

SERVICE

CALLS – ISSUE PARTS

Issuing a part from a Call in BPO will be the result of an initial **part request linked to that Call**.

Part requests are raised from a Call in order to notify stores that stock is required for work to be done on that Call. The stores person can then pick and issue the stock or, if necessary, raise a **purchase requisition** for stock to be bought.

Important Notes when Issuing Parts:

1. Depending on your company configuration, the initial part requests may need to be **authorised** by a technical or service manager before stores will receive the request and the stock can be issued.
2. **Part Issue Notes** and **Delivery Notes** are crucial in **good business practice**.
 - i. **Issue Notes** are evidence of a physical outbound movement of items from the company warehouse to another location. They result in a decrease of items in a warehouse. These notes are internal documents signed by both the storeman and the delivery person (or technician).
 - **Issue Note Scenario:** The storeman will give the delivery person (or technician) the issued items and the Issue Note which they will both sign. Thus stock is recorded as going out by the storeman (1st signature) and is now in the hands of the delivery person (2nd signature) who will take it to the customer. Both signatures ensure that all parties take responsibility for

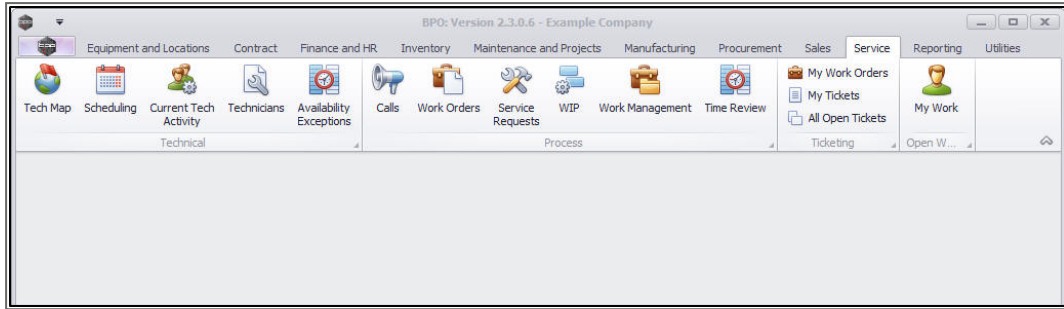
their part in the process and that stock is accounted for.

- ii. **Delivery Notes** are evidence of the receipt of items from the delivery person (or technician) to the customer. They contain details such as the type and quantity of the items delivered. It is imperative to keep records of this document in case there is a discrepancy between what is expected by the customer and what is actually received **e.g.** there could be a shortage of items received or some items may be damaged. These notes are external documents signed by the customer (recipient). It is good practice to have 2 copies of a Delivery Note - one for your company and one for the customer.

- **Delivery Note Scenario:** The delivery person (or technician) will arrive at the customer's location. The items being delivered will be checked by the customer for the expected quantity and quality. The customer will sign the Delivery Note with any comments if necessary **i.e.** comment if there is a shortfall or if an item is damaged. The delivery person will bring this document back to the storeman who will match it to the issue note. If there is a problem later and the customer claims not to have received the items, the storeman can check the signed Delivery Note. This document protects both the delivery person and the customer.

This process enables the call centre person to issue a part directly from the Call. The process for issuing a **C-Class** item differs slightly from the process for issuing an **A-Class** item. Both processes are set out below.

Ribbon Access: *Service > Calls*



1. The **Call Listing** screen will be displayed.

Select the **site** and **status**.

2. In this example, **Durban** is selected as the site.
3. The status is set to **New**.

ISSUE C-CLASS PART

SELECT THE CALL

4. Select the **Call** that contains the C-Class part request that you wish to issue.
5. Click on **Edit**.

1. The **Call Listing** - BPO: Version 2.3.0.6 - Example Company screen will be displayed.

2. The **Call maintenance: Call ref. - []** screen will be displayed.

3. The **Work Orders** tile will be displayed.

4. The **Work Orders** tile will be displayed.

5. The **Work Orders** tile will be displayed.

1. The **Call maintenance: Call ref. - []** screen will be displayed.

SELECT THE WORK ORDER

Select the **Work Order** linked to the **C-Class** Part Request

2. Click on the **Work Orders** tile.

Call maintenance : Call ref. - CN0000673 - BPO: Version 2.3.0.6 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links
Enter text to search...

Functions

- Work Orders 1
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info 1

Customer: Young Electric

Contact: Carol Young

Contact No.: 031 555 1234

Address: 12 Du Toit Bluff

Call Type: Repair

Error Code: Faulty

Description: Paper jam AHF01

Call Date Time: 23-01-2020 14:07:46

Priority: 3

SLA:

Date Required: 23-01-2020

Order No:

Logged By: AbigailM

Status: N - New

Optional No:

Relates To :

ReferenceType	ReferenceNo
Serial No	AHF01
Prior Call Reference	
Contract No	CO0000031
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls :

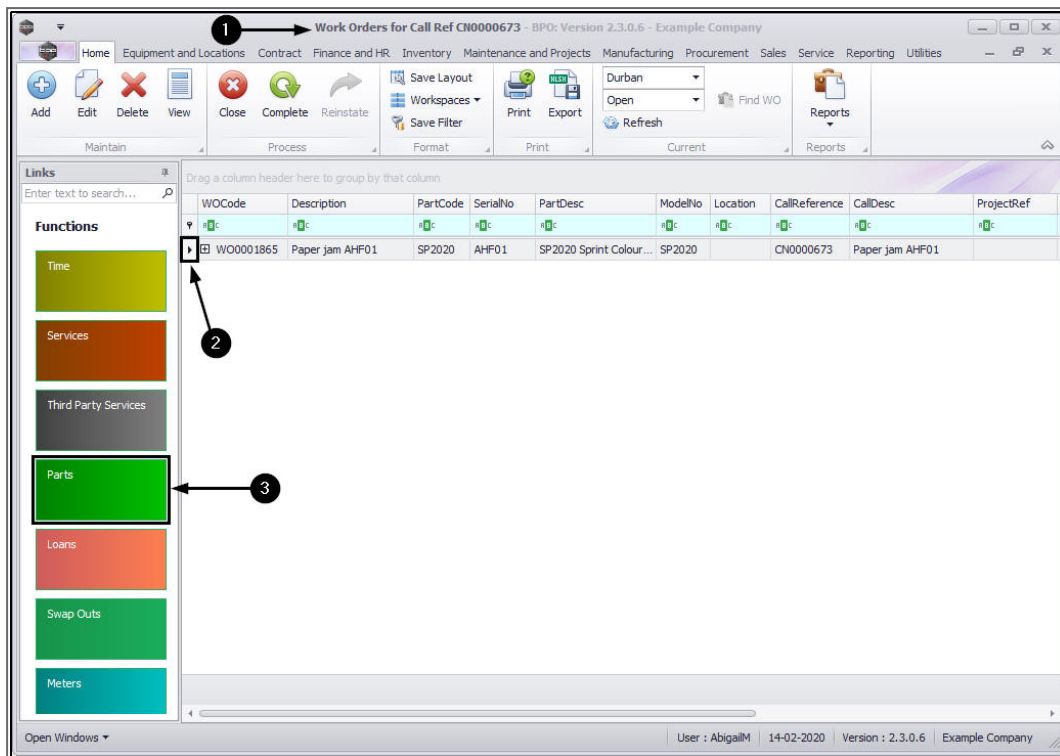
CallReference	CallDate	CallTime	Description	CallType
CN0000673	23-01-2020	14:07:46	Paper jam AHF01	REP

Meters

Open Windows

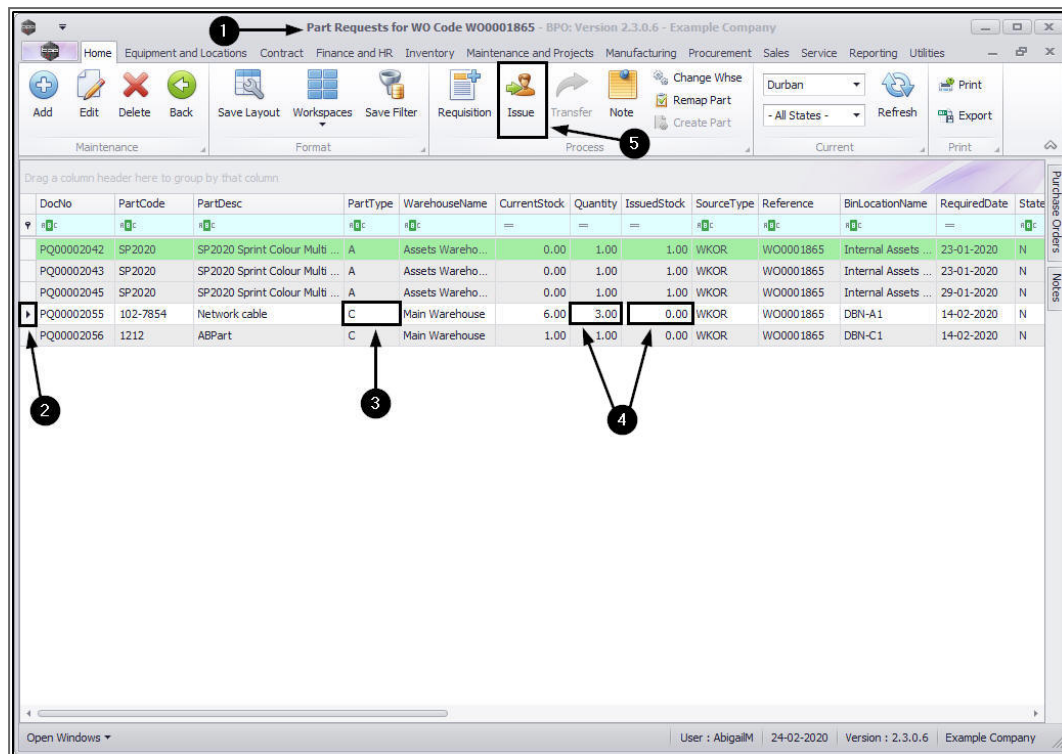
User : AbigailM 14-02-2020 Version : 2.3.0.6 Example Company

1. The **Work Orders for Call Ref []** screen will be displayed.
2. Select the **work order** that is linked to the C-Class part request that you wish to **issue**.
3. Click on the **Parts** tile.

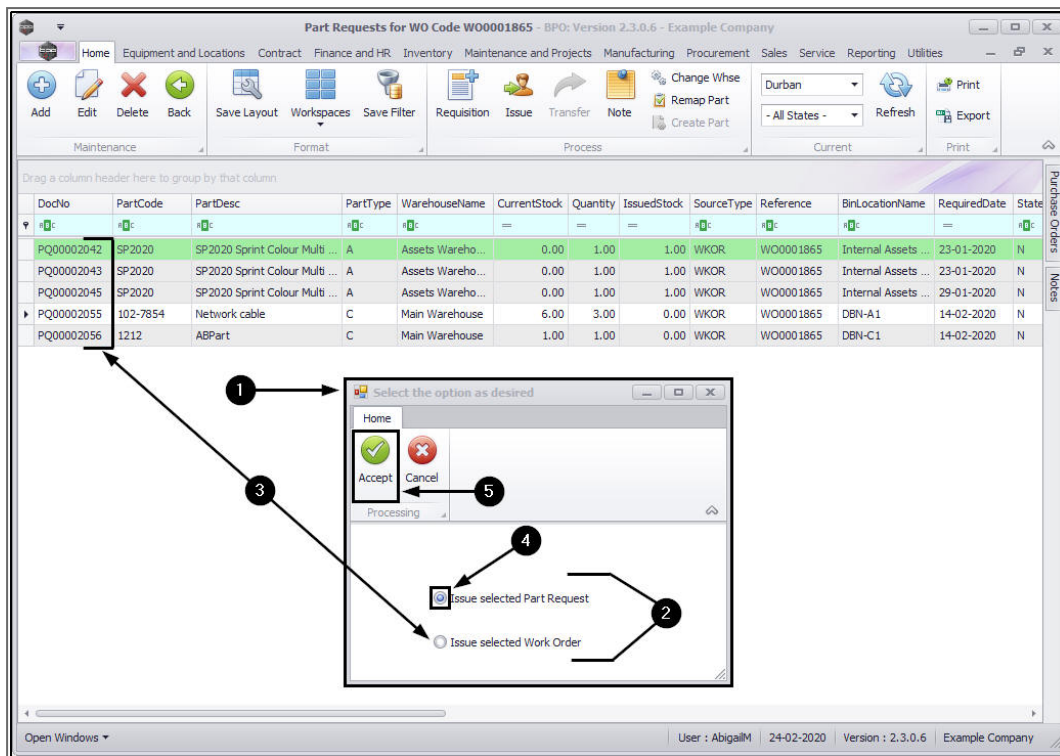


ISSUE THE C-CLASS PART

1. The *Part Requests for WO Code []* screen will be displayed.
2. Select the part request that you wish to issue.
3. Note that this is a **C-Class** item.
4. Note that the *Quantity* (requested) is **3** and the *Issued Stock* is **0**.
5. Click on *Issue*.



