

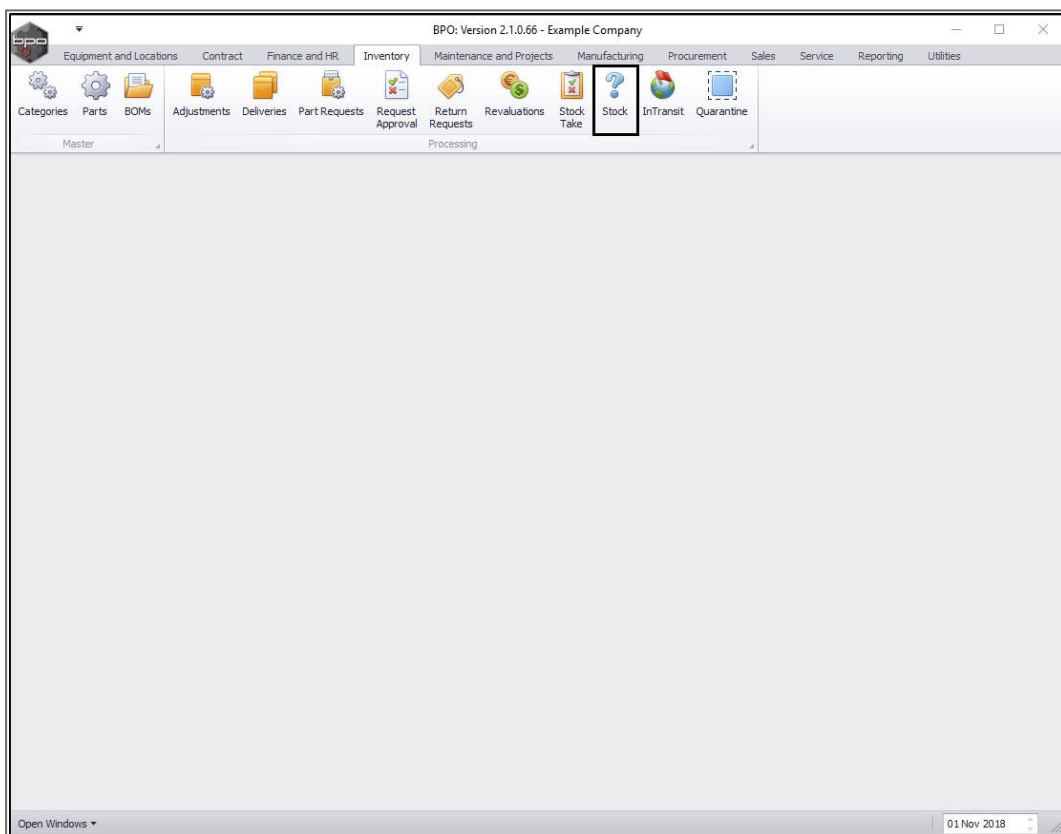
INVENTORY

ACTION ITEMS

The Action Items status will filter the **Stock Status** screen to give you a list of all the parts that need to be 'actioned' e.g. the requisitions (and subsequent purchase orders) that need to be raised in order to fulfill the part requests that are on the system.

