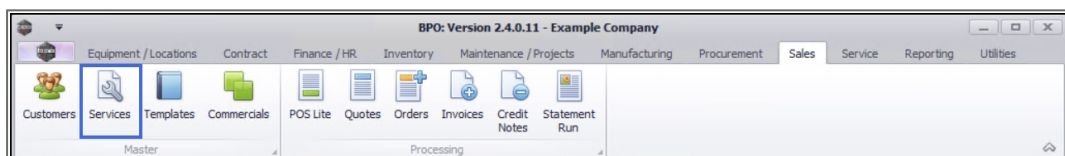


SALES

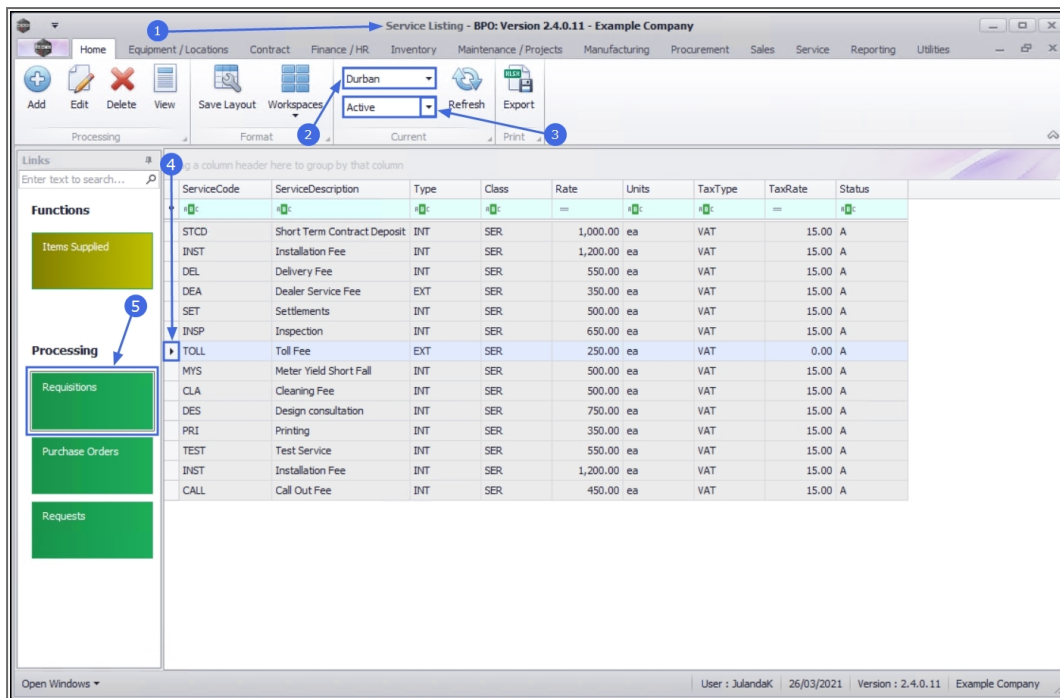
SERVICES – PURCHASE REQUISITIONS

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 Access: *Sales > Services*



1. The **Service Listing** screen will be displayed.
2. Select the **Site** where the service can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the service.
 - The example has **Active** selected.
4. Click on the **row** of the **service** you wish to list purchase requisitions for.
5. Click on the **Requisitions** tab.



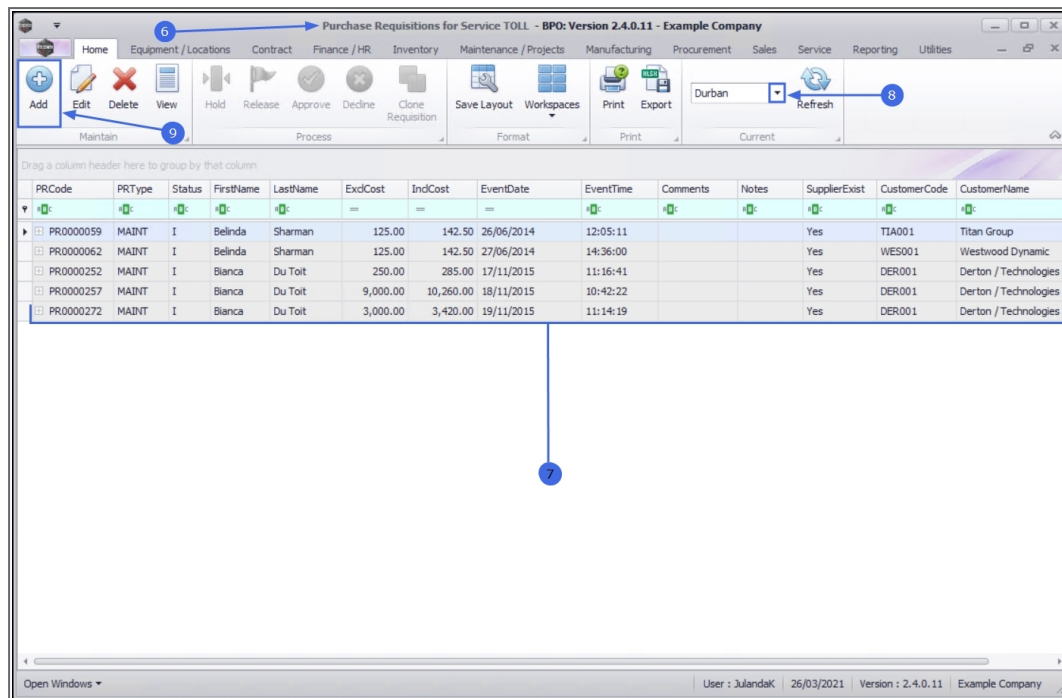
6. The **Purchase Requisitions for Service** [service code] list screen will be displayed.
7. All the services that have been created for the created will display on the screen.
8. Ensure that the correct **Site** has been selected, or
 - Change the **Site** if you wish to add a requisition for a service located on another site.

