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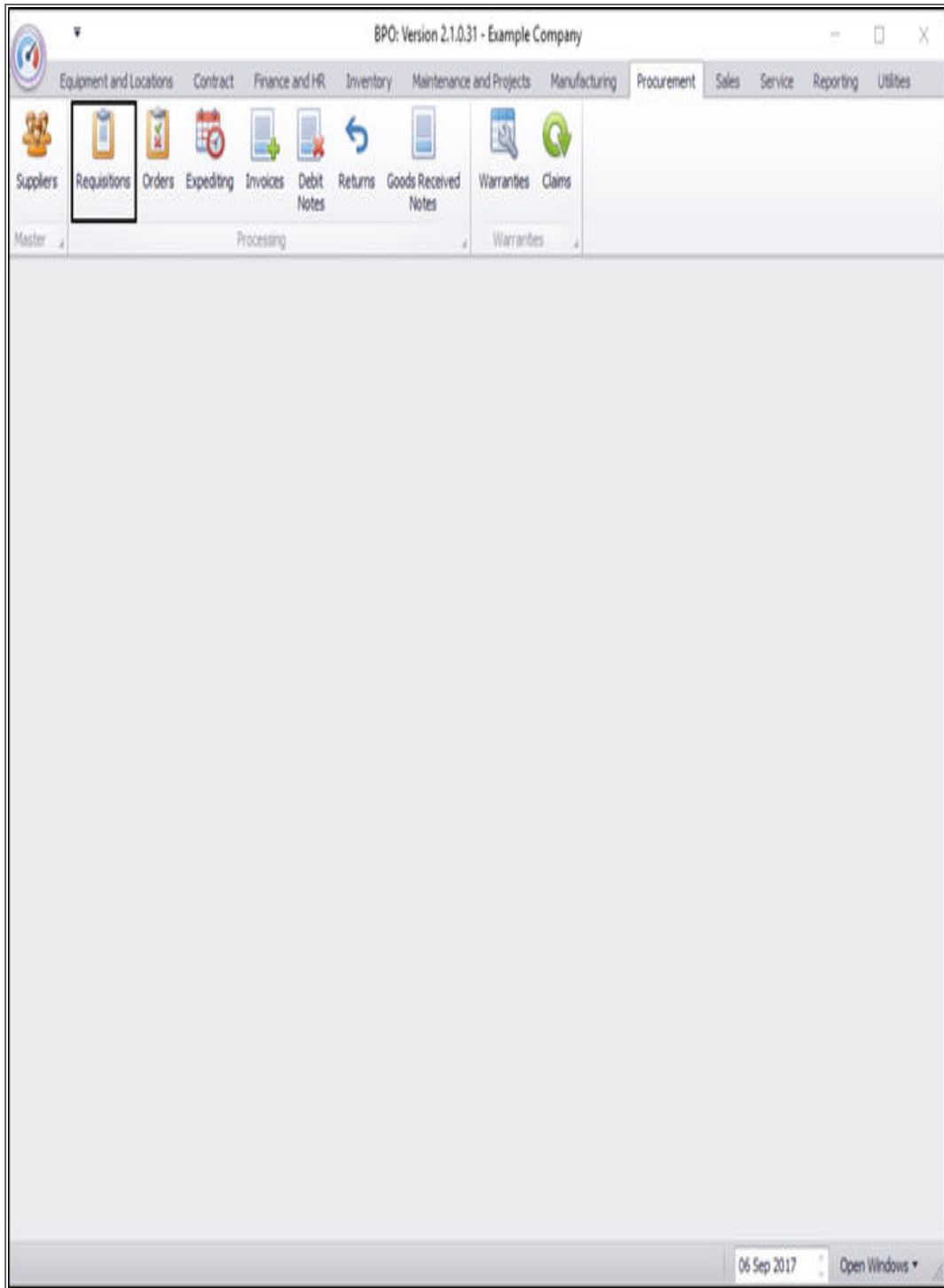
PROCUREMENT

