# 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 <u>cannot</u> edit a current Note / Comment, only add to it.

Ribbon Access: *Procurement > Requisitions*
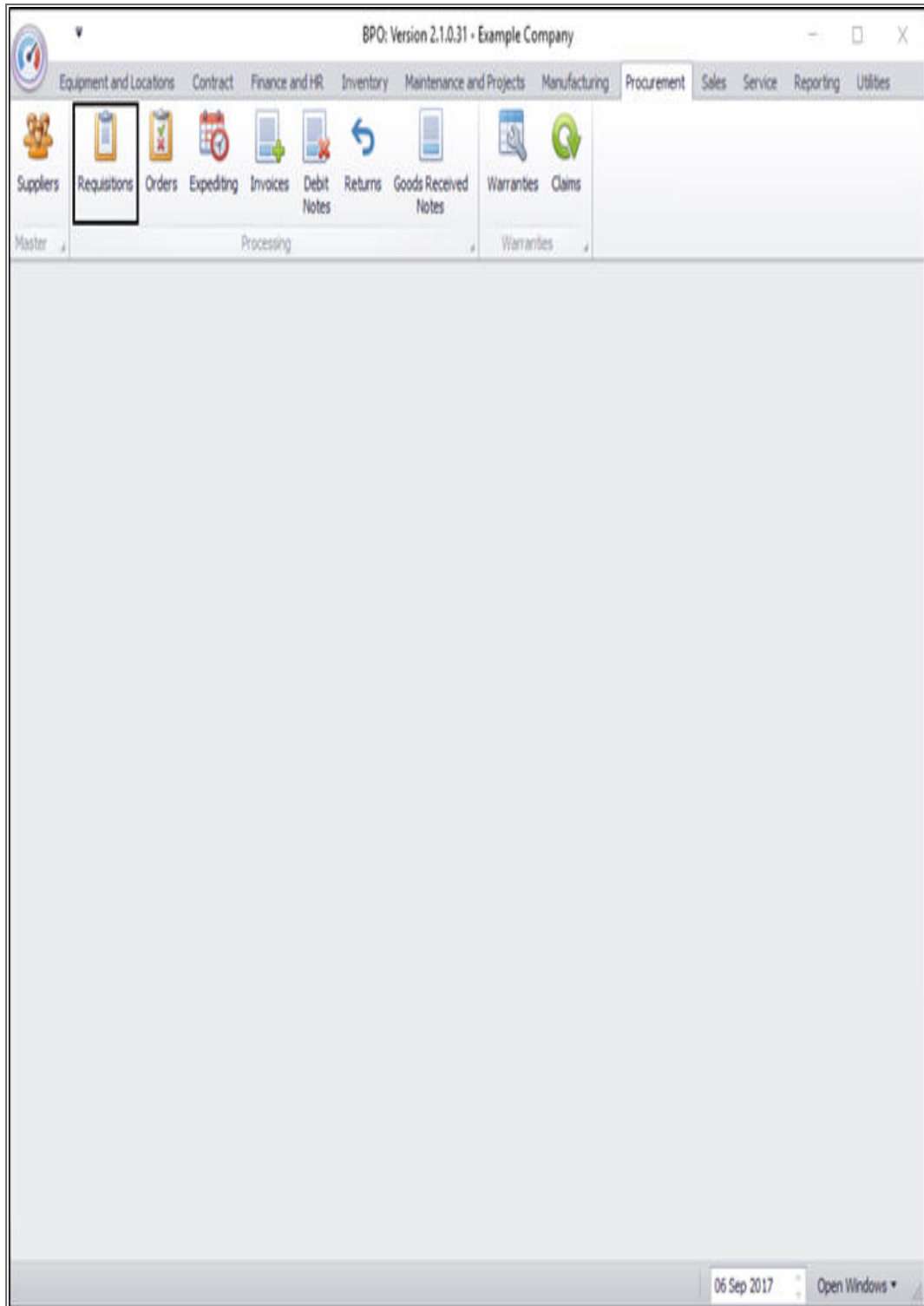
Select the Site and Status

- 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.

1. 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.

1. 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.

1. 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.
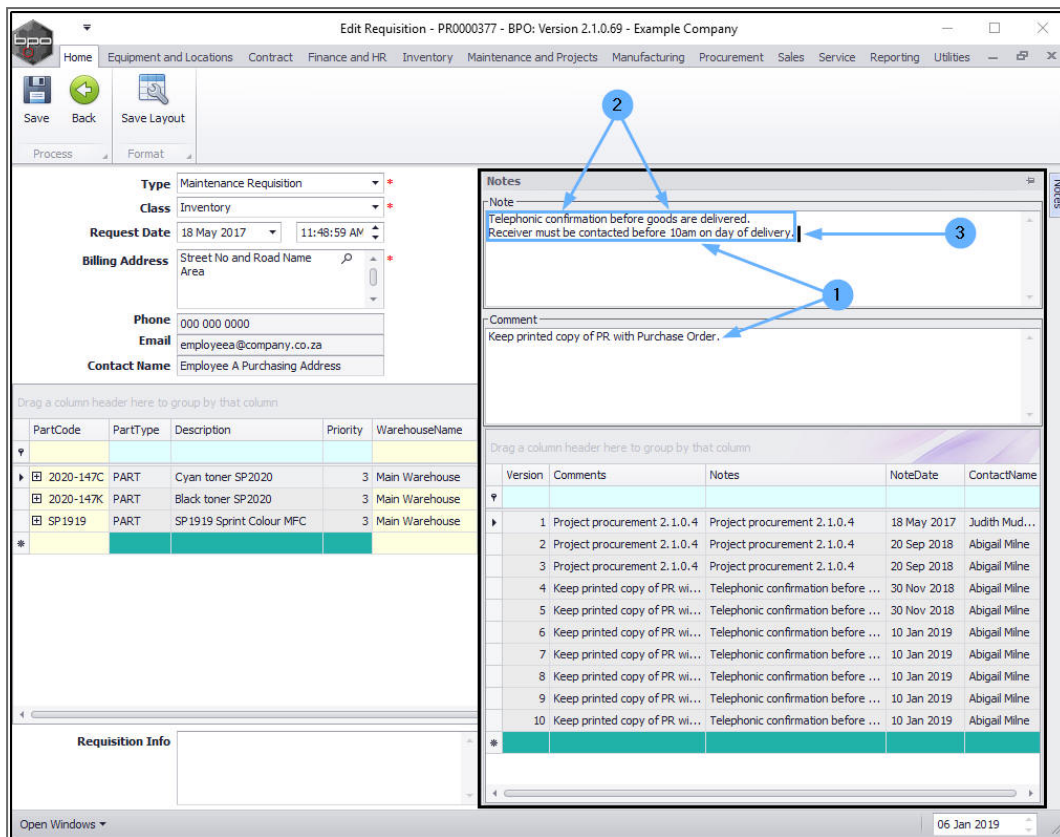2. *Expand* this panel to make it easier to work in.

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.

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