

# INVENTORY

## PART REQUESTS - NOTE

It may be necessary to add a note to a part request, which could also involve manually change the part request **state**. For example the request could be partially issued, with the remaining stock requested on back-order. This would need to be **noted** and the request state manually changed to '**Requisition raised**'. This can be done using the **Note** button in the ribbon toolbar.

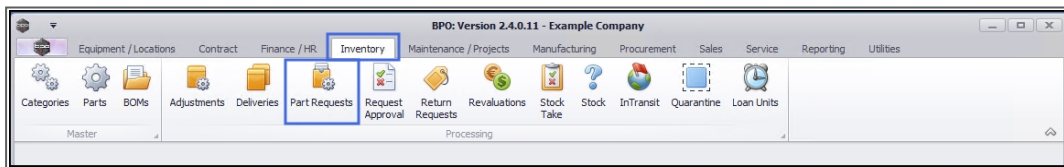
This can be done via the **Part Requests from the Site** screen or the [Part Request for the Part \[\]](#) screen.

For this process, you will be navigating from the **Part Requests from the Site** screen.

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### Ribbon Access: *Inventory > Part Requests*

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1. The **Part Requests for the Site** screen will display.
2. The **Site** filter will be set according to your company configuration. If required, select the Site you wish to work in.

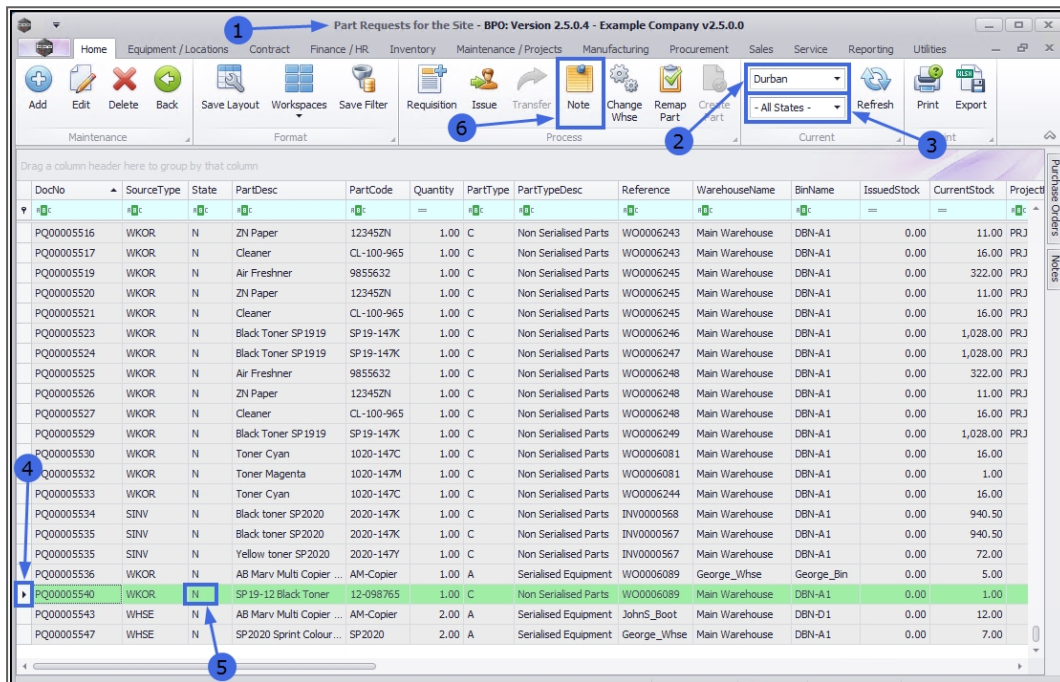
Note: Refer to [Site Selection](#) for more information.