ADD A REQUISITION FROM PURCHASING TEMPLATE

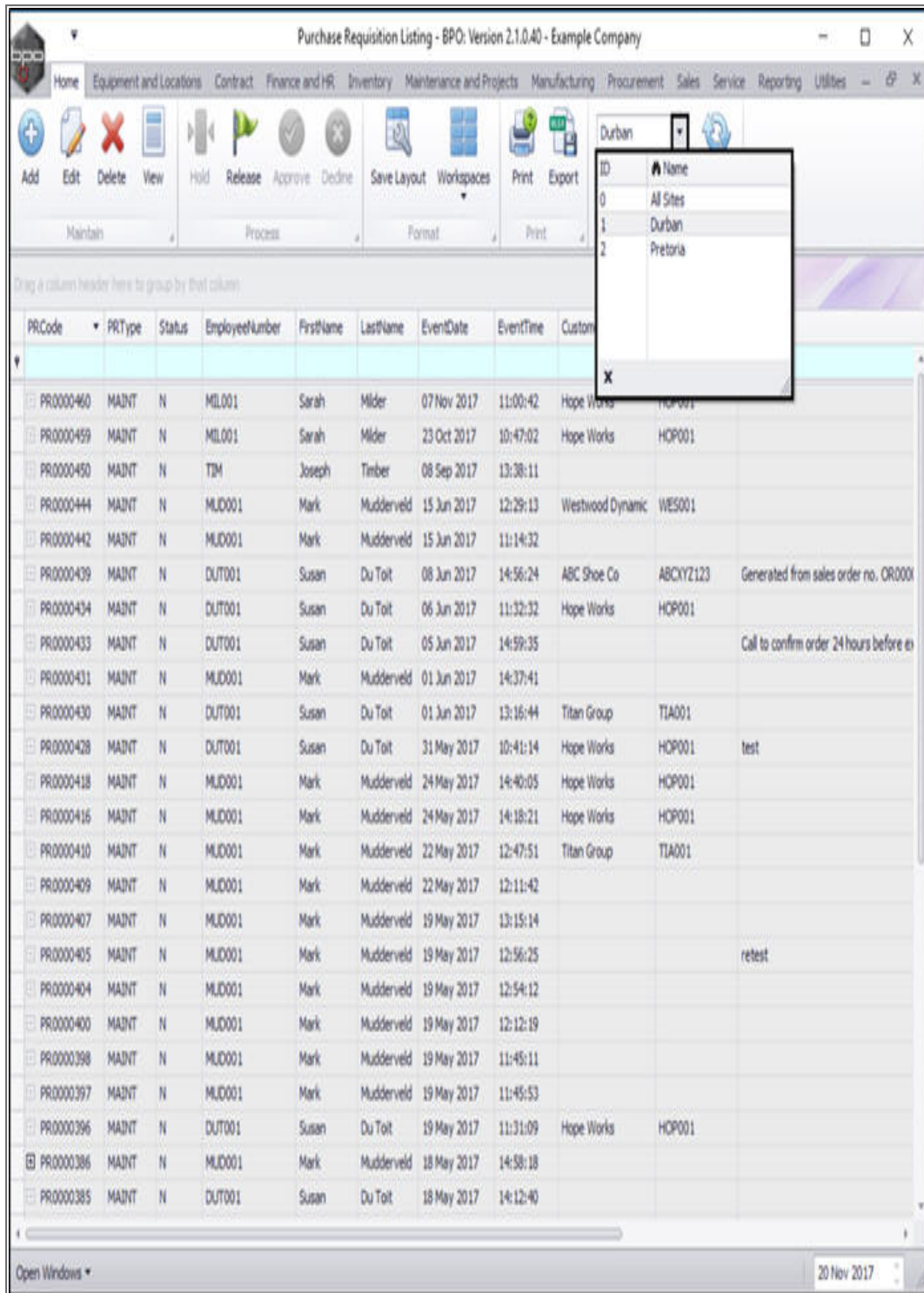Purchasing Templates can be created to preconfigure purchase requisitions to effectively generate bulk orders.

> 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.

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

ADD PURCHASE REQUISITION

- Click on **Add**.

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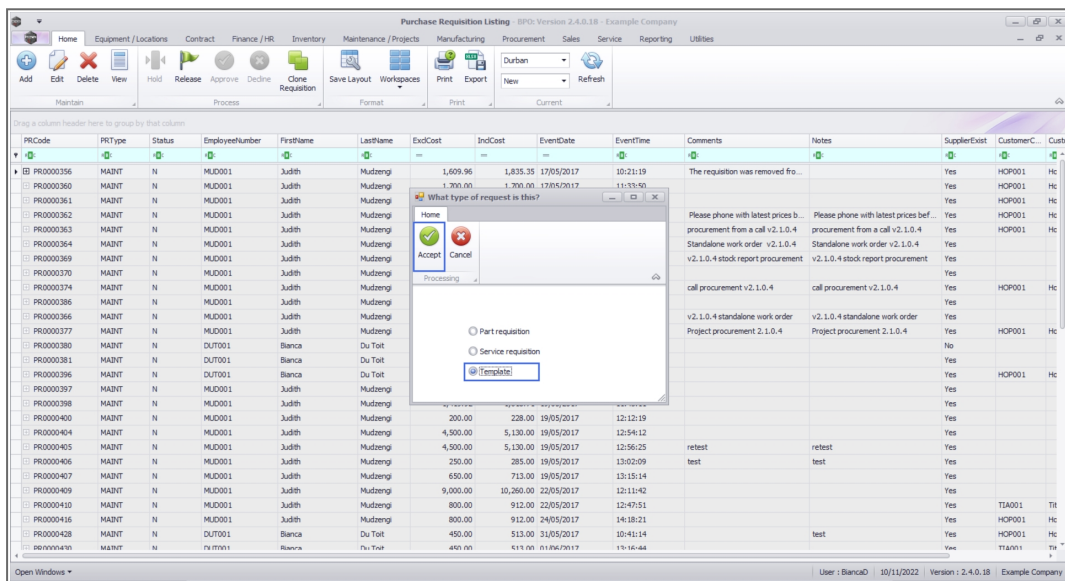
The **Purchasing Template lookup** screen will be displayed.

