

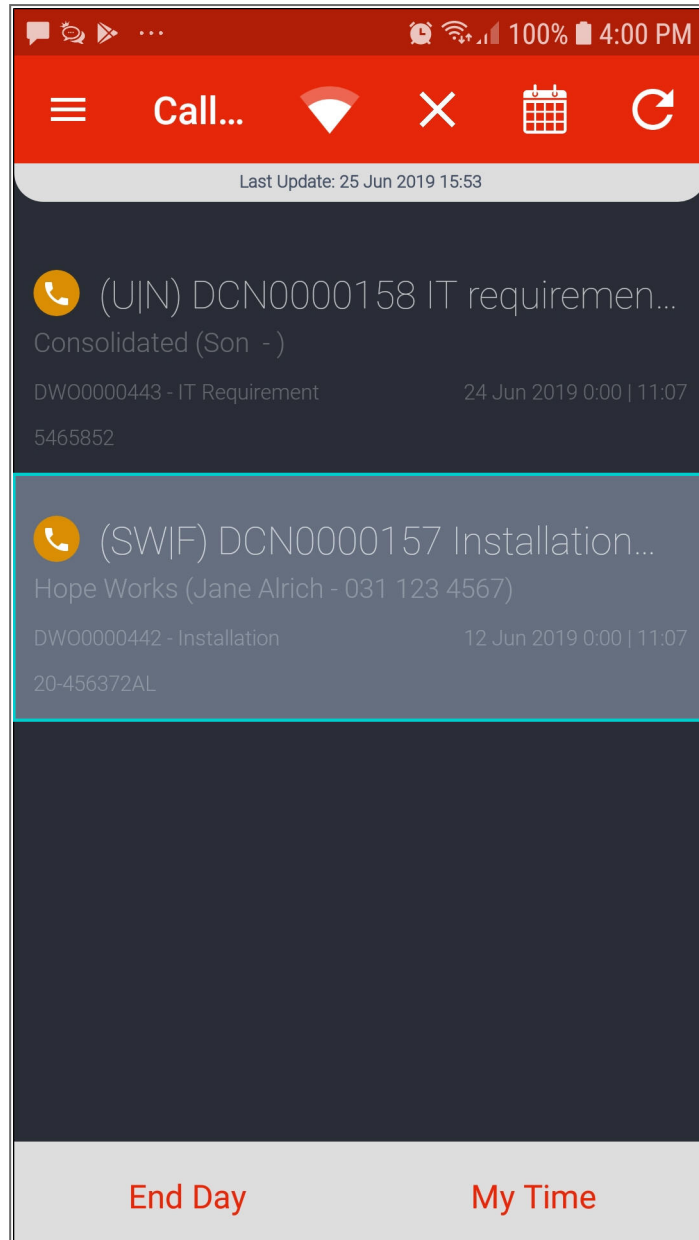
# TECHCONNECT

## WORK OPTIONS - STOCK

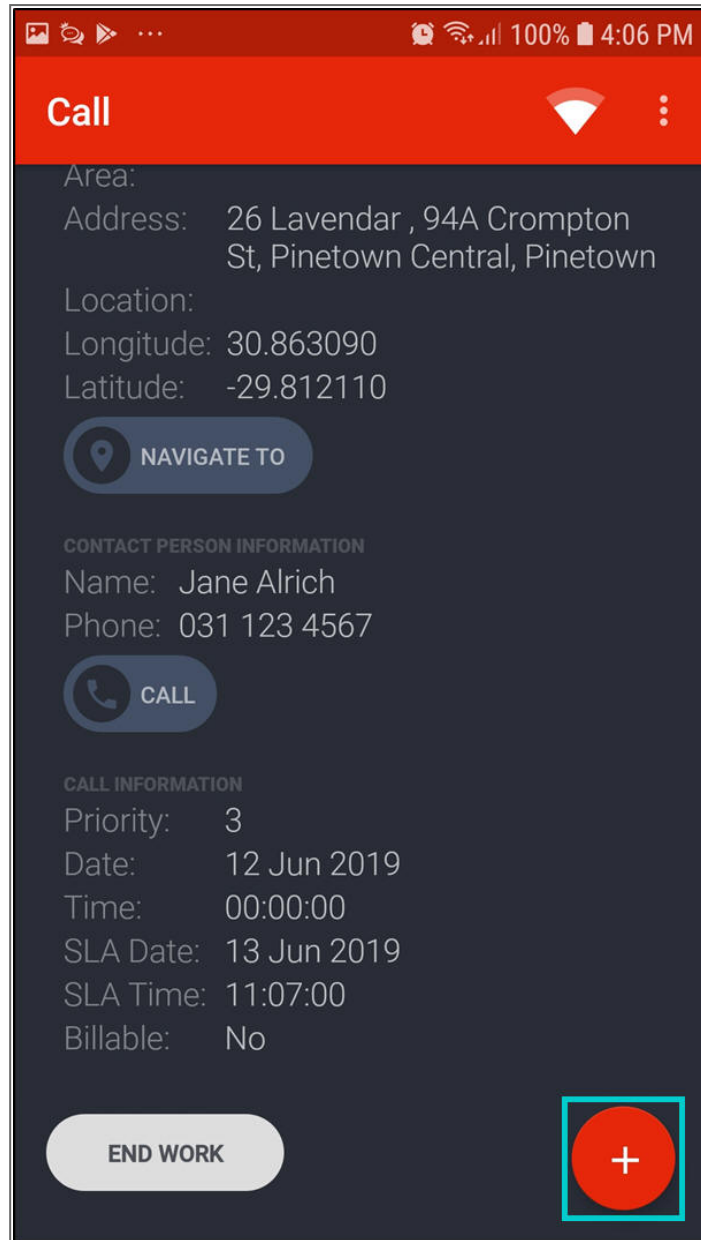
### PART REQUESTS

---

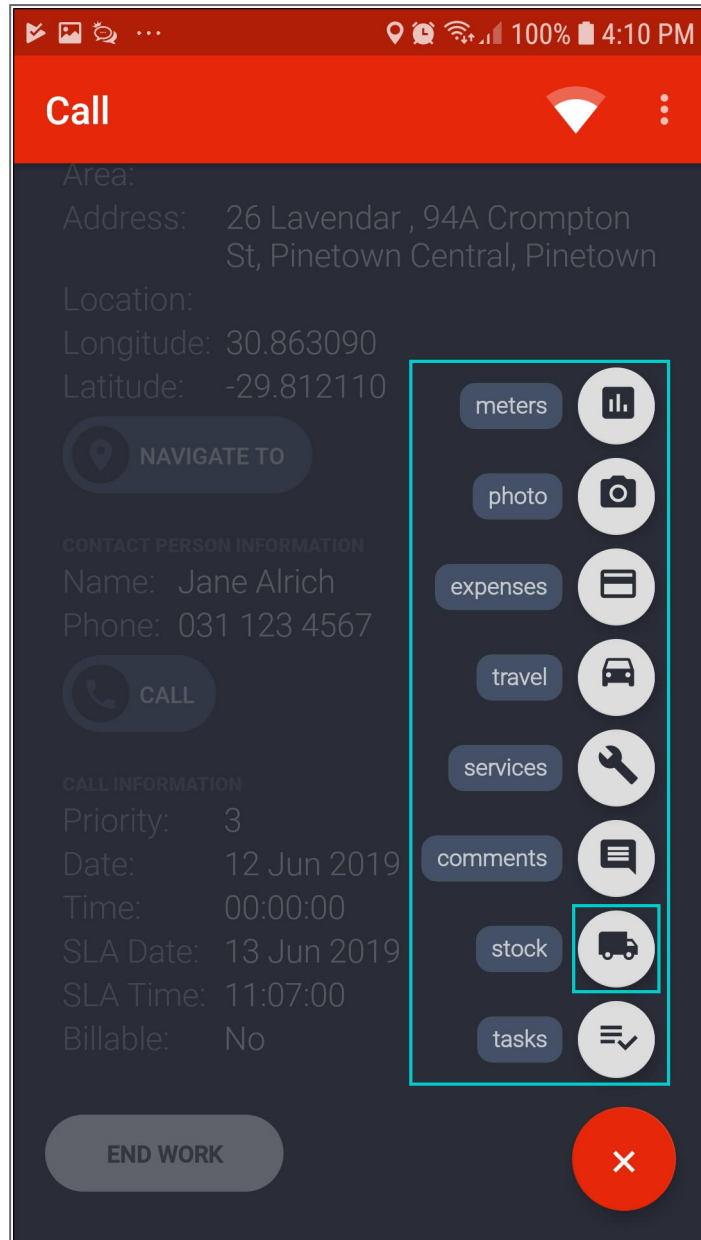
- You can view or add part requests in *Tech Connect*.
- Click on the call / project you wish to work on.



