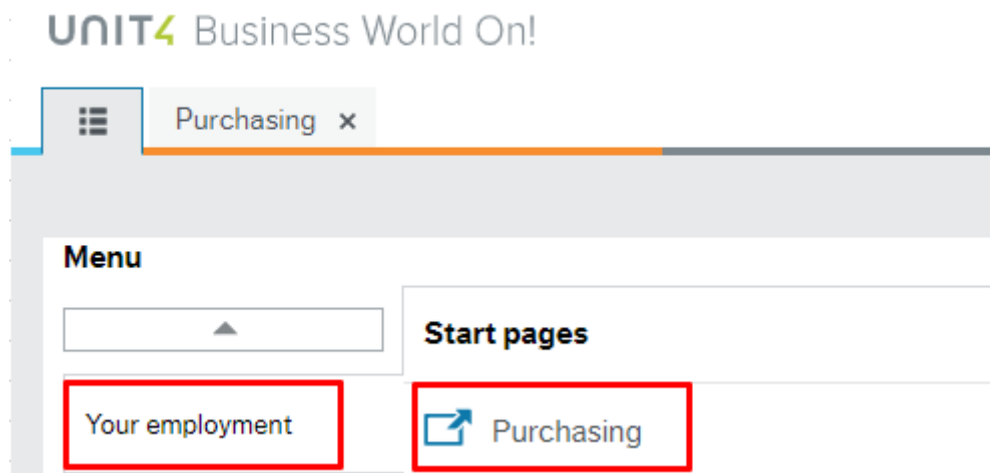
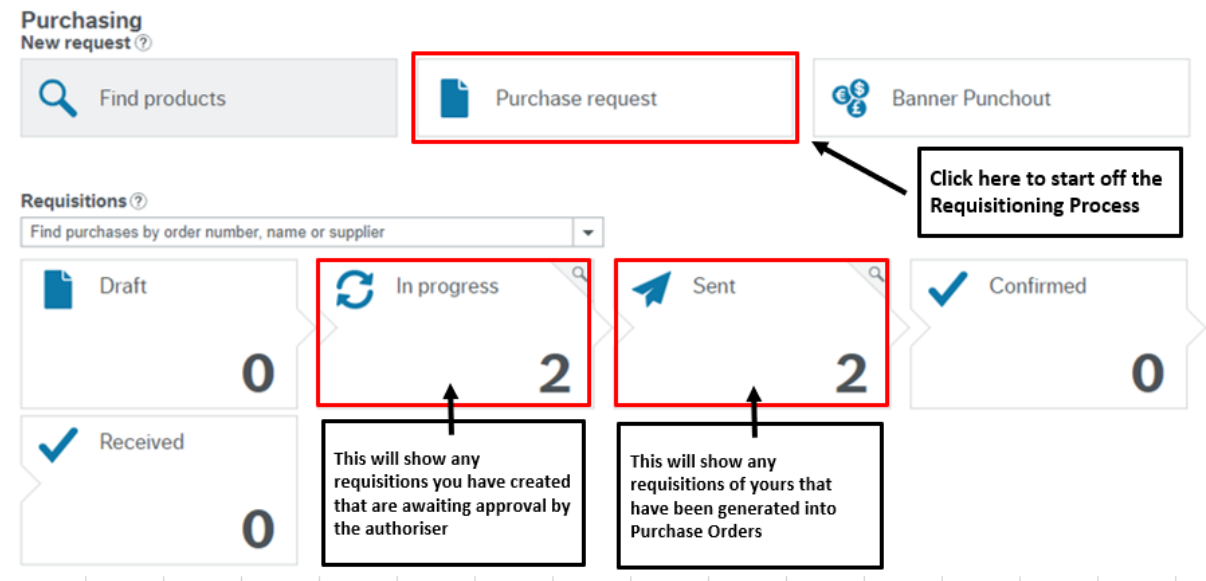


## How do I raise a requisition in Business World?

To raise a requisition in Business World, you can navigate to Your Employment > Purchasing



After you click on the Purchasing Button, you can click on the Purchase Request Button to begin the Requisitioning Process.



Next, you can click on the Settings Button.

Purchasing x Purchase request x

Purchasing > Purchase request

### Purchase request

On behalf of Requisitioner\* **Di donato, Thomas** Purchase request name

**Di donato, Thomas (Delivery)**

Abbey Foregate Shrewsbury Shropshire SY2 6ND

Delivery date

Delivery description Delivery attention Delivery information

**Your Delivery Address will be defaulted here but you can select another address from the drop down menu**

**Your Next Step is to click on the Settings Button**

After you click on the Settings Button, the following options will appear

The image shows a 'Settings' form with several fields and instructional callouts. The form fields are:

- Supplier**: A text input field with a dropdown arrow and three asterisks (\*\*\*) on the right.
- Period\***: A text input field containing the value '201806'.
- External reference**: A text input field with the placeholder text 'Free text field. Add any extern...'
- Close**: A blue button located at the bottom left of the form.
- Default cost categories**: A section containing three fields:
  - Cost centre\***: A dropdown menu with 'Commissioning - Reside...' selected and '10000' below it. It has three asterisks (\*\*\*) on the right.
  - Procurement Governance\***: A dropdown menu with three asterisks (\*\*\*) on the right.
- Purchase Order Delivery Type\***: A dropdown menu with three asterisks (\*\*\*) on the right.
- Contract Reference**: A text input field with three asterisks (\*\*\*) on the right.
- Purchase Order Type\***: A dropdown menu with three asterisks (\*\*\*) on the right.
- Price Suppressed on Req/PO\***: A dropdown menu with three asterisks (\*\*\*) on the right.