3. The **Status** field will auto-populate with **All States**. This does not need to be changed in order for you to add a Note. However, you can click on

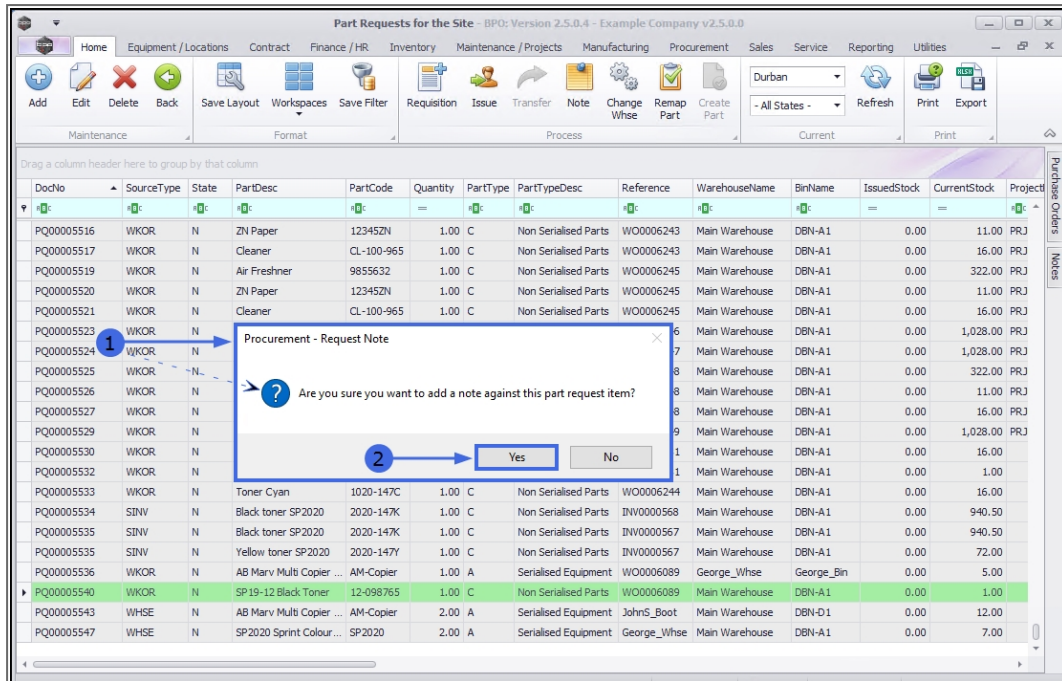
the drop-down arrow and select a specific part request state from the list, if required.

## SELECT PART REQUEST

4. Select the **row** of the part request that you wish to **add** a note to.
5. Note that the part request is currently in the **N-New** state.
6. Click on the **Note** ribbon toolbar button.



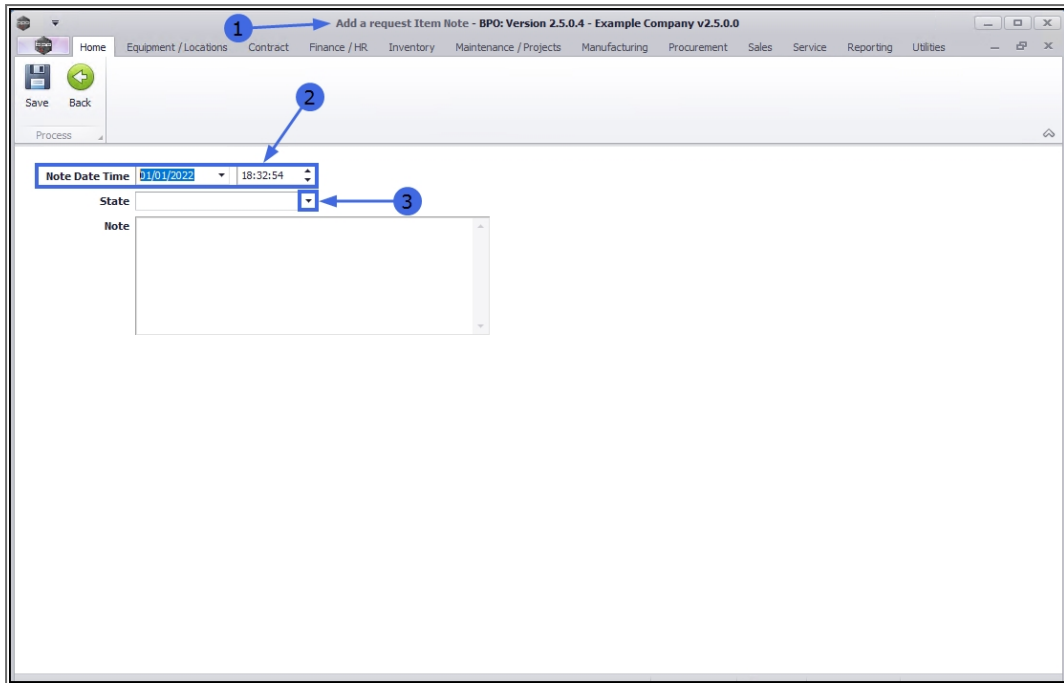
1. A **Procurement - Request Note** message box will pop up with the following prompt:
  - *Are you sure you want to add a note against this part request item?*
2. Click on **Yes**.