1. A **Select the option as desired** pop up box will appear.
2. You will have 2 options:
 - Issue selected part request
 - Select this option if you want to issue the currently selected part request only .
 - Issue selected Work Order
 - Select this option if you want to issue all the part requests in this screen that are linked to the work order.
3. If you chose **Issue selected Work order** then all of the unissued Part Requests linked to this Work Order will be issued (if there is stock available).
4. For the purpose of this manual, **Issue selected Part Request** is chosen.
5. Click on **Accept**.



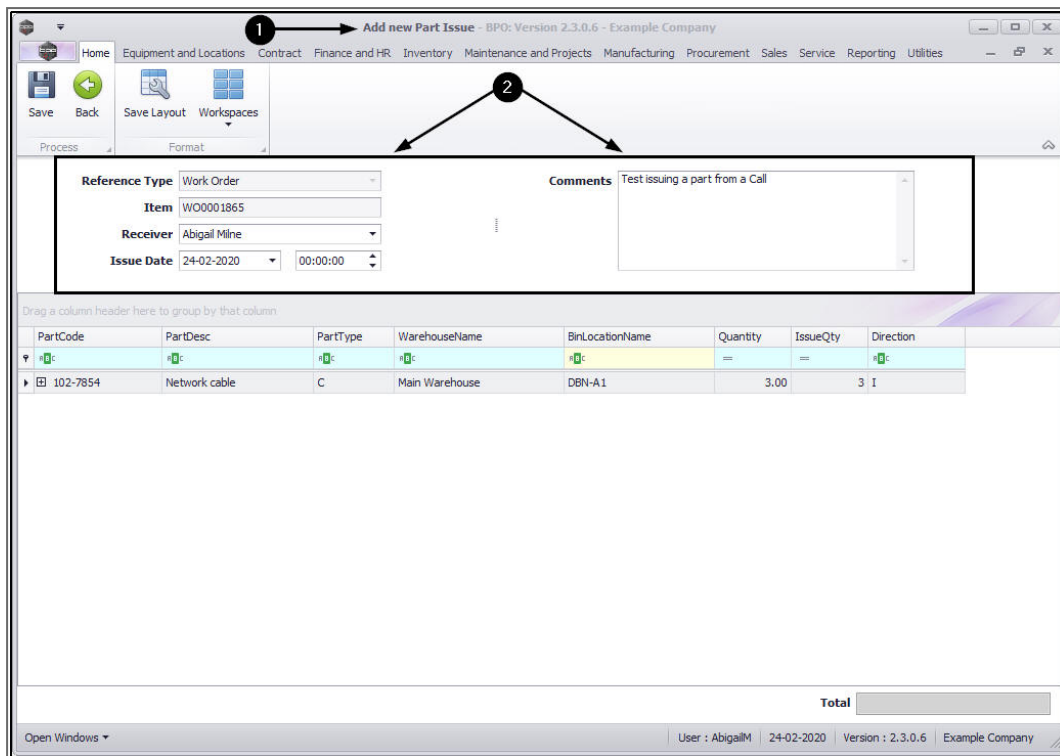
The **Add new Part Issue** screen will be displayed.

ADD NEW PART ISSUE SCREEN

Part Issue Info

- **Reference Type:** This will auto populate with the reference type linked to this part request - in this example, a Work Order.
- **Item:** This will auto populate with the reference number of the reference type linked to this part request (in this example, the Work Order Number).
- **Receiver :** This will auto populate with the person logged on to the system, editing the call. You can click on the drop-down arrow and select an alternative receiver if required.
- **Issue Date and Time:** This will auto populate with the current date and time.

- **Issue Date** : You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
- **Issue Time**: You can either type in or click on the directional arrows to select an alternative time.
- **Comments**: Type in a relevant comment regarding this part issue, if required.
 - **Reference Type**: This will auto populate with the reference type linked to this part request - in this example, a Work Order.
 - **Item**: This will auto populate with the reference number of the reference type linked to this part request (in this example, the Work Order Number).
 - **Receiver** : This will auto populate with the person logged on to the system, editing the call. You can click on the drop-down arrow and select an alternative receiver if required.
 - **Issue Date and Time**: This will auto populate with the current date and time.
 - **Issue Date** : You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
 - **Issue Time**: You can either type in or click on the directional arrows to select an alternative time.
- **Comments**: Type in a relevant comment regarding this part issue, if required.



Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 24-02-2020 00:00:00

Comments: Test issuing a part from a Call

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
102-7854	Network cable	C	Main Warehouse	DBN-A1	3.00	3	I

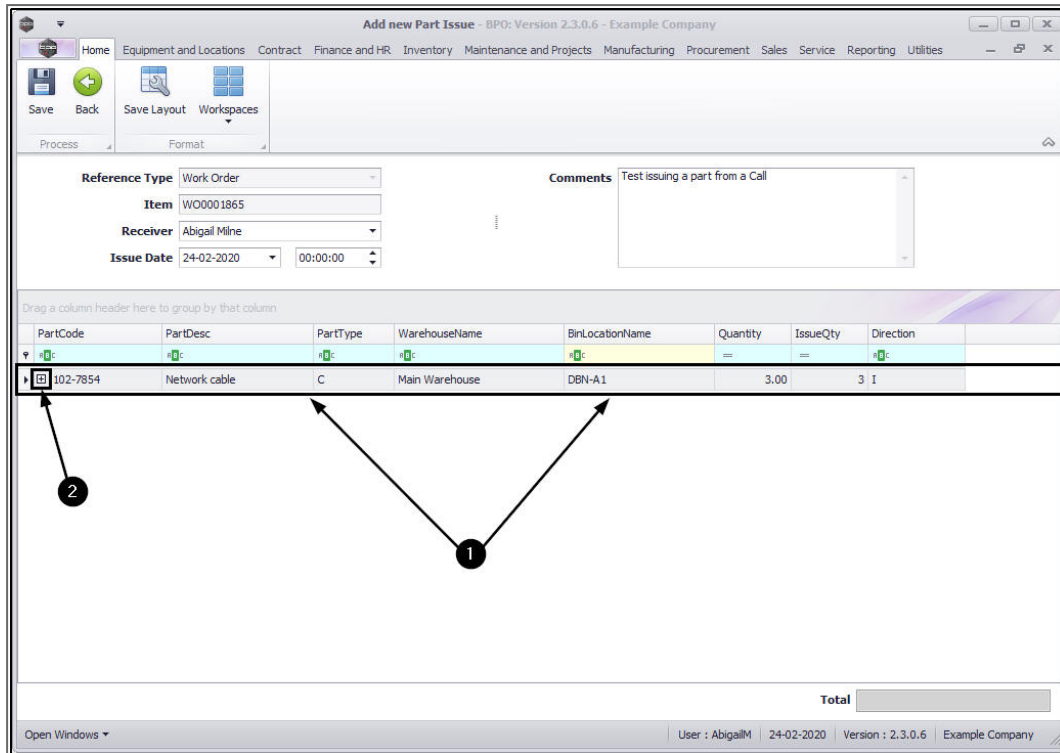
Total

User: AbigailM | 24-02-2020 | Version: 2.3.0.6 | Example Company

The Parts Data Grid

- The following information will be auto populated:
 - Part Code:** This will auto populate with the selected C-Class item Part Code.
 - Part Description:** This will auto populate with the selected C-Class item part Description.
 - Part Type:** This will auto populate with the selected C-Class item Part Type.
 - Warehouse Name:** This will auto populate with the warehouse selected on the initial Part Request.
 - Bin Location Name:** This will auto populate with the **default** bin location linked to the warehouse above.
 - Quantity:** This will populate with the quantity requested on the initial part request.

- **Issue Qty:** This will populate depending on the part type (A or C-Class):
 - **A-Class and B-Class Items:** The Issue Qty text box will populate with **0** as you need to manually select the unique serial number of the A or B-Class item to be issued. This will be covered in Section 2 of this manual: - **Issue A-Class Part from a Call**
 - **C-Class Items:** The Issue Qty text box will populate with the total quantity requested on the initial Part Request that can be issued out from the default warehouse ***if there is stock available*** in this warehouse.
 - **Note 1:** If the Issue Qty of a C-Class item does not equal the Quantity due to short stock then you will either need to **request an interwarehouse transfer** to bring these items into the default warehouse or if you will need to follow the process to **procure** stock.
 - **Note 2:** You can issue partial quantities by selecting an issue quantity that is less than the requested quantity.
 - **Direction:** This will auto populate with **I** - Issue.
2. Click on the **expand** icon in the row of the part.



Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 24-02-2020 00:00:00

Comments: Test issuing a part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
102-7854	Network cable	C	Main Warehouse	DBN-A1	3.00	3	1

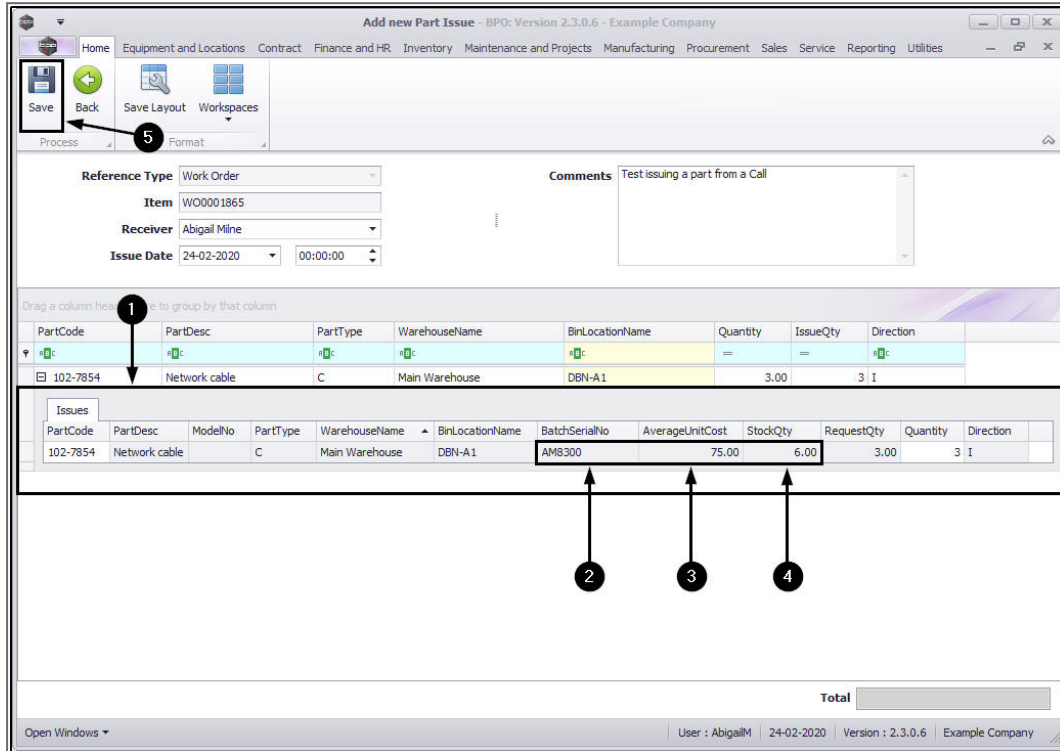
Total

Open Windows | User: AbigailM | 24-02-2020 | Version: 2.3.0.6 | Example Company

1. The **Issues** frame will be expanded. This will give more detail regarding the stock in the warehouse:
 2. the Batch numbers of the items (if batch tracking is used)
 3. the weighted average unit cost of the items (C-Class items only)- this is calculated over multiple batches, within the same bin location
 4. the available stock quantity - the amount of the item currently in the warehouse bin(s)
- In this frame, you can now select to issue the part from a specific stock batch number if your company is using the **Stock Batch Tracking option**. For information on issuing from an alternate batch refer to **Part Requests: Issuing Stock Items: Selecting a Part from an Alternative Batch**.

Save Part Issue

- When you have finished checking the details in this screen, click on **Save**.



Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

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

Save Back Save Layout Workspaces

Process **5** Format

Reference Type: Work Order
Item: WO0001865
Receiver: Abigail Milne
Issue Date: 24-02-2020 00:00:00

Comments: Test issuing a part from a Call

Drag a column header to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
102-7854	Network cable	C	Main Warehouse	DBN-A1	3.00	3.00	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
102-7854	Network cable		C	Main Warehouse	DBN-A1	AM8300	75.00	6.00	3.00	3.00	I

Total

Open Windows User : AbigailM 24-02-2020 Version : 2.3.0.6 Example Company

- A **Part Issue Processing** message box will pop up informing you that;
 - Part Issue No. [] saved successfully.**
- Click on **OK**.