- The **Call** screen will be displayed.
- Click on the '+' icon.

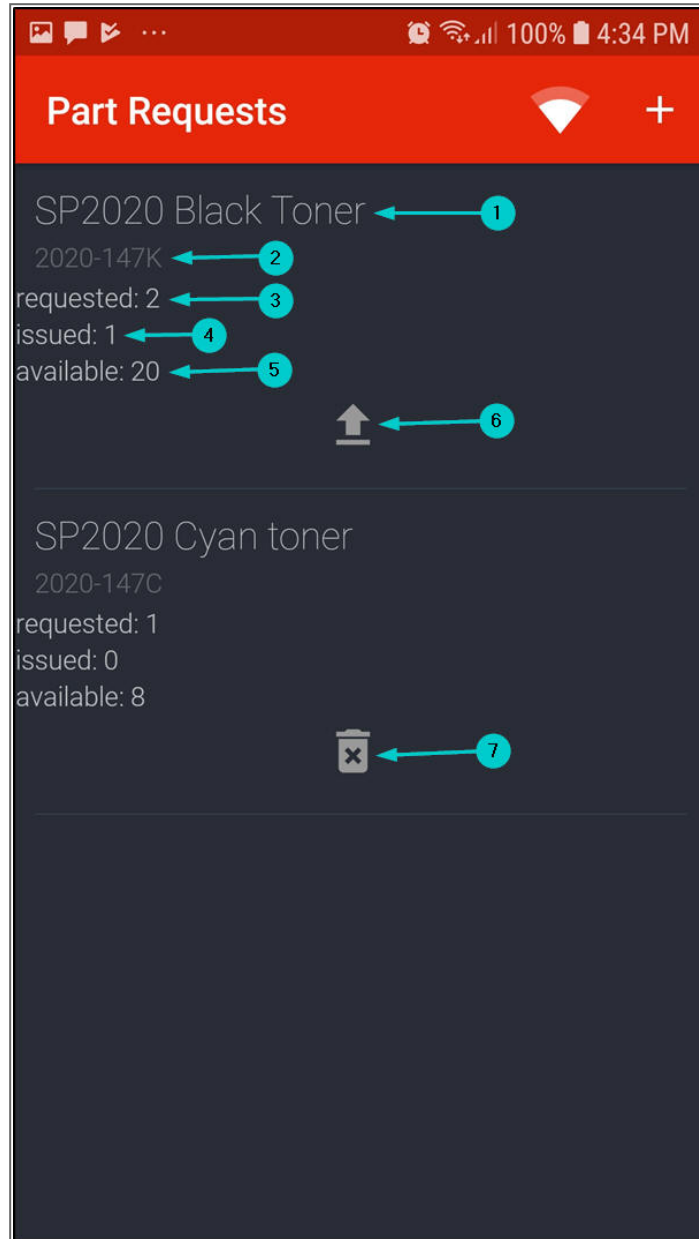


- A call options *menu* will be displayed.
- Click on **Stock**.



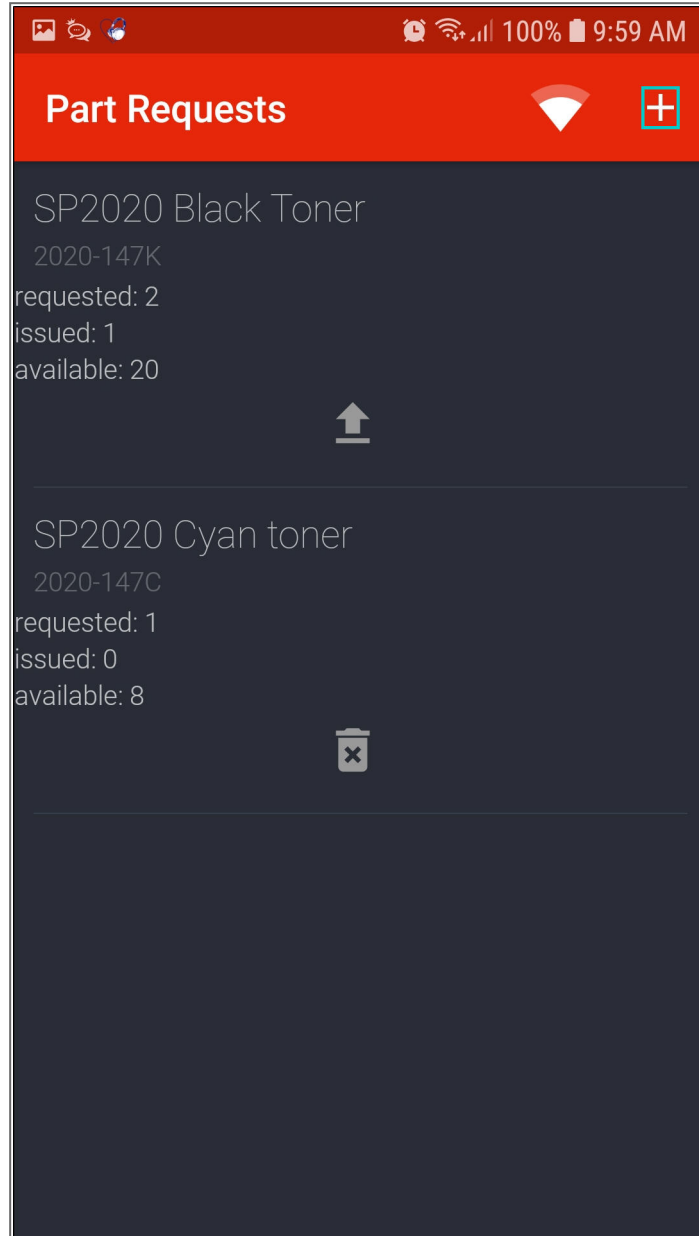
- Any current part requests will be displayed in the **Part Requests** screen showing;
  1. the part description,
  2. part code,
  3. requested quantity,

4. issued quantity from the 'main' warehouse or the boot stock warehouse,
5. and the available quantity in the boot stock warehouse.
6. A **Return** icon if any stock was issued.
7. A **Delete** icon if no stock was issued.

