier](#)

[Sales Services - Add a Purchase Requisition](#)

[Sales Services - Purchase Orders](#)

[Sales Services - View Service Request List](#)

[Sales Services - Items Supplied Add / Link Supplier](#)

[Sales Services - Items Supplied Edit Supplier](#)



Sales Services - Items Supplied Delete Supplier

MNU.065.005