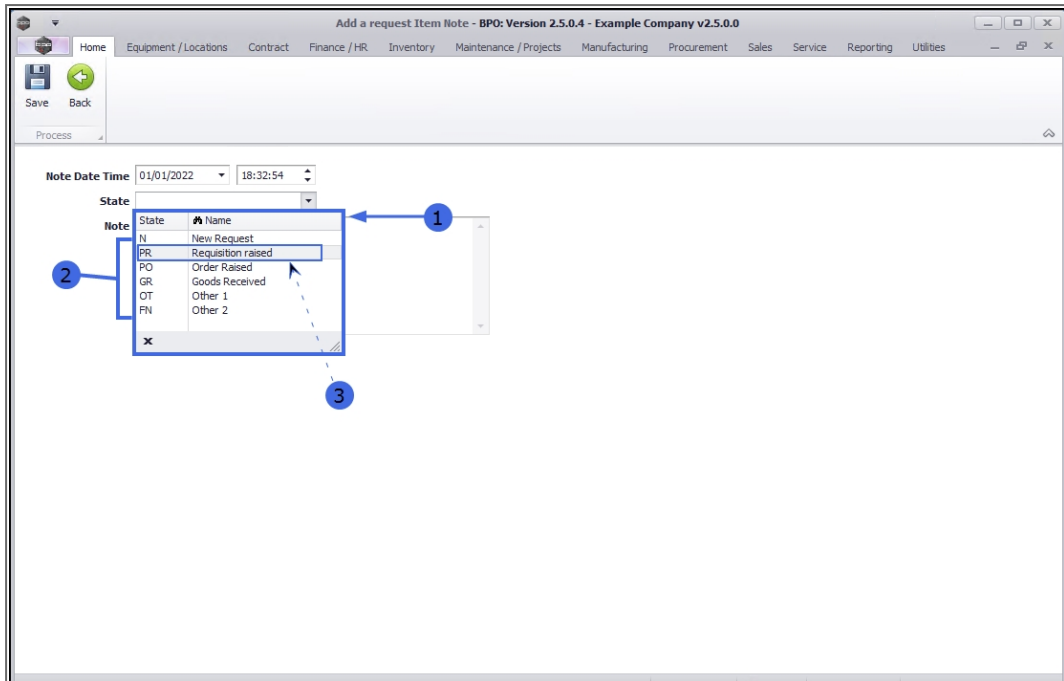
1. The **Add a request item Note** screen will be displayed.

## ADD NOTE DETAILS

2. **Note Date Time:** These fields will auto populate with the current date and time.
  - You can either **type in** or click on the drop-down arrow and use the **calendar function** to select an alternative **date** if required.
  - You can either **type in** or use the **arrow indicators** to select an alternative **time** if required.
3. **State:** Click on the **drop-down arrow** in this field.