A requisition can be raised directly from this **Stock Status** screen

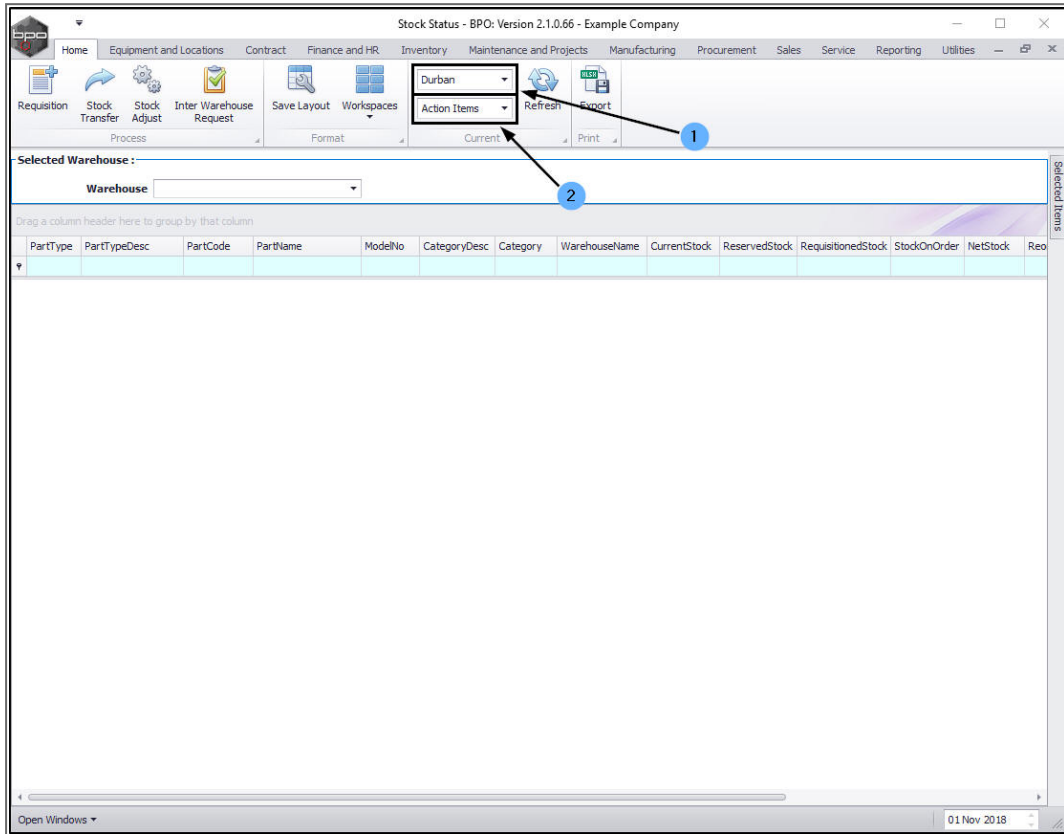
Ribbon Access: *Inventory > Stock*



The **Stock Status** screen will be displayed.