- Click the **Purchasing Template** you wish to use for this requisition .
- Click on the **Ok** button.
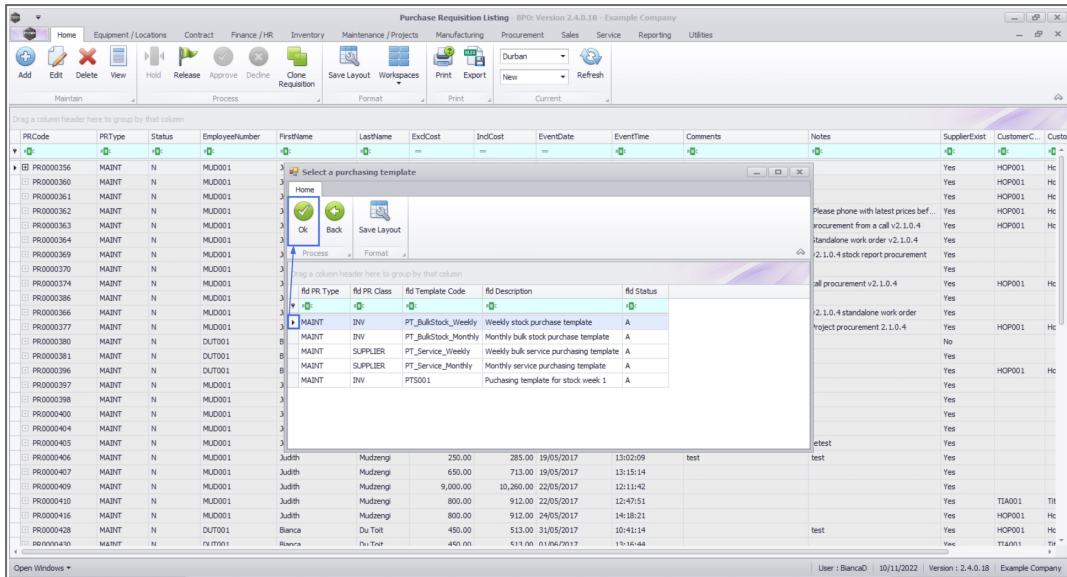
The **Add new Requisition** screen will be displayed, listing all items as configured on the selected purchasing template.
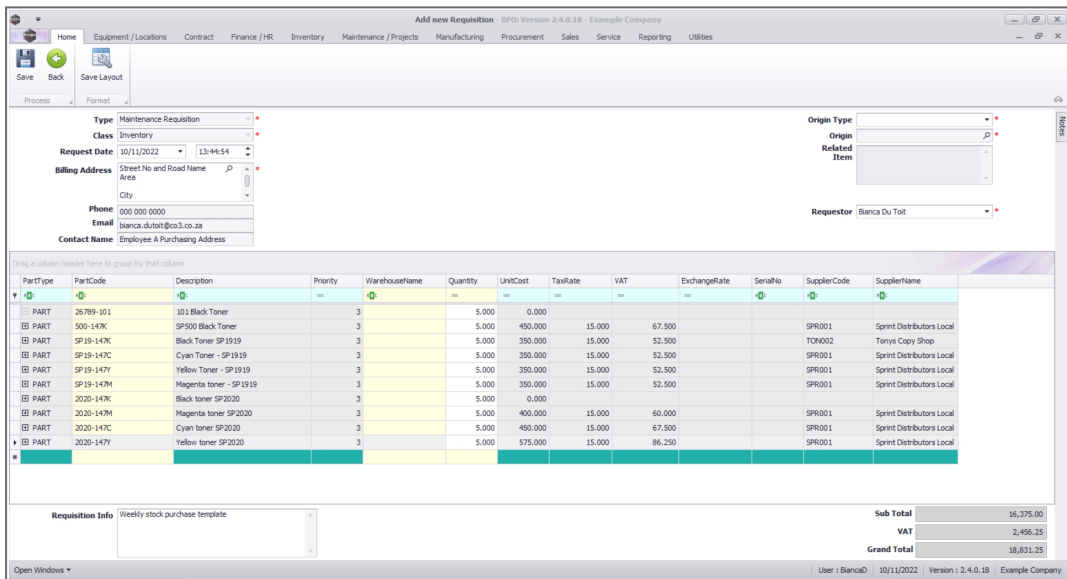
REQUISITION HEADER INFORMATION

