# 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.

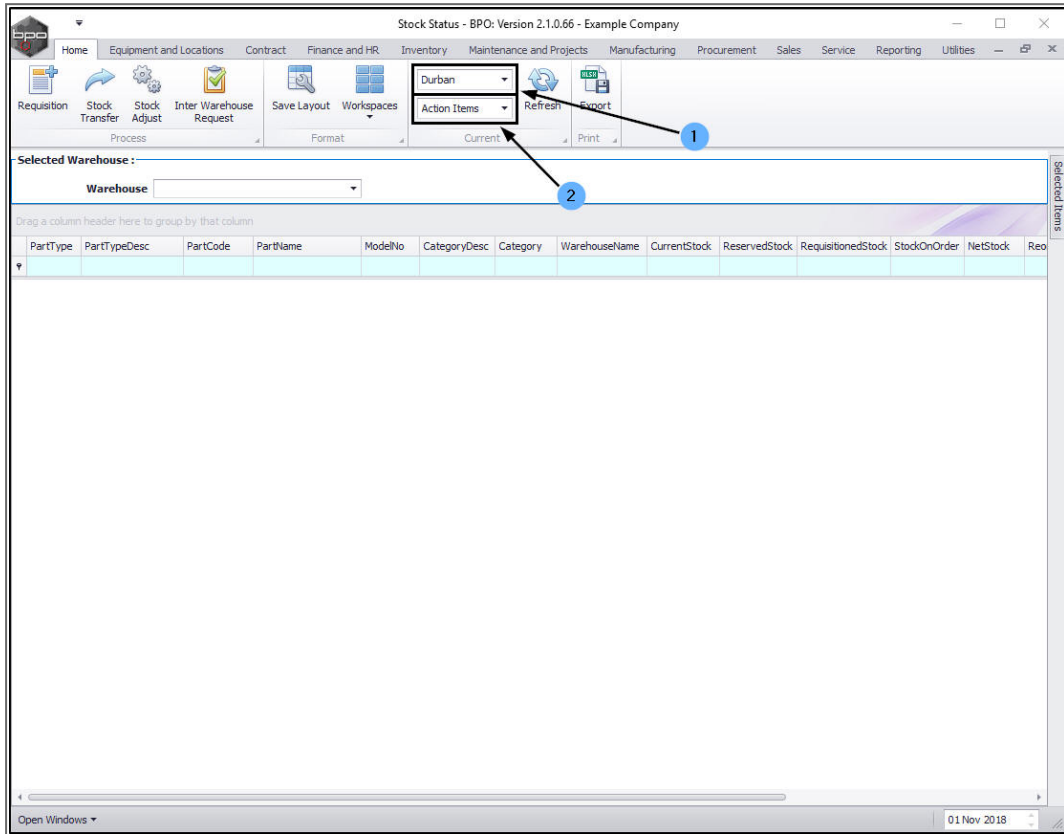A requisition can be raised directly from this *Stock Status* screen