1. The ***State menu*** will display.
2. Select the state that *corresponds* with the note that you are creating for the part request.
3. In this example, ***Requisition Raised*** is selected.
  - For example, there may be several part requests raised for this part. A large part requisition may have been raised by the company to fulfil *all* these part requests, rather than creating a request for *each individual* request.
  - It would be prudent to note on the individual part requests, such as this one , that a requisition has been raised. Therefore the person monitoring the part request listing screen can see that instead of raising a requisition against this part, it would be judicious to wait for the large requisition of goods to be received and then the requested parts could be issued.

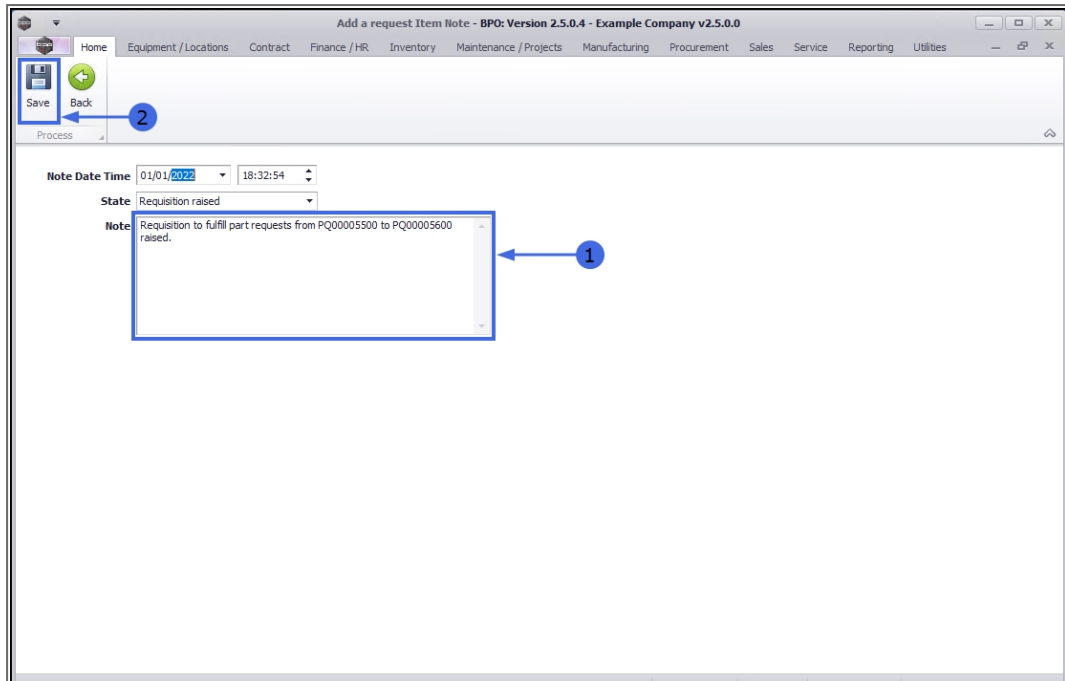


1. In the **Note** field, type in a *reason* for the state change.