ADD PURCHASE REQUISITION FOR SERVICE

9. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



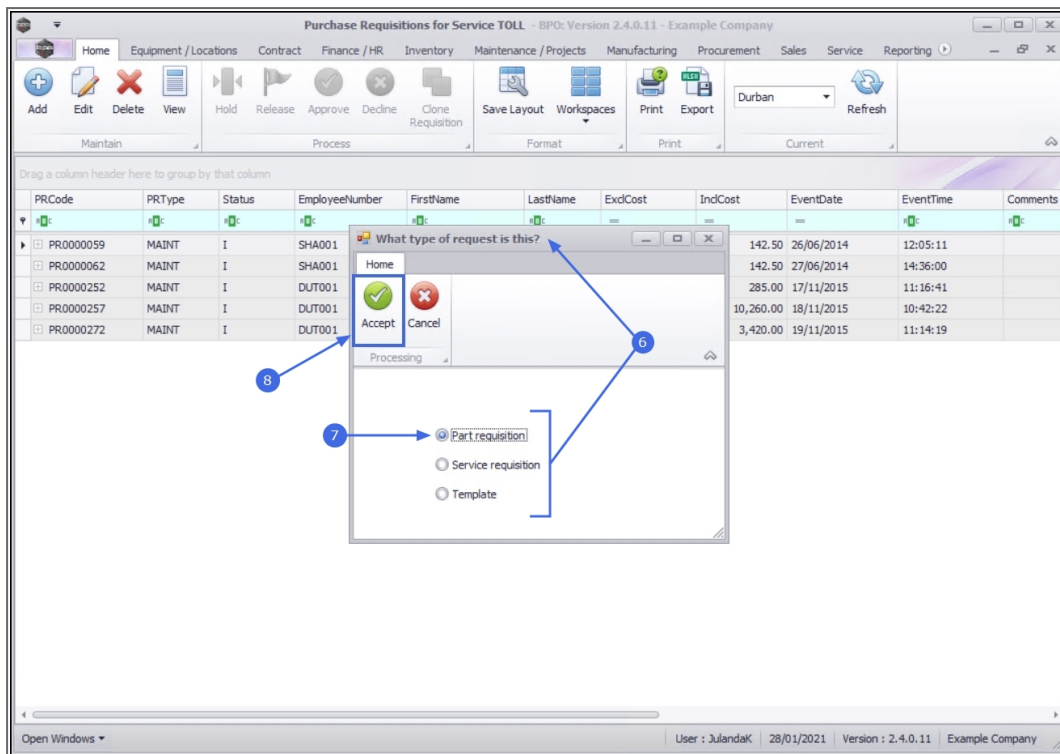
10. The ***What type of request is this?*** message will be displayed.

- 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 preloaded Requisition Template.

11. Click on the radio ***button*** of the option you require.

- The example has ***Part requisition*** selected.

12. Click on ***Accepted***.



13. The **Add new Requisition** screen will be displayed.

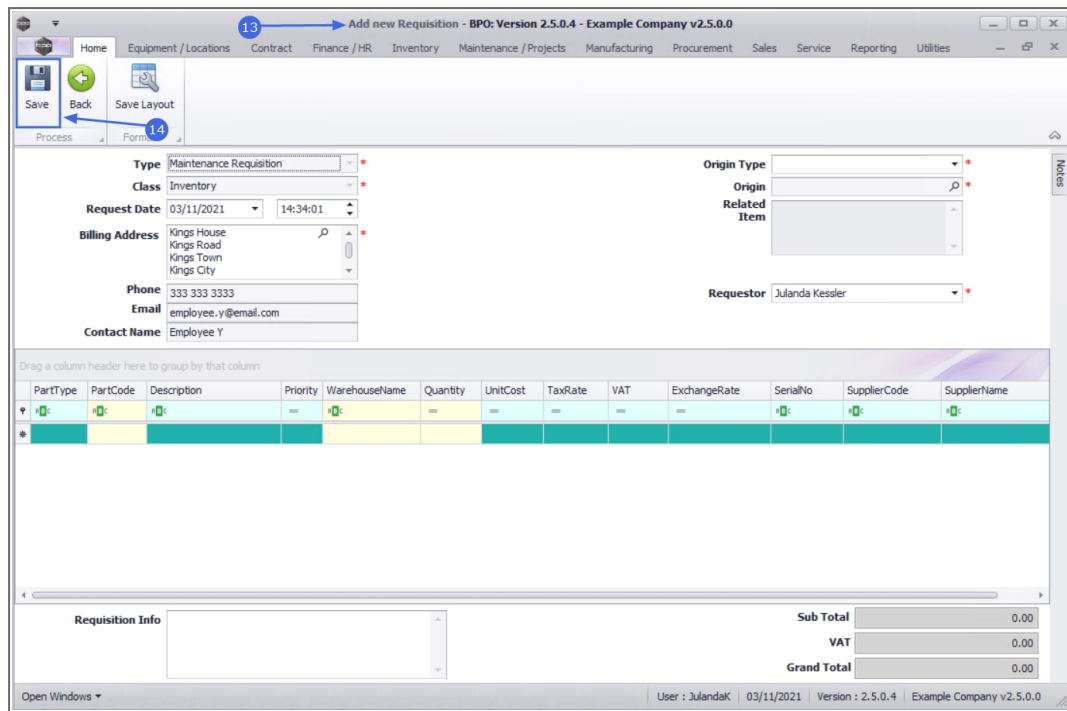
14. Complete the Part or Service Requisition and then click on **Save**.



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](#)