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.
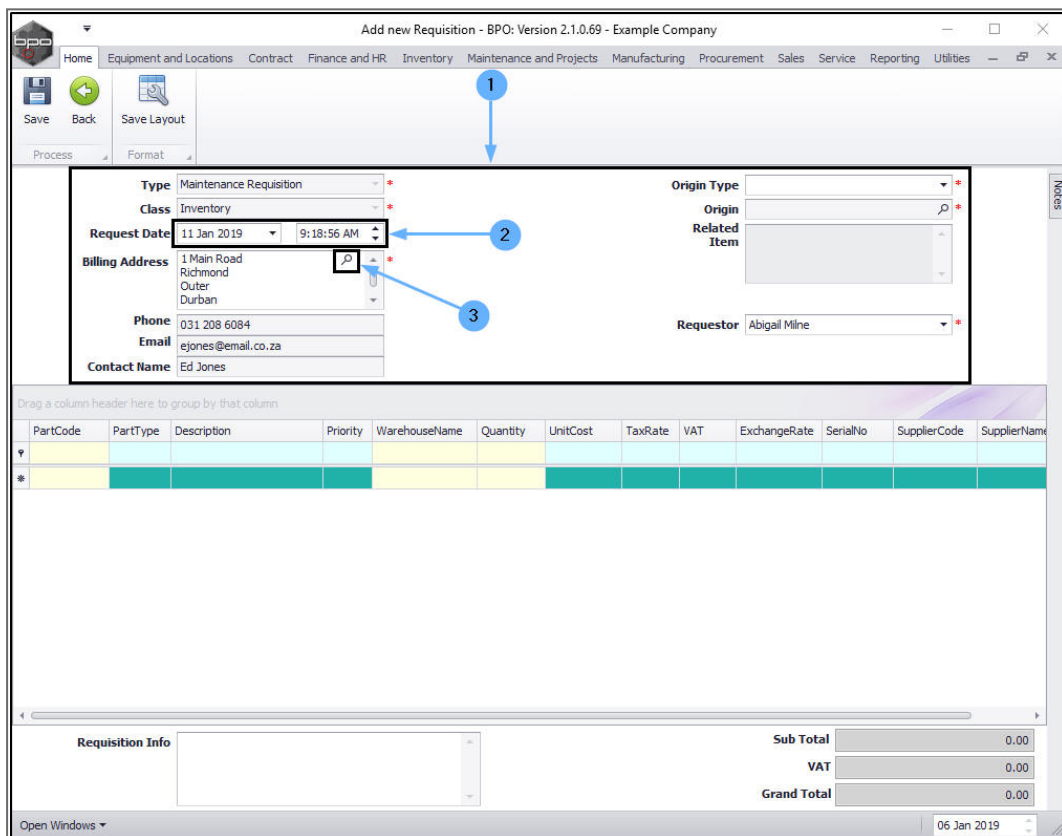- ○ **Request Time:** You can either type in or use the directional arrows to select an alternative time.

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.
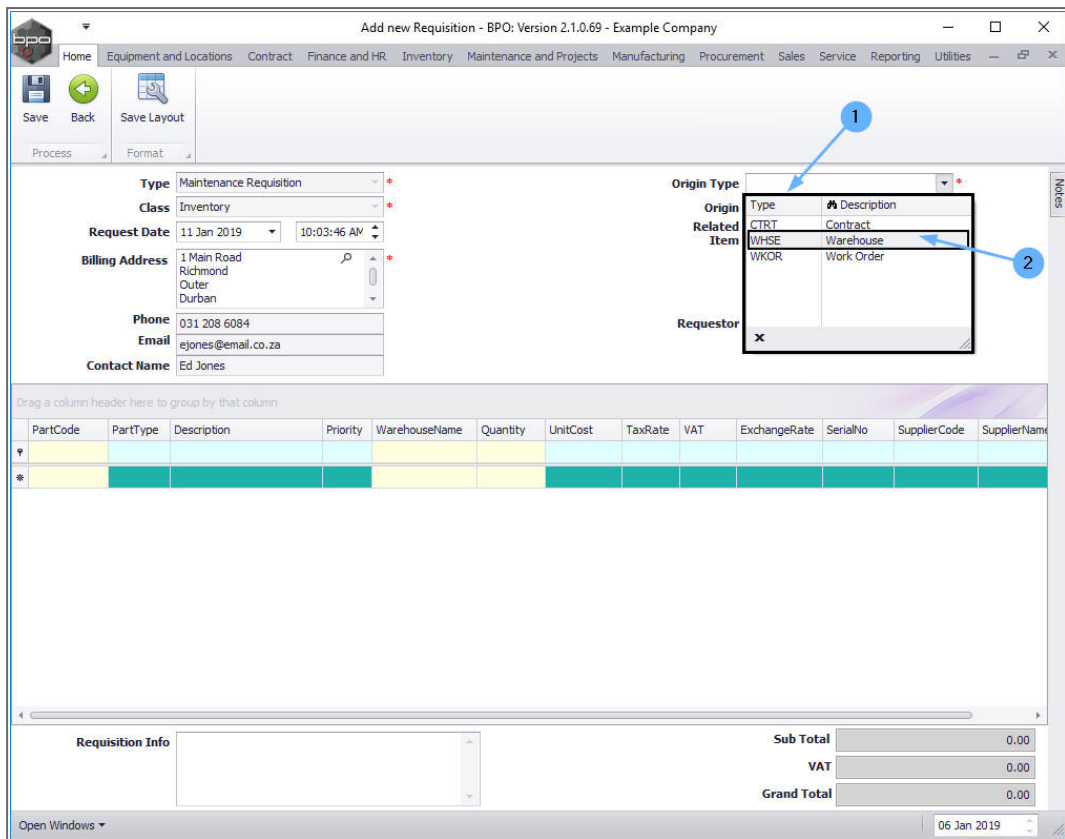
ORIGIN TYPE AND ORIGIN