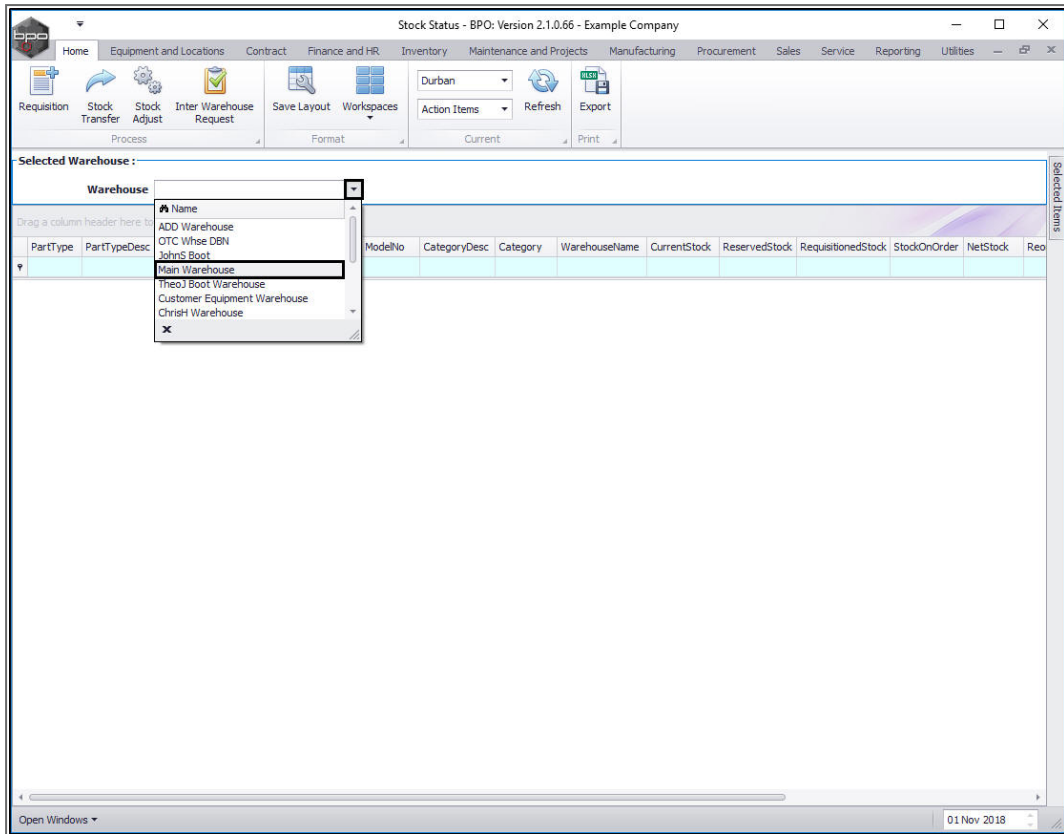
Select the Site and Status

1. Select the **site**.
2. Select the **status** - this should be set to **Action Items**.



SELECT THE WAREHOUSE

- Click on the drop-down arrow in the **Warehouse** field and select the warehouse.
 - In this image, **Main Warehouse** has been selected.



1. The **Parts** frame will now populate with all the parts that need a **purchase requisition** (and subsequent purchase order) to be raised to fulfill the requisitioned stock amount.
2. **Scroll right** in this screen until you can view the **Requisition Required** column.

Stock Status - BPO: Version 2.1.0.66 - Example Company

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

Requestion | Stock Transfer | Stock Adjust | Inter Warehouse Request | Save Layout | Workspaces | Durban | Action Items | Refresh | Export