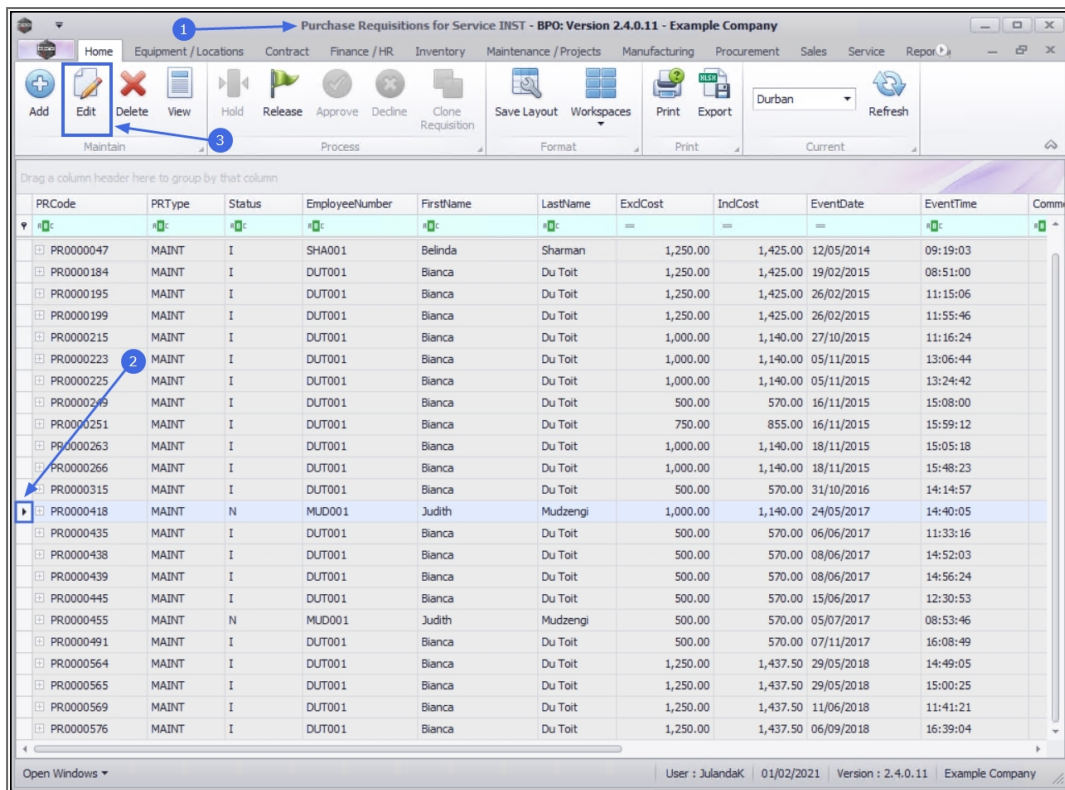


EDIT PURCHASE REQUISITION

1. From the **Purchase Requisitions for Service** [service code] screen,
2. Click on the **row** of the Purchase Requisition you wish to edit.
3. Click on **Edit**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.



PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000047	MAINT	I	SHA001	Belinda	Sharmar	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	1,000.00	1,140.00	24/05/2017	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	
PR0000576	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	06/09/2018	16:39:04	

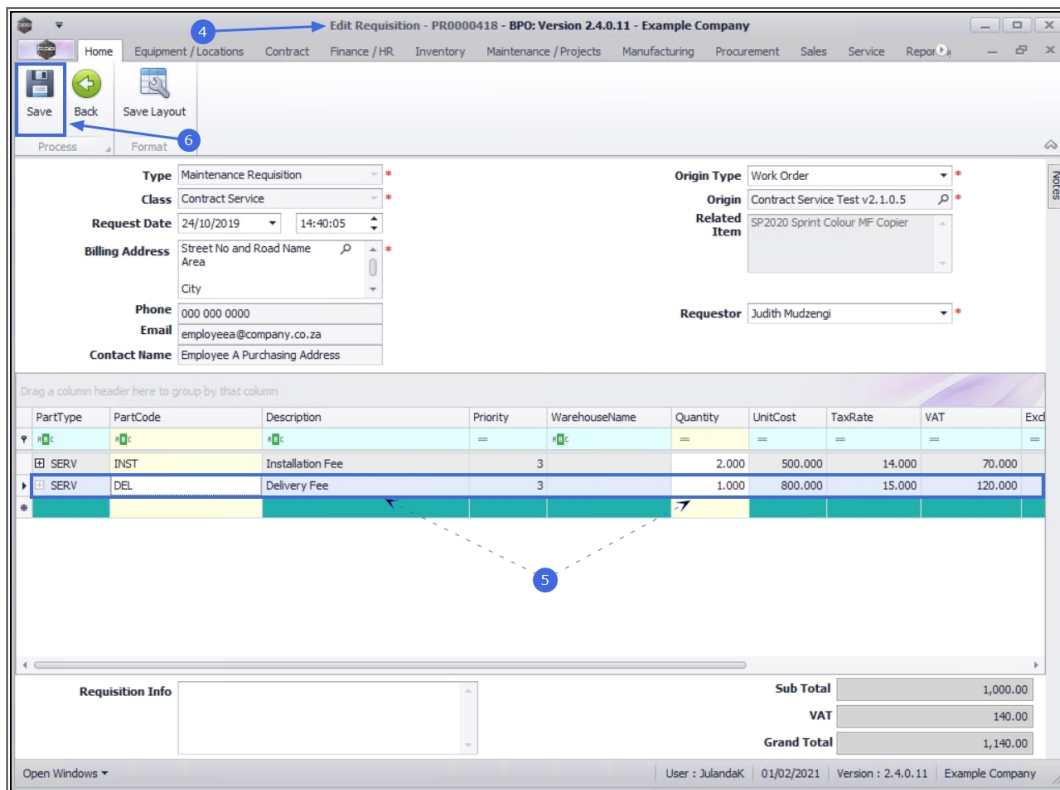
4. The **Edit Requisition - [requisition number]** screen will be displayed.
5. The example has a **Delivery Fee** added to the Requisition.
6. After making the relevant changes to the Requisition, click on **Save**.



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](#)



DELETE A PURCHASE REQUISITION

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

1. From the **Purchase Requisitions for Service PR[requisition number]** screen,
2. Click on the **row** of the Purchase Requisition you wish to close.
3. Click on **Delete**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.

Purchase Requisitions for Service INST - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reports

Add Edit **Delete** View Hold Release Approve Decline Clone Requisition Save Layout Workspaces Print Export Durban Refresh

Maintain Process Format Print Current

Click a column header here to group by that column

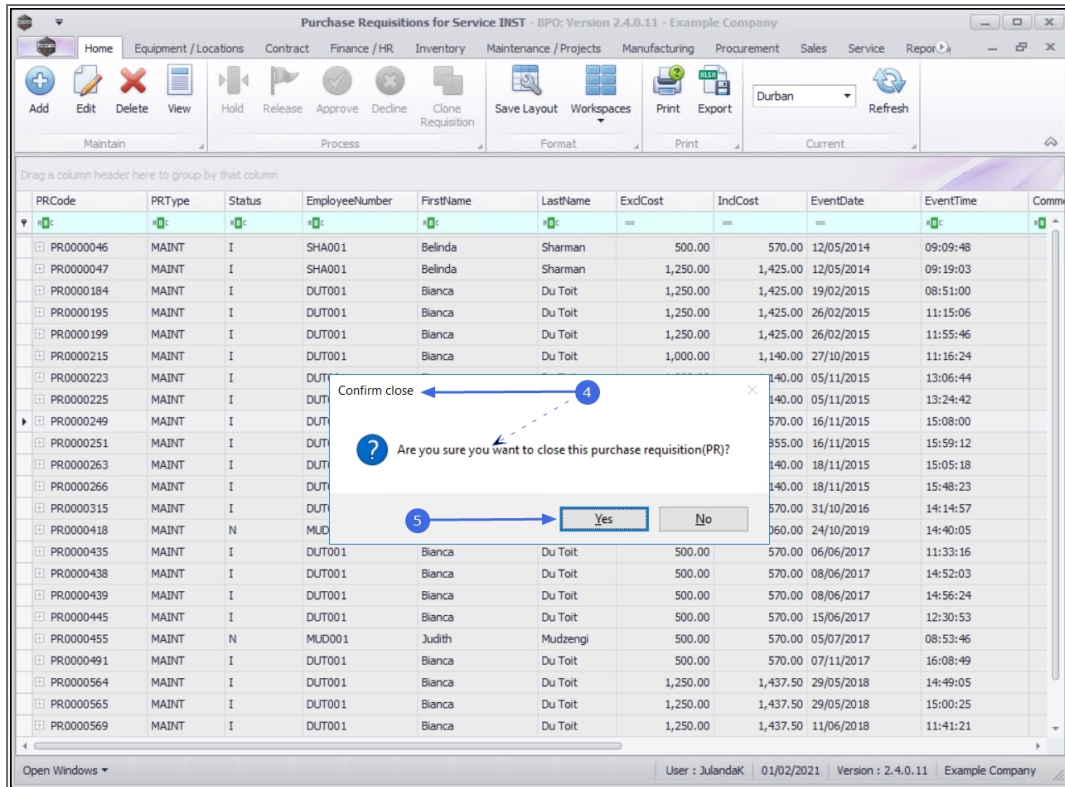
PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	N	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