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 24-02-2020 00:00:00

Comments: Test issuing a part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
102-7854	Network cable	C	Main Warehouse	DBN-A1	3.00	3	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
102-7854	Network cable		C	Main Warehouse	DBN-A1	AM8300	75.00	6.00	3.00	3	I

1 → Part Issue Processing

2 → OK

Part Issue No. SI00000840 saved successfully.

Total

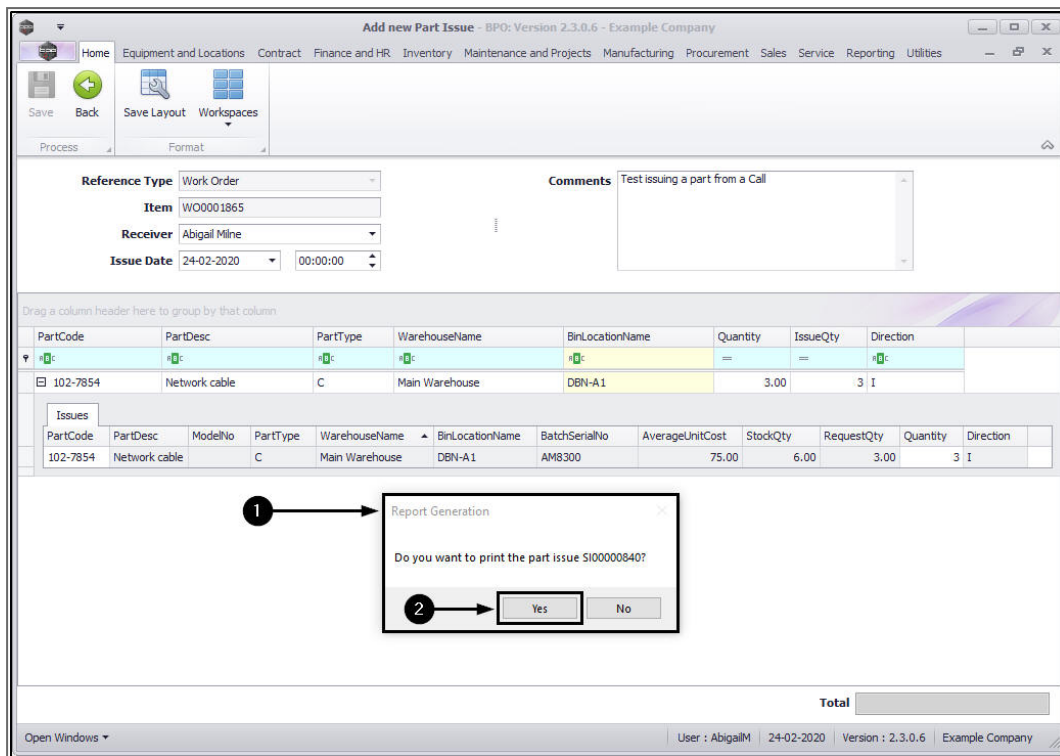
Open Windows | User : AbigailM | 24-02-2020 | Version : 2.3.0.6 | Example Company

PRINT THE PART ISSUE NOTE

1. A **Report Generation** message box will pop up asking;
 - **Do you want to print the part issue []?**
2. Click on **Yes**.

Note: The Issue Note is a very important part of the Issuing Stock Process.

Refer to **Introduction: Important Notes when Issuing Parts**



PRINT THE DELIVERY NOTE

1. The Issue Note will open in the background and a second **Report Generation** message box will pop up asking;
 - **Do you wish to print the Delivery notes [/?**
2. Select **Yes**.

Note: The Delivery Note is a very important part of the Issuing Stock Process. Refer to **Introduction: Important Notes when Issuing Parts**

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 24-02-2020 00:00:00

Comments: Test issuing a part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
102-7854	Network cable	C	Main Warehouse	DBN-A1	3.00	3	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
102-7854	Network cable		C	Main Warehouse	DBN-A1	AM8300	75.00	6.00	3.00	3	I

Report Generation

Do you want to print the delivery note SI00000840?

Yes No

Total

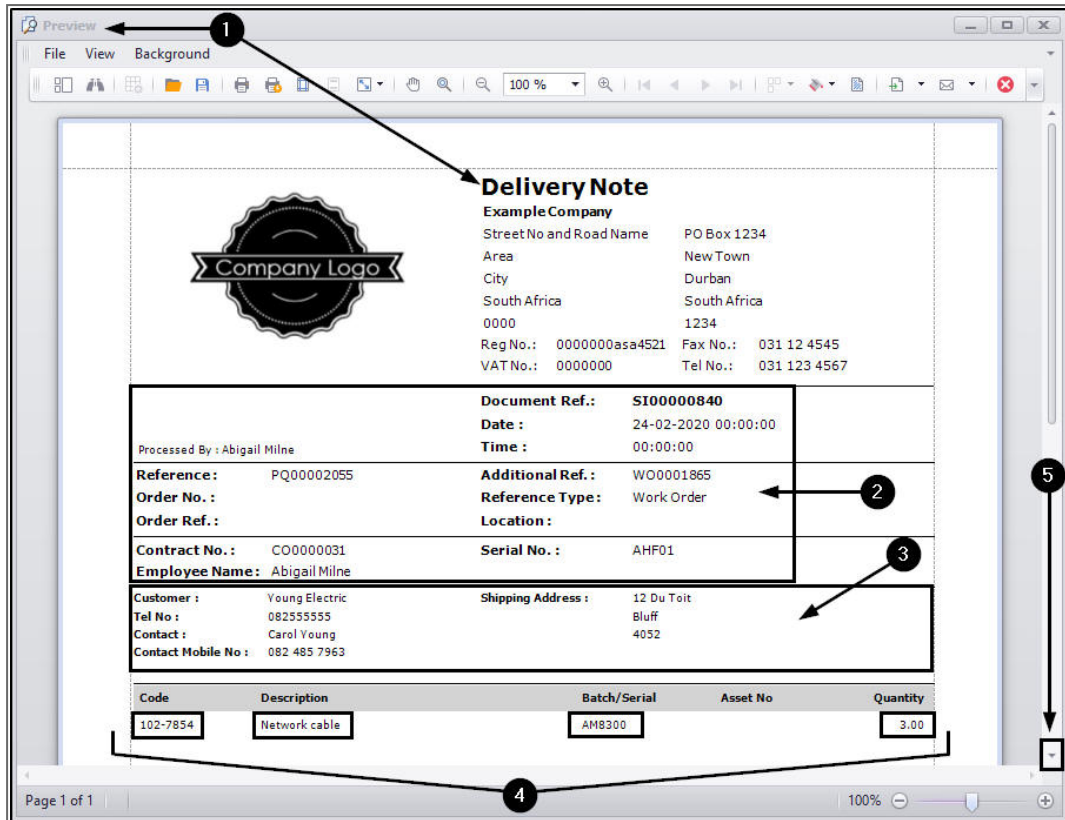
Open Windows | User : AbigailM | 24-02-2020 | Version : 2.3.0.6 | Example Company

Delivery Note Preview

1. The **Report Preview** screen for the **Delivery Note** will pop up first.

Here you can view:

2. the **company** details
3. the **customer** details
4. and the **part** details.
5. **Scroll down** the Preview page.



Delivery Note

Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 00000000 Tel No.: 031 123 4567

Processed By : Abigail Milne

Reference : PQ00002055	Additional Ref. : WO0001865
Order No. :	Reference Type : Work Order
Order Ref. :	Location :
Contract No. : CO0000031	Serial No. : AHF01
Employee Name : Abigail Milne	

Customer : Young Electric	Shipping Address : 12 Du Toit
Tel No. : 082555555	Bluff
Contact : Carol Young	4052
Contact Mobile No. : 082 485 7963	

Code	Description	Batch/Serial	Asset No	Quantity
102-7854	Network cable	AM8300		3.00

Page 1 of 1

There are 2 sections for the customer to record:

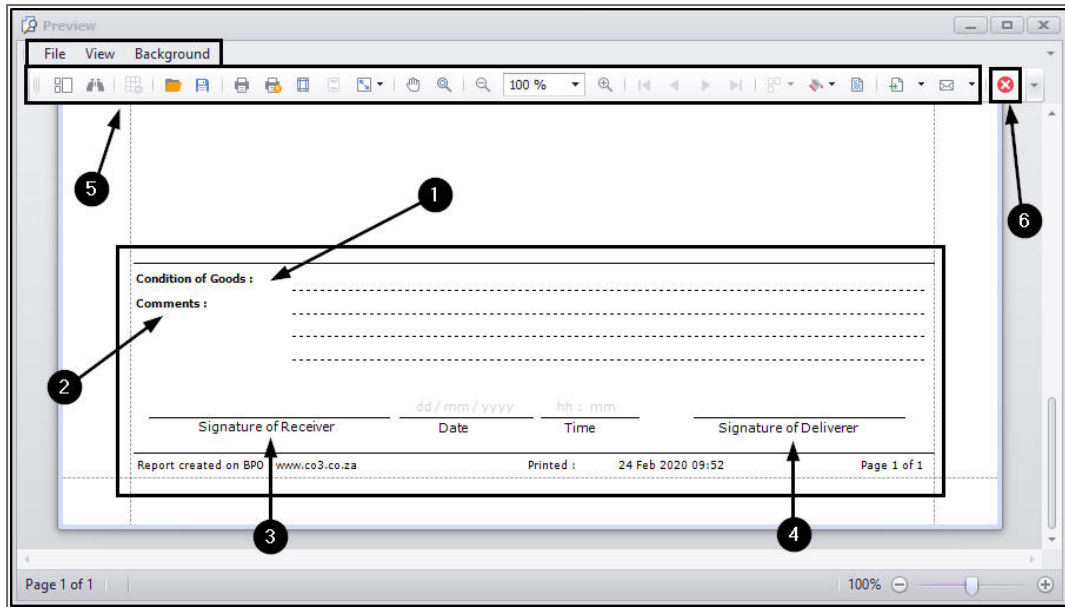
1. the **condition** of the received parts
2. any **comments** regarding the delivery

It is good business practice for the Delivery Note to contain both

3. the signature of the **Receiver** (Customer) and
4. the signature of the **Deliverer** (usually the technician).
5. From here you can **View, Print, Export** or **Email** the Delivery Note.

2 copies of the Delivery Note should be printed, signed and taken with the delivery person (or technician) to the receiver (customer). 1 is for the receiver (customer) to keep and 1 for the delivery person (technician) to take back to the company storeman.

6. **Close** this Preview page when you are done.

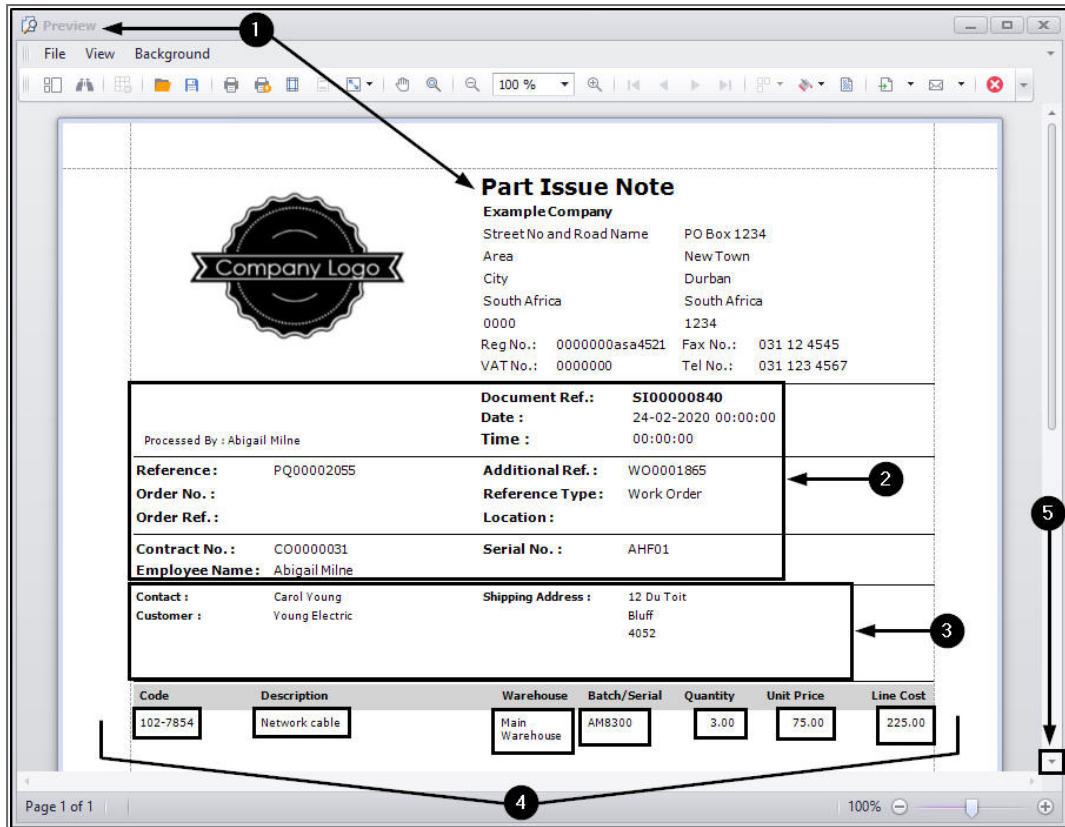


Part Issue Note Preview

1. You will then see the **Report Preview** screen for the **Part Issue Note**.

Here you can view:

2. the **Company** details
3. the **customer** details
4. and the **part** details. This section will also contain information such as:
 - i. which **warehouse** and
 - ii. which **batch number** this C-class part is being issued out from
 - iii. the **Unit Price** and
 - iv. the total **Line Cost** of the part (Quantity x Unit Price)
5. **Scroll down** the Preview page.