Selected Warehouse: Warehouse: Main Warehouse

Drag a column header here to group by that column

PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category	WarehouseName	CurrentStock	ReservedStock	RequisitionedStock	StockOnOrder	NetStock	Reord
A	Serialised Equipment	SP1919	SP1919 Sprint Colo...	1919	Hardware	MAMNGR	Main Warehouse	4.00	28.00	15.00	8.00	-16.00	
A	Serialised Equipment	SP1818	Sprint copier		Hardware	MAMNGR	Main Warehouse	0.00	11.00	0.00	0.00	-11.00	
A	Serialised Equipment	1458-96523	K147 Kyocera Colo...	K147	Kyocera Mul...	MAKYMFC	Main Warehouse	6.00	6.00	0.00	0.00	0.00	
A	Serialised Equipment	KZN-1227FB	Kruger ZN Fax Mac...	ZN122	Hardware	MAMNGR	Main Warehouse	5.00	5.00	0.00	0.00	0.00	
C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	STCOOT	Main Warehouse	5.00	102.00	0.00	0.00	-97.00	
C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TOMNGR	Main Warehouse	3.00	3.00	0.00	0.00	0.00	
C	Non Serialised Parts	9855632	Air Freshner		Stationery	STCOOT	Main Warehouse	6.00	52.00	0.00	0.00	-46.00	
A	Serialised Equipment	SP19-123456	SP19-12 Colour Co...	SP19-12	Hardware	MAMNGR	Main Warehouse	2.00	14.00	0.00	0.00	-12.00	
C	Non Serialised Parts	12-098765	SP19-12 Black Toner		Toners	TOMNGR	Main Warehouse	36.00	36.00	0.00	0.00	0.00	
C	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TOMNGR	Main Warehouse	1.00	1.00	0.00	0.00	0.00	
C	Non Serialised Parts	102-7854	Network cable		Spare Parts	SPMNGR	Main Warehouse	6.00	8.00	0.00	1.00	-1.00	
A	Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	MAMNGR	Main Warehouse	1.00	3.00	1.00	0.00	-2.00	
A	Serialised Equipment	204-147K	SP204 Black Toner		Toners	TOMNGR	Main Warehouse	5.00	10.00	1.00	1.00	-4.00	
C	Non Serialised Parts	19-687	Drum		Spare Parts	SPMNGR	Main Warehouse	5.00	14.00	6.00	0.00	-9.00	
C	Non Serialised Parts	MOU001	Mouse		Toner Part ...	TOMNGR	Main Warehouse	0.00	0.00	0.00	0.00	0.00	
A	Serialised Equipment	2020-998	Staple Unit		Accessories	ACMNGR	Main Warehouse	4.00	10.00	0.00	0.00	-6.00	
A	Serialised Equipment	SP1020	Copier	SP1020	Hardware	MAMNGR	Main Warehouse	0.00	11.00	2.00	1.00	-10.00	
B	Serialised Spares	1020-478	Staple Unit	1020-478	Accessories	ACMNGR	Main Warehouse	2.00	29.00	0.00	0.00	-27.00	
C	Non Serialised Parts	1020-147M	Toner Magenta		Toners	TOMNGR	Main Warehouse	1.00	2.00	0.00	0.00	-1.00	
C	Non Serialised Parts	20-753	SP2020 Fuser Unit		Spare Parts	SPMNGR	Main Warehouse	0.00	2.00	0.00	0.00	-2.00	
A	Serialised Equipment	X821932-002	Microsoft Mouse	1454	Accessories	ACMNGR	Main Warehouse	1.00	2.00	0.00	0.00	-1.00	
C	Non Serialised Parts	500-147K	SP500 Black Toner		Toners	TOMNGR	Main Warehouse	0.00	0.00	0.00	0.00	0.00	
B	Serialised Spares	ACR-01	Acer copier outer s...		Accessories	ACMNGR	Main Warehouse	11.00	17.00	0.00	0.00	-6.00	
B	Serialised Spares	DR111111	Drum		Accessories	ACMNGR	Main Warehouse	1.00	2.00	0.00	0.00	-1.00	
B	Serialised Spares	16-856	Drum for SP1616		Spare Parts	SPMNGR	Main Warehouse	1.00	3.00	0.00	0.00	-2.00	

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1. You will note that this column has filtered for all the **'Yes'** Requisition Required.
2. The **Process action buttons** in this screen are greyed out as they cannot be used yet.
3. Click on the **Selected Items** tab.