Open Windows User : JulandaK 01/02/2021 Version : 2.4.0.11 Example Company

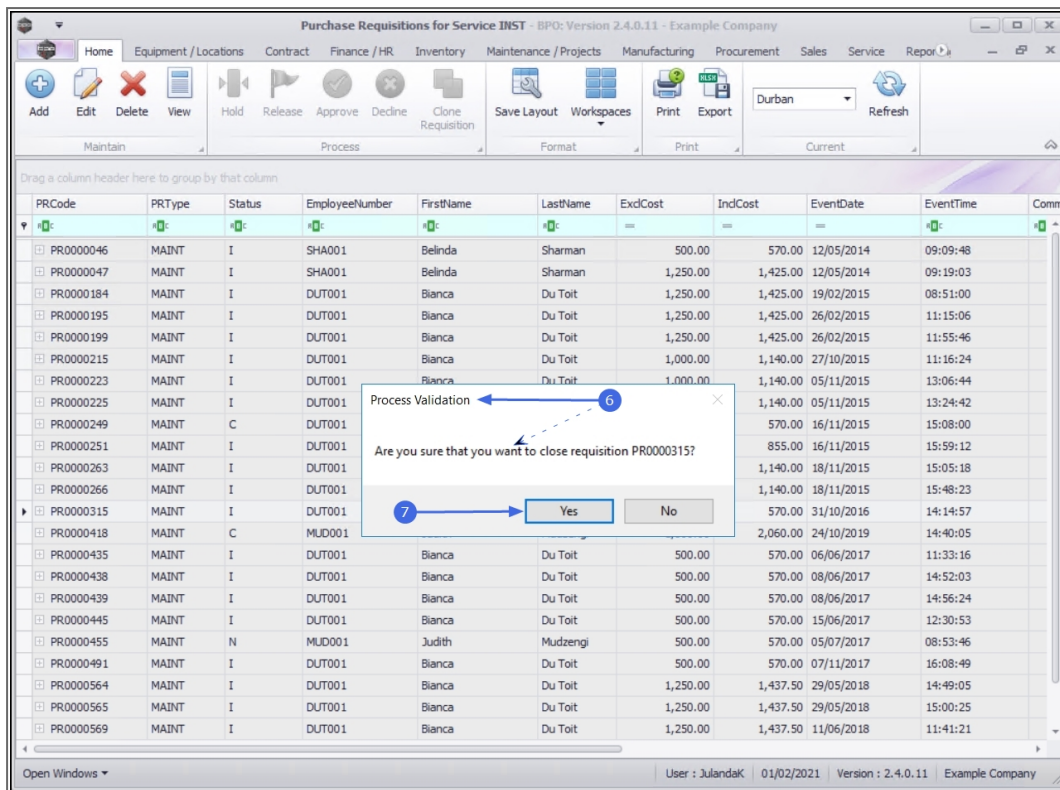
4. When you receive the **Confirm close** message;

- **Are you sure you want to close this purchase requisition (PR)?**

5. Click on **Yes** if you are certain about your selection.



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

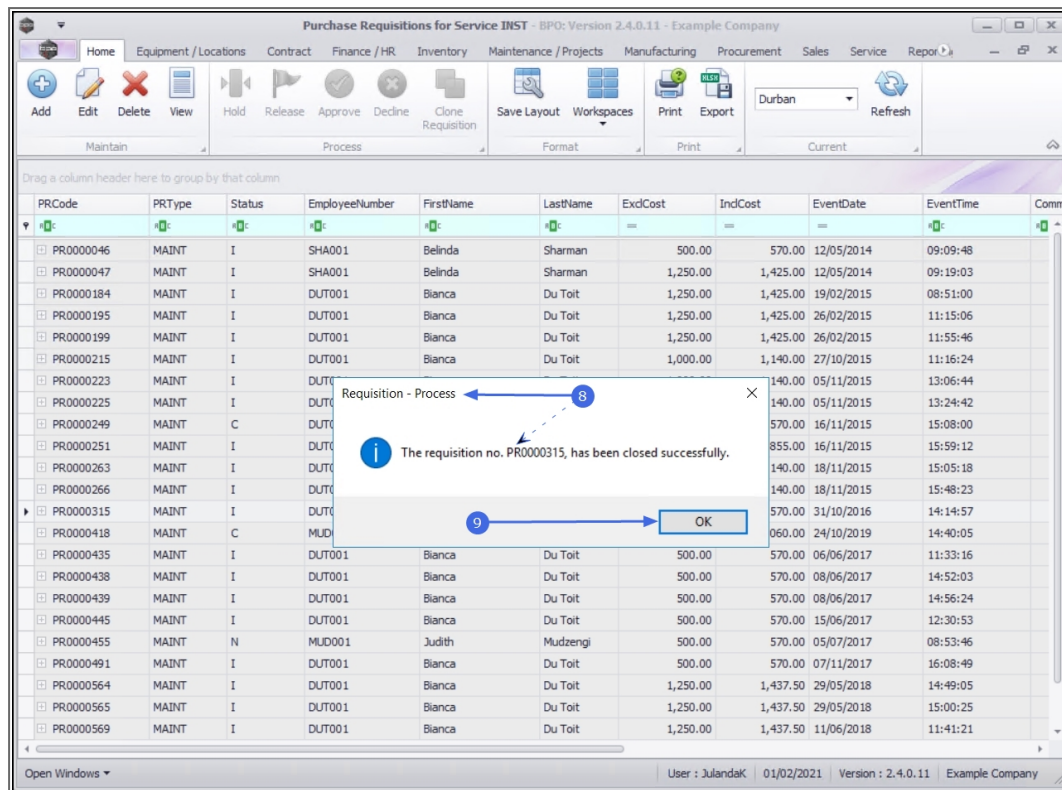


PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001			1,140.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001			570.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001			855.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001			1,140.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001			1,140.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	I	DUT001			570.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001			2,060.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzenzi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

