

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

PROCUREMENT

REQUISITION NOTES AND COMMENTS

Once you have created your purchase requisition, you may be required to **add** Notes and / or Comments.

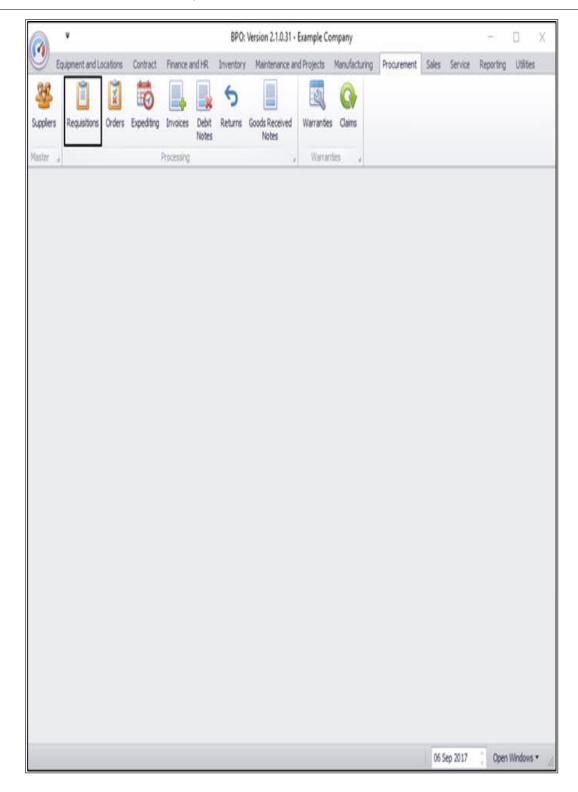
- Comments: These are internal notes regarding the requisition.
- **Notes:** These are notes concerning orders to this supplier, which will pull through to the **Purchase Order**.

You <u>cannot</u> delete a Note / Comment. Each note or comment saved will be listed in the lower half of the Notes docking panel.

You cannot edit a current Note / Comment, only add to it.

Ribbon Access: Procurement > Requisitions



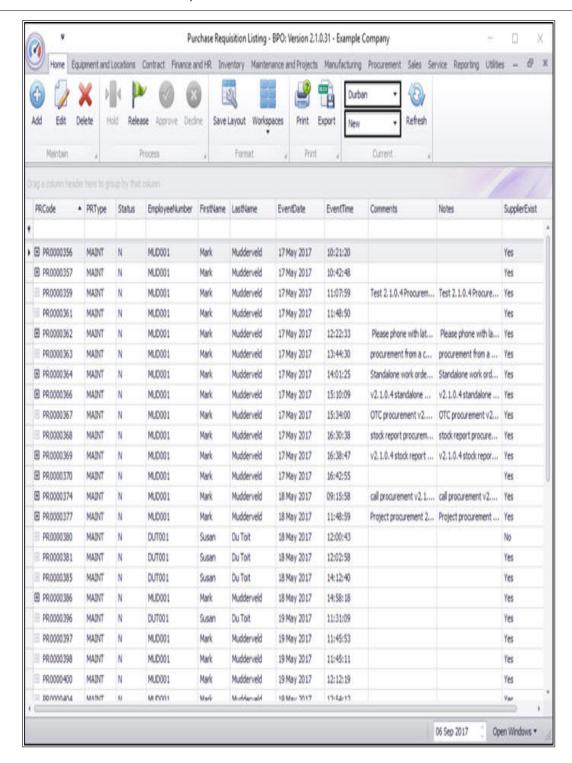


Select the Site and Status



- Select the **Site**.
 - In this image **Durban** has been selected.
- Select the **Status**.
 - In this image the status has been set to **New**.