Stock Status - BPO: Version 2.1.0.66 - Example Company

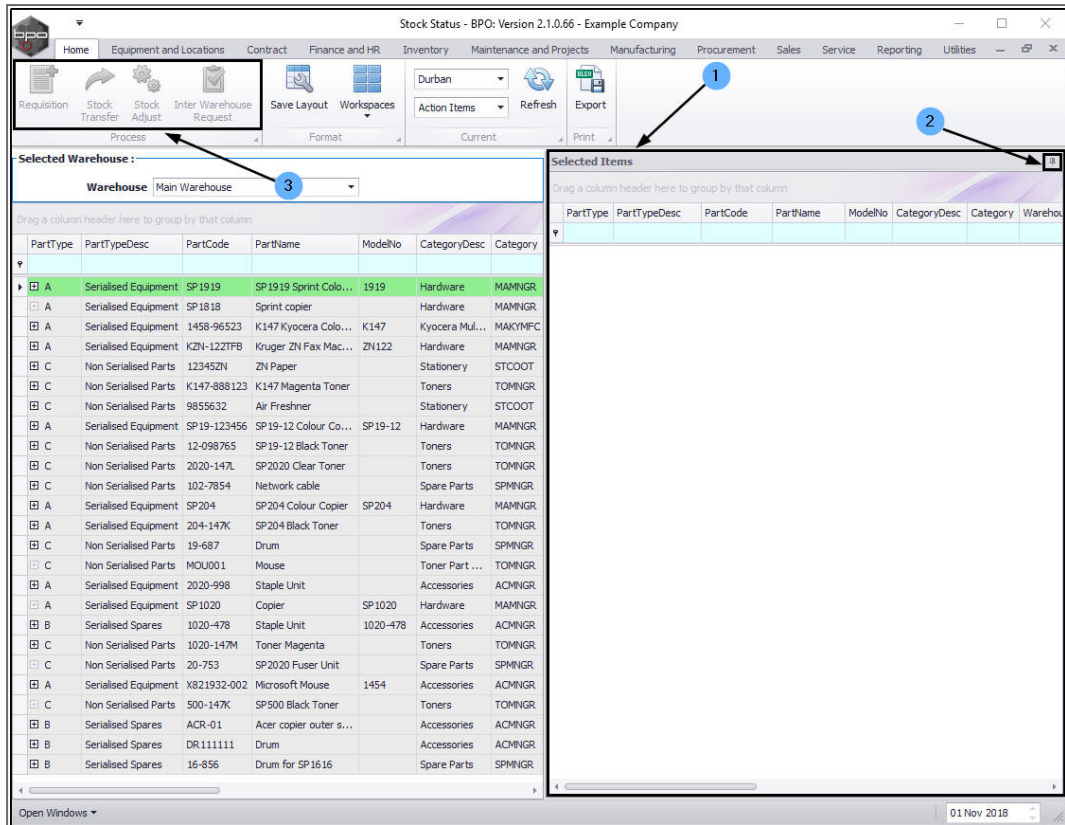
Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Requisition Stock Transfer Stock Adjust Inter Warehouse Request Save Layout Workspaces Action Items Refresh Export