8. Next, the **Requisition - Process** message will inform you that;

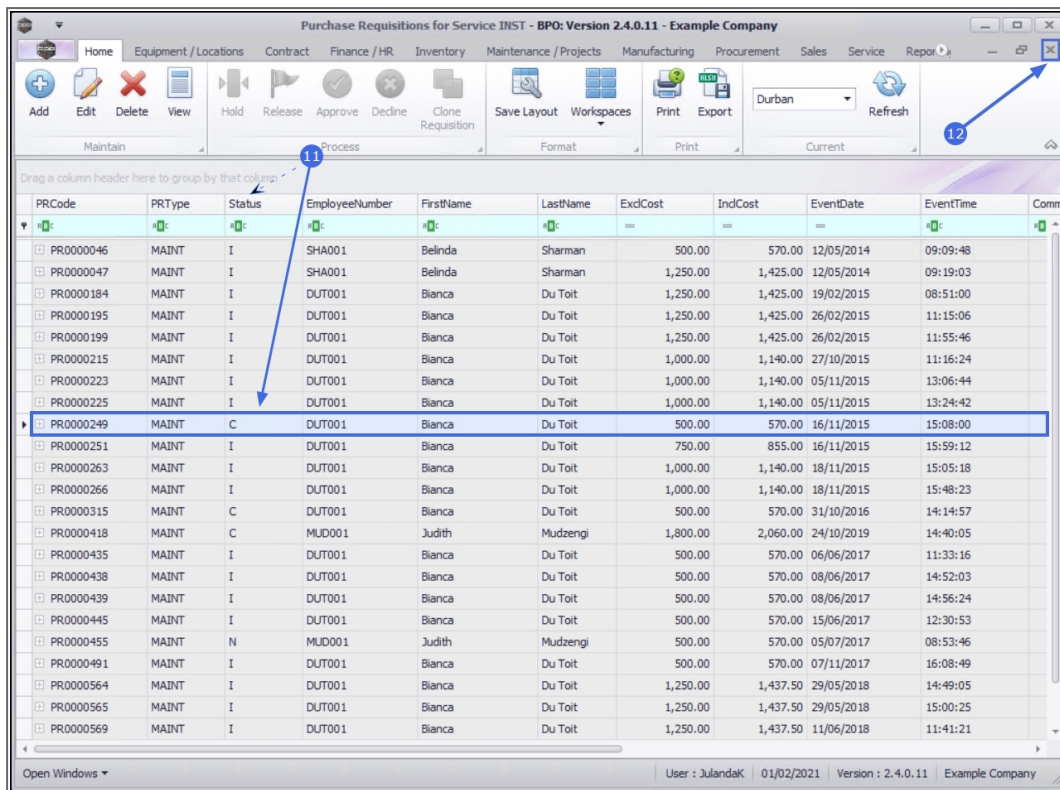
- **The requisition no. [requisition number], has been closed successfully.**

9. Click on **OK**.



PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
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PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	570.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	855.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	140.00	140.00	18/11/2015	15:48:23	
PR0000315	MAINT	C	DUT001	Bianca	Du Toit	570.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzenzi	060.00	060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzenzi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

10. Note the Status has changed to **[C]** to indicate that the Purchase Requisition has been **Closed**.
11. Click the **Close** icon to return to the **Service Listing** Screen.



PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
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PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

VIEW A PURCHASE REQUISITION

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

1. From the **Purchase Requisitions for Service [requisition number]** screen,
2. Click on the **row** of the Purchase Requisition you wish to view.
3. Click on **View**.

Purchase Requisitions for Service INST - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reports

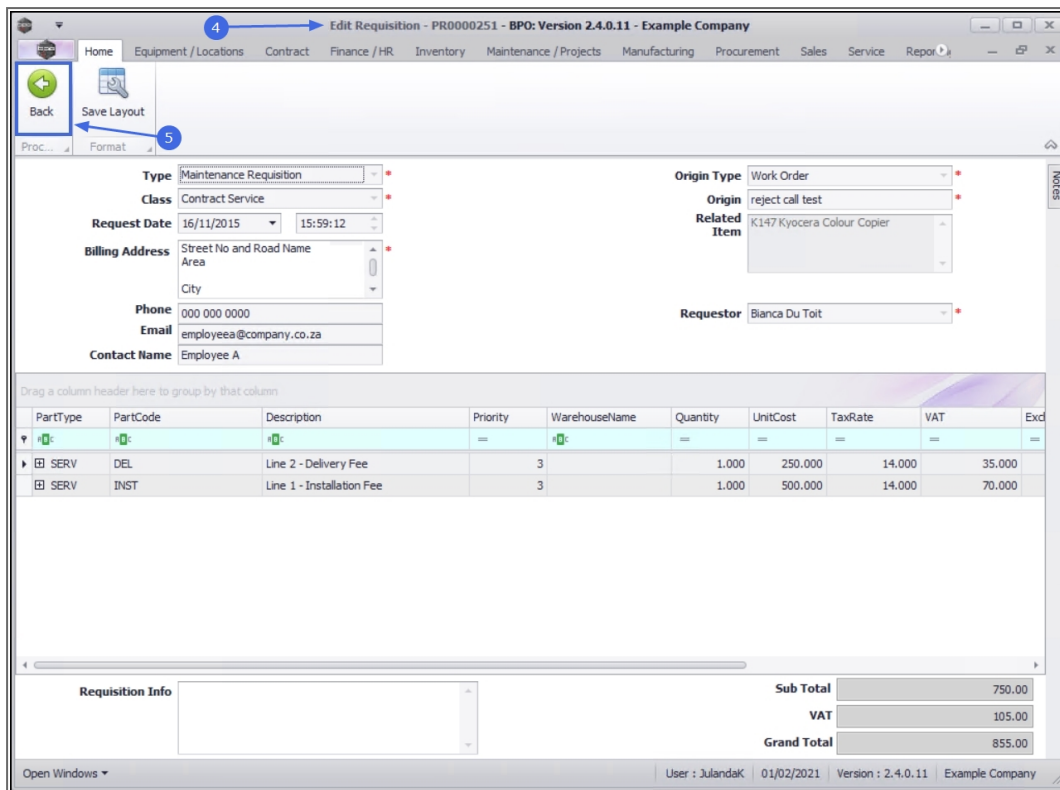
Add Edit Delete View Hold Release Approve Decline Clone Requisition Save Layout Workspaces Print Export Durban Refresh