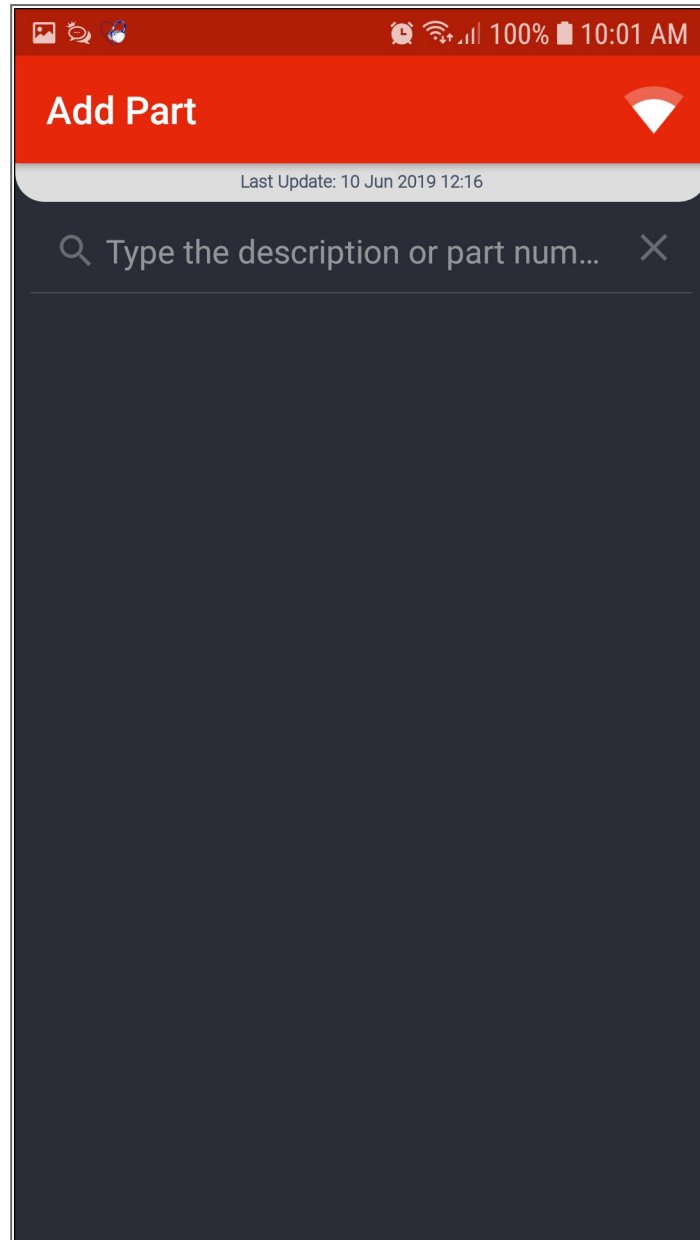


## CHECK PART PRICE

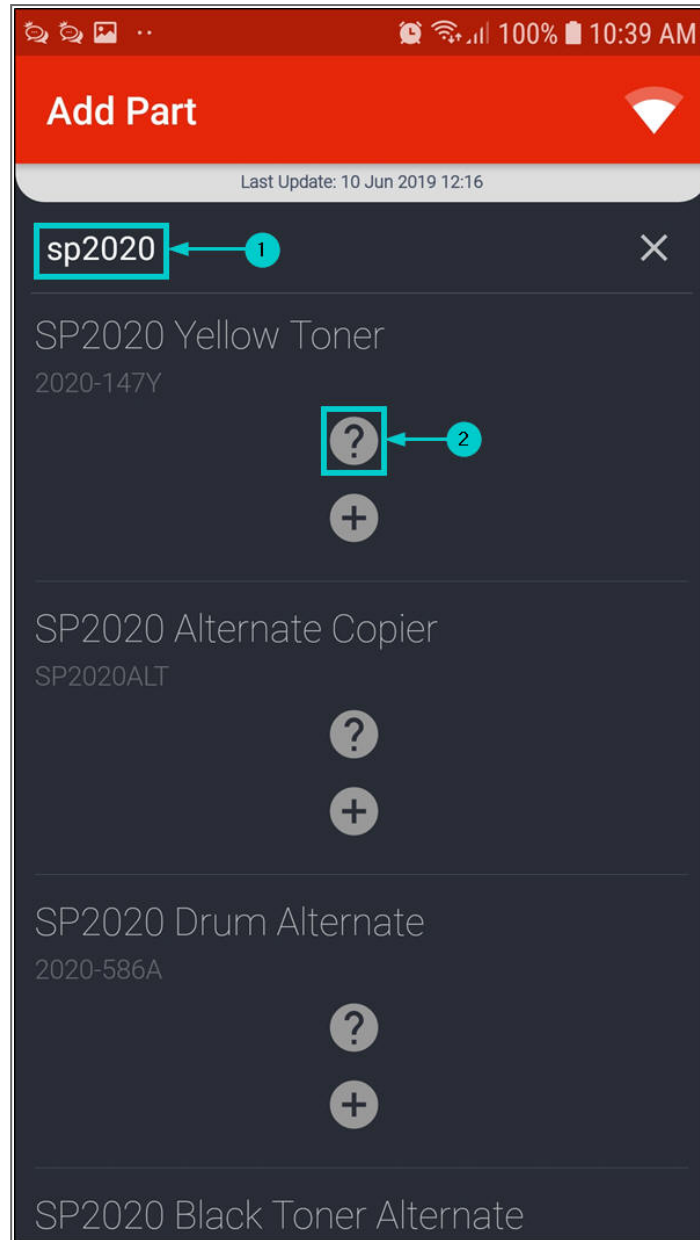
- If you need to quote on the item price, click on the '+' icon in the *Part Requests* screen.



- The *Add Part* screen will be displayed.

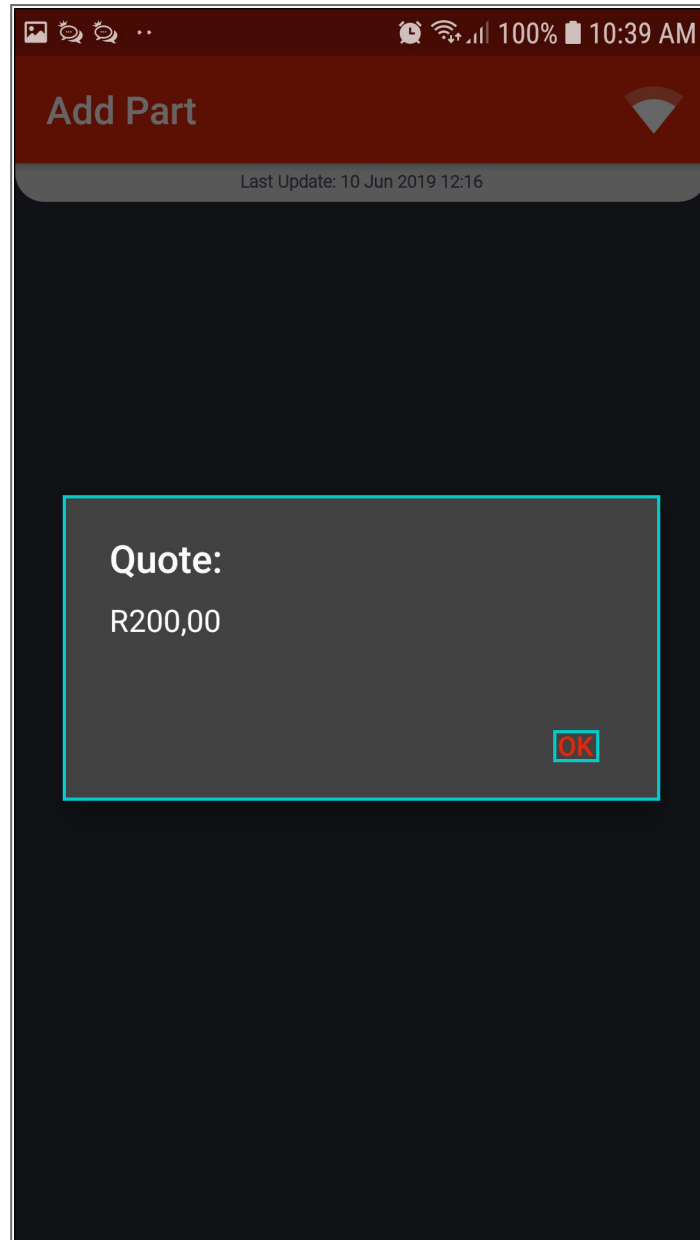


1. Type in the part number or description of the part you wish to check the price for.
  - A list of items that matches the description will come up.
2. Click on the '?' (question mark) icon.



- A **Quote** message box will pop up showing the quote price (unless this is a new part code where no stock has been bought previously).
- Click on **Ok** when done.