Part Issue Note

Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 00000000 Tel No.: 031 123 4567

Processed By : Abigail Milne

Document Ref.: SI00000840
Date : 24-02-2020 00:00:00
Time : 00:00:00

Reference: PQ00002055
Order No. :
Order Ref.:

Additional Ref.: WO0001865
Reference Type: Work Order
Location :

Contract No.: CO0000031
Serial No.: AHF01

Employee Name: Abigail Milne

Contact : Carol Young
Customer : Young Electric

Shipping Address : 12 Du Toit
 Bluff
 4052

Code	Description	Warehouse	Batch/Serial	Quantity	Unit Price	Line Cost
102-7854	Network cable	Main Warehouse	AM8300	3.00	75.00	225.00

Page 1 of 1

There are 2 sections for the storeman to record:

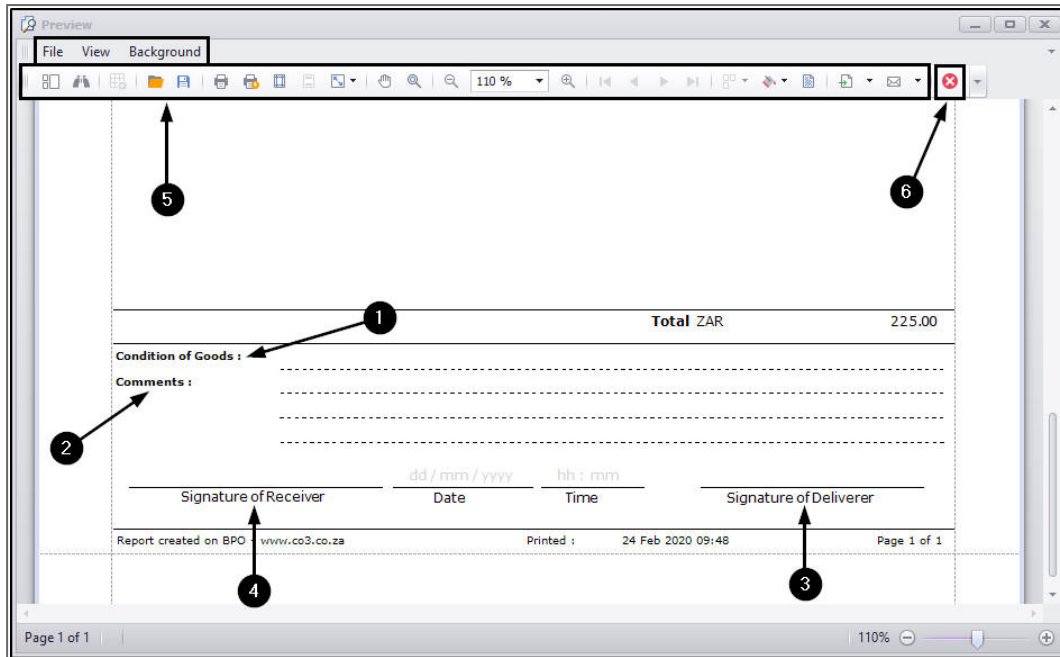
1. the **condition** of the parts being issued out of the warehouse
2. any **comments** regarding the parts being issued.

It is good business practice for the Issue Note to contain both

3. the signature of the **storeman** (in this case called the deliverer) and
4. the signature of the **technician** (in this case called the Receiver).
5. From here you can **View, Print, Export** or **Email** the Issue Note.

This Issue Note should be printed, signed and kept by the storeman to match against the signed Delivery Note when it comes back with the technician after the parts have been delivered.

6. **Close** this Preview page when you are done.



Preview

File View Background

110 %

5

6

1

Total ZAR 225.00

Condition of Goods :

Comments :

2

Signature of Receiver

dd / mm / yyyy

hh : mm

Signature of Deliverer

Report created on BPO : www.co3.co.za

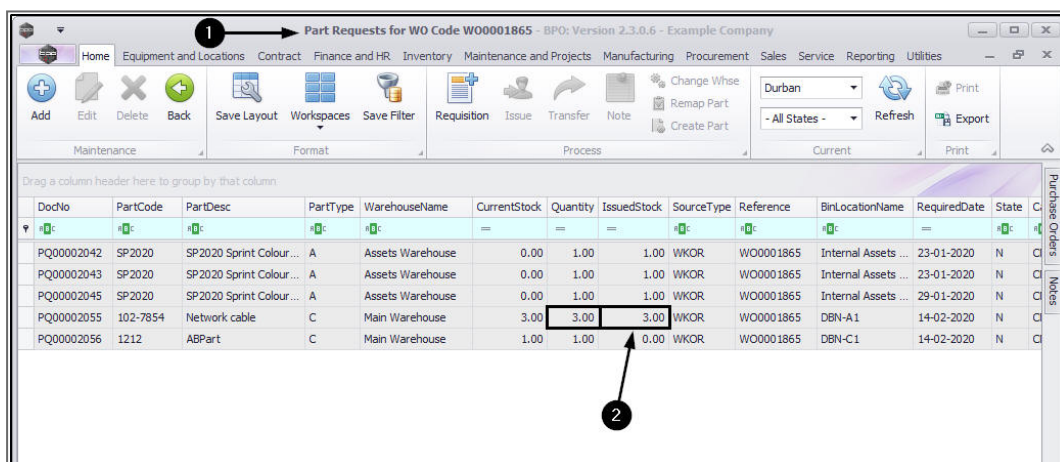
Printed : 24 Feb 2020 09:48

Page 1 of 1

Page 1 of 1

110%

1. You will return to the **Part Requests for WO Code []** screen.
2. Note that the **IssuedStock** amount has now changed to **3**.



Part Requests for WO Code W00001865 - BPO: Version 2.3.0.6 - Example Company

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

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

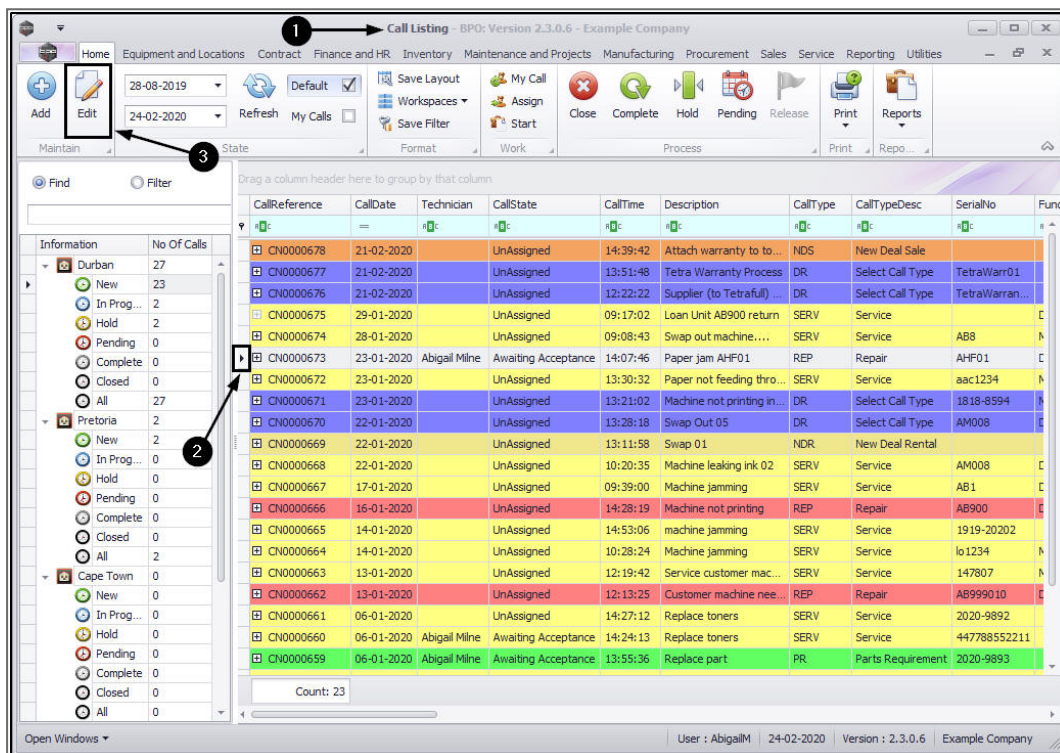
DocNo	PartCode	PartDesc	PartType	WarehouseName	CurrentStock	Quantity	IssuedStock	SourceType	Reference	BinLocationName	RequiredDate	State
PQ00002042	SP2020	SP2020 Sprint Colour...	A	Assets Warehouse	0.00	1.00	1.00	WKOR	W00001865	Internal Assets ...	23-01-2020	N
PQ00002043	SP2020	SP2020 Sprint Colour...	A	Assets Warehouse	0.00	1.00	1.00	WKOR	W00001865	Internal Assets ...	23-01-2020	N
PQ00002045	SP2020	SP2020 Sprint Colour...	A	Assets Warehouse	0.00	1.00	1.00	WKOR	W00001865	Internal Assets ...	29-01-2020	N
PQ00002055	102-7854	Network cable	C	Main Warehouse	3.00	3.00	3.00	WKOR	W00001865	DBN-A1	14-02-2020	N
PQ00002056	1212	ABPart	C	Main Warehouse	1.00	1.00	0.00	WKOR	W00001865	DBN-C1	14-02-2020	N

2

ISSUE A-CLASS PART

SELECT THE CALL

1. In the **Call Listing** screen,
2. Select the **Call** that contains the A-Class part request that you wish to issue.
3. Click on **Edit**.



1. The **Call maintenance: Call ref. - []** screen will be displayed.

SELECT THE WORK ORDER

Select the Work Order linked to the A-Class Part Request

2. Click on the **Work Orders** tile.

Call maintenance : Call ref. - CN0000673 - BPO: Version 2.3.0.6 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links
Enter text to search...

Functions

- Work Orders 1
- Work In Progress
- Notes
- Assignments
- Hold History
- Pending History
- On Site Info 1

Customer: Young Electric

Contact: Carol Young

Contact No.: 031 555 1234

Address: 12 Du Toit Bluff

Call Type: Repair

Error Code: Faulty

Description: Paper jam AHF01

Call Date Time: 23-01-2020 14:07:46

Priority: 3

SLA:

Date Required: 23-01-2020

Order No:

Logged By: AbigailM

Status: N - New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	AHF01
Prior Call Reference	
Contract No	CO0000031
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

Prior Calls:

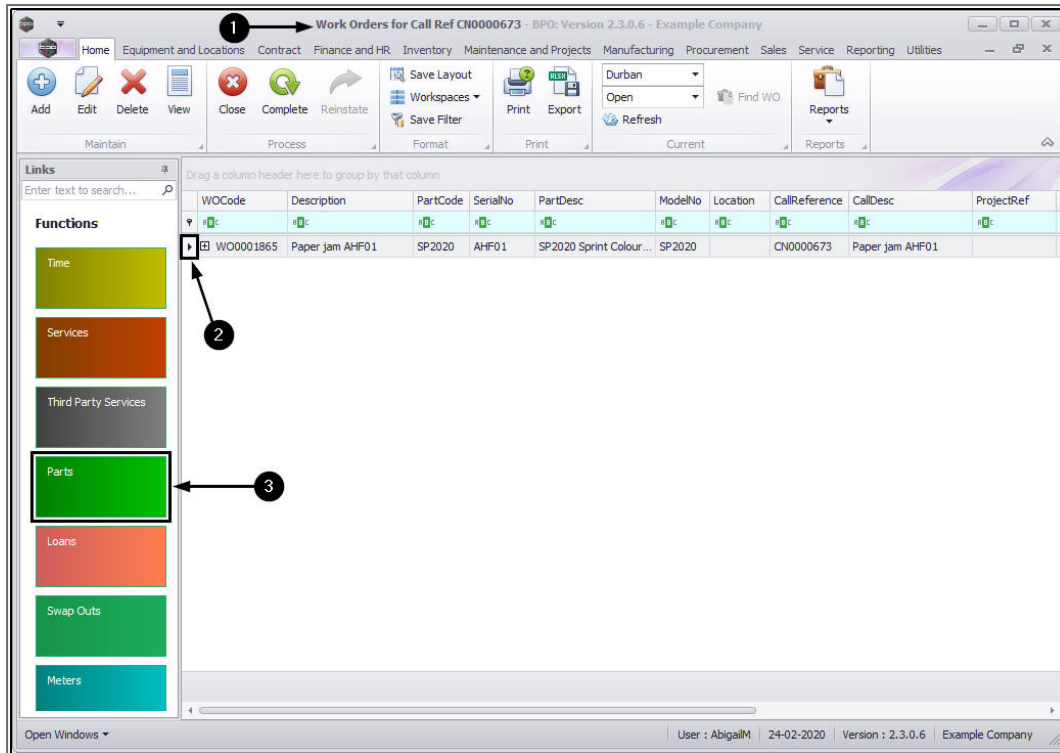
CallReference	CallDate	CallTime	Description	CallType
CN0000673	23-01-2020	14:07:46	Paper jam AHF01	REP