Ribbon Access: *Inventory > Stock*
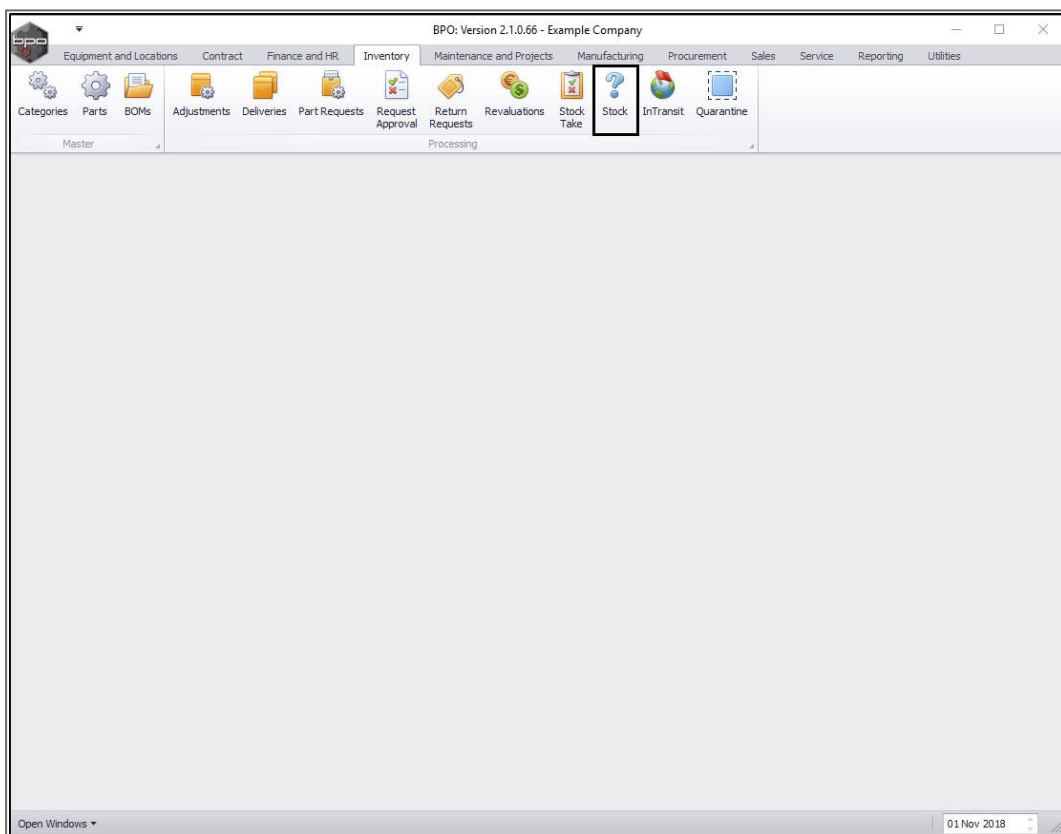
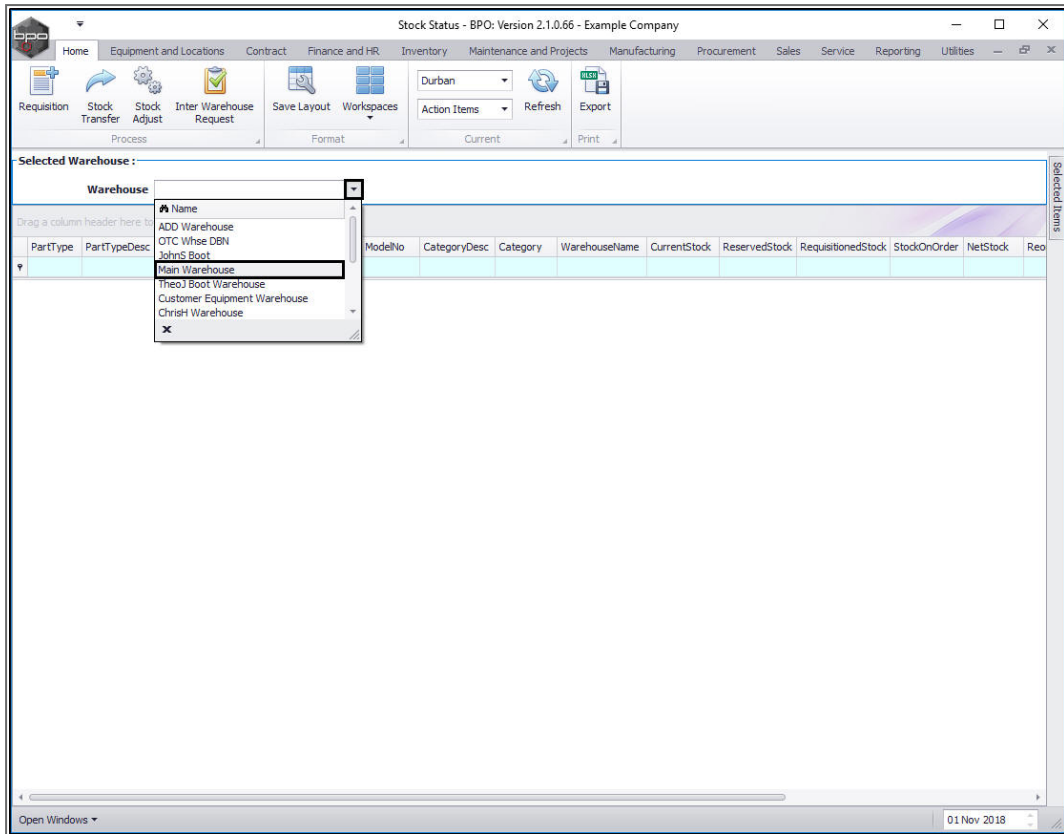The *Stock Status* screen will be displayed.

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.

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.