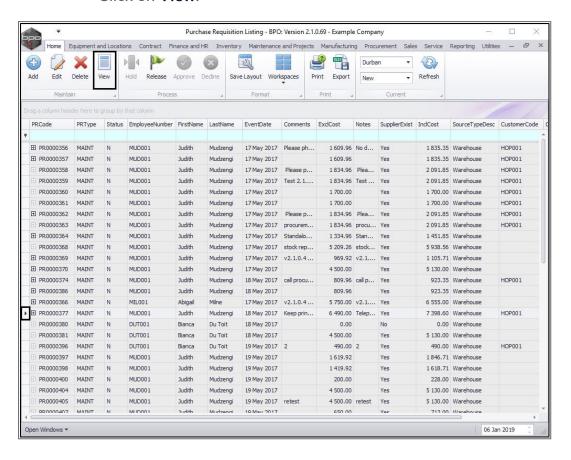






VIEW REQUISITION NOTES AND COMMENTS

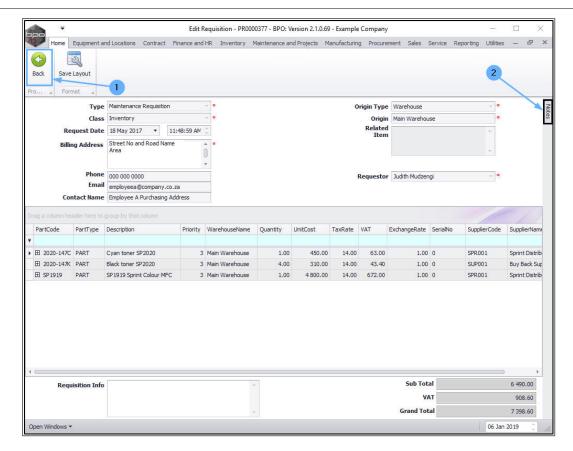
- Select the row of the row of the purchase requisition where you
 wish to view the notes and comments.
- Click on View.



The **Edit Requisition** screen will be displayed.

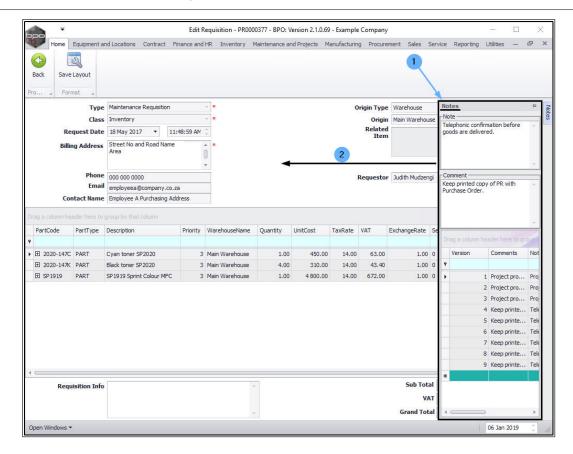
- 1. As you navigated to this screen via the **View** button, you will note that there is only a **Back** processing button here (and no **Save** button) therefore you cannot make or save any changes.
- 2. Click on the **Notes** tab on the right hand side of the screen.





- 1. The Notes docking panel will be displayed.
- 2. **Expand** this panel to make it easier to work in.



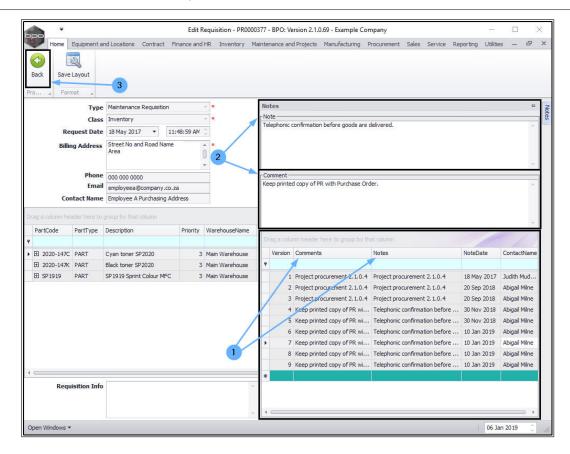


 In the Notes docking panel you can view all the previous Notes and Comments

Note: These past Notes and Comments <u>cannot</u> be deleted or edited, just viewed for information.

- 2. In this screen, you can also view the **current** Notes and Comments.
- 3. When you are finished viewing the details, click on **Back** to return to the **Purchase Requisition Listing** screen.