This information is mandatory.

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

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 <u>contract</u> origin for this requisition screen will pop up.
>
>   ii. If **Work Order Type** was selected then the Select a <u>work order</u> origin for this requisition screen will pop up.
>
>   iii. As **Warehouse Type** was selected then the Select a <u>warehouse</u> 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**.
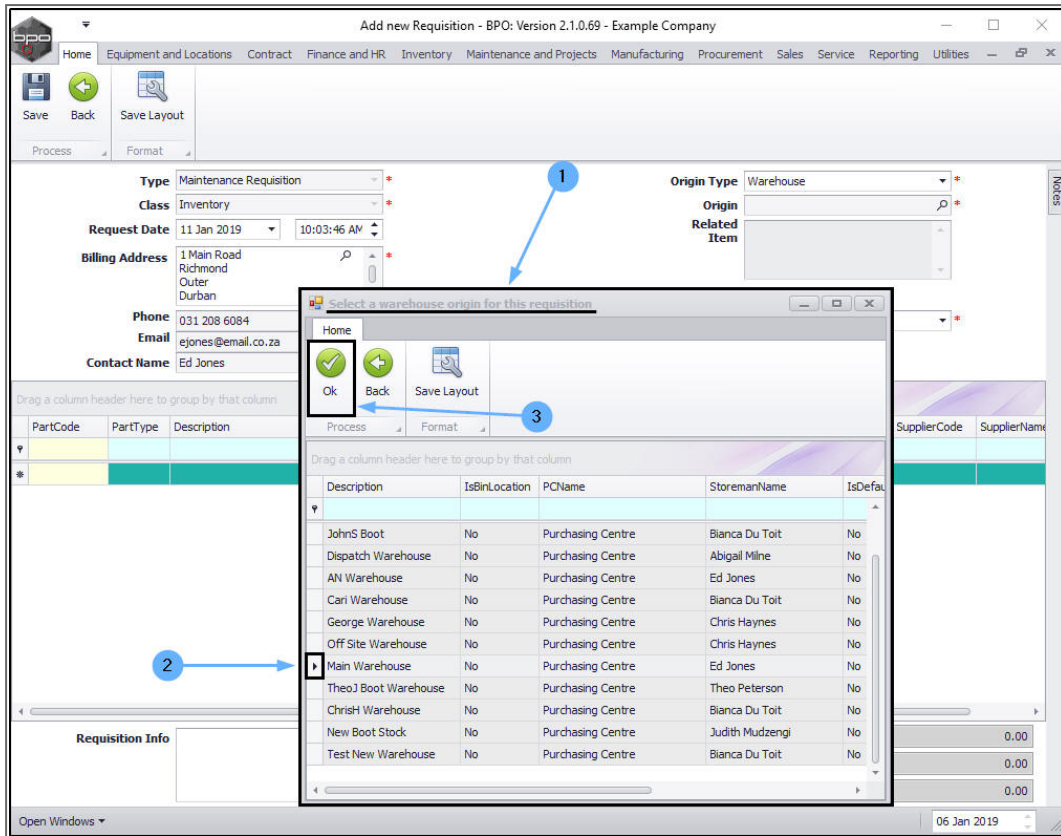
RELATED ITEMS