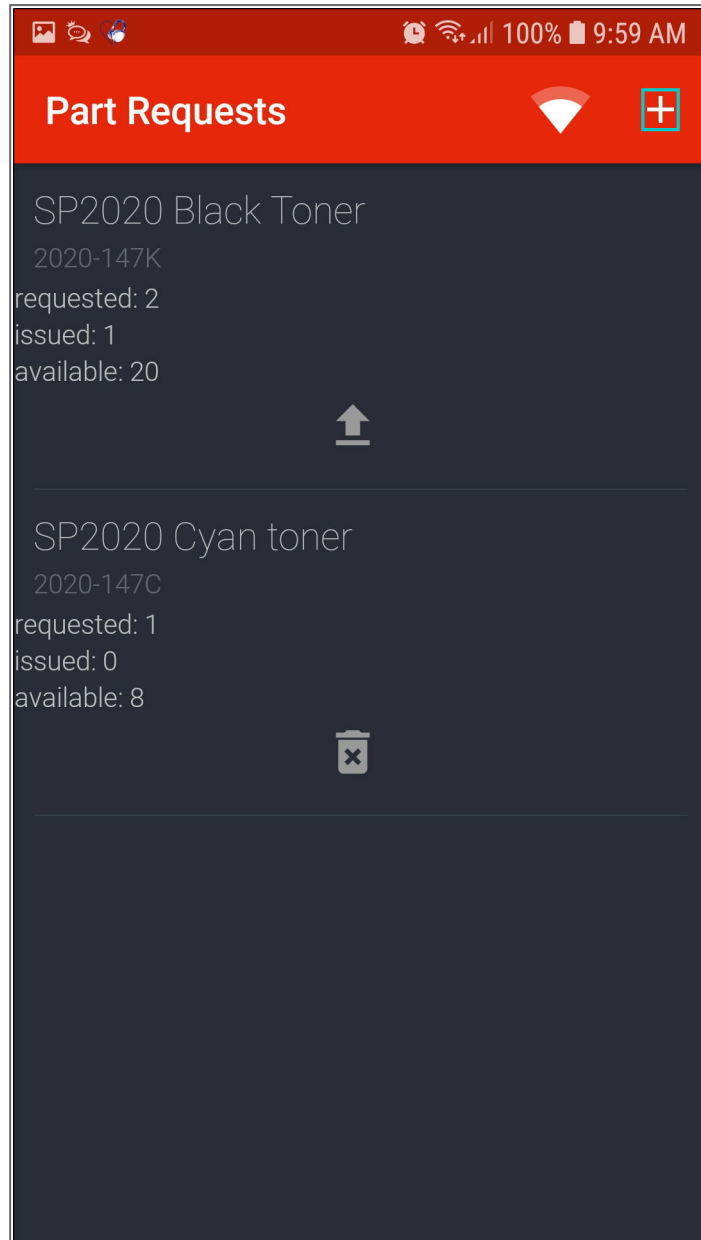


- The **Quote** message box will close.

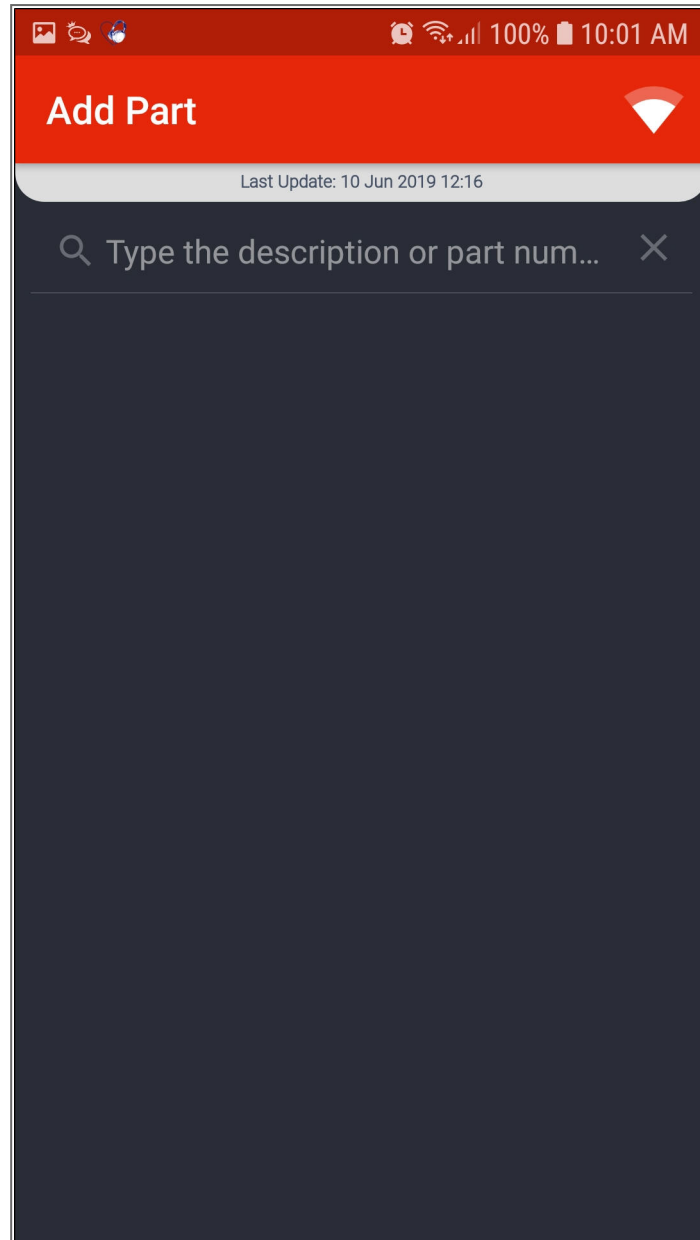


## ADD A PART REQUEST

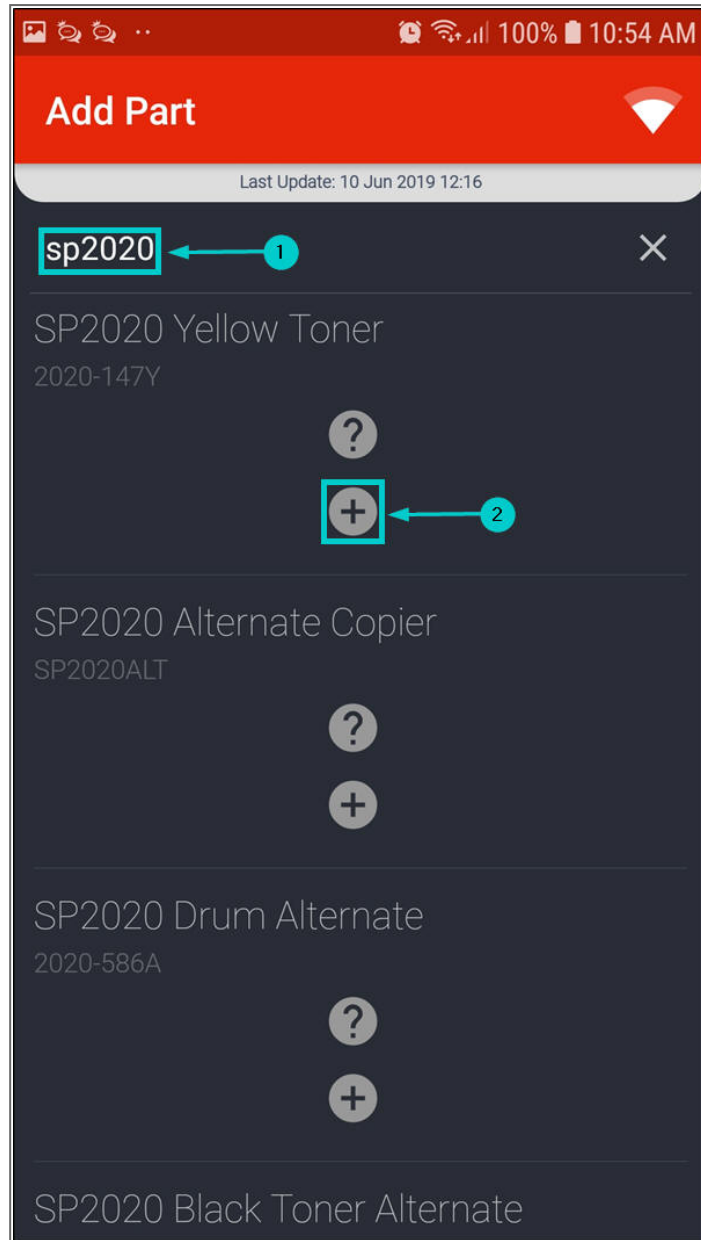
- To add a part request, click on the '+' icon in the *Part Requests* screen.