Drag a column header here to group by that column

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments
PR0000046	MAINT	I	SHA001	Belinda	Sharman	500.00	570.00	12/05/2014	09:09:48	
PR0000047	MAINT	I	SHA001	Belinda	Sharman	1,250.00	1,425.00	12/05/2014	09:19:03	
PR0000184	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	19/02/2015	08:51:00	
PR0000195	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:15:06	
PR0000199	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,425.00	26/02/2015	11:55:46	
PR0000215	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	27/10/2015	11:16:24	
PR0000223	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:06:44	
PR0000225	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	05/11/2015	13:24:42	
PR0000249	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	16/11/2015	15:08:00	
PR0000251	MAINT	I	DUT001	Bianca	Du Toit	750.00	855.00	16/11/2015	15:59:12	
PR0000263	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:05:18	
PR0000266	MAINT	I	DUT001	Bianca	Du Toit	1,000.00	1,140.00	18/11/2015	15:48:23	
PR0000315	MAINT	C	DUT001	Bianca	Du Toit	500.00	570.00	31/10/2016	14:14:57	
PR0000418	MAINT	C	MUD001	Judith	Mudzengi	1,800.00	2,060.00	24/10/2019	14:40:05	
PR0000435	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	06/06/2017	11:33:16	
PR0000438	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:52:03	
PR0000439	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	08/06/2017	14:56:24	
PR0000445	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	15/06/2017	12:30:53	
PR0000455	MAINT	N	MUD001	Judith	Mudzengi	500.00	570.00	05/07/2017	08:53:46	
PR0000491	MAINT	I	DUT001	Bianca	Du Toit	500.00	570.00	07/11/2017	16:08:49	
PR0000564	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	14:49:05	
PR0000565	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	29/05/2018	15:00:25	
PR0000569	MAINT	I	DUT001	Bianca	Du Toit	1,250.00	1,437.50	11/06/2018	11:41:21	

Open Windows User : JulandaK 01/02/2021 Version : 2.4.0.11 Example Company

- The **Edit Requisition - [requisition number]** 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.

1. From the **Purchase Requisitions for Service** [service code] screen,
2. Click on the **row** of the requisition you wish to release for approval.



Note the Status for the example as R - Released

3. Click on **Hold**.



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

Purchase Requisitions for Service CALL - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

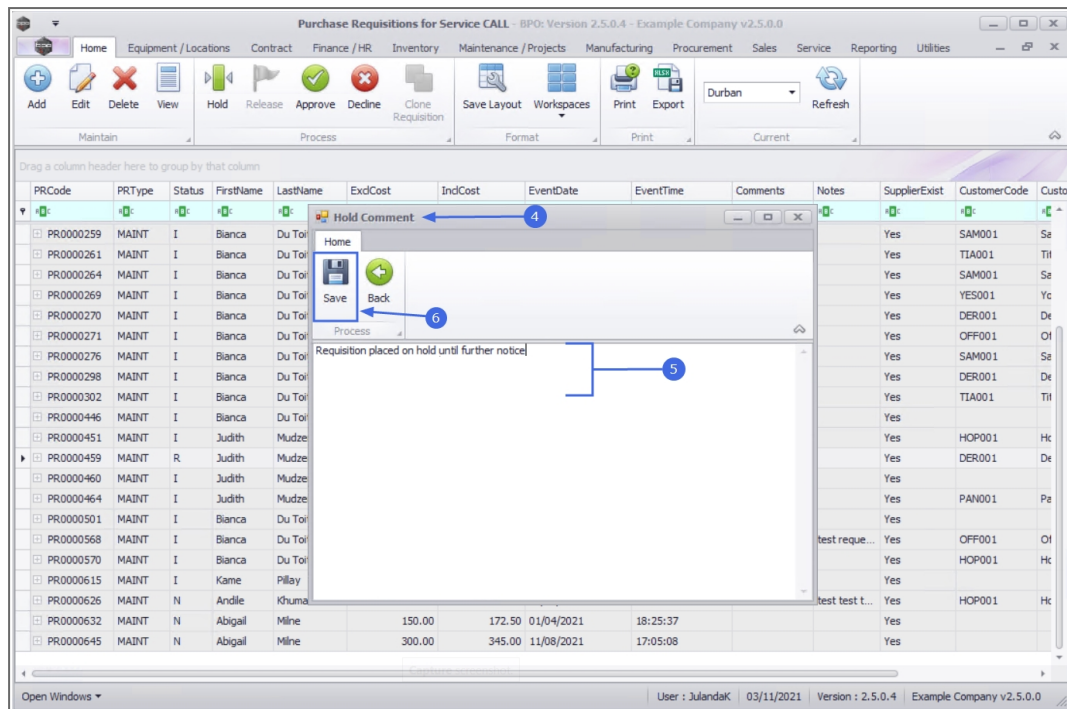
Add Edit Delete View **Hold** Release Approve Decline Clone Requisition Save Layout Workspaces Print Export Durban Refresh

Drag a column header here to group by that column

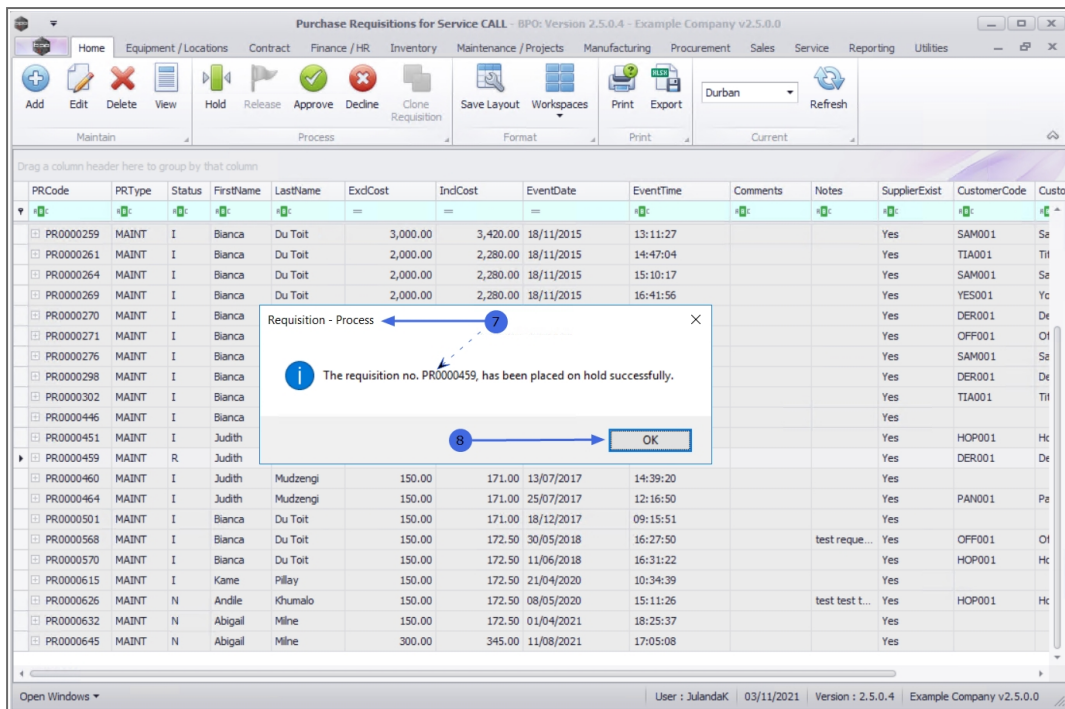
PRCode	PRType	Status	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Tit
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Tit
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes		
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000459	MAINT	R			150.00	171.00	13/07/2017	14:39:20			Yes		
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50			Yes	PAN001	Pa
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	OFF001	Of
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes	HOP001	Hc
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26			Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