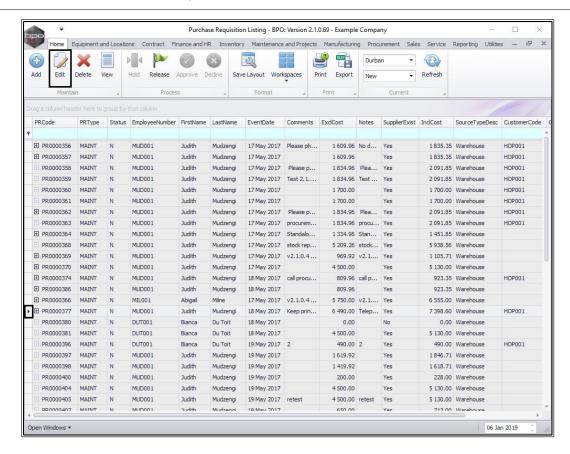


ADD REQUISITION NOTES AND COMMENTS

In the Purchase Requisition Listing screen,

- Select the row of the purchase requisition where you wish add Comments and/or Notes.
- Click on Edit.

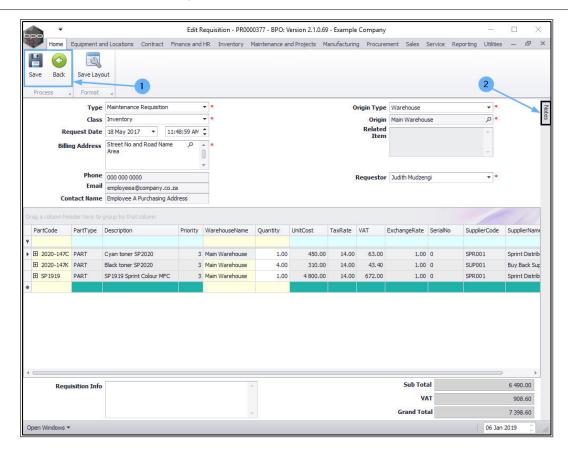




The **Edit Requisition** screen will be displayed.

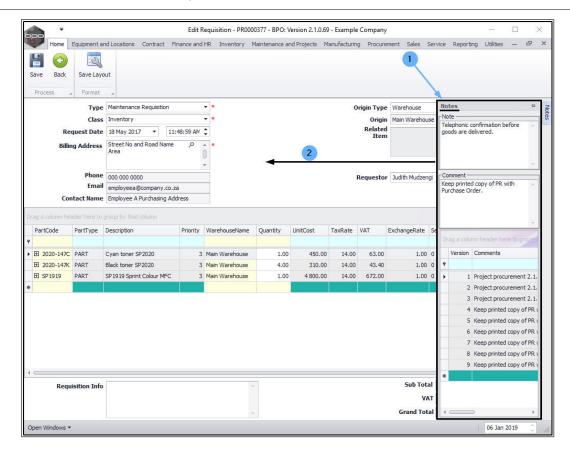
- As you navigated to this screen via the Edit button, you will note that there is now a Save processing button here as well as a Back button. You <u>can</u> make and save changes in this screen.
- 2. Click on the **Notes** tab on the right hand side of the screen.





- 1. The Notes docking panel will be displayed.
- 2. **Expand** this panel to make it easier to work in.