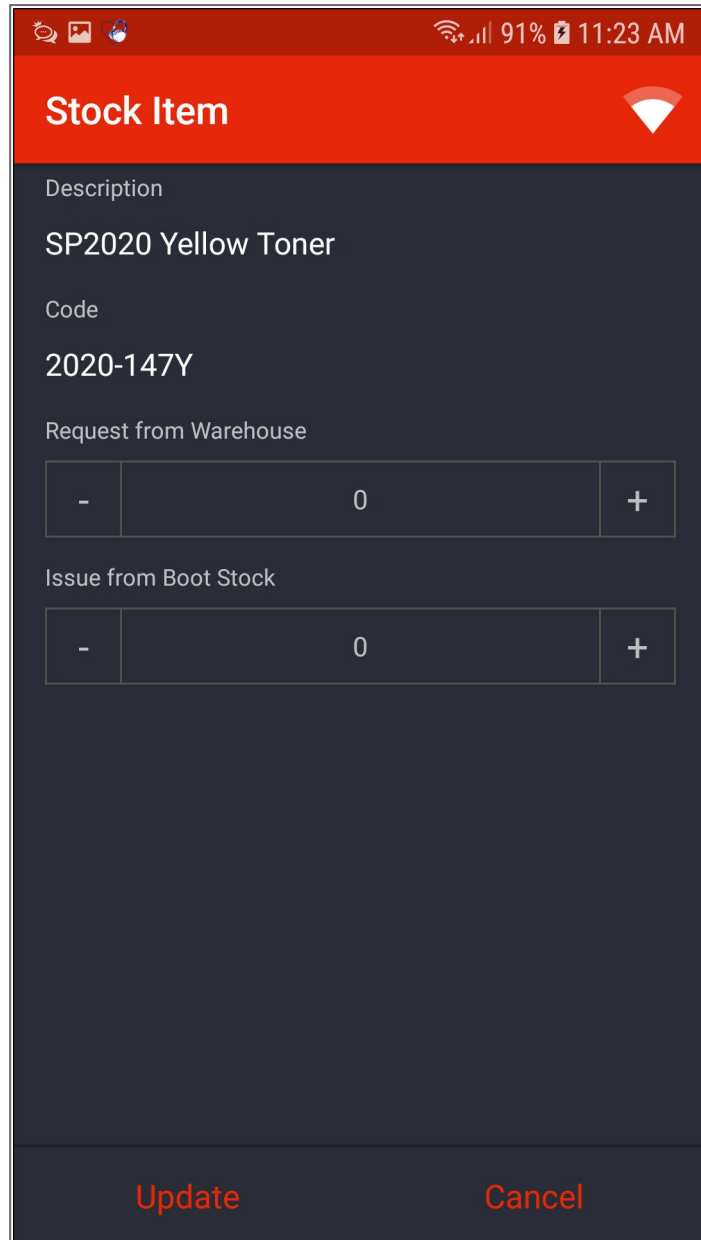
- The **Add Part** screen will be displayed.



1. Type in the part number or description of the part number you wish to add.
  - A list of items that matches the description will come up.
2. Click on the '+' icon.



- The **Stock Item** screen will be displayed.
- You have the option to request from your **Boot Stock Warehouse** or from the **Main Warehouse**.
  - Note that if your Company's Configuration for **TECHRequestBootWhse** is set to Yes, the origin warehouse will be set to the Technician's boot warehouse.



Stock Item

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Request from Warehouse

- 0 +

Issue from Boot Stock

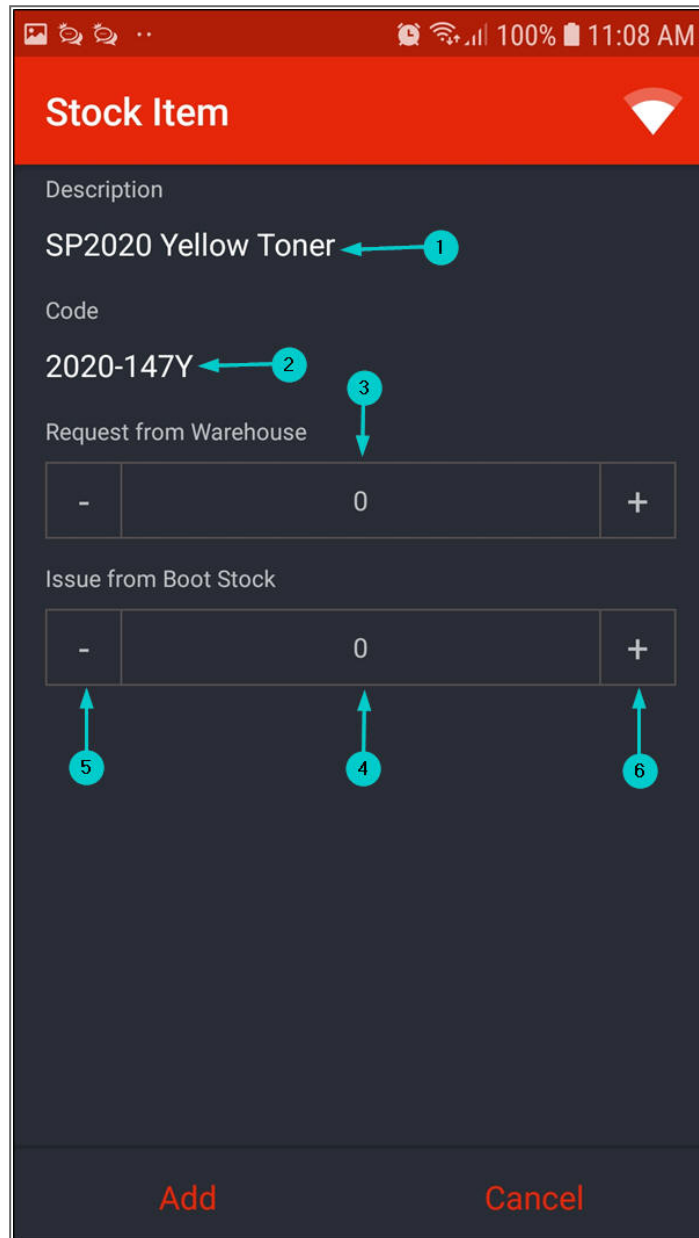
- 0 +

Update Cancel

### ***Boot Stock / Main Warehouse Request***

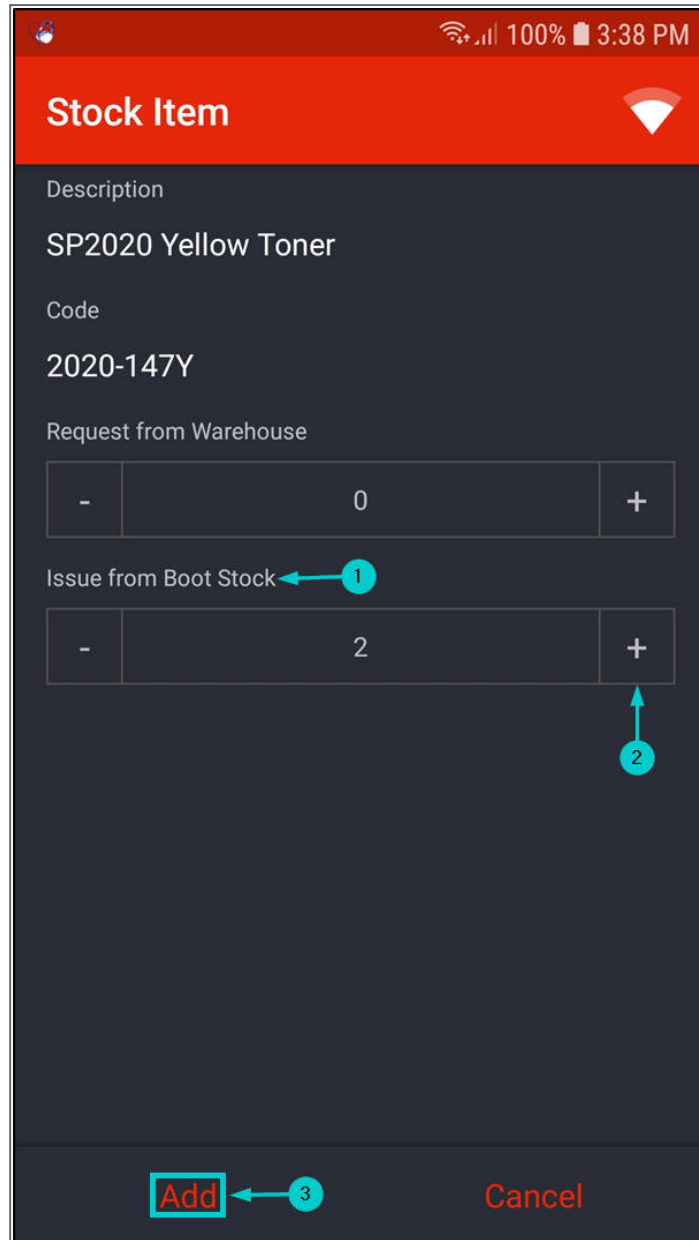
1. **Description:** This shows the item description.
2. **Code:** This shows the part code.
3. **Request from warehouse:** This enables you to request the selected part from the 'main' warehouse.

4. **Issue from Boot stock:** This enables you to issue the selected part from your boot stock warehouse.
5. **Minus ('-') icon:** This enables you to adjust the quantity downwards.
6. **Plus ('+') icon:** This enables you to adjust the quantity upwards.