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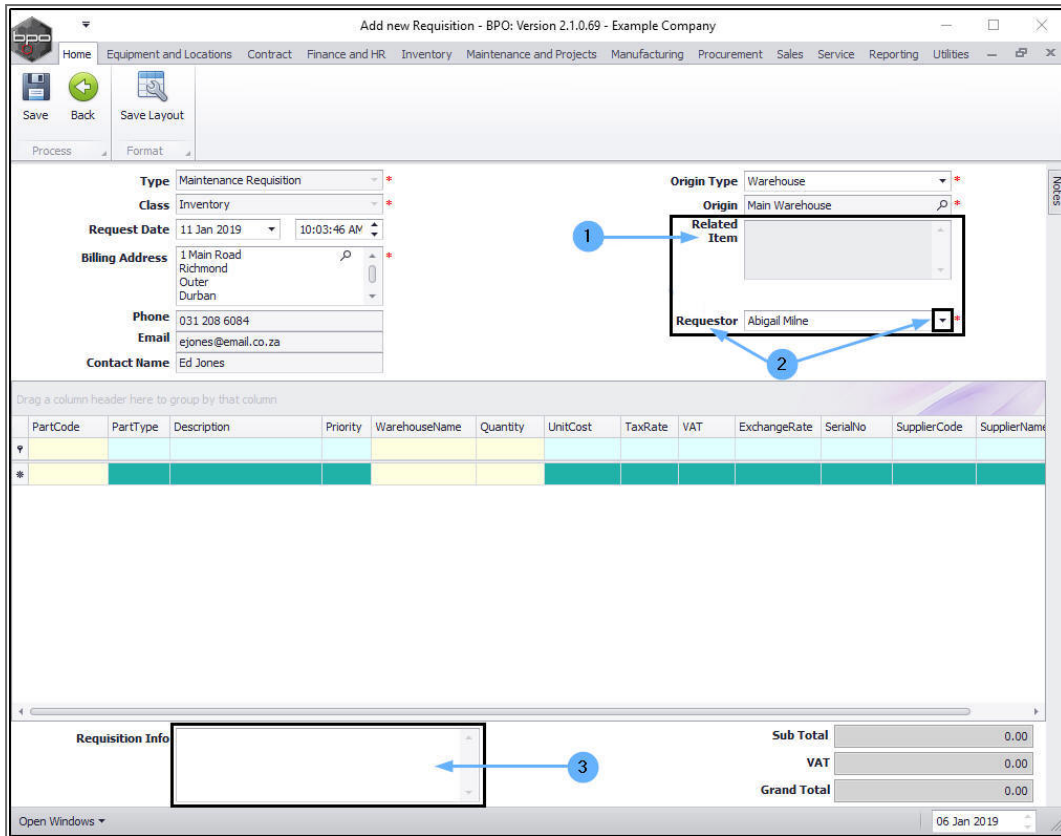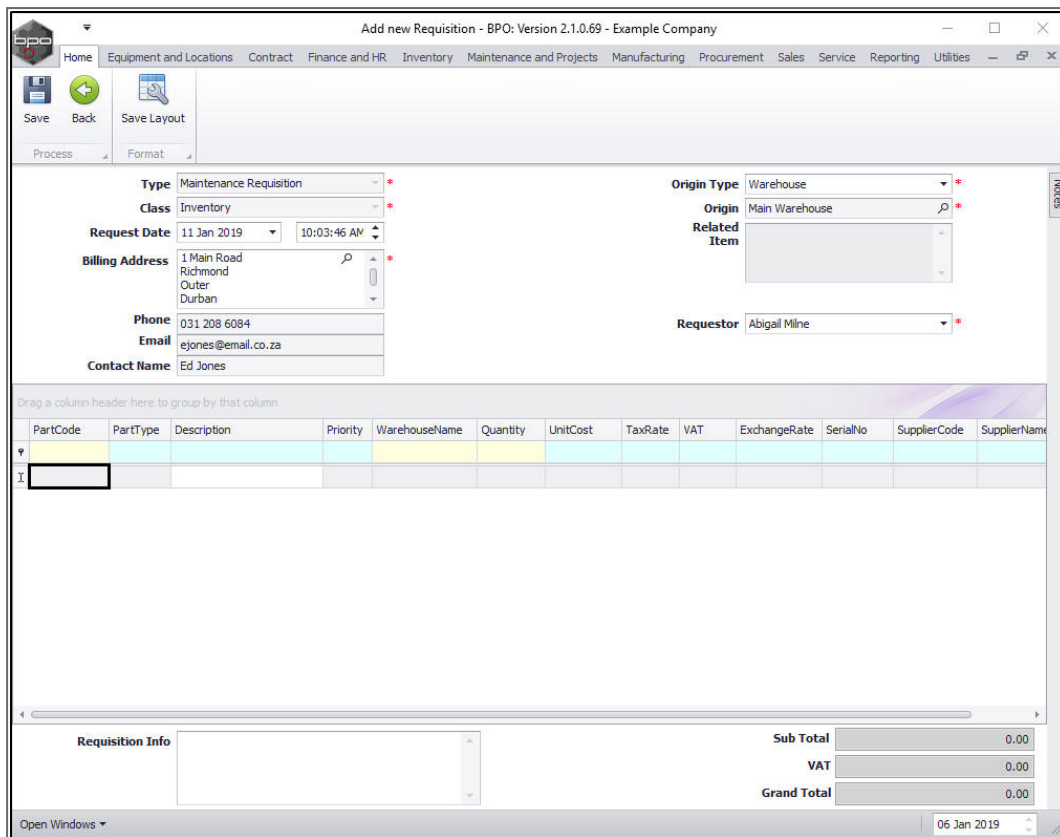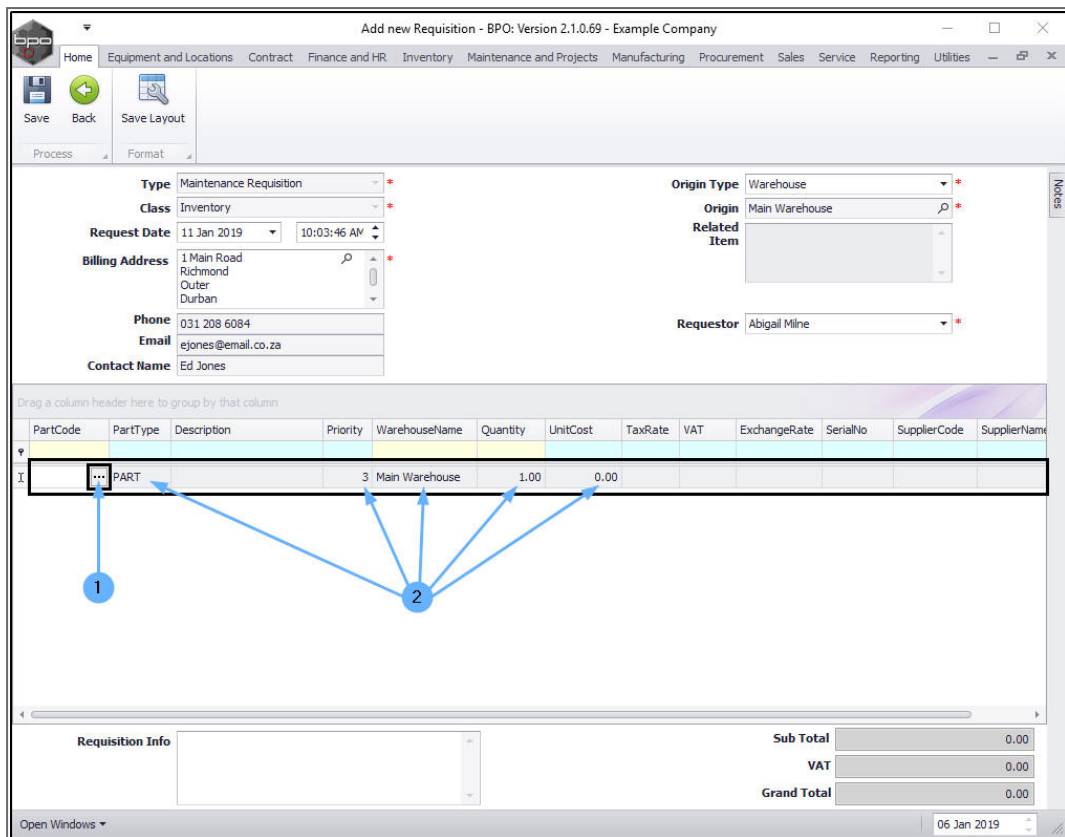
You can now move down to the **Parts** data grid.

