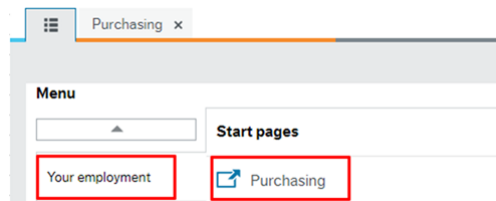
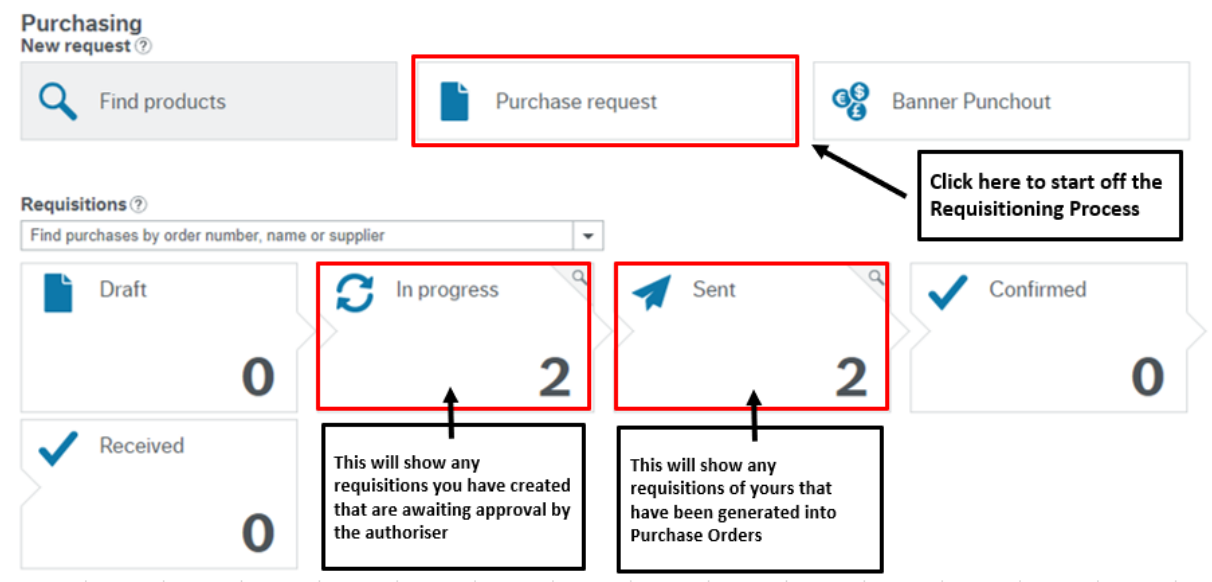


How do I raise a requisition in Unit4 ERP?

To raise a requisition in Unit4 ERP, 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 > Purchase request

Purchase request

On behalf of Requisitioner* Thomas Di Donato

Purchase request name Add a name to this purchase request

Add delivery group Message Delivery date 28/02/2025 Apply to selection Apply to all Header

Delivery to

Delivery contact* Thomas Di Donato (Delivery)

Delivery address Guildhall Frankwell Quay Shrewsbury Shropshire SY3 8HQ

Delivery description Delivery attention

Product	Product description	Funds check	Tax code
Click Add product to start entering your purchase request			

Your next step is to click on the Header button

Your delivery address will be defaulted here but you can select another address from the dropdown menu if required

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

You can type in the Supplier ID you wish to use or start to type in the supplier name to select the right Supplier ID

Any information you enter in the External reference field will appear as Expenditure Justification for the Spend Board panel

Header

Supplier [] ***	Period* 202411	External reference Free text field. Add any exter...
Contract [] ***		<input type="checkbox"/> Fixed contract

Default cost categories

Cost centre* Management Accounting 11132	Purchase Order Delivery Type* [] ***	Is this a retrospective purchase order for goods or services already arranged? [] ***
Contract Reference [] ***	Price Suppressed on Req/PO* [] ***	

Close

Your Cost Centre will default here but you can change this if required

This section can be left blank

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

You can press 'space' in this cell and select Yes - Retrospective Order or No - Not a Retrospective order.