Meters

Open Windows

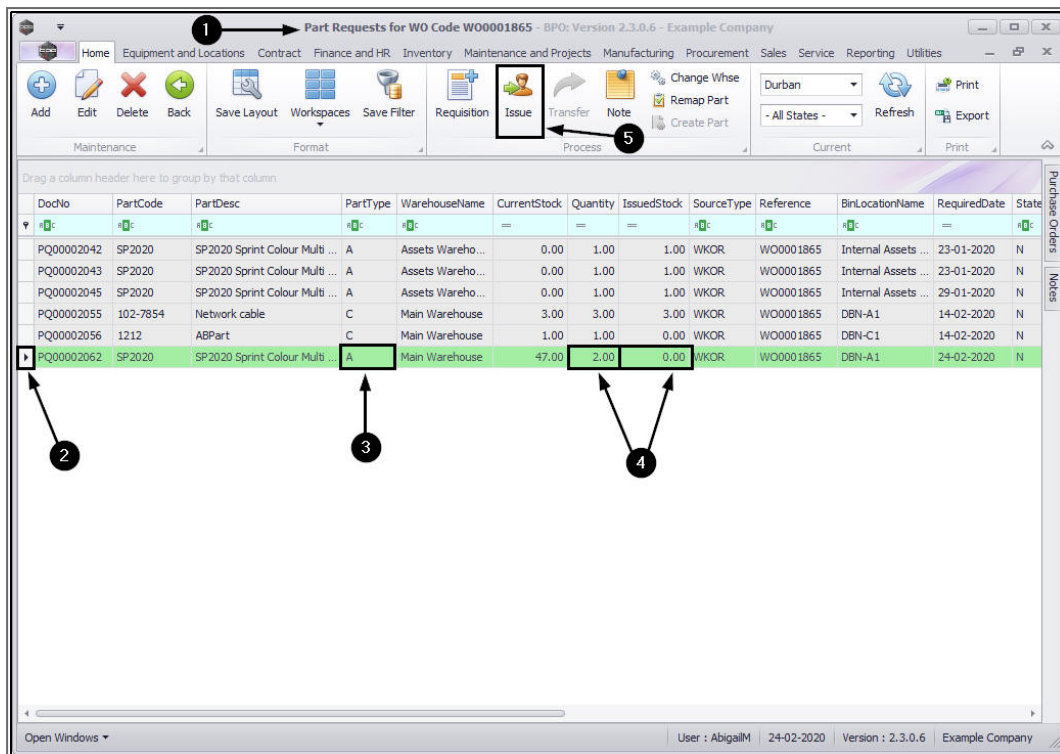
User : AbigailM 24-02-2020 Version : 2.3.0.6 Example Company

1. The **Work Orders for Call Ref []** screen will be displayed.
2. Select the **work order** that is linked to the A-Class part request that you wish to **issue**.
3. Click on the **Parts** tile.

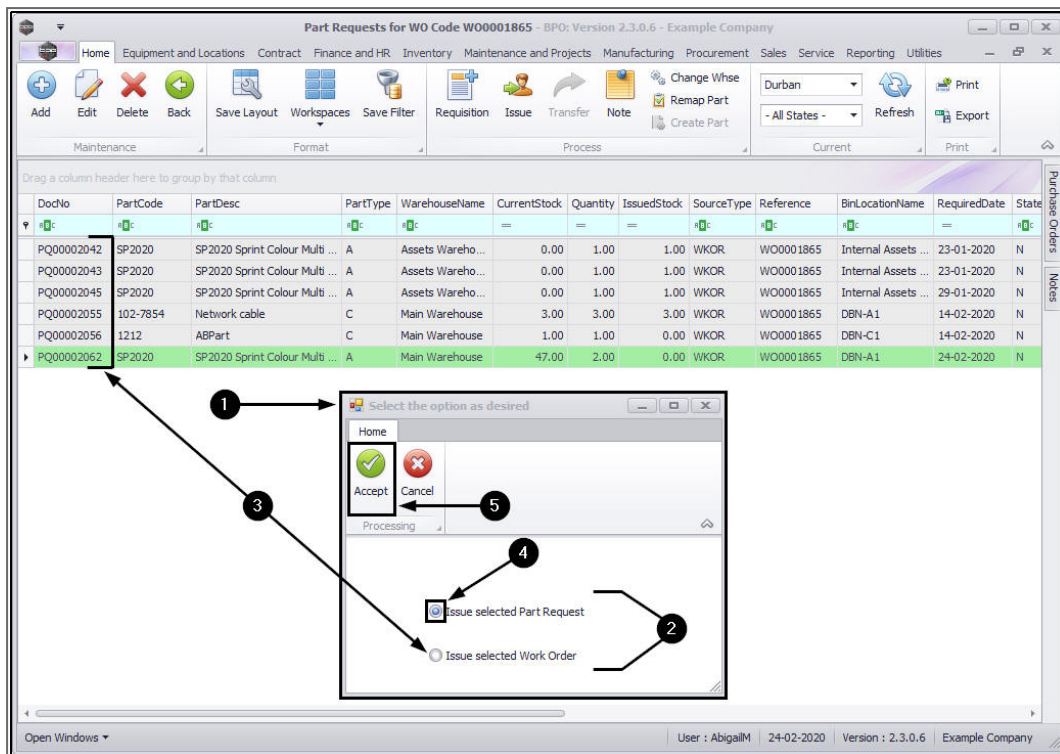


ISSUE THE A-CLASS PART

1. The **Part Requests for WO Code []** screen will be displayed.
2. Select the part request that you wish to issue.
3. Note that this is an **A-Class** item.
4. Note that the **Quantity** (requested) is **2** and the **Issued Stock** is **0**.
5. Click on **Issue**.



1. A **Select the option as desired** pop up box will appear.
2. You will have 2 options:
 - i. Issue selected part request
 - Select this option if you want to issue the currently selected part request only .
 - ii. Issue selected Work Order
 - Select this option if you want to issue all the part requests in this screen that are linked to the work order.
3. If you chose **Issue selected Work order** then all of the unissued Part Requests linked to this Work Order will be issued (if there is stock available).
4. For the purpose of this manual, **Issue selected Part Request** is chosen.
5. Click on **Accept**.



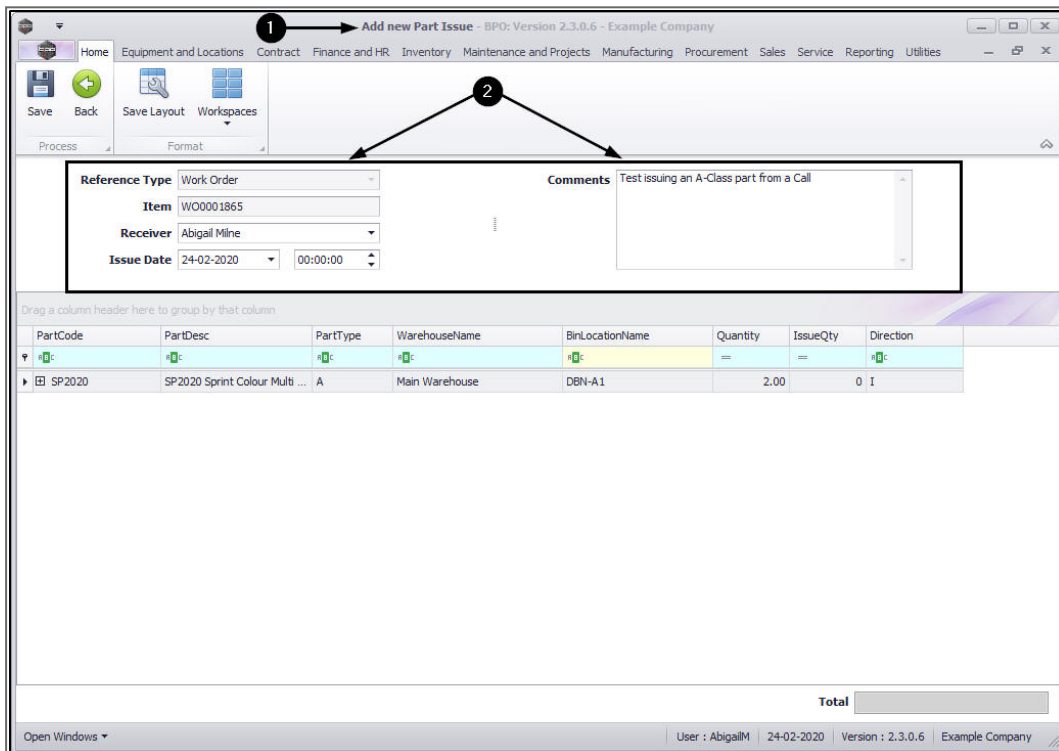
The **Add new Part Issue** screen will be displayed.

ADD NEW PART ISSUE SCREEN

Part Issue Info

- **Reference Type:** This will auto populate with the reference type linked to this part request - in this example, a Work Order.
- **Item:** This will auto populate with the reference number of the reference type linked to this part request (in this example the Work Order Number).
- **Receiver :** This will auto populate with the person logged on to the system, editing the call. You can click on the drop-down arrow and select an alternative receiver if required.

- **Issue Date and Time:** This will auto populate with the current date and time.
 - **Issue Date :** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
 - **Issue Time:** You can either type in or click on the directional arrows to select an alternative time.
- **Comments:** Type in a relevant comment regarding this part issue, if required.



1 → Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

2

Reference Type: Work Order

Item: WO0001865

Receiver: Abigail Milne

Issue Date: 24-02-2020 00:00:00

Comments: Test issuing an A-Class part from a Call

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	0	I

Total

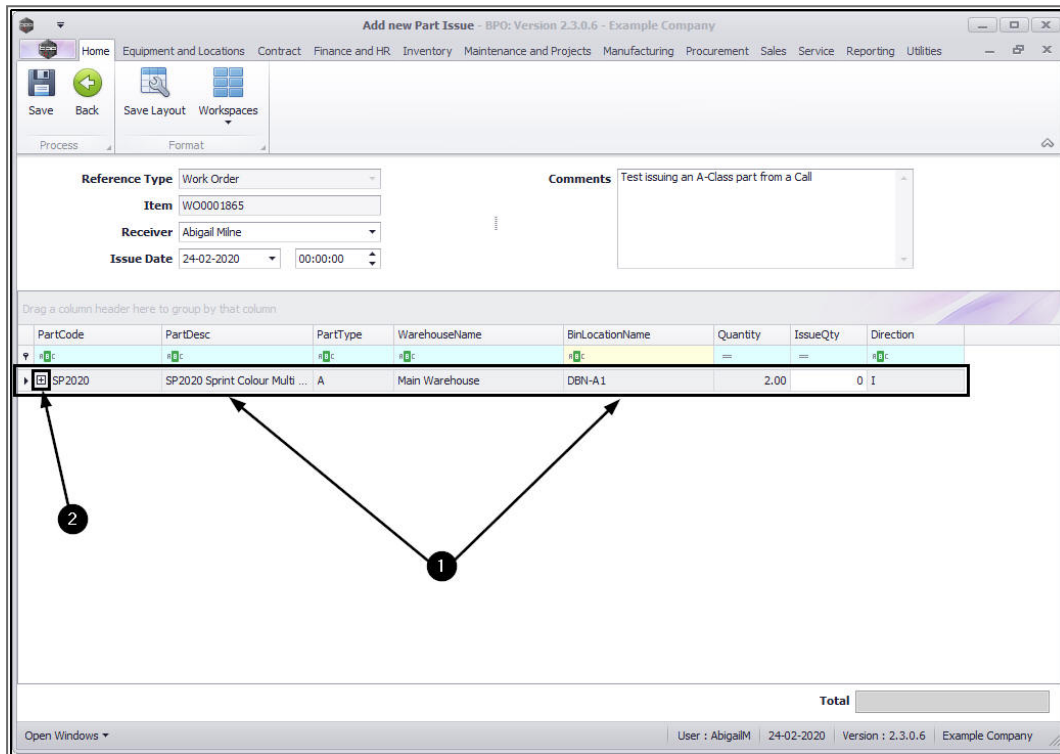
User : AbigailM | 24-02-2020 | Version : 2.3.0.6 | Example Company

The Parts Data Grid

- The following information will be auto populated:
 - **Part Code:** This will auto populate with the selected A-Class item Part Code.