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 <u>cannot</u> use the Process action buttons
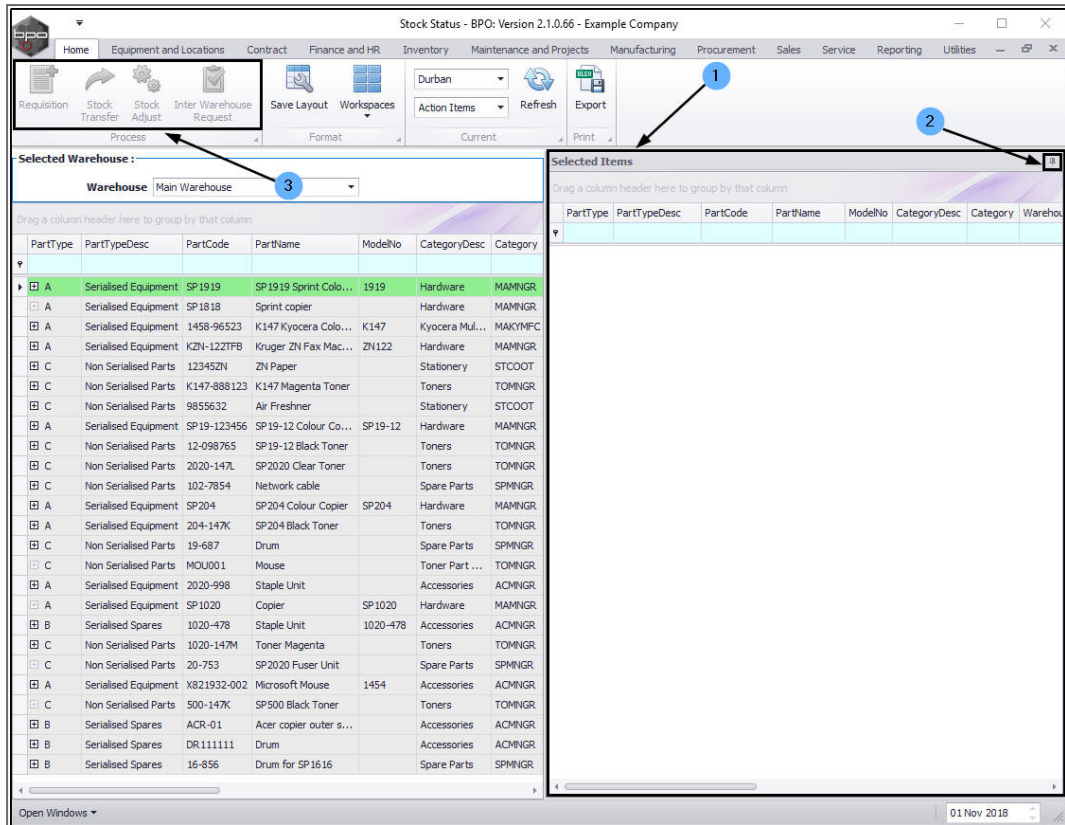
ACTION PART REQUEST

1. Select an *item line* in the *Selected Warehouse* frame.
2. *Drag* and *drop* this item line into the *Selected Items* panel.
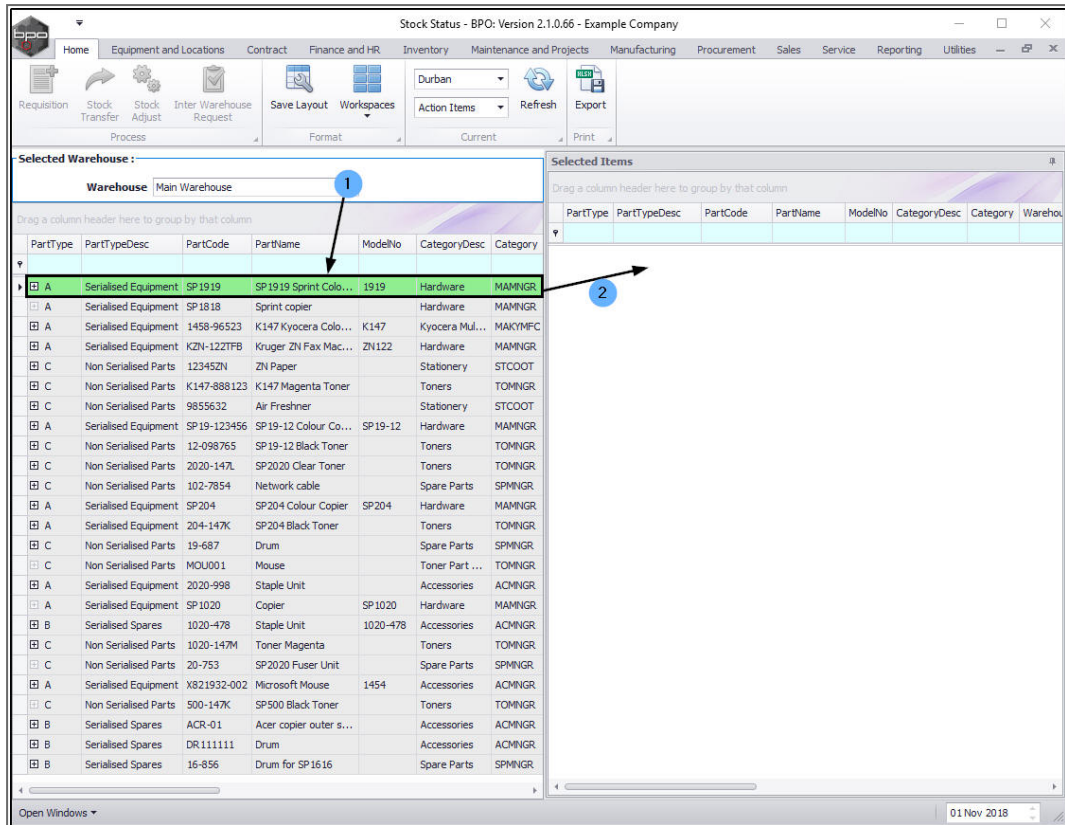
1. As the item line is *dropped* in the *Selected Items* frame.
2. The Process action buttons will become *'live'* and you will now be able to

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*.

MNU.037.009