You can click Close once you have completed the other fields in this section

If you have a contract reference for the goods/service you are purchasing, you can press 'space' and select from the available options. Otherwise you can leave this section blank.

You can press 'space' in this cell and select N if you dont want the price to be hidden on the order the supplier will receive or select Y if you would like the price to be hidden.

*If you decide that you want to send the order directly to the supplier rather than to yourself, you should check the email address is correct against the supplier ID you have chosen. Guidance on how to do this is detailed at the end of this guidance.

You can also enter any additional delivery information in one of the three boxes below. The information you enter here will appear on the order template that gets created and sent to yourself or the supplier.

Delivery description	Delivery attention	Delivery information
Please leave item at reception desk		

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.

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 ? Delivery date 17/03/2019 Apply to selection Apply to all

Delivery to

Delivery contact* Di donato, Thomas (Delivery)

Delivery address Abbey Foregate Shrewsbury Shropshire SY2 6ND

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	

Add product Delete product Copy product Move selection here Total amount:

***Useful Tip*:** You can overtype the Product Description to put the specific item detail here. This is especially useful if you have a large order for lots of items as when you come to goods receipt the item, you will be easily able to identify the item you have received rather than seeing multiple lines for clothing/stationery and then having to look at the detail of each one.

Delivery to

Delivery contact* Thomas Di Donato (Delivery)

Delivery address The Shirehall Abbey Foregate Shrewsbury Shropshire SY2 6ND

Product	Product description	Supplier	Delivery date	Quantity	Unit
A42000-101	High Visibility Reflective Jacket Size Medium Item Col	Bishop Sports & Leis 1000142	04/02/2020	1	EA

Add product Delete product Copy product Move selection here

After entering these details you can then click on the magnifying glass icon. (To note this icon may appear on the left hand of the screen)

Purchasing > Purchase request

Purchase request


On behalf of Requisitioner* Thomas Di Donato Purchase request name Add a name to this purchase request

Add delivery group ?

You 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

Delivery to

Delivery contact* Thomas Di Donato (Delivery) Delivery address Guildhall Frankwell Quay Shrewsbury Shropshire SY3 8HQ

Product	Product description	Supplier	Delivery date	Quantity	Unit	Price	Currency
 A42000-100	Clothing & Uniforms - Schools	Bishop Sports & Leisure Ltd 1000142	28/02/2025	1	Each EA	100.00	Sterling Pound (GB) GBP

Add product Delete product Copy product Move selection here More product information

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 Cost Centre, Account Code (Subjective) and Tax Details, you can then click on the Product Text Box if you want to include any additional product details

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

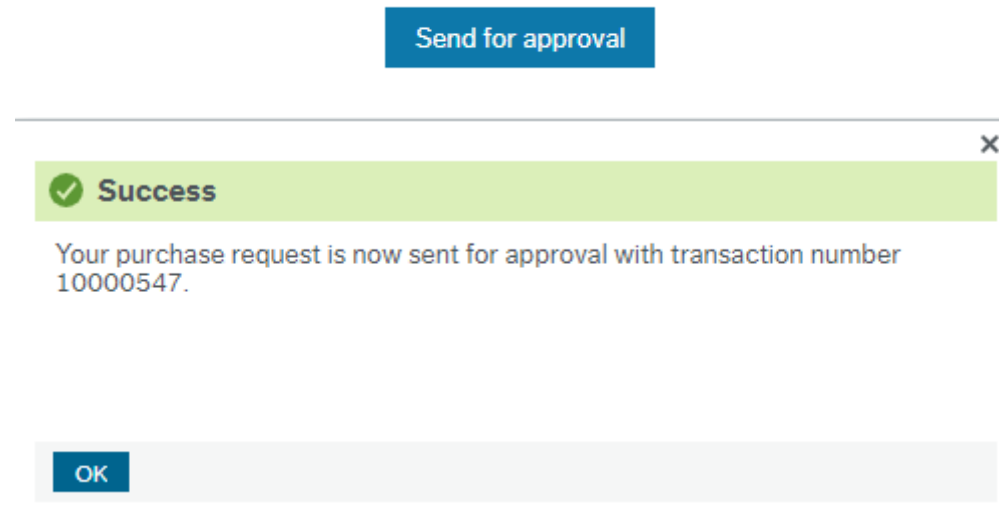
Waterproof, ENSIO 20471 certified
and class 3 Padded motorway jacket

