

Closure of requisitions via workflow tasks

Users can now close a requisition which is no longer needed via one of 3 existing workflow tasks

Rejected Requisition

Supplier required

Price required

A new “Close Requisition” task is initiated to the originator of the requisition– Users **MUST** change the status from Active to **CLOSED** before saving

The option to amend and resubmit is still available

Rejected Requisition task

New “Close Requisition” option available

The screenshot shows the UNIT4 ERP Task management interface. The main content area displays requisition information, including the resource name, updated date (13/09/2024), and delivery address. Below this is a table of requisition details with columns for Map, Status, Funds check, Currency, Curr. amou..., Quantity, Unit, Price, Product, Product desc..., Supplier, Supplier name, and Delivery date. The table contains two rows of data. At the bottom of the interface, a row of buttons is visible, with the 'Close Requisition' button highlighted in red. Other buttons include Resubmit, Advanced mode, Workflow user log, Log book, Export, Funds check, and Funds check results.

Map	Status	Funds check	Currency	Curr. amou...	Quantity	Unit	Price	Product	Product desc...	Supplier	Supplier name	Delivery date
<input type="checkbox"/>			GBP	5.82	1.00	EA	5.82	A27020-100	Cleaning Materials	Safewrap Ref. 1000277	Banner Grou...	13/09/2024
<input type="checkbox"/>			GBP	11.72	4.00	EA	2.93	A43010-102	Lakeland Se...	1000277	Banner Grou...	13/09/2024

Rejected Requisition - Close Requisition

Enter your comment

No longer needed

[Close Requisition](#)

The new “Close Requisition” task will appear with status as Active but users **MUST** change this to **CLOSED** before saving

Task management x

Search for tasks

Task description
 Client: SC, Workflow step: **Close Requisition**
 Process name: Requisitioning - Co-SC, Order No: [REDACTED]
 Amount: 17.54, Cat 1: 11552

Requisitions - standard

Requisition entry | Product explorer | Punchout

Requisition number: [REDACTED]

Requisition

Requisitioner* [REDACTED]

Status* **Active**

Period: 202406

External reference: [REDACTED]

Default supplier & contract

Supplier: 1000277
Banner Group Ltd

Contact: [REDACTED]

Fixed supplier

Delivery contact

Delivery date: 13/09/2024

Contact: [REDACTED]

Delivery address:
 Enable
 New Zealand House
 Suite E, Second Floor
 Abbey Foregate
 Shrewsbury

Default GL analysis

Costc*: 11552
Restart Employment Support

Reggov: [REDACTED]

Suppressprice*: N
No

Poorderdel*: SUPP
Send PO to Supplier

Contractref: [REDACTED]

Save | Clear | Open | Print preview | Export | Log book | Copy requisition | Start from template | Save as template | More

Status changed to "Closed"

Requisitions - standard

Requisition entry | Product explorer | Punchout

Requisition number: [REDACTED]

Requisition

Requisitioner [REDACTED]

Status* **Closed**

Period: 202406

External reference: [REDACTED]

Default supplier & contract

Supplier: 1000277
Banner Group Ltd

Contact: [REDACTED]

Fixed supplier

Delivery contact

Delivery date: 13/09/2024

Contact: [REDACTED]

Delivery address:
 Enable
 New Zealand House
 Suite E, Second Floor
 Abbey Foregate
 Shrewsbury

Default GL analysis

Costc*: 11552
Restart Employment Support

Reggov: [REDACTED]

Suppressprice*: N
No

Poorderdel*: SUPP
Send PO to Supplier

Contractref: [REDACTED]

Save | Clear | Open | Print preview | Export | Log book | Copy requisition | Start from template | Save as template | More

Supplier required task

New option to "Close requisition"

UNIT4 ERP

Task management x

Search for tasks

You have entered a requisition where the supplier is missing from one or more lines. Please review this requisition and resubmit, or cancel the request

Task description

Client: SC, Workflow step: **Supplier Required**

Process name: Requisitioning, Co: SC, Order No: [REDACTED], Amount: 11221.32, Cat 1: T0046

Requisition information

Resource: [REDACTED] Requisition number: [REDACTED]

Updated: 05/06/2024

Deliv.addr.: Mount McKinley Building, Shrewsbury Business Park, Shrewsbury, Shropshire, SY2 6LG

Workflow log (row 1)

(Enter a comment)

Copy

Message from user

Van hire from April 2024 - 31st March 25 (Reg no: Oswestry Repairs)