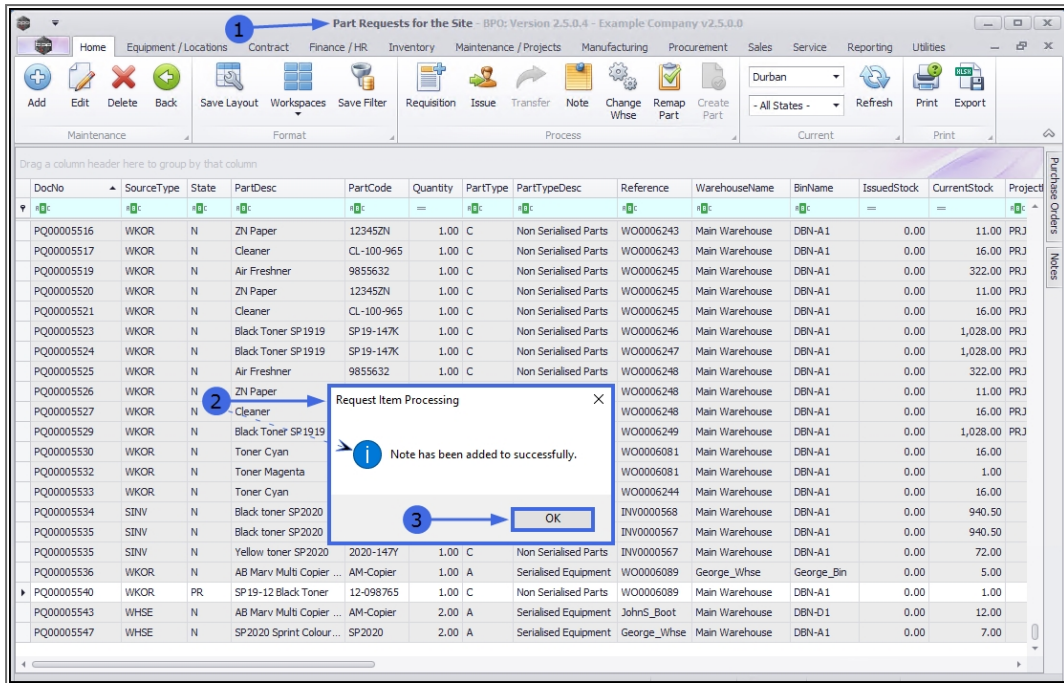
## SAVE NOTE

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2. When you have finished editing the fields in this screen, click on **Save**.



1. You will return to the ***Part Requests for the Site*** screen.
2. A ***Request Item Processing*** message box will pop up advising the following:
  - *Note has been added to successfully.*
3. Click on ***OK***.



## VIEW UPDATED PART REQUEST STATUS

1. Note that the part request *State* has updated to **PR** - *Purchase Requisition Raised*.

## VIEW ADDED NOTE

2. Click on the **Notes** tab on the right side of the screen.

Part Requests for the Site - 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 Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process Current Print

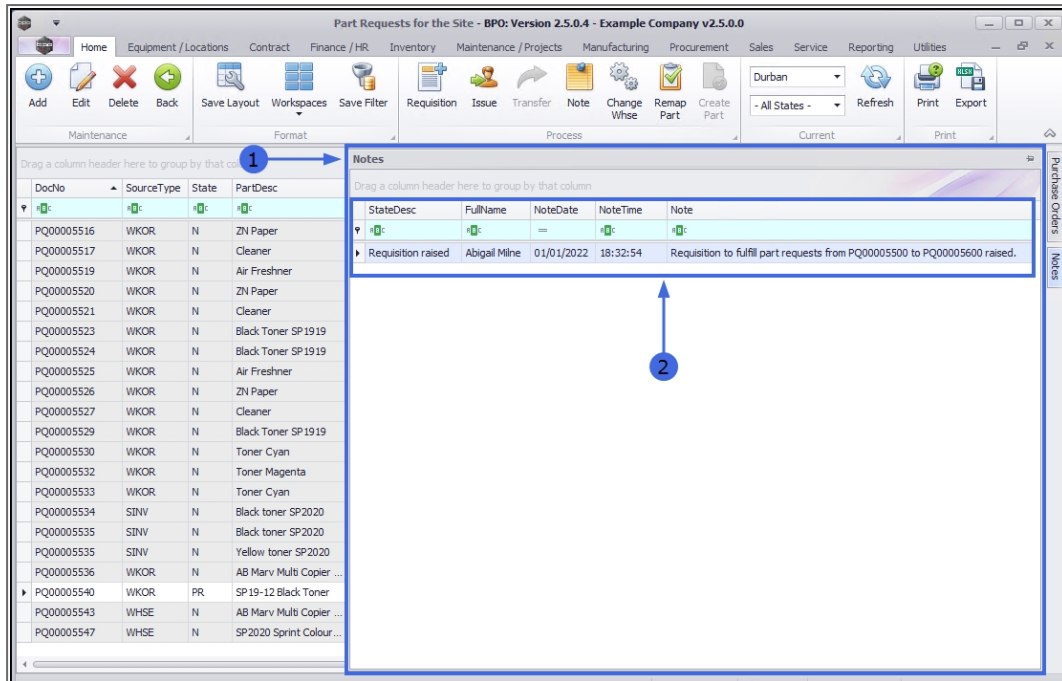
Drag a column header here to group by that column