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
 Fast Key Services Ltd
 Pilot Close
 Fulmar Way
 Wickford
 Essex
 SS11 8YW
Supplier Code: 1002071

Deliver To / Execute Work At
 Road Safety Office
 107 Longden Road
 Shrewsbury
 Shropshire
 SY3 9DS



Shirehall
 Abbey Foregate

VAT No: GB 1623 474 72

Enquiries To
 Contact Details: Karl Williams
 Tel: 01234 567891
 Email:

Invoice and Payment
 Please send an electronic pdf invoice to
 shropshirecouncil.invoices@proactiscapture.com
 Alternatively you can send a paper copy of your
 invoice to the delivery address above.

PURCHASE ORDER
Purchase Order No: 20016496
 Please quote this number in all correspondence
Purchase Order Date : 28/11/2019
 Authorised By:

Delivery Description
 Please leave item at reception desk

Delivery Attention

Delivery Information

Contract Ref	Supplier Product Code	Description	Required By	Qty	UOM	Unit Price	Net Price
	A44006-100	High Visibility Reflective Jacket Size Medium Waterproof, ENSIO 20471 certified and class 3 Padded motorway jacket	28/11/2019	1.00	EA	150.00	150.00
This order is subject to the terms and conditions included in your contract with Shropshire Council. 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: http://www.shropshire.gov.uk/doing-business-with-shropshire-council 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.						Total Net	150.00
						Total VAT	0.00
						Total inc VAT	150.00

This is where the Product Description you entered appears

This is where the Additional Product Text you entered

How do I change the email address against a supplier?

You can do this by going to Procurement>Supplier Information>Suppliers, typing in the Supplier ID or name and pressing tab.

Next if you click on the Contact Information tab and then click on the General Line, you will see the email address information below:

Suppliers

Supplier **Contact information** Invoice Payment Relations Charity Number

Supplier

Lookup
1003600 ...
Unicorn Fire & Safety Solutions

Address

<input type="checkbox"/>	Address type	▲ Street address	Town	County	Postcode	Contact
<input type="checkbox"/>	General	6 Salendine	Shrewsbury	Shropshire	SY1 3XJ	

Add Delete

⌵ **Address details**

Address Address type General	Phone numbers Telephone 0845 519 9039	E-mail and website E-mail info@unicornsafety.co.uk
---	--	---

If you need to change the email address or add one. You can change the information directly here and click Save. After 1 minute a task will appear for you in the top right hand corner and will require you to then attach evidence/supporting documentation for the change that you have made. You can click on the task and then attach the evidence through the paperclip icon. You can then click on the Task Complete button.

This task will then be redirected to the Payments Team to approve.

How do I view an Order Template in the System?

You can go to Procurement>Purchase Orders>Purchase Order. Next if you click the Open Button at the bottom of the screen then you should see your orders appear that you can select from.

Once selected the Purchase Order screen will appear and you can click on the Paperclip icon in the top right hand side. If you then select the copy purchase order on the left hand side you will either see you Purchase Order appear in the middle of the screen in its entirety or as a pdf icon. If it appears as a pdf icon you can right click and then click 'Save Local Copy' and will be able to view it.