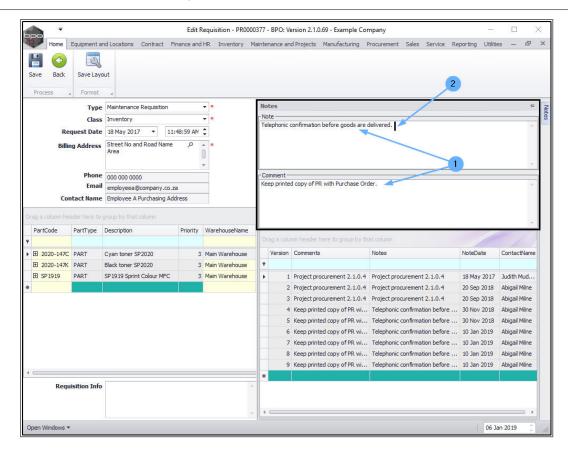




ADD TO EXISTING NOTES AND/OR COMMENTS

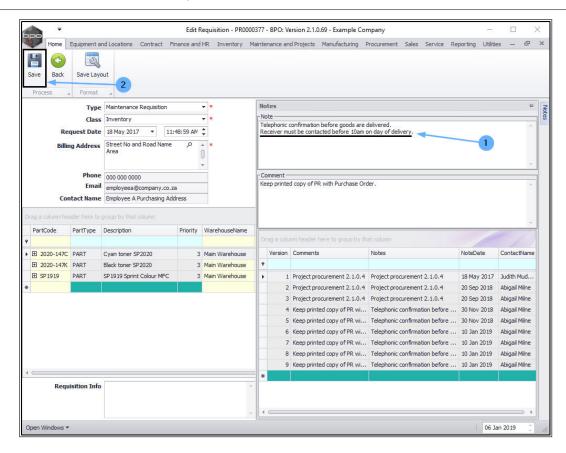
- 1. In this images you can see that there is <u>already</u> text in the current frames.
- 2. If you wish to keep these current and **add** to them, place your **cursor** at the end of the existing text in the relevant frame. Either start typing there or press **Enter** on your keyboard to move onto a new line.





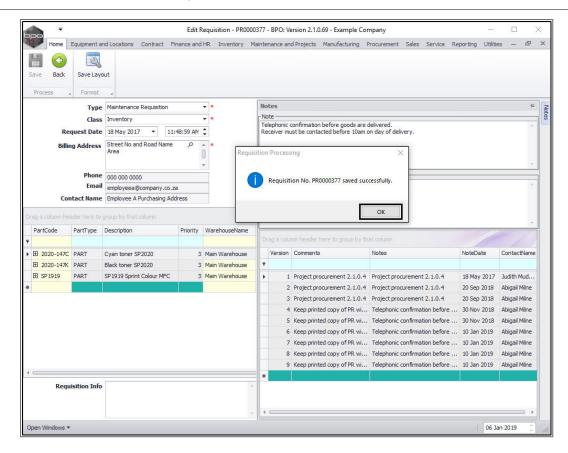
- 1. In this image the **new** text has been typed on the next line.
- 2. Click on Save.





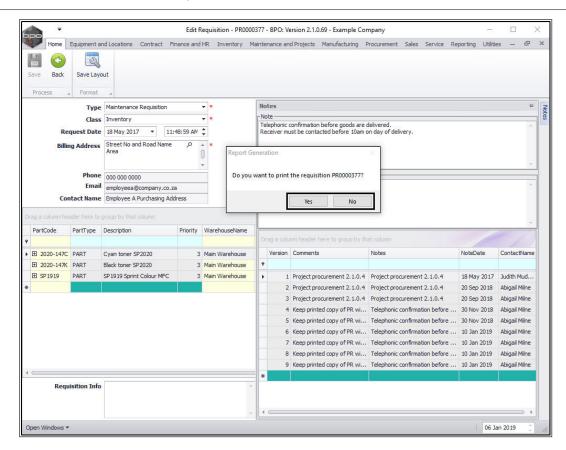
- A Requisition Processing message box will pop up informing you that:
 - Requisition No. [] saved successfully.
- Click on OK.





- A Report Generation message box will pop up asking;
 - Do you want to print the requisition []?
- Click on Yes or No as required.