| DocNo      | SourceType | State | PartDesc                 | PartCode   | Quantity | PartType | PartTypeDesc         | Reference   | WarehouseName  | BinName    | IssuedStock | CurrentStock | Project |
|------------|------------|-------|--------------------------|------------|----------|----------|----------------------|-------------|----------------|------------|-------------|--------------|---------|
| PQ00005516 | WKOR       | N     | ZN Paper                 | 123452N    | 1.00     | C        | Non Serialised Parts | W00006243   | Main Warehouse | DBN-A1     | 0.00        | 11.00        | PRJ     |
| PQ00005517 | WKOR       | N     | Cleaner                  | CL-100-965 | 1.00     | C        | Non Serialised Parts | W00006243   | Main Warehouse | DBN-A1     | 0.00        | 16.00        | PRJ     |
| PQ00005519 | WKOR       | N     | Air Freshner             | 9855632    | 1.00     | C        | Non Serialised Parts | W00006245   | Main Warehouse | DBN-A1     | 0.00        | 322.00       | PRJ     |
| PQ00005520 | WKOR       | N     | ZN Paper                 | 123452N    | 1.00     | C        | Non Serialised Parts | W00006245   | Main Warehouse | DBN-A1     | 0.00        | 11.00        | PRJ     |
| PQ00005521 | WKOR       | N     | Cleaner                  | CL-100-965 | 1.00     | C        | Non Serialised Parts | W00006245   | Main Warehouse | DBN-A1     | 0.00        | 16.00        | PRJ     |
| PQ00005523 | WKOR       | N     | Black Toner SP1919       | SP19-147K  | 1.00     | C        | Non Serialised Parts | W00006246   | Main Warehouse | DBN-A1     | 0.00        | 1,028.00     | PRJ     |
| PQ00005524 | WKOR       | N     | Black Toner SP1919       | SP19-147K  | 1.00     | C        | Non Serialised Parts | W00006247   | Main Warehouse | DBN-A1     | 0.00        | 1,028.00     | PRJ     |
| PQ00005525 | WKOR       | N     | Air Freshner             | 9855632    | 1.00     | C        | Non Serialised Parts | W00006248   | Main Warehouse | DBN-A1     | 0.00        | 322.00       | PRJ     |
| PQ00005526 | WKOR       | N     | ZN Paper                 | 123452N    | 1.00     | C        | Non Serialised Parts | W00006248   | Main Warehouse | DBN-A1     | 0.00        | 11.00        | PRJ     |
| PQ00005527 | WKOR       | N     | Cleaner                  | CL-100-965 | 1.00     | C        | Non Serialised Parts | W00006248   | Main Warehouse | DBN-A1     | 0.00        | 16.00        | PRJ     |
| PQ00005529 | WKOR       | N     | Black Toner SP1919       | SP19-147K  | 1.00     | C        | Non Serialised Parts | W00006249   | Main Warehouse | DBN-A1     | 0.00        | 1,028.00     | PRJ     |
| PQ00005530 | WKOR       | N     | Toner Cyan               | 1020-147C  | 1.00     | C        | Non Serialised Parts | W00006081   | Main Warehouse | DBN-A1     | 0.00        | 16.00        | PRJ     |
| PQ00005532 | WKOR       | N     | Toner Magenta            | 1020-147M  | 1.00     | C        | Non Serialised Parts | W00006081   | Main Warehouse | DBN-A1     | 0.00        | 1.00         | PRJ     |
| PQ00005533 | WKOR       | N     | Toner Cyan               | 1020-147C  | 1.00     | C        | Non Serialised Parts | W00006244   | Main Warehouse | DBN-A1     | 0.00        | 16.00        | PRJ     |
| PQ00005534 | SINV       | N     | Black toner SP2020       | 2020-147K  | 1.00     | C        | Non Serialised Parts | INV0000568  | Main Warehouse | DBN-A1     | 0.00        | 940.50       | PRJ     |
| PQ00005535 | SINV       | N     | Black toner SP2020       | 2020-147K  | 1.00     | C        | Non Serialised Parts | INV0000567  | Main Warehouse | DBN-A1     | 0.00        | 940.50       | PRJ     |
| PQ00005535 | SINV       | N     | Yellow toner SP2020      | 2020-147Y  | 1.00     | C        | Non Serialised Parts | INV0000567  | Main Warehouse | DBN-A1     | 0.00        | 72.00        | PRJ     |
| PQ00005536 | WKOR       | N     | AB Marv Multi Copier ... | AM-Copier  | 1.00     | A        | Serialised Equipment | W00006089   | George_Whse    | George_Bin | 0.00        | 5.00         | PRJ     |
| PQ00005540 | WKOR       | PR    | SP19-12 Black Toner      | 12-098765  | 1.00     | C        | Non Serialised Parts | W00006089   | Main Warehouse | DBN-A1     | 0.00        | 1.00         | PRJ     |
| PQ00005543 | WHSE       | N     | AB Marv Multi Copier ... | AM-Copier  | 2.00     | A        | Serialised Equipment | JohnS_Boot  | Main Warehouse | DBN-D1     | 0.00        | 12.00        | PRJ     |
| PQ00005547 | WHSE       | N     | SP2020 Sprint Colour ... | SP2020     | 2.00     | A        | Serialised Equipment | George_Whse | Main Warehouse | DBN-A1     | 0.00        | 7.00         | PRJ     |