Open Windows Capture screenshot User : JulandaK 03/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

- 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**.



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



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

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.

1. From the **Purchase Requisitions for Service [service code]** screen,
2. Click on the **row** of the requisition you wish to release for approval.
3. Click on **Release**.



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

Purchase Requisitions for Service CALL - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Hold Release Approve Decline Clone requisition Save Layout Workspaces Print Export Durban Refresh

Drag a column header here to group by that column

PRCode	PRType	Status	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes		
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	N	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000460	MAINT	I	Judith	Mudzengi	150.00	171.00	13/07/2017	14:39:20			Yes		
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50		test reque...	Yes	OFF001	Of
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26		test test t...	Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

Open Windows User : JulandaK 03/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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

Requisition - Process

The requisition no. PR0000459, has been released successfully.

OK

PRCode	PRType	Status	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Cus
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes	HOP001	Hc
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Of
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

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

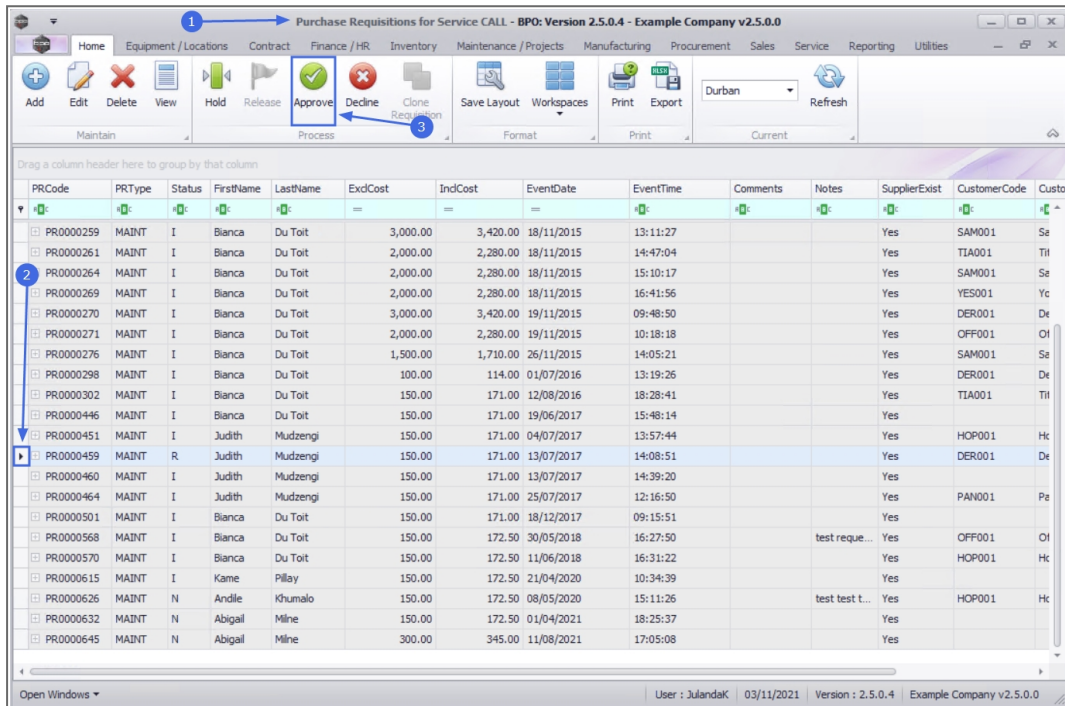
PRCode	PRType	Status	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Cus
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Til
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Til
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes	HOP001	Hc
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Of
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

APPROVE REQUISITION

1. From the **Purchase Requisitions for Service [service code]** screen,
2. Click on the **row** of the requisition you wish to approve.
3. Click on **Approve**.



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

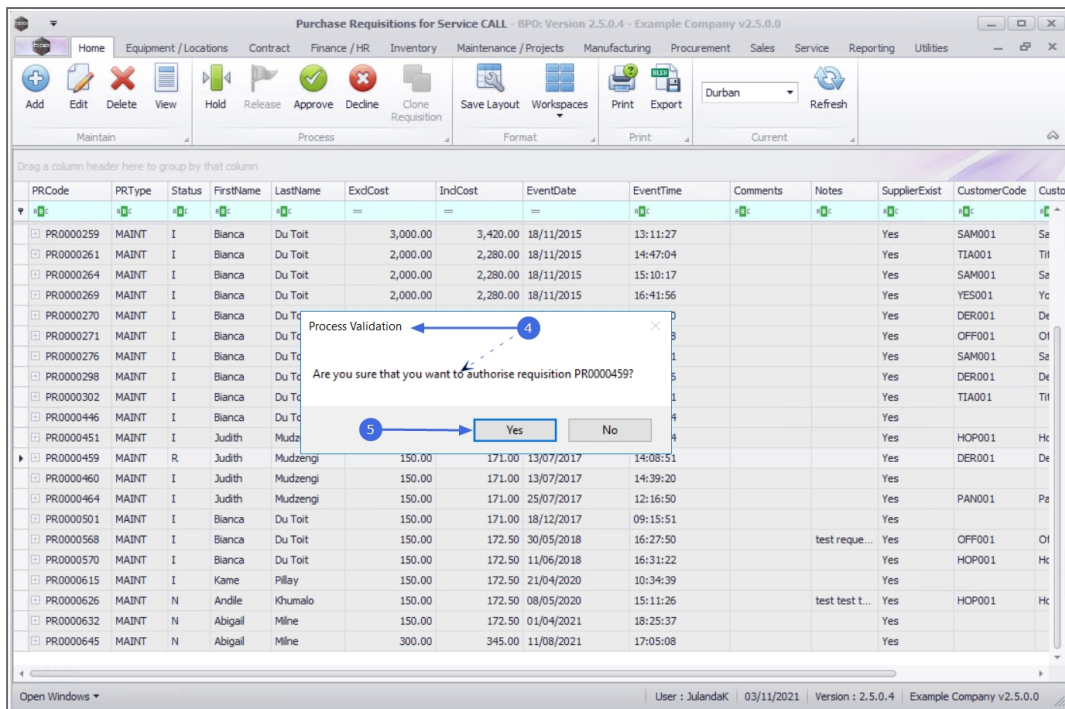


PRCode	PRType	Status	FirstName	LastName	ExcdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Ti
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Ti
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes		
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	R	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000460	MAINT	I	Judith	Mudzengi	150.00	171.00	13/07/2017	14:39:20			Yes		
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50	test reque...		Yes	OFF001	Of
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	N	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