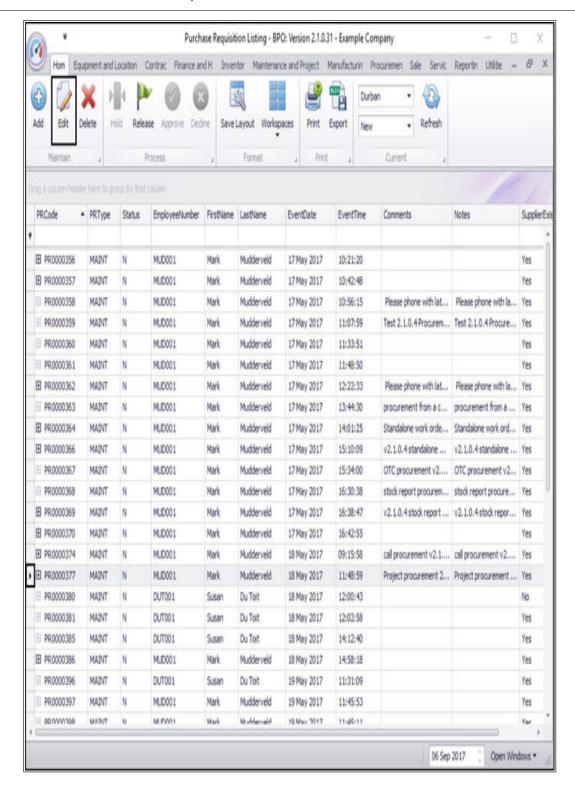


CREATE NEW NOTE AND/OR COMMENT

In the Purchase Requisition Listing screen.

- Select the row of the **purchase requisition** where you wish to add a **new** Note and/or Comment.
- · Click on Edit.

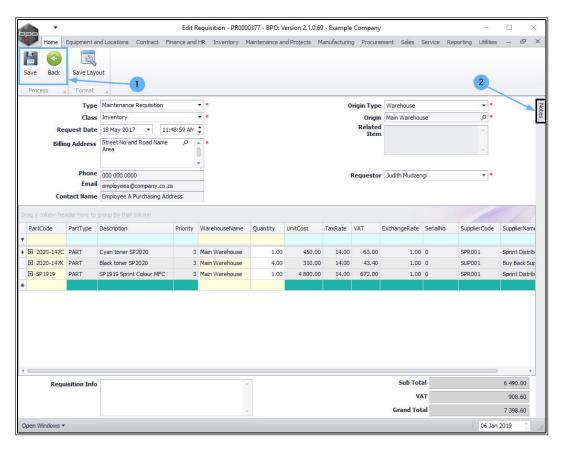




The **Edit Requisition** screen will be displayed.

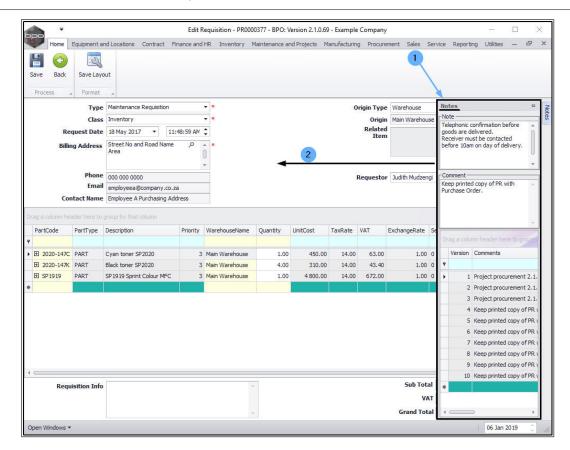


- As you navigated to this screen via the **Edit** button, you will note that there is now a **Save** processing button here as well as a **Back** button. You <u>can</u> make and save changes in this screen.
- 2. Click on the **Notes** tab on the right hand side of the screen.



- 1. The **Notes** docking panel will be displayed.
- 2. **Expand** this panel to make it easier to work in.