Instructional callouts are provided for each field:

- Supplier**: You can type in the Supplier ID you wish to use or start to type in the Supplier Name to select the right ID
- Cost centre\***: Your Cost Centre will default in here but you can change this if required
- Procurement Governance\***: You can press 'space' in this cell and select the relevant Procurement step taken
- Purchase Order Delivery Type\***: You can press 'space' in this cell and select SUPP if you want the order to be emailed to the Supplier once approved or USER if you want the order to be emailed to yourself once approved
- Contract Reference**: If you have a contract reference for the goods/service you are purchasing, you can press 'space' a select from the available options. Otherwise you can leave this section blank
- Purchase Order Type\***: You can press 'space' in this cell and PLEASE ENSURE you click STAN each time. If you click CONF the Order may not be created. This option will be removed/defaulted shortly after we go live with the system
- Price Suppressed on Req/PO\***: You can press 'space' in this cell and select N if you don't want the price to be hidden on the order that the supplier will receive or select Y if you would like the price to be hidden
- Close**: You can click Close once you have completed the other fields in this section

Your next step is to click on the Add Product button and begin to enter your product details.

You can start to type in your Product ID or Product Name if you know it. If you are unsure of the Product Code you need to use, you can review the Product Masterfile list attached to your intranet guidance.

*Please Note: The majority of products are generic and so the person who places the order will have to add the additional product detail in the product text section when placing a requisition so that this appears on the order that the supplier receives.*

In the example below, I have selected a Clothing and Uniforms Product and then entered the quantity and price.

The screenshot shows a web application interface for creating a purchase request. At the top, there are tabs for 'Purchasing' and 'Purchase request'. Below the tabs, there is a breadcrumb trail 'Purchasing > Purchase request' and a set of utility icons (grid, link, lightbulb, heart, wrench, question mark). The main section is titled 'Purchase request' and contains several input fields: 'On behalf of Requisitioner\*' with a dropdown menu showing 'Di donato, Thomas', and 'Purchase request name' with a text input field containing 'Add a name to this purchase request'. Below these are 'Add delivery group' with a help icon, 'Delivery date' with a calendar icon and the value '17/03/2019', and buttons for 'Apply to selection', 'Apply to all', and 'Settings' with a help icon. A section titled 'Delivery to' contains 'Delivery contact\*' with a dropdown menu showing 'Di donato, Thomas (Delivery)' and 'Delivery address' with the text 'Abbey Foregate Shrewsbury Shropshire SY2 6ND'. Below this is a table with columns: Product, Product description, Supplier, Delivery date, Quantity, Unit, Price, Currency, Currency amo..., and Funds check. The table has one row with the following data: Product 'A42000-101', Product description 'Clothing & Uniforms - Employees', Supplier 'Bishop S... 1000142', Delivery date '17/03/2...', Quantity '1', Unit 'EA', Price '100.00', Currency 'GBP', and Currency amo... '100.00'. At the bottom of the table are buttons for 'Add product', 'Delete product', 'Copy product', and 'Move selection here'. On the right side of the table, there is a magnifying glass icon. At the bottom right of the form, it says 'Total amount: GBP 100.00'.

Product	Product description	Supplier	Delivery date	Quantity	Unit	Price	Currency	Currency amo...	Funds check
A42000-101	Clothing & Uniforms - Employees	Bishop S... 1000142	17/03/2...	1	EA	100.00	GBP	100.00	

After entering these details you can then click on the magnifying glass icon.

Purchasing x Purchase request x

Purchasing > Purchase request

### Purchase request

On behalf of Requisitioner\* Di donato, Thomas

Purchase request name Add a name to this purchase request

Add delivery group ?

Settings ?