Requisition details

Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product	Product des...	Supplier	Supplier no...	Delivery date	Status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GBP	11,221.32	12.00	EA	935.11	A32010-102	Hire of Transp...	[REDACTED]	[REDACTED]	05/06/2024	Active

Close Requisition Resubmit Advanced mode Workflow user log Log book Export Funds check Funds check results

Supplier Required - Close Requisition

Enter your comment

New "Close requisition" task initiated

User MUST change status from active to Closed before clicking Save

Task management x

Search for tasks

Requisitions - standard

Requisition entry Product explorer Punchout

Requisition number: [REDACTED]

Task description

Client: SC, Workflow step: **Close Requisition**

Process name: Requisitioning, Co: SC, Order No: [REDACTED], Amount: 11221.32, Cat 1: T0046

Requisition

Requisitioner: [REDACTED]

Status: **Closed**

Period: 202403

External reference: [REDACTED]

Default supplier & contract

Supplier: 1000867 Enterprise Flex-E-Rent

Contact: [REDACTED]

Fixed supplier:

Default GL analysis

Costc*: T0046 Responsive Repairs (North)

Reqgov: 2 5k to 50k - 3 written quotations required

Suppressprice*: Y Yes

Poorderdel*: USER Send PO to Requestor

Contractref: [REDACTED]

Delivery contact

Delivery date: 05/06/2024

Contact: Mount McKinley (Delivery)

Delivery address: Mount McKinley Building, Shrewsbury Business Park, Shrewsbury, Shropshire, SY2 6LG

Save Clear Open Print preview Export Log book Copy requisition Start from template Save as template Mo

Price Required task

New "Close Requisition" option available

Task management x

Search for tasks

Task description

Client: SC, Workflow step: Price Required, Process name: Requisitioning, Co: SC, OrderNo: [REDACTED], Amount: 0, Cat 1: T0032

Client: SC, Workflow step: Price Required, Process name: Requisitioning, Co: SC, OrderNo: [REDACTED], Amount: 0, Cat 1: T0046

Requisition approval

Requisition

You have entered a requisition that does not have a price on at least one line. Please update and resubmit the request.

Requisition information

Resource Updated: 05/08/2024
Mount McKinley Building
Shrewsbury Business Park
Shrewsbury Shropshire SY2 6LG

Requisition number: [REDACTED]

Workflow log (row 1)

29/01/2025 14:2: [REDACTED]

(Enter a comment)

Copy

Requisition details

Map	Status	Funds check	Currency	Curr. amou...	Quantity	Unit	Price	Product	Product des...	Supplier	Supplier name	Delivery date
<input type="checkbox"/>	A		GBP	0.00	1.00	EA	0.00	A44001-100	Legal Disbur	1000255	Legal & Dem...	05/08/2024
Σ												
Kit components												

Close Requisition Re-submit Advanced mode Workflow user log Log book Export Funds check Funds check results

Price Required - Close Requisition

Enter your comment

Not needed

Close Requisition

User **MUST** change status from active to **CLOSED** before clicking Save

Task management x

Search for tasks

Task description

Client: SC, Workflow step: Close Requisition, Process name: Requisitioning, Co: SC, OrderNo: [REDACTED], Amount: 0, Cat 1: T0032

Client: SC, Workflow step: Price Required, Process name: Requisitioning, Co: SC, OrderNo: [REDACTED], Amount: 0, Cat 1: T0046

Client: SC, Workflow step: Rejected Requisition, Process name: Requisitioning, Co: SC, OrderNo: [REDACTED], Amount: 2025, Cat 1: T0043

Requisitions - standard

Requisition entry Product explorer Punchout

Requisition number: [REDACTED]

Requisition

Requisitioner: [REDACTED]

Status*: Closed

Revised: 202405

External reference: [REDACTED]

Default supplier & contract

Supplier: 1000255
Legal & Democratic Ser... [REDACTED]

Fixed supplier:

Contact: [REDACTED]

Default GL analysis

Costc*: T0032
Rent Collection

Reqgov: 1
< 5k - Verbal Quotation required

Suppressprice*: N
No

Poorderdel*: SUPP
Send PO to Supplier

Contractref: [REDACTED]

Delivery contact

Delivery date: 05/08/2024

Contact: Mount McKinley (Delivery)

Delivery address: Mount McKinley Building
Shrewsbury Business Park
Shrewsbury Shropshire SY2 6LG

Save Clear Open Print preview Export Log book Copy requisition Start from template Save as template More