- **Part Description:** This will auto populate with the selected A-Class item part Description.
- **Part Type:** This will auto populate with the selected A-Class item Part Type.
- **Warehouse Name:** This will auto populate with the warehouse selected on the initial Part Request.
- **Bin Location Name:** This will auto populate with the *default* bin location linked to the warehouse above.
- **Quantity:** This will populate with the quantity requested on the initial part request.
- **Issue Qty:** This will populate depending on the part type (A or C-Class):
 - **A-Class and B-Class Items:** The Issue Qty text box will populate with **0** as you need to manually select the unique serial number of the A or B-Class item to be issued.
 - **C-Class Items:** The Issue Qty text box will populate with the total quantity requested on the initial Part Request that can be issued out from the default warehouse *if there is stock available* in this warehouse. This is covered in Section 1 of this manual: [Issue C-Class Part from a Call](#)
 - **Note 1:** If the Issue Qty does not equal the Quantity due to short stock then you will either need to [request an interwarehouse transfer](#) to bring these items into the default warehouse or if you will need to follow the process to [procure](#) stock.

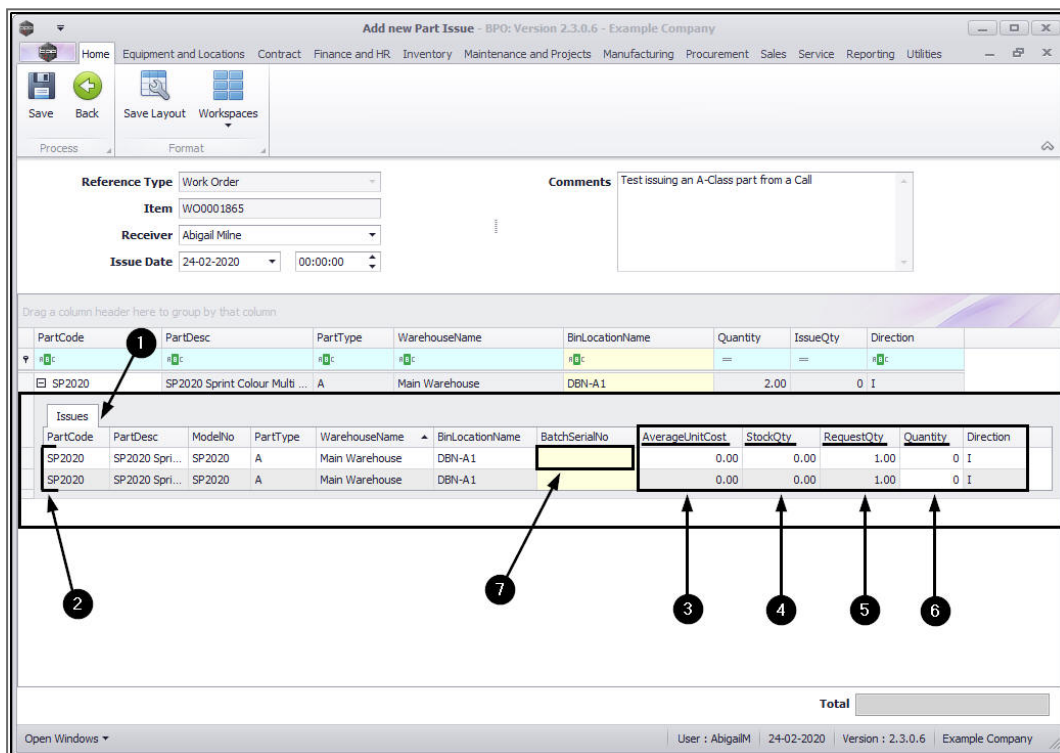
- **Note 2:** You can issue partial quantities by selecting an issue quantity that is less than the requested quantity.
 - **Direction:** This will auto populate with *I* - Issue.
2. Click on the **expand** icon in the row of the part.



PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	0	I

1. The **Issues** frame for this A/B-Class item will be expanded.
2. Note that each A-Class item is on a separate line. This is because A-Class items each have a unique serial number so must be issued out individually (not issued as a batch, like C-Class items - see above).
3. **Average Unit Cost** is set to **0**. This will only populate when the user selects the unique **serial** number of the A or B-Class item to be issued out.

4. **Stock Qty** is set to **0**. This will only populate with **1** when the user selects the unique **serial** number of the A or B-Class item to be issued out.
5. **Request Qty** is set to **1**. Only **1 serialised** item can be selected per line e.g. if your requested quantity is 2, then 2 lines will be displayed, each with a Request Quantity of 1.
6. **Quantity** is set to **0**. This will only populate with **1** when the user selects the unique **serial** number of the A or B-Class item to be issued out.
7. Click in the **Batch Serial No** text box.



Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order | Item: WO0001865 | Receiver: Abigail Mline | Issue Date: 24-02-2020 | 00:00:00

Comments: Test issuing an A-Class part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	0	I

Issues

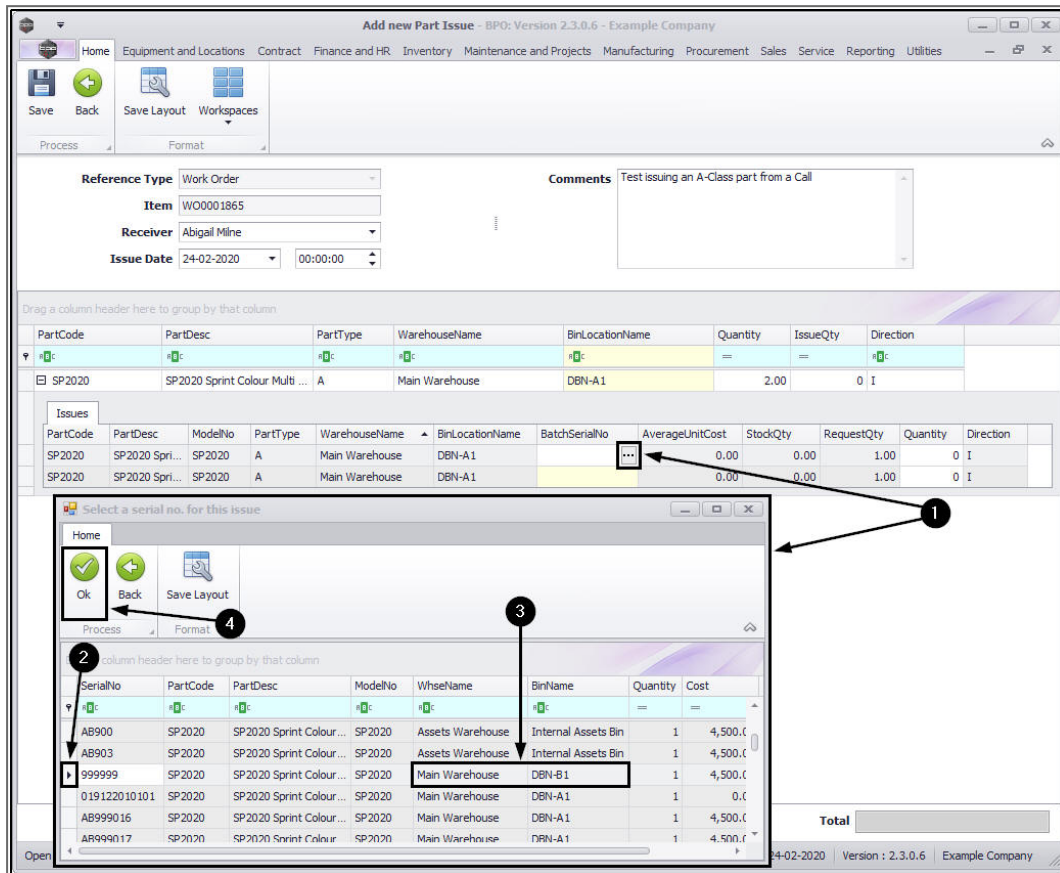
PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-A1		0.00	0.00	1.00	0	I
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-A1		0.00	0.00	1.00	0	I

Total

User: AbigailM | 24-02-2020 | Version: 2.3.0.6 | Example Company

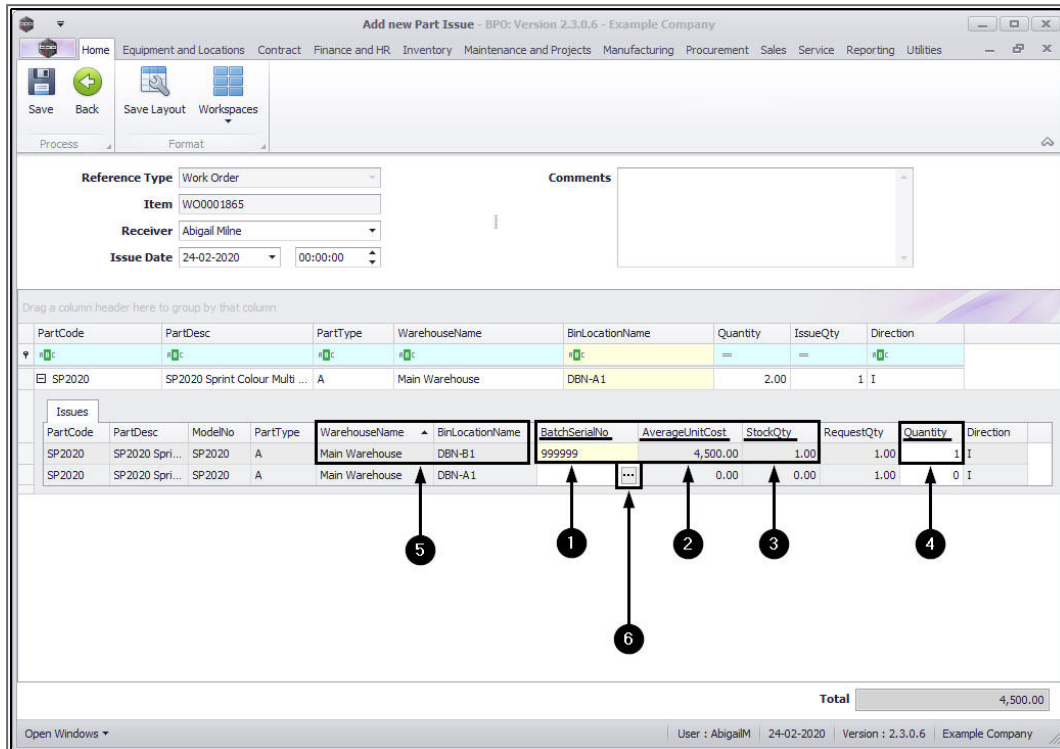
1. An **ellipsis** button will be revealed. Click on this button to display the **Select a serial no. for this issue** pop up screen.
2. Click on the **row selector** in front of the serial number of the item that you wish to issue out.

3. Note that this A-Class item is selected from the **Main Warehouse**, and bin **DBN-B1**
4. Click on **Ok**.



1. The **BatchSerialNo** text box will populate with the selected serial number.
2. **Average Unit Cost:** This will now populate with the unit cost of the selected A or B-Class item to be issued out.
3. **Stock Quantity:** This will now populate with **1**.
4. **Quantity:** This will now populate with **1**.
5. The **WarehouseName** and **BinLocationName** fields will populate with the warehouse and bin where the selected A-Class item is currently stored.

- Click in the **BatchSerialNo** field of the next row of the Issue frame to reveal the ellipsis button.



The screenshot shows the 'Add new Part Issue' window for 'BPO: Version 2.3.0.6 - Example Company'. The 'Reference Type' is 'Work Order', 'Item' is 'WO0001865', 'Receiver' is 'Abigail Milne', and 'Issue Date' is '24-02-2020'. The 'Comments' field is empty.