- In this screen, you can either request stock from the 'main' **ware-**  
**house** or from your **boot stock warehouse**.
- For the purpose of this manual, stock is requested from the **boot**  
**stock warehouse**.
  1. Go to **Issue from Boot Stock**,
  2. Click on the '+' icon to add the required quantity.
  3. Click on **Add**.





**Stock Item**

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Request from Warehouse

- 0 +

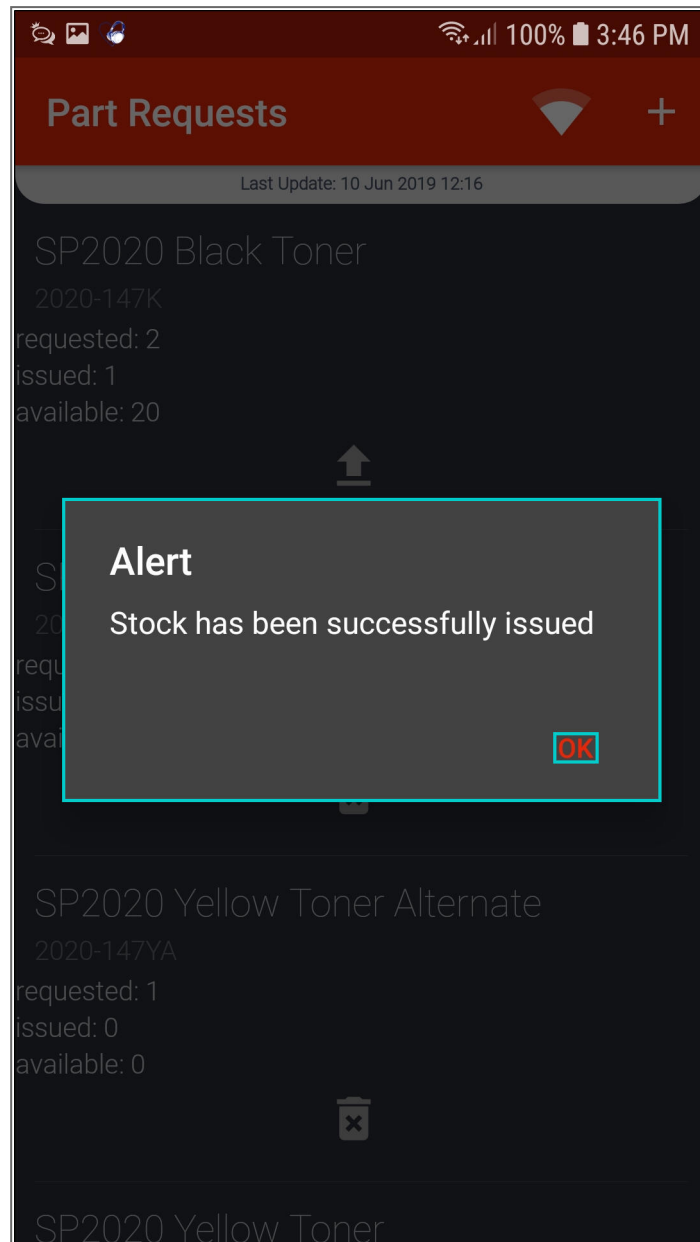
Issue from Boot Stock 1

- 2 + 2

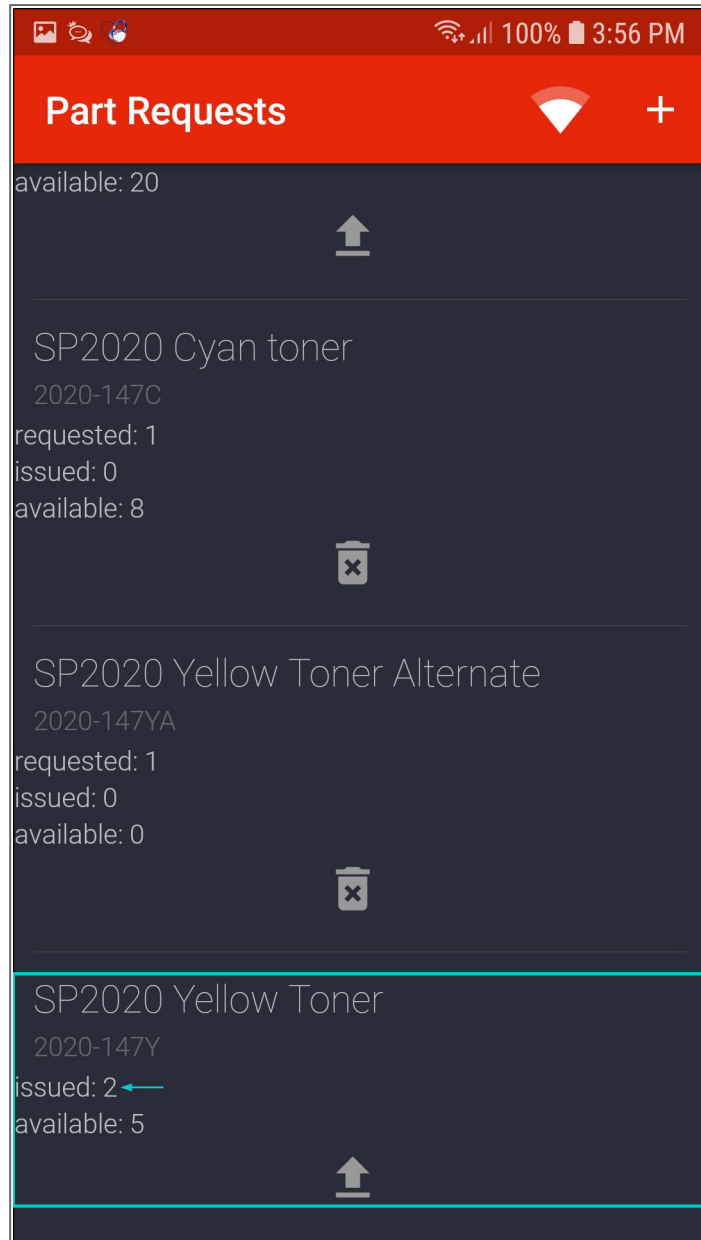
Add 3 Cancel

- An **Alert** message box will pop up telling you;
  - *Stock has been successfully issued.*
- Click on **Ok**.
- **Note:** If you request from the **boot stock warehouse**, the stock will be issued

automatically.



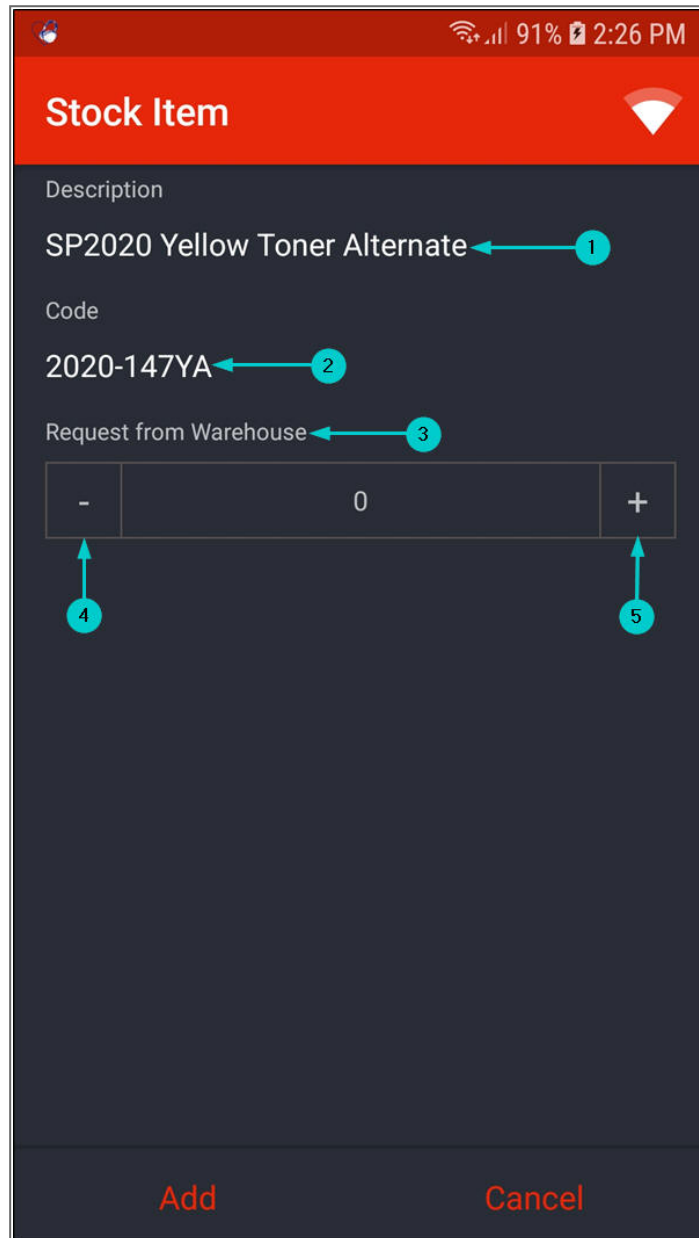
- The issued part request will be displayed in the **Part Requests** screen.