Notes

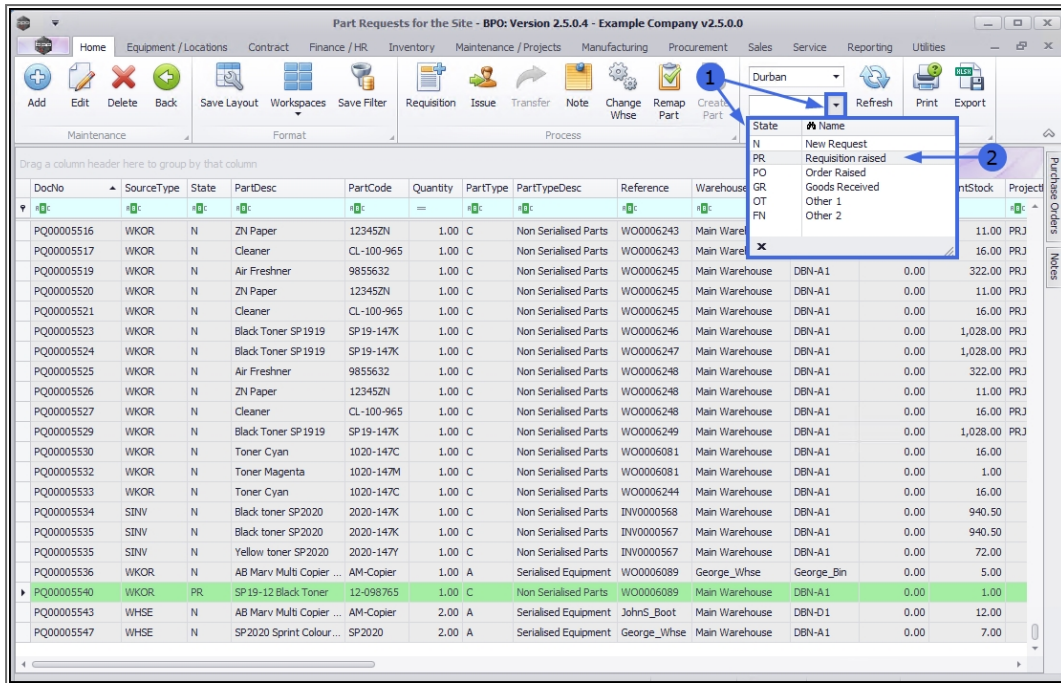
1. The **Notes** panel will expand.
2. The following note *details* have been recorded:
  - i. The State Description.
  - ii. The ***name of the employee*** logged on to the system who added the note.
  - iii. The ***Date*** and ***Time*** the note was logged.
  - iv. The ***reason*** why the note was added.