The 'Issues' table is displayed with the following data:

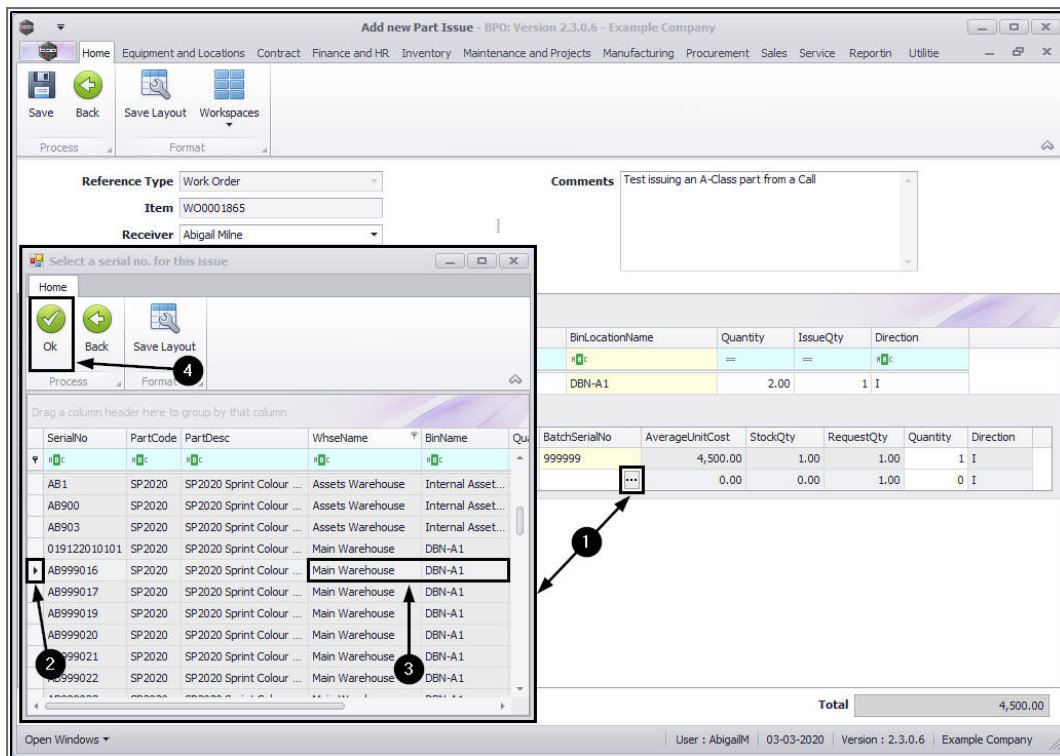
PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Sprint Colour Multi ...	SP2020	A	Main Warehouse	DBN-A1		2.00	1.00	1.00	1.00	I
SP2020	SP2020 Sprint Colour Multi ...	SP2020	A	Main Warehouse	DBN-B1	999999	4,500.00	1.00	1.00	1.00	I
SP2020	SP2020 Sprint Colour Multi ...	SP2020	A	Main Warehouse	DBN-A1		0.00	0.00	1.00	0.00	I

Annotations on the screenshot:

- 1: Points to the 'BatchSerialNo' field of the second row.
- 2: Points to the 'AverageUnitCost' field of the second row.
- 3: Points to the 'StockQty' field of the second row.
- 4: Points to the 'Quantity' field of the second row.
- 5: Points to the 'WarehouseName' field of the second row.
- 6: Points to the ellipsis button next to the 'BatchSerialNo' field of the second row.

The 'Total' at the bottom right is 4,500.00.

- The **Select a serial no. for this issue** pop up screen will display again.
- Click on the **row selector** in front of the serial number of the next item that you wish to issue out.
- Note that this A-Class item is selected from the **Main Warehouse**, and bin **DBN-B1**
- Click on **Ok**.



Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reportin Utilite

Save Back Save Layout Workspaces

Process Format

Reference Type Work Order

Item WO0001865

Receiver Abigail Mine

Comments Test issuing an A-Class part from a Call

Select a serial no. for this issue

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

SerialNo	PartCode	PartDesc	WhseName	BinName	Qty
AB1	SP2020	SP2020 Sprint Colour ...	Assets Warehouse	Internal Asset...	
AB900	SP2020	SP2020 Sprint Colour ...	Assets Warehouse	Internal Asset...	
AB903	SP2020	SP2020 Sprint Colour ...	Assets Warehouse	Internal Asset...	
019122010101	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999016	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999017	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999019	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999020	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999021	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	
AB999022	SP2020	SP2020 Sprint Colour ...	Main Warehouse	DBN-A1	

BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
9999999	4,500.00	1.00	1.00	1	I
	0.00	0.00	1.00	0	I

Total 4,500.00

User : AbigailM 03-03-2020 Version : 2.3.0.6 Example Company

1. The **BatchSerialNo** text box will populate with the selected serial number.
2. **Average Unit Cost:** This will now populate with the unit cost of the selected A or B-Class item to be issued out.
3. **Stock Quantity:** This will now populate with **1**.
4. **Quantity:** This will now populate with **1**.
5. The **WarehouseName** and **BinLocationName** fields will populate with the warehouse and bin where the selected A-Class item is currently stored.

Save the Part Issue

6. Click on **Save**.

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reportin | Utilite

Save | Back | Save Layout | Workspaces

Process | **6** | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 03-03-2020 00:00:00

Comments: Test issuing an A-Class part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	2.00	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-B1	999999	4,500.00	1.00	1.00	1.00	I
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-A1	A8999016	4,500.00	1.00	1.00	1.00	I

5 1 2 3 4

Total: 9,000.00

Open Windows | User: AbigailM | 03-03-2020 | Version: 2.3.0.6 | Example Company

1. A **Part Issue Processing** message box will pop up informing you that;
 - **Part Issue No. [] saved successfully.**
2. Click on **OK**.

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sale | Service | Reportin | Utilitie

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 03-03-2020 00:00:00

Comments: Test issuing an A-Class part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	2	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Spri...	SP2020	A	Main Warehouse	DBN-B1	999999	4,500.00	1.00	1.00	1	I
SP2020	SP2020 Spri...	SP2020	A	Main Warehouse	DBN-A1	AB999016	4,500.00	1.00	1.00	1	I

1 → Part Issue Processing

Part Issue No. SI00000841 saved successfully.

2 → OK

Total: 9,000.00

Open Windows | User: AbigailM | 03-03-2020 | Version: 2.3.0.6 | Example Company

PRINT THE PART ISSUE NOTE

- A **Report Generation** message box will pop up asking;
 - Do you want to print the part issue []?**
- It is advisable to select **Yes**. Refer to **Important Notes when Issuing Parts** for more information.

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sale | Service | Reportin | Utilitie

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 03-03-2020 00:00:00

Comments: Test issuing an A-Class part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	2	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-B1	999999	4,500.00	1.00	1.00	1	I
SP2020	SP2020 Spr...	SP2020	A	Main Warehouse	DBN-A1	AB999016	4,500.00	1.00	1.00	1	I

Report Generation

Do you want to print the part issue S100000841?

Yes No

Total: 9,000.00

Open Windows | User: AbigailM | 03-03-2020 | Version: 2.3.0.6 | Example Company

PRINT THE DELIVERY NOTE

- The Issue Note will open in the background and a second Report Generation message box will pop up asking:
 - Do you want to print the delivery note []?*
- It is advisable to select **Yes**. Refer to **Important Notes when Issuing Parts** for more information.

Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sale | Service | Reportin | Utilite

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 03-03-2020 00:00:00

Comments: Test issuing an A-Class part from a Call

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction
SP2020	SP2020 Sprint Colour Multi ...	A	Main Warehouse	DBN-A1	2.00	2	I

Issues

PartCode	PartDesc	ModelNo	PartType	WarehouseName	UnitCost	StockQty	RequestQty	Quantity	Direction
SP2020	SP2020 Sprint Colour Multi ...	SP2020	A	Main Warehouse	500.00	1.00	1.00	1	I
SP2020	SP2020 Sprint Colour Multi ...	SP2020	A	Main Warehouse	500.00	1.00	1.00	1	I

Report Generation

Do you want to print the delivery note SI00000841?

Yes No

Total: 9,000.00

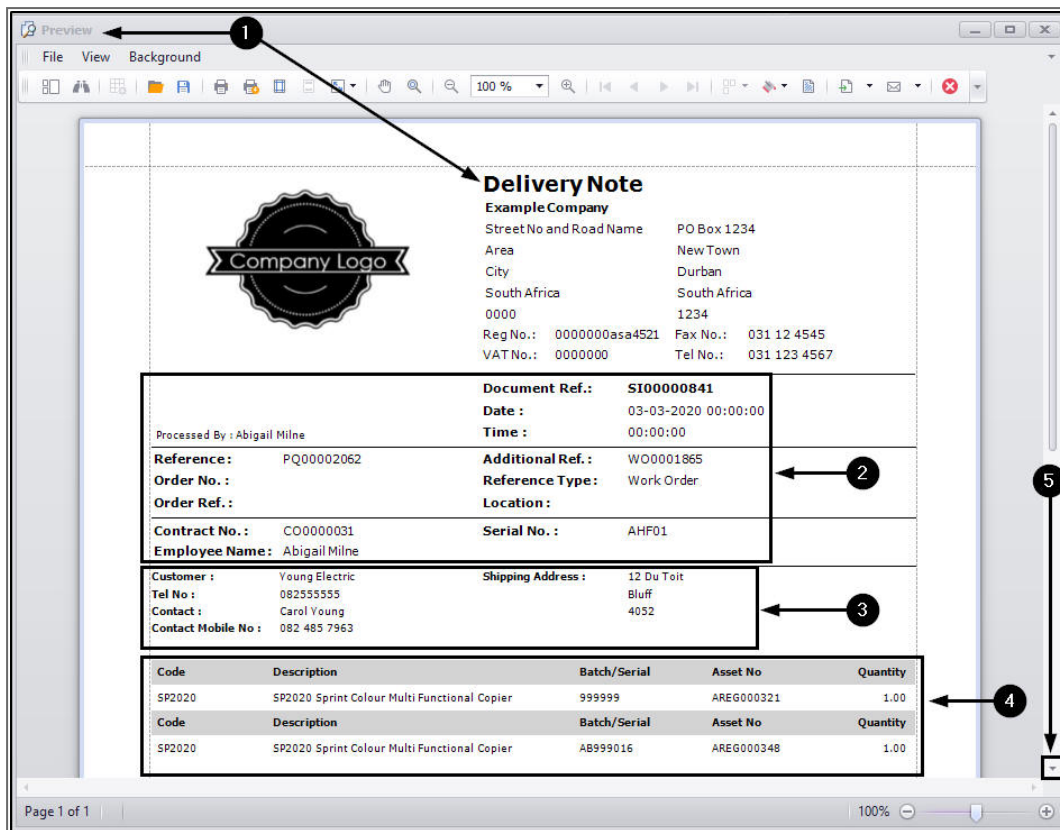
Open Windows | User: AbigailM | 03-03-2020 | Version: 2.3.0.6 | Example Company

Delivery Note Preview

1. The **Report Preview** screen for the **Delivery Note** will pop up first.

Here you can view:

2. the **company** details
3. the **customer** details
4. and the **part** details.
5. **Scroll down** the Preview page.



Delivery Note

Example Company

Street No and Road Name: PO Box 1234
Area: New Town
City: Durban
South Africa: South Africa
0000: 1234
Reg No.: 0000000asa4521 Fax No.: 031 12 4545
VAT No.: 00000000 Tel No.: 031 123 4567

Processed By: Abigail Milne

Document Ref.: SI00000841
Date: 03-03-2020 00:00:00
Time: 00:00:00

Reference: PQ00002062 **Additional Ref.:** WO0001865
Order No.: **Reference Type:** Work Order
Order Ref.: **Location:**

Contract No.: CO0000031 **Serial No.:** AHF01
Employee Name: Abigail Milne

Customer: Young Electric **Shipping Address:** 12 Du Toit
Tel No.: 0825555555 **Bluff**
Contact: Carol Young **4052**
Contact Mobile No.: 082 485 7963

Code	Description	Batch/Serial	Asset No	Quantity
SP2020	SP2020 Sprint Colour Multi Functional Copier	999999	AREG000321	1.00
Code	Description	Batch/Serial	Asset No	Quantity
SP2020	SP2020 Sprint Colour Multi Functional Copier	AB999016	AREG000348	1.00

Page 1 of 1

There are 2 sections for the customer to record:

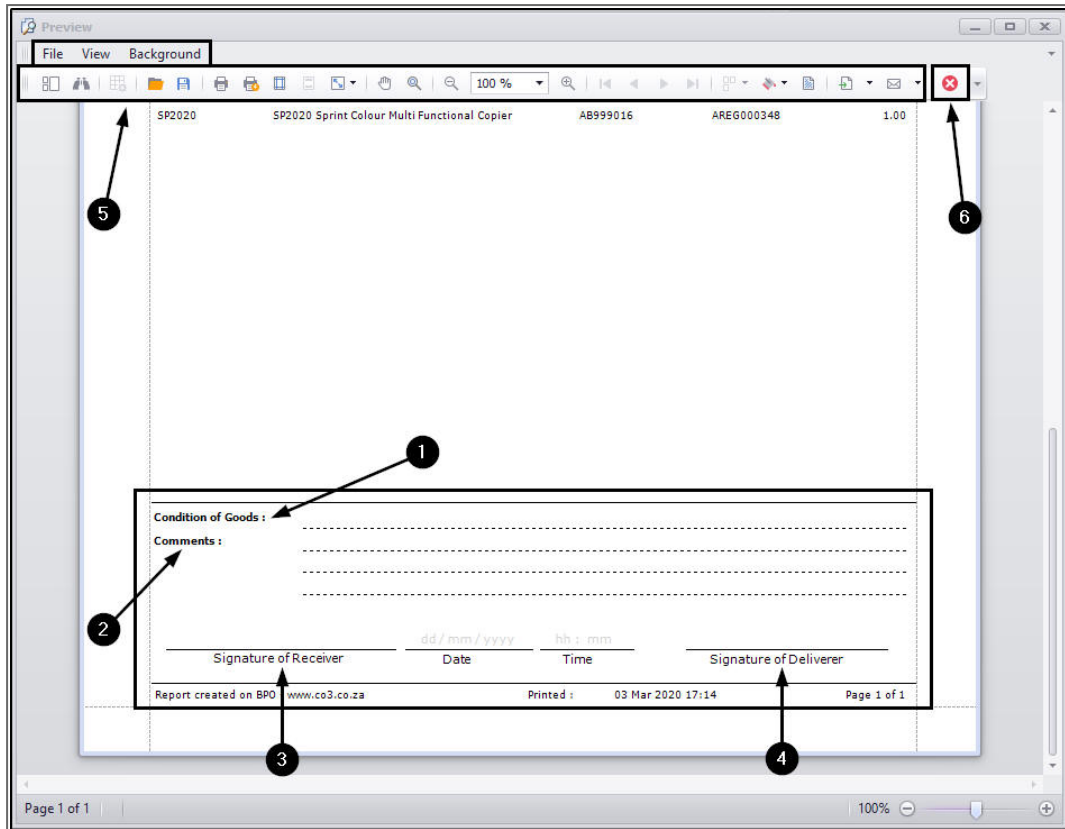
1. the **condition** of the received parts
2. any **comments** regarding the delivery

It is good business practice for the Delivery Note to contain both

3. the signature of the **Receiver** (Customer) and
4. the signature of the **Deliverer** (usually the technician).
5. From here you can **View**, **Print**, **Export** or **Email** the Delivery Note.

2 copies of the Delivery Note should be printed, signed and taken with the delivery person (or technician) to the receiver (customer). 1 is for the receiver (customer) to keep and 1 for the delivery person (technician) to take back to the company storeman.

6. **Close** this Preview page when you are done.

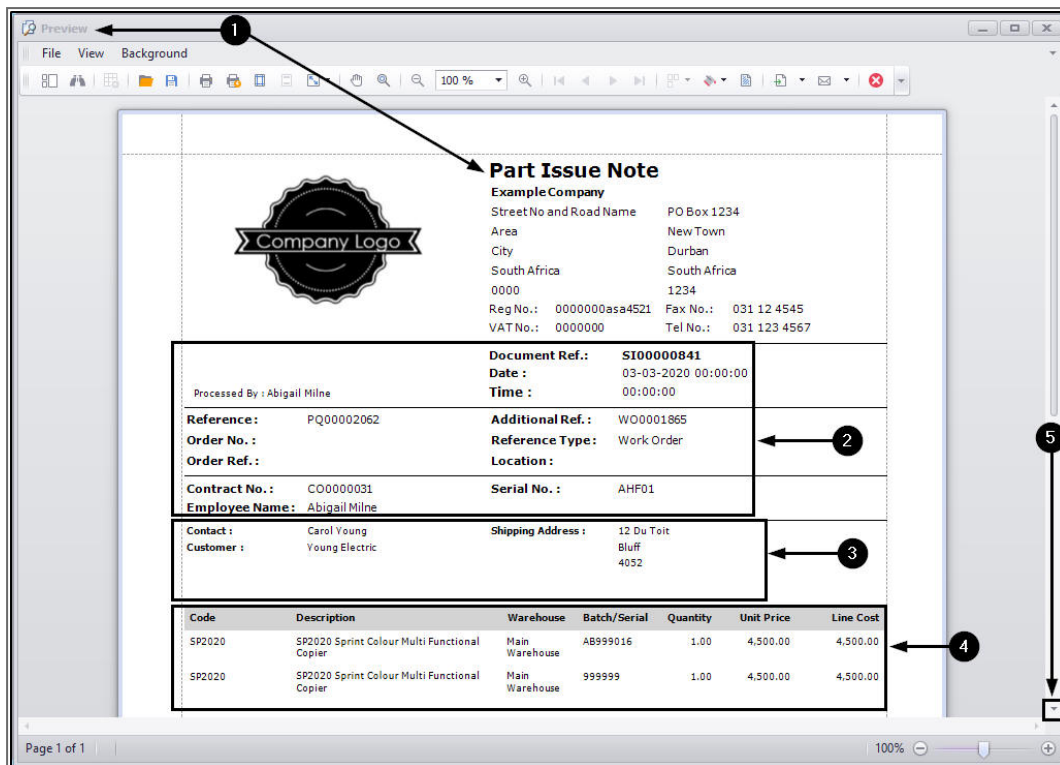


Part Issue Note Preview

1. You will then see the **Report Preview** screen for the **Part Issue Note**.

Here you can view:

2. the **Company** details
3. the **customer** details
4. and the **part** details. This section will also contain information such as:
 - i. which **warehouse** and
 - ii. which **batch number** this C-class part is being issued out from
 - iii. the **Unit Price** and
 - iv. the total **Line Cost** of the part (Quantity x Unit Price)
5. **Scroll down** the Preview page.



Part Issue Note

Example Company

Street No and Road Name PO Box 1234
Area New Town
City Durban
South Africa South Africa
0000 1234
Reg No.: 0000000asa4521 Fax No.: 031 12 4545
VAT No.: 00000000 Tel No.: 031 123 4567

Processed By : Abigail Milne

Document Ref.: SI00000841
Date : 03-03-2020 00:00:00
Time : 00:00:00

Reference: PQ00002062
Order No. : WO0001865
Order Ref. : Reference Type: Work Order
Contract No. : CO0000031
Employee Name: Abigail Milne
Serial No. : AHF01

Contact : Carol Young
Customer : Young Electric
Shipping Address : 12 Du Toit Bluff 4052

Code	Description	Warehouse	Batch/Serial	Quantity	Unit Price	Line Cost
SP2020	SP2020 Sprint Colour Multi Functional Copier	Main Warehouse	AB999016	1.00	4,500.00	4,500.00
SP2020	SP2020 Sprint Colour Multi Functional Copier	Main Warehouse	999999	1.00	4,500.00	4,500.00

There are 2 sections for the storeman to record:

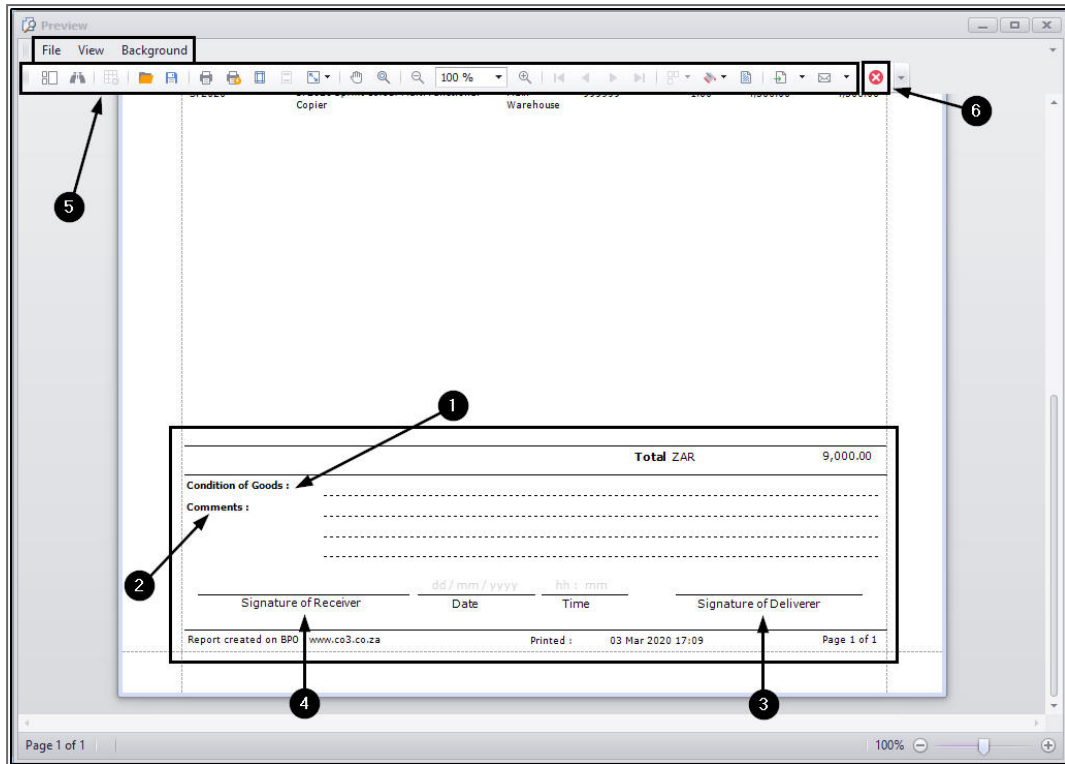
1. the **condition** of the parts being issued out of the warehouse
2. any **comments** regarding the parts being issued.

It is good business practice for the Issue Note to contain both

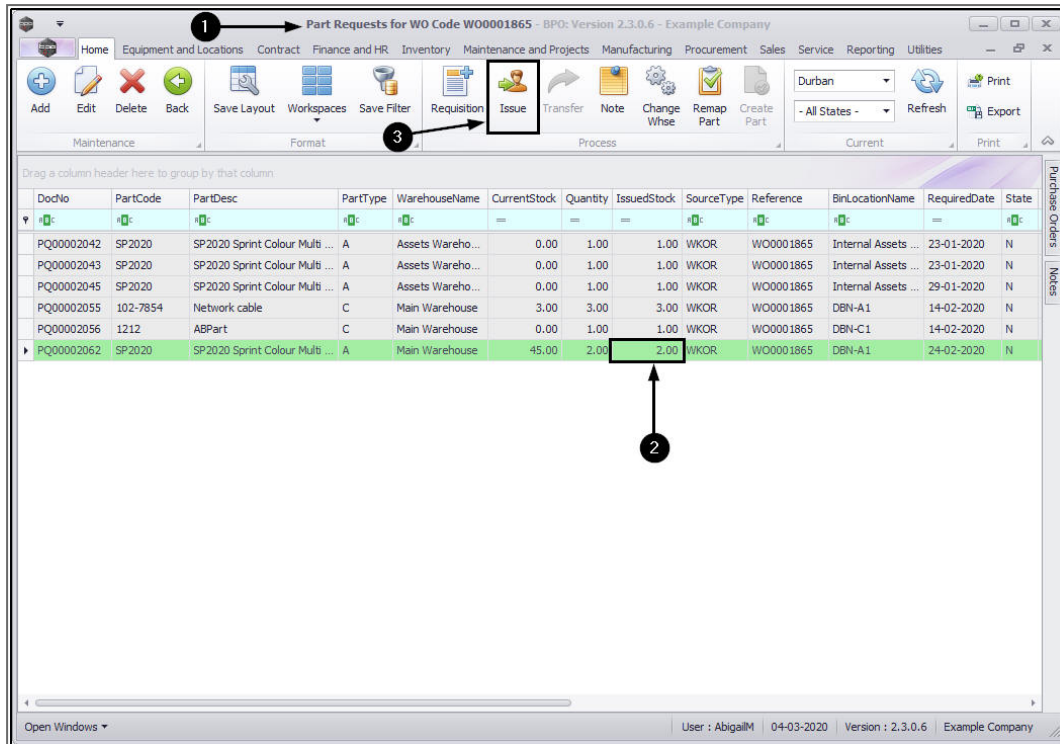
3. the signature of the **storeman** (in this case called the deliverer) and
4. the signature of the **technician** (in this case called the Receiver).
5. From here you can **View, Print, Export** or **Email** the Issue Note.

This Issue Note should be printed, signed and kept by the storeman to match against the signed Delivery Note when it comes back with the technician after the parts have been delivered.

6. **Close** this Preview page when you are done.



1. You will return to the **Part Requests for WO Code []** screen.
2. Note that the **IssuedStock** amount has now changed to **2**.
3. Even though the **Issue** button remains 'active' you will not be able to issue the stock again. Click on this button.



1. The **Add New Part Issue** screen will open.
2. The **Parts** data grid will no longer contain any part information.

1 → Add new Part Issue - BPO: Version 2.3.0.6 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sale | Service | Reportin | Utilite

Save | Back | Save Layout | Workspaces

Process | Format

Reference Type: Work Order
 Item: WO0001865
 Receiver: Abigail Milne
 Issue Date: 03-03-2020 00:00:00

Comments

Drag a column header here to group by that column

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssueQty	Direction

2

Total

Open Windows | User : AbigailM | 03-03-2020 | Version : 2.3.0.6 | Example Company

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