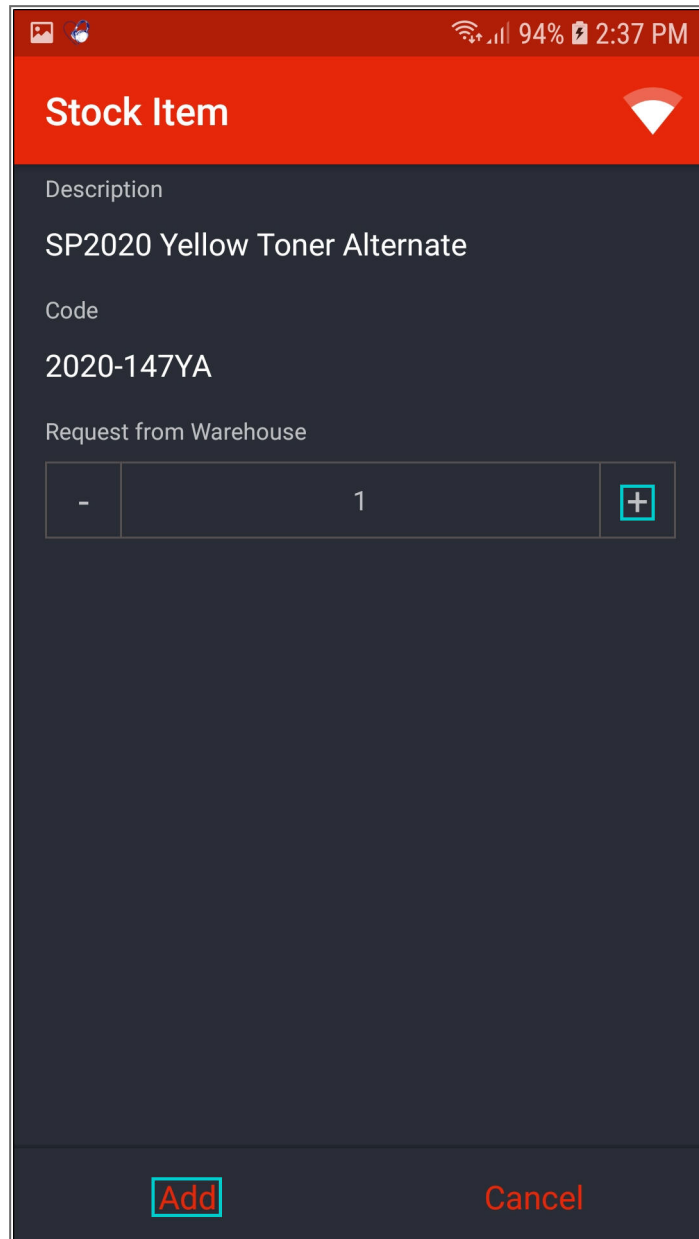
### 'Main' Warehouse Request

1. **Description:** This shows the item description.
2. **Code:** This shows the part code.
3. **Request from warehouse:** This enables you to request the selected part from the 'main' warehouse.

4. **Minus ('-') icon:** This enables you to adjust the quantity downwards.
  5. **Plus ('+') icon:** This enables you to adjust the quantity upwards.
- For the purpose of this manual, part code **2020-147YA** is used as an example.

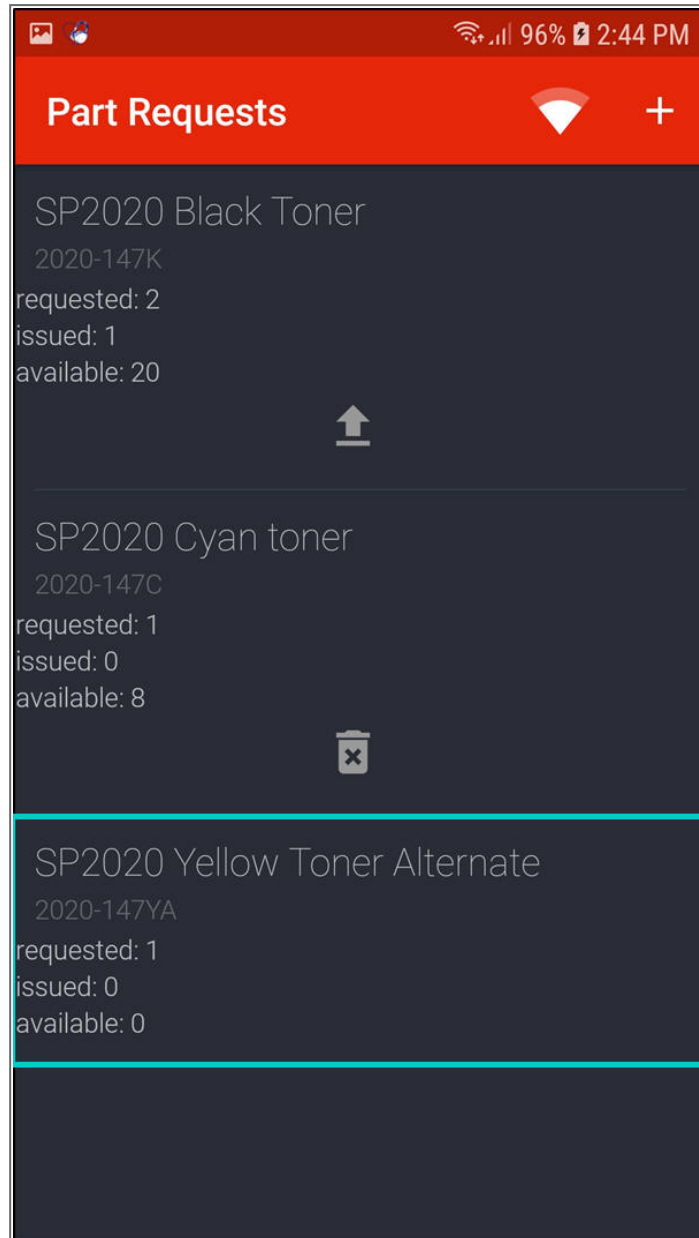


- In the **Request from Warehouse** field, click on the '+' icon to add the required quantity.
- Click on **Add**.



- The part request will now be displayed in the **Part Requests** screen.

- The stock must be issued by the stores person from **BPO**.