Selected Warehouse: Main Warehouse

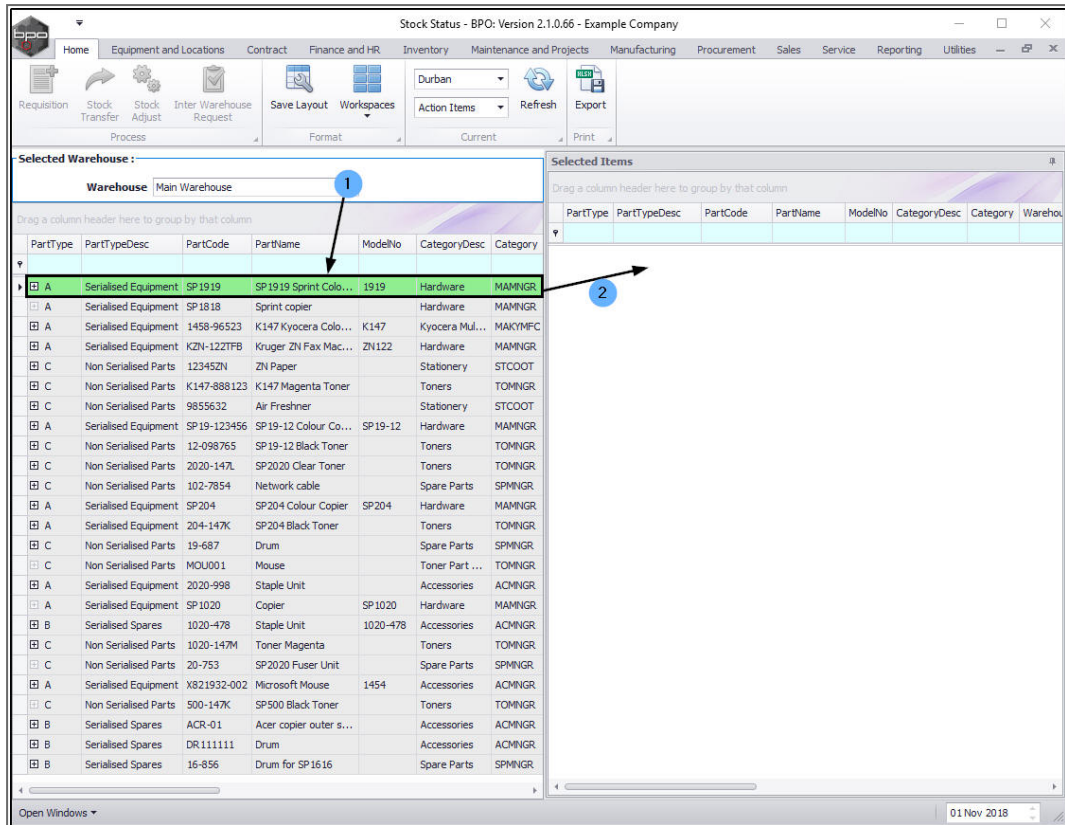
ModelNo	Category	WarehouseName	CurrentStock	ReservedStock	RequisitionedStock	StockOnOrder	NetStock	ReorderLevel	ReorderAmount	ReorderRequired	RequisitionRequired
1919	Hardware	MAMNGR Main Warehouse	4.00	28.00	15.00	8.00	-16.00	0.00	16.00	No	Yes
K147	Kyocera Mul...	MAKYMFC Main Warehouse	6.00	6.00	0.00	0.00	0.00	0.00	0.00	No	Yes
ZN122	Hardware	MAMNGR Main Warehouse	5.00	5.00	0.00	0.00	0.00	0.00	0.00	No	Yes
	Stationery	STCOOT Main Warehouse	5.00	102.00	0.00	0.00	-97.00	0.00	97.00	No	Yes
	Toners	TOMNGR Main Warehouse	3.00	3.00	0.00	0.00	0.00	0.00	0.00	No	Yes
	Stationery	STCOOT Main Warehouse	6.00	52.00	0.00	0.00	-46.00	0.00	46.00	No	Yes
SP19-12	Hardware	MAMNGR Main Warehouse	2.00	14.00	0.00	0.00	-12.00	0.00	12.00	No	Yes
	Toners	TOMNGR Main Warehouse	36.00	36.00	0.00	0.00	0.00	0.00	0.00	No	Yes
	Toners	TOMNGR Main Warehouse	1.00	1.00	0.00	0.00	0.00	0.00	0.00	No	Yes
	Spare Parts	SPMNGR Main Warehouse	6.00	8.00	0.00	1.00	-1.00	0.00	1.00	No	Yes
SP204	Hardware	MAMNGR Main Warehouse	1.00	3.00	1.00	0.00	-2.00	0.00	2.00	No	Yes
	Toners	TOMNGR Main Warehouse	5.00	10.00	1.00	1.00	-4.00	0.00	4.00	No	Yes
	Spare Parts	SPMNGR Main Warehouse	5.00	14.00	6.00	0.00	-9.00	0.00	9.00	No	Yes
	Toner Part ...	TOMNGR Main Warehouse	0.00	0.00	0.00	0.00	0.00	5.00	10.00	No	Yes
	Accessories	ACMNGR Main Warehouse	4.00	10.00	0.00	0.00	-6.00	0.00	6.00	No	Yes
SP1020	Hardware	MAMNGR Main Warehouse	0.00	11.00	2.00	1.00	-10.00	0.00	10.00	No	Yes
1020-478	Accessories	ACMNGR Main Warehouse	2.00	29.00	0.00	0.00	-27.00	0.00	27.00	No	Yes
	Toners	TOMNGR Main Warehouse	1.00	2.00	0.00	0.00	-1.00	0.00	1.00	No	Yes
	Spare Parts	SPMNGR Main Warehouse	0.00	2.00	0.00	0.00	-2.00	0.00	2.00	No	Yes
1454	Accessories	ACMNGR Main Warehouse	1.00	2.00	0.00	0.00	-1.00	0.00	1.00	No	Yes
	Toners	TOMNGR Main Warehouse	0.00	0.00	0.00	0.00	0.00	5.00	10.00	No	Yes
	Accessories	ACMNGR Main Warehouse	11.00	17.00	0.00	0.00	-6.00	0.00	6.00	No	Yes
	Accessories	ACMNGR Main Warehouse	1.00	2.00	0.00	0.00	-1.00	0.00	1.00	No	Yes
	Spare Parts	SPMNGR Main Warehouse	1.00	3.00	0.00	0.00	-2.00	0.00	2.00	No	Yes

1. The **Selected Items** panel will be expanded.
2. **Dock** this panel to make it easier to work in.
3. You will note that you still cannot use the Process action buttons



ACTION PART REQUEST

1. Select an *item line* in the *Selected Warehouse* frame.
2. **Drag** and **drop** this item line into the *Selected Items* panel.



