

# **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 <u>State/Type Selections</u> for more information.

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



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	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					
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	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					
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	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 Audity	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					
	TPC	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.
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### **ADD PURCHASE REQUISITION FOR SERVICE**

• Click on Add.

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Help v2024.5.0.7/1.0 - Pg 2 - Printed: 21/08/2024



- 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.

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- 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** 



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#### **EDIT PURCHASE REQUISITION**

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

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- 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

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#### **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**.

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- 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.

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- 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.

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

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- 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.

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	÷	KPR0000151	MAINT	N	Work Order	Maintenance R	equísition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR			
	Đ	KPR0000152	MAINT	N	Work Order	Maintenance R	equisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR			
	÷	KPR0000153	MAINT	N	Warehouse	Maintenance R	equísition	Contract Service	5,400.00	6,210.00	24 Jul 2024	12:32:04	Yes	SUPPLIER	WHSE			
Þ		KPR0000154	MAINT	с	Warehouse	Maintenance R	equisition	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, <u>no</u> changes can be made to the requisition information, it is <u>view only</u>.

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

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	÷	KPR0000151	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes	SUPPLIER	WKOR			
Þ	Ð	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	С	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.



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		Phone	084 555 1234												Requestor	Eden Rowan		••		
		Email	contact@exampled	domain.co.z	ra															
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#### 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.



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	+	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	R	Work Order		Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR			
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- 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.

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

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

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### **RELEASE REQUISITION FOR APPROVAL**

A Purchase Requisition can <u>only</u> 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.

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Help v2024.5.0.7/1.0 - Pg 10 - Printed: 21/08/2024



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

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		KPR0000152	MAINT	N	Work Order	Maintenance P	Requisition	Con	tra				12:24:08	Yes		SUPPLIER	WKOR		
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• The requisition status has changed from **N** - **New** to **R** - **Released**.

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		KPR0000152	MAINT	N	Work Order	Maintenance Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR			
	Ŧ	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	С	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE			

### **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.



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Þ		KPR0000151	MAINT	R	Process		nce Requisition	0	ontract Service	2,635.00	3,030.25	24 Jul 2024	12:18:56	Yes		SUPPLIER	WKOR			
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- When you receive the Process Validation message to confirm -
  - Are you sure that you want to authorise requisition PR[ ]?
- Click on Yes.

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

Purchase Requisitions for Service ITSA - Nucleus Service: Version 2024.5.0.7 - All Things Example Co																		×			
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- 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.

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+		KPR0000151	MAINT	R	Work Order	Maintenance Requisition	Contract Service		12:18:56	Yes	SUPPLIER	WKOR.		
		KPR0000152	MAINT	N	Work Order	Maintenance Requisition	Contract Service	Yes No	12:24:08	Yes	SUPPLIER	WKOR		
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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.

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		KPR0000152	MAINT	R	Work Order	Maintenan	ce Requisition	Contract Service	2,135.00	2,455.25	24 Jul 2024	12:24:08	Yes	SUPPLIER	WKOR			
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- When you receive the **Process Validation** message to confirm -
  - Are you sure that you want to decline requisition []?
- Click on Yes.

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- 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.

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

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		KPR0000154	MAINT	С	Warehouse	Maintenance Requisition	Contract Service	2,125.00	2,443.75	24 Jul 2024	12:33:27	Yes	SUPPLIER	WHSE					
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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

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