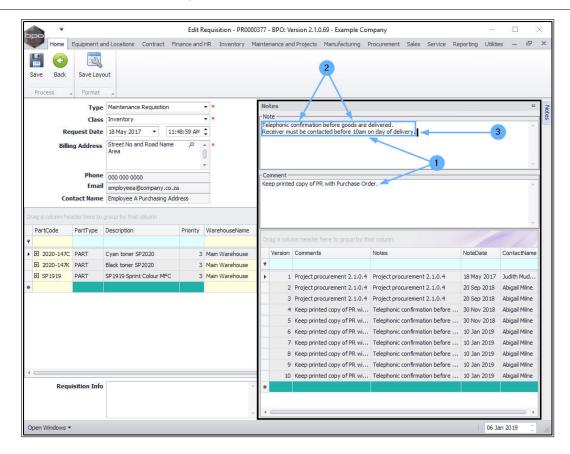


1. In this image you can see that there is <u>already</u> text in the current frames.

To **remove** this text and create a **new** Note or Comment, Either

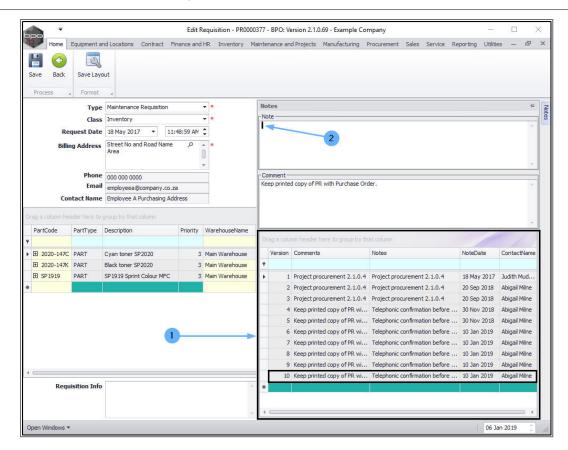
- 2. highlight the text and press Delete on your keyboard
- 3. or place your **cursor** at the end of the existing text in the relevant frame and press **Backspace** on your keyboard until you have deleted the required text.





- 1. The **lower** frame will keep a record of all Notes and Comments.
- 2. Place your **cursor** in the now empty frame and type in the new Note and/ or Comment.

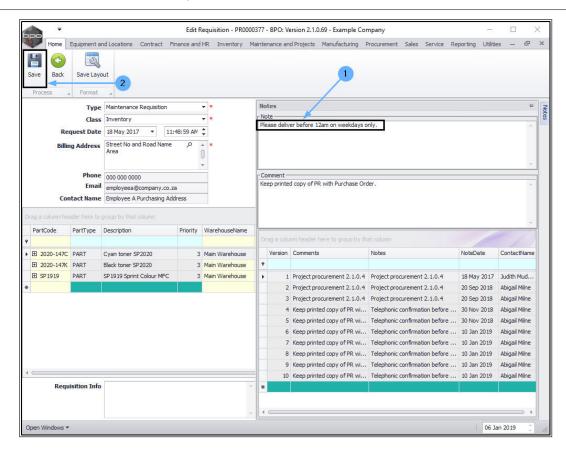




SAVE NOTE/COMMENT

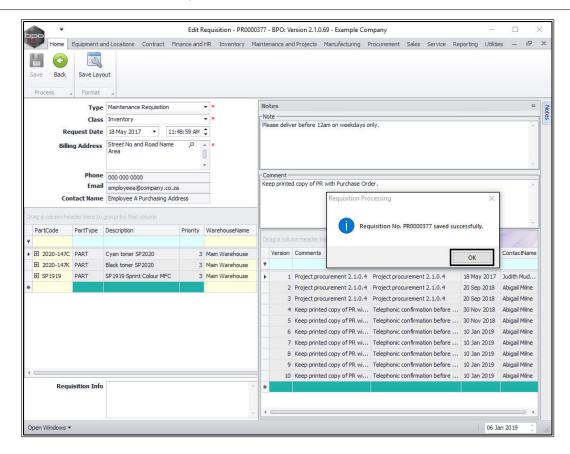
- 1. When you have finished typing in the **new** Note and/or Comment,
- 2. click on Save.





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

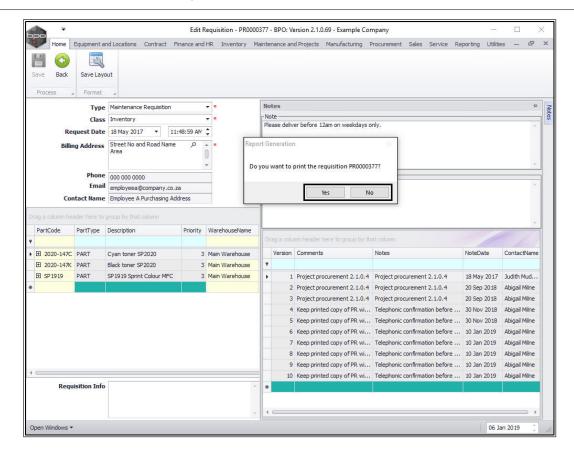




PRINT REQUISITION

- A Report Generation message box will pop up asking;
- Do you want to print the requisition[]?
- Click on Yes or No according to your requirements.
 - Yes: Follow the Print Purchase Requisition process.
 - No: You will return to the Purchase Requisition Listing screen.





MNU.053.007