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 will **PART**.
    - **Priority:** This will auto populate with **3**.
    - **Warehouse Name:** This will only auto populate if the <u>Origin Type</u> selected is **Warehouse**. Then it will populate with the <u>same</u> 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**.
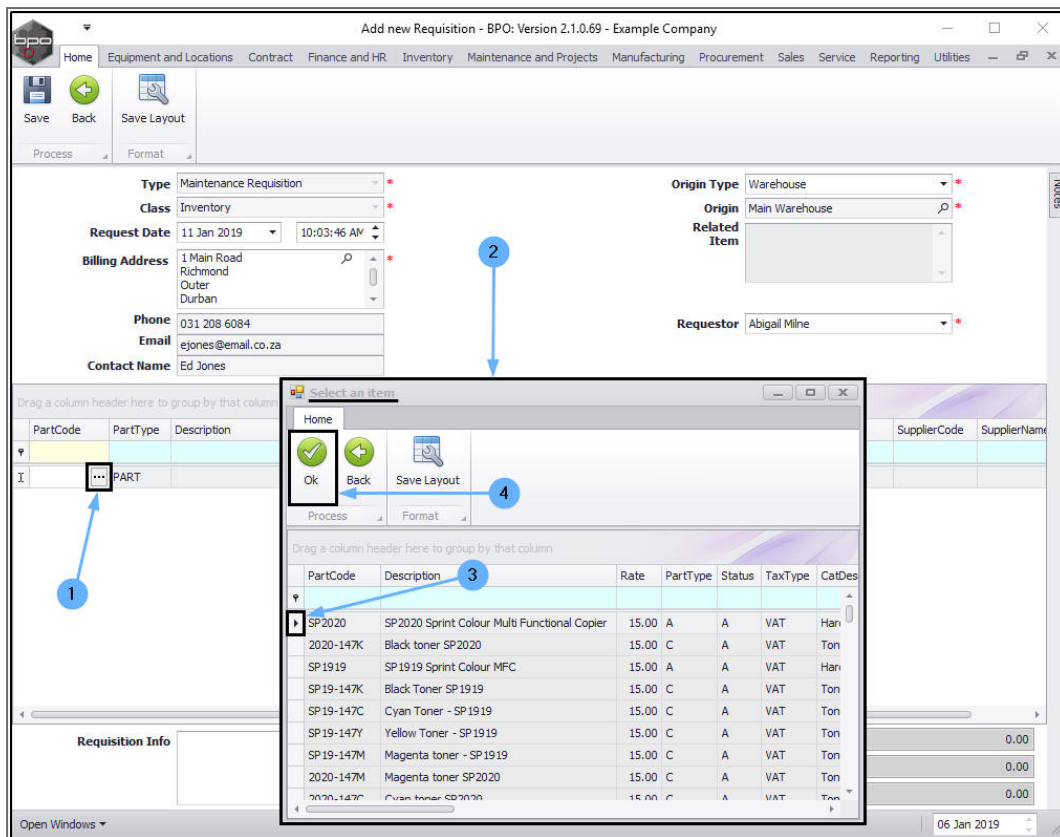
ITEM DETAILS