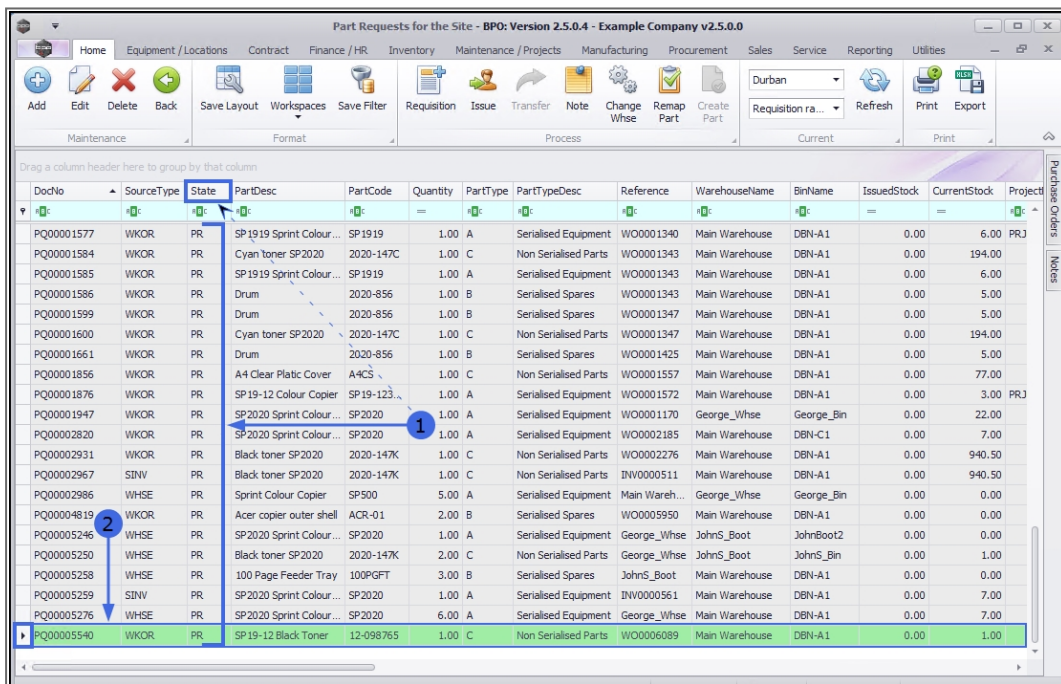


You can also view the part request in its *manually changed* state.

1. Click on the **drop-down arrow** in the **Status** field.
2. Select the **state** that you changed the record to.
  - In this example, the state was changed to '*Requisition raised*'.



1. The screen will now only display the part requests in the selected 'Requisition raised' state.
2. You can now view the manually changed part request in this screen.



### Related Topics

[Part Requests - Note](#)

[Part Requests - Edit \(View\)](#)

[Part Requests - Delete](#)

[Part Requests - Requisition - Single Item](#)

[Part Requests - Requisition - Multiple Items](#)

[Part Requests - Issue - Stock Linked to a Sales Invoice \(SINV\)](#)

[Part Requests - Issue - Stock Linked to a Work Order \(WKOR\)](#)

[Part Requests - Issue - A or B-class Parts](#)

[Part Requests - Issue - C-class Parts](#)

[Part Requests - Issue - Partial Quantity of A-class Parts](#)

[Part Requests - Issue - Partial Quantity of C-class Parts](#)

[Part Requests - View and Issue Alternative/Substitute Parts](#)

[Part Requests - Issue - Internal Assets](#)

[Part Requests - Transfer - Direct](#)

[Part Requests - Transfer - In-transit](#)

[Part Requests - Note](#)

[Part Requests - Change Warehouse](#)

[Part Requests - Remap Part](#)

[Part Requests - Create Part](#)

[Part Requests - Print \(Picking Slip\) for Part Request originating from a Sales Invoice \(SINV\)](#)

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