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



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



DECLINE A PURCHASE REQUISITION

1. From the **Purchase Requisitions for Service [service code]** screen,
2. Click on the **row** of the requisition you wish to decline.
3. Click on **Decline**.



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

Purchase Requisitions for Service CALL - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Hold Release Approve Decline Clone Requisition Save Layout Workspaces Print Export Durban Refresh

Drag a column header here to group by that column

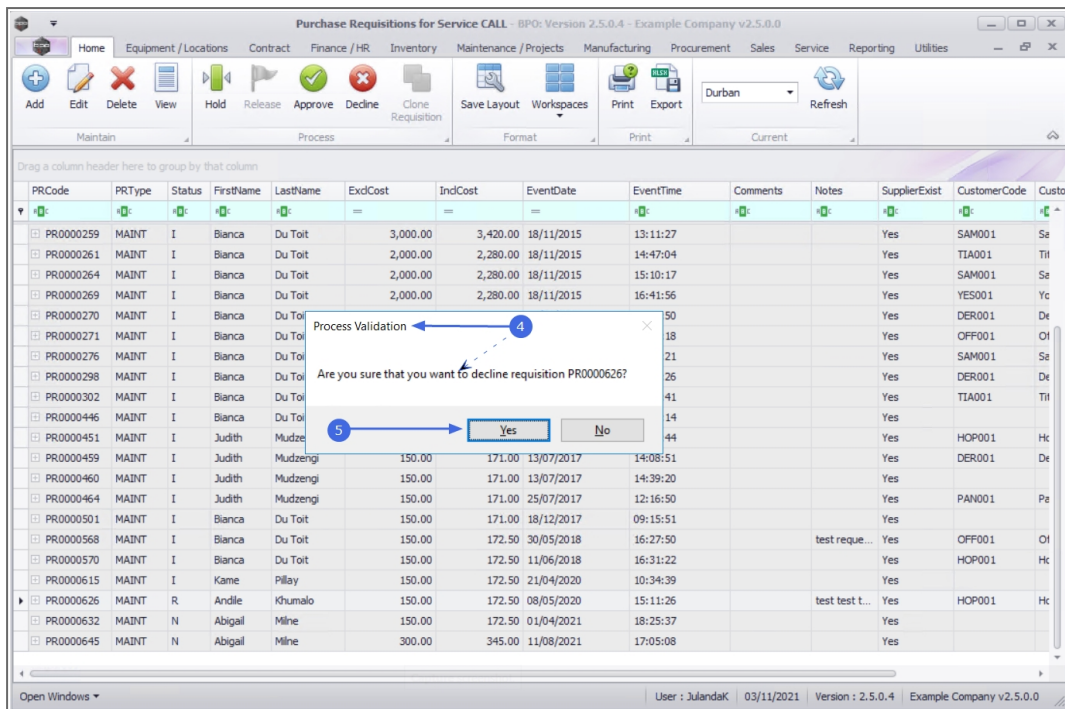
PRCode	PRType	Status	FirstName	LastName	ExdCost	IndCost	EventDate	EventTime	Comments	Notes	SupplierExist	CustomerCode	Custo
PR0000259	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	18/11/2015	13:11:27			Yes	SAM001	Se
PR0000261	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	14:47:04			Yes	TIA001	Tit
PR0000264	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	15:10:17			Yes	SAM001	Se
PR0000269	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	18/11/2015	16:41:56			Yes	YES001	Yc
PR0000270	MAINT	I	Bianca	Du Toit	3,000.00	3,420.00	19/11/2015	09:48:50			Yes	DER001	De
PR0000271	MAINT	I	Bianca	Du Toit	2,000.00	2,280.00	19/11/2015	10:18:18			Yes	OFF001	Of
PR0000276	MAINT	I	Bianca	Du Toit	1,500.00	1,710.00	26/11/2015	14:05:21			Yes	SAM001	Se
PR0000298	MAINT	I	Bianca	Du Toit	100.00	114.00	01/07/2016	13:19:26			Yes	DER001	De
PR0000302	MAINT	I	Bianca	Du Toit	150.00	171.00	12/08/2016	18:28:41			Yes	TIA001	Tit
PR0000446	MAINT	I	Bianca	Du Toit	150.00	171.00	19/06/2017	15:48:14			Yes		
PR0000451	MAINT	I	Judith	Mudzengi	150.00	171.00	04/07/2017	13:57:44			Yes	HOP001	Hc
PR0000459	MAINT	I	Judith	Mudzengi	150.00	171.00	13/07/2017	14:08:51			Yes	DER001	De
PR0000460	MAINT	I	Judith	Mudzengi	150.00	171.00	13/07/2017	14:39:20			Yes		
PR0000464	MAINT	I	Judith	Mudzengi	150.00	171.00	25/07/2017	12:16:50			Yes	PAN001	Pa
PR0000501	MAINT	I	Bianca	Du Toit	150.00	171.00	18/12/2017	09:15:51			Yes		
PR0000568	MAINT	I	Bianca	Du Toit	150.00	172.50	30/05/2018	16:27:50		test reque...	Yes	OFF001	Of
PR0000570	MAINT	I	Bianca	Du Toit	150.00	172.50	11/06/2018	16:31:22			Yes	HOP001	Hc
PR0000615	MAINT	I	Kame	Pillay	150.00	172.50	21/04/2020	10:34:39			Yes		
PR0000626	MAINT	R	Andile	Khumalo	150.00	172.50	08/05/2020	15:11:26	test test t...		Yes	HOP001	Hc
PR0000632	MAINT	N	Abigail	Milne	150.00	172.50	01/04/2021	18:25:37			Yes		
PR0000645	MAINT	N	Abigail	Milne	300.00	345.00	11/08/2021	17:05:08			Yes		

Open Windows User : JulandaK 03/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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



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.

MNU.065.005