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:
>
> i. The currency of the Primary Supplier set up is **different** to your company currency as set up in BPO2.
> ii. 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.

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 <u>add A, B or C-Class items</u> in this way until you have finished adding items to the requisition.

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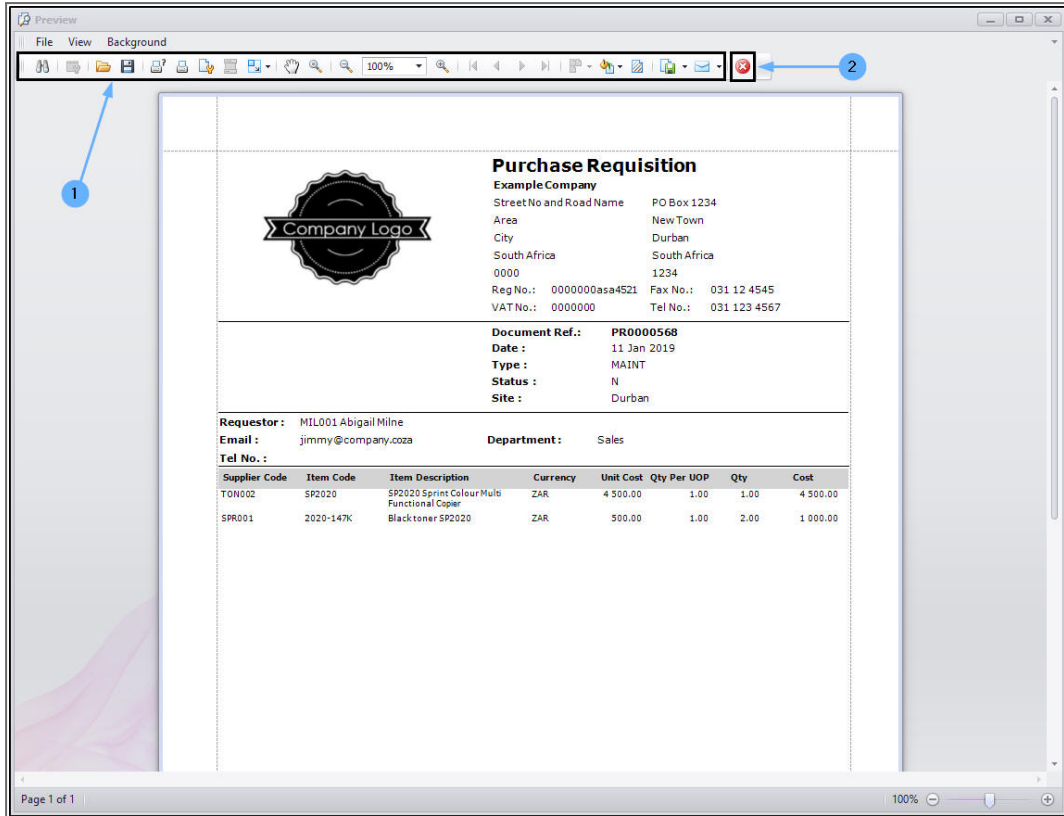
You will return to the **Purchase Requisition** Listing screen.

VIEW REQUISITION

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

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

DELETE A REQUISITION

Select the Site and Status

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

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

Select Requisition

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

CONFIRM DELETION

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

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

- Click on **Yes**.

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

VIEW DELETED (CLOSED) REQUISITION

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

MNU.053.011