1. As the item line is **dropped** in the **Selected Items** frame.
2. The Process action buttons will become **'live'** and you will now be able to

CREATE A REQUISITION

- [Create a Requisition](#)

TRANSFER STOCK

- [Transfer Stock](#)

ADJUST STOCK

- [Adjust Stock](#) or

CREATE AN INTER WAREHOUSE REQUEST

- Create an Inter Warehouse Request

in order to fulfill a request for any of the stock items as listed in the *Action Report*.

The screenshot shows the 'Stock Status - BPO: Version 2.1.0.66 - Example Company' application. The 'Inter Warehouse Request' process is selected in the top navigation bar. The 'Selected Warehouse' is set to 'Main Warehouse'. A table of stock items is displayed, with the first item highlighted. A blue circle '1' points to the first row of the table, and a blue circle '2' points to the 'Inter Warehouse Request' button in the top navigation bar.

PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category
A	Serialized Equipment	SP1919	SP1919 Sprint Colo...	1919	Hardware	MAMNGR
A	Serialized Equipment	SP1818	Sprint copier		Hardware	MAMNGR
A	Serialized Equipment	1458-96523	K147 Kyocera Colo...	K147	Kyocera Mul...	MAKYMFC
A	Serialized Equipment	KZN-122TFB	Kruger ZN Fax Mac...	ZN122	Hardware	MAMNGR
C	Non Serialized Parts	12345ZN	ZN Paper		Stationery	STCOOT
C	Non Serialized Parts	K147-888123	K147 Magenta Toner		Toners	TOMNGR
C	Non Serialized Parts	9855632	Air Freshner		Stationery	STCOOT
A	Serialized Equipment	SP19-123456	SP19-12 Colour Co...	SP19-12	Hardware	MAMNGR
C	Non Serialized Parts	12-098765	SP19-12 Black Toner		Toners	TOMNGR
C	Non Serialized Parts	2020-147L	SP2020 Clear Toner		Toners	TOMNGR
C	Non Serialized Parts	102-7854	Network cable		Spare Parts	SPMNGR
A	Serialized Equipment	SP204	SP204 Colour Copier	SP204	Hardware	MAMNGR
A	Serialized Equipment	204-147K	SP204 Black Toner		Toners	TOMNGR
C	Non Serialized Parts	19-687	Drum		Spare Parts	SPMNGR
C	Non Serialized Parts	MOU001	Mouse		Toner Part ...	TOMNGR
A	Serialized Equipment	2020-998	Staple Unit		Accessories	ACMNGR
A	Serialized Equipment	SP1020	Copier	SP1020	Hardware	MAMNGR
B	Serialized Spares	1020-478	Staple Unit	1020-478	Accessories	ACMNGR
C	Non Serialized Parts	1020-147M	Toner Magenta		Toners	TOMNGR
C	Non Serialized Parts	20-753	SP2020 Fuser Unit		Spare Parts	SPMNGR
A	Serialized Equipment	X821932-002	Microsoft Mouse	1454	Accessories	ACMNGR
C	Non Serialized Parts	500-147K	SP500 Black Toner		Toners	TOMNGR
B	Serialized Spares	ACR-01	Acer copier outer s...		Accessories	ACMNGR
B	Serialized Spares	DR.111111	Drum		Accessories	ACMNGR
B	Serialized Spares	16-856	Drum for SP1616		Spare Parts	SPMNGR

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