Delivery to

Delivery contact\* Di donato, Thomas (Delivery)

Delivery address Abbey Foregate Shrewsbury Shrop

Product	Product description	Supplier	Delivery date	Quantity	Unit	Price	Currency	Currency amo...	Funds check
<input type="checkbox"/>	A42000-101 *** Clothing & Uniforms - Employees	Bishop S... 1000142	17/03/2...	1	EA	100.00	GBP	100.00	

Add product Delete product Copy product Move selection here

Total amount: GBP 100.00

**Your can then click on the magnifying glass icon to add the additional Product Detail and check that the correct Cost Centre, Account Code (Subjective), Tax Code has been used**

Product: A42000-101 - Clothing & Uniforms - Employees

Cost categories Product text

Account	Cost centre	Legal entity	Tax code	Percentage	Amount	Funds check
* Clothin... A42000	Commissi... 10000	Shropshir... SC01	VAT Purc... P1	100	100.00	

**If you are happy with the Cose Centre, Account Code (Subjective) and Tax Details you can then click on the Product Teaxt Box to add your additional product details requirement**

After you have entered your additional Product Details you can then click on the Done button.

✕**Product: A42000-101 - Clothing & Uniforms - Employees**

Cost categories

Product text

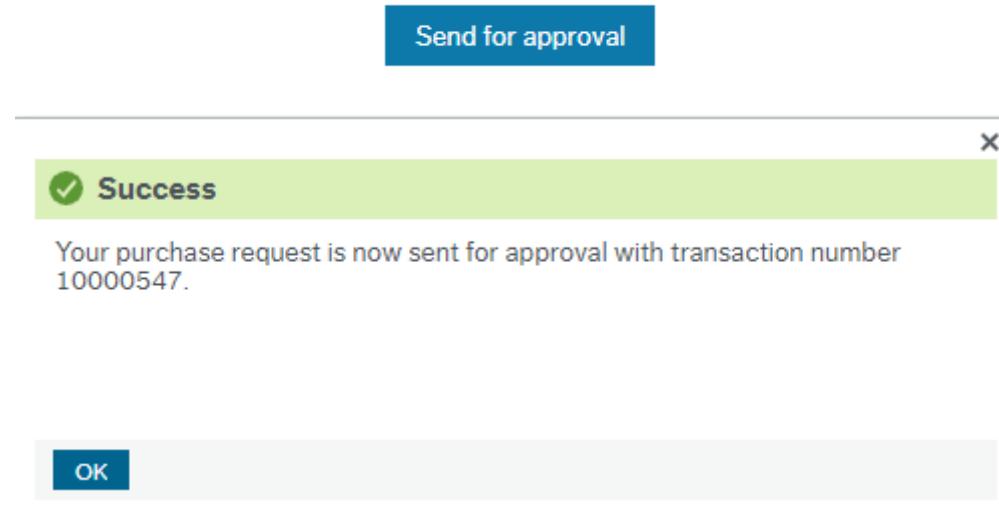
High Visibility Reflective Jacket  
Size Medium  
Item Code COFD0001L

Done

Apply cost categories to all lines ?

The final step is to click on the 'Send For Approval' Button if you are happy with your requisition. *To note, if you wanted to add an additional product you would just click on the Add Product button again. If you wanted to order an product for a different delivery address you can click on the Add Delivery Group button*

After you have clicked on the Send For Approval Button a notification will appear stating that that your requisition has been created



This requisition will then be workflowed to the authoriser of the Cost Centre that was included in the requisition. Once the authoriser approves this requisition it will then be automatically generated into a purchase order and sent to the supplier. An example of the order template that the supplier will receive is included below:

**Supplier**

Bishop Sports & Leisure Limited  
 Test Road  
 Test

Supplier Code: 1008559

**Deliver To / Execute Work At**

Abbey Foregate  
 Shrewsbury  
 Shropshire  
 SY2 6ND



Shirehall,  
 Abbey Foregate

VAT No: GB 1623 474 72

**Enquiries To**

Contact Details: Thomas Di donato

Tel: 01234 567894

Email: erptest@shropshire.gov.uk

**Invoice and Payment**

Please send an electronic pdf invoice to  
 purchaseledger@shropshire.gov.uk

Alternatively you can send a paper copy of  
 your invoice to the delivery address above.

**PURCHASE ORDER**

**Purchase Order No: 20000416**

Please quote this number in all correspondence

**Purchase Order Date : 17/03/2019**

Authorised By:

Page 1 of 1

Contract Ref	Supplier Product Code	Description	Required By	Qty	UOM	Unit Price	Net Price
	A42000-101	Clothing and Uniform - Employees  High Visibility Reflective Jacket Size Medium Item Code COFD0001L	17/03/2019	1.00	EA	100.00	100.00
<p>This order is subject to the terms and conditions included in your contract with Shropshire Council.</p> <p>Where you do not have a contract with Shropshire Council for the delivery of this good/service; this order is subject to Shropshire Council's General Terms and Conditions (as amended by any specific terms below) which can be found at:  <a href="http://www.shropshire.gov.uk/doing-business-with-shropshire-council">http://www.shropshire.gov.uk/doing-business-with-shropshire-council</a>            By accepting this Order and/or undertaking the supply of any goods, works or services referred to in it, you are agreeing to accept Shropshire Council's General Terms and Conditions, which shall take precedence over any terms and conditions of the Contractor.</p>						Total Net	100.0
						Total VAT	0
						<b>Total inc VAT</b>	<b>20.00</b>