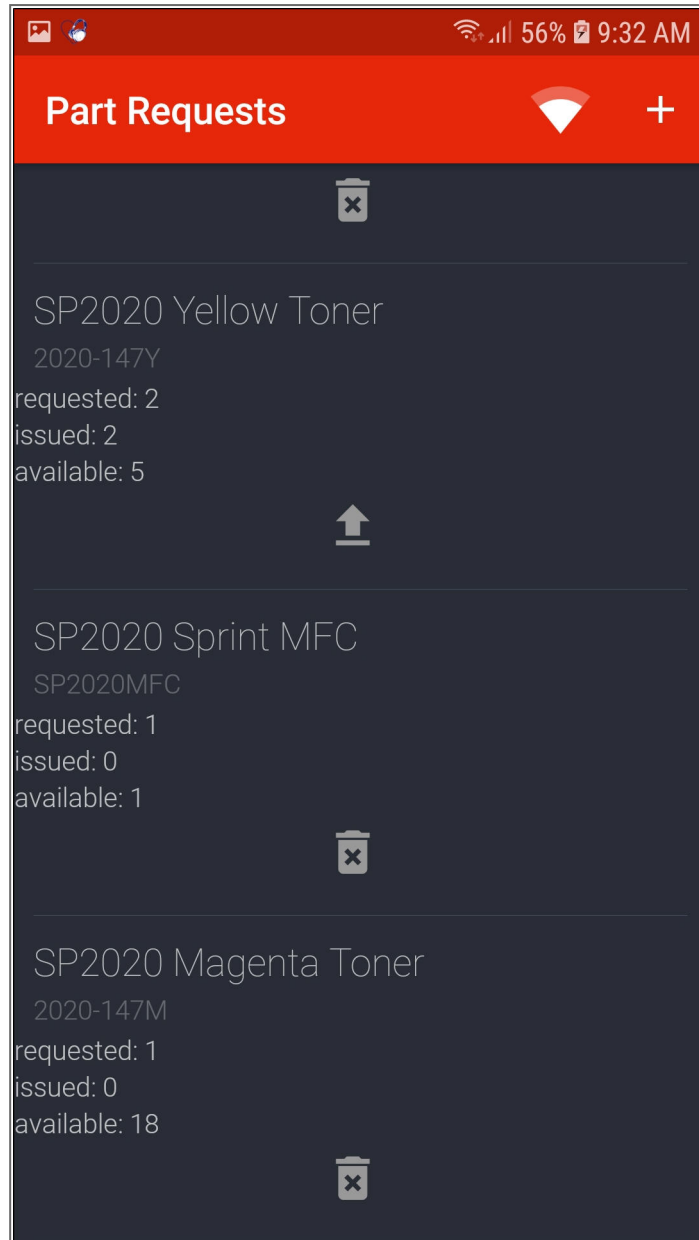


## **ACTION EXISTING PART REQUESTS**

- On an existing part request, you have the option to:
  - [Issue Boot Stock Against A 'Main' Warehouse Part Request](#): This enables you to issue boot stock against a

part request that was raised by the **Call Centre** in **BPO**.

- **Note:** If a part request is raised from the **Call Centre** in **BPO**, the part request will be logged against the 'main' **warehouse** in **Tech Connect** by default.
- **Return And Replace Stock / Return Without Replacing Stock:** This enables you to raise a stock return request for stock that was issued, but is faulty or no longer required.
- **Delete A Part Request:** This enables you to delete a part request that has not been issued.
- **Request Additional Stock:** This enables you to request additional stock from the **boot stock** / 'main' **warehouse**.

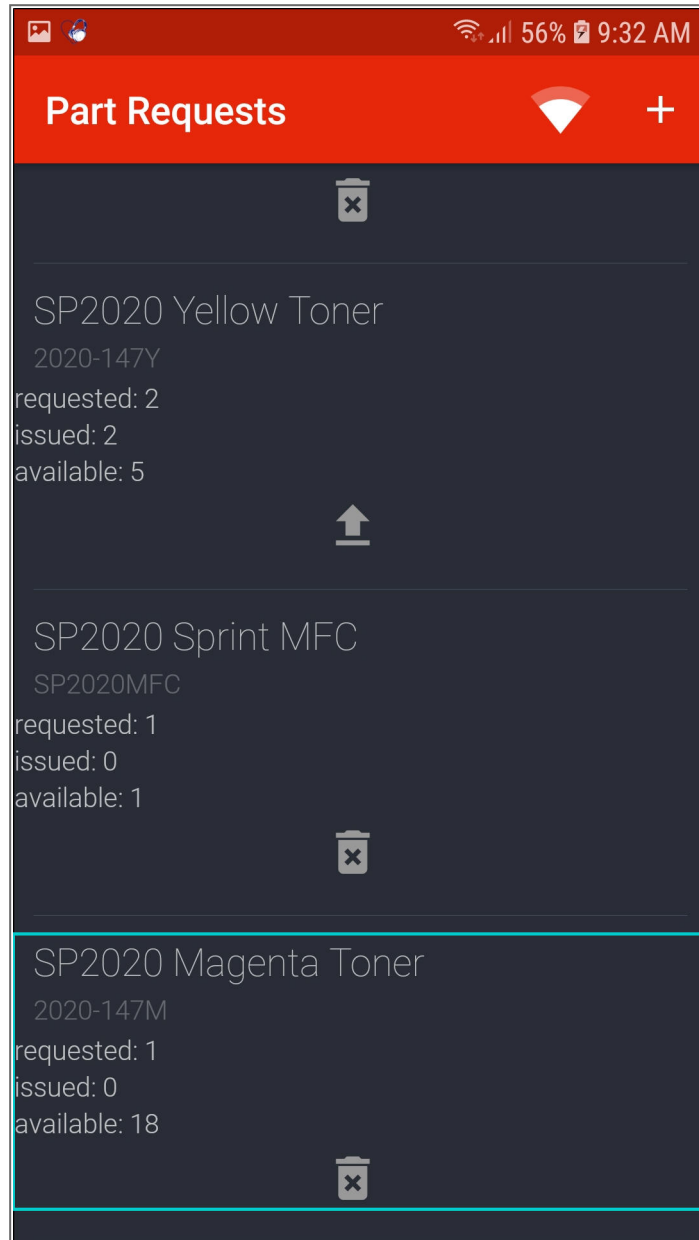


### ***Issue Boot Stock Against A 'Main' Warehouse Part Request***

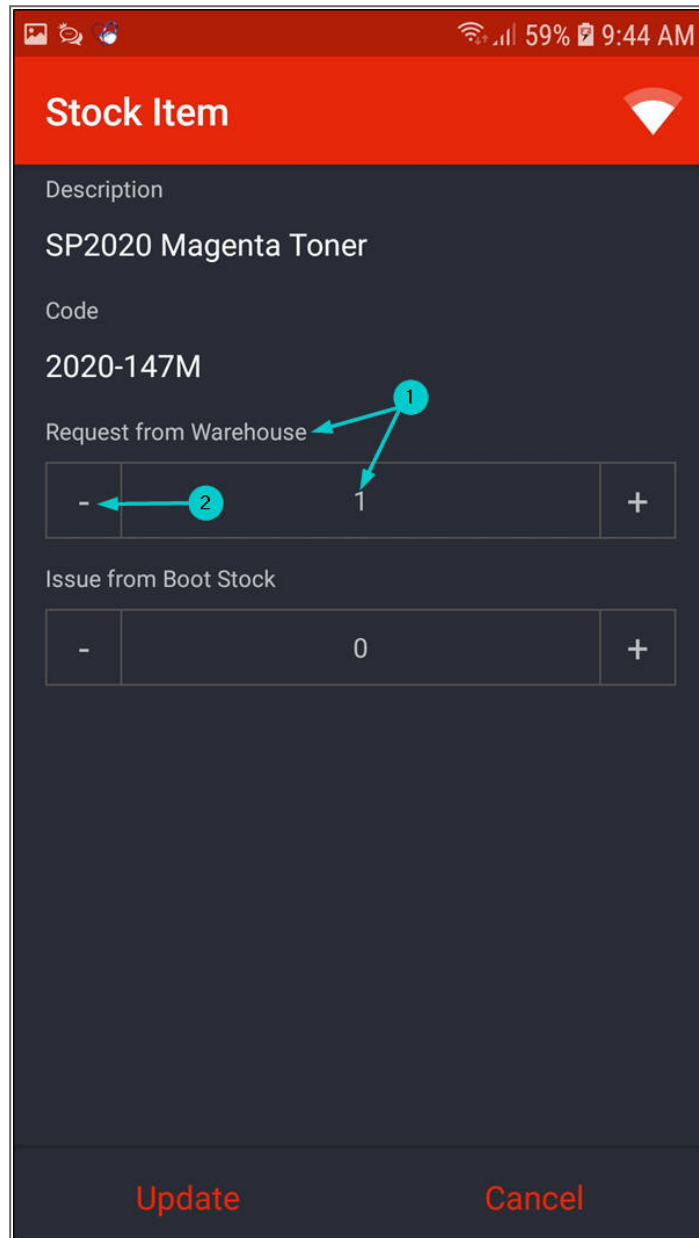
- If the **Call Centre** raises a part request in **BPO**, the part request will be logged against the 'main' **warehouse** in **Tech Connect** by default.



- In **Tech Connect**, you can change the part request warehouse from 'main' **warehouse** to your **boot stock warehouse**. This enables you to issue the part directly from your **boot stock warehouse**.
- Click on the part request raised by the **Call Centre**.



- The **Stock Item** screen will be displayed.
  1. Initially, the part request will be logged against the 'main' **warehouse**.
  2. In the **Request from Warehouse** field, use the '-' sign to remove the same quantity from the 'main' **warehouse** you wish to issue from your **boot stock warehouse**.



**Stock Item**

Description  
SP2020 Magenta Toner

Code  
2020-147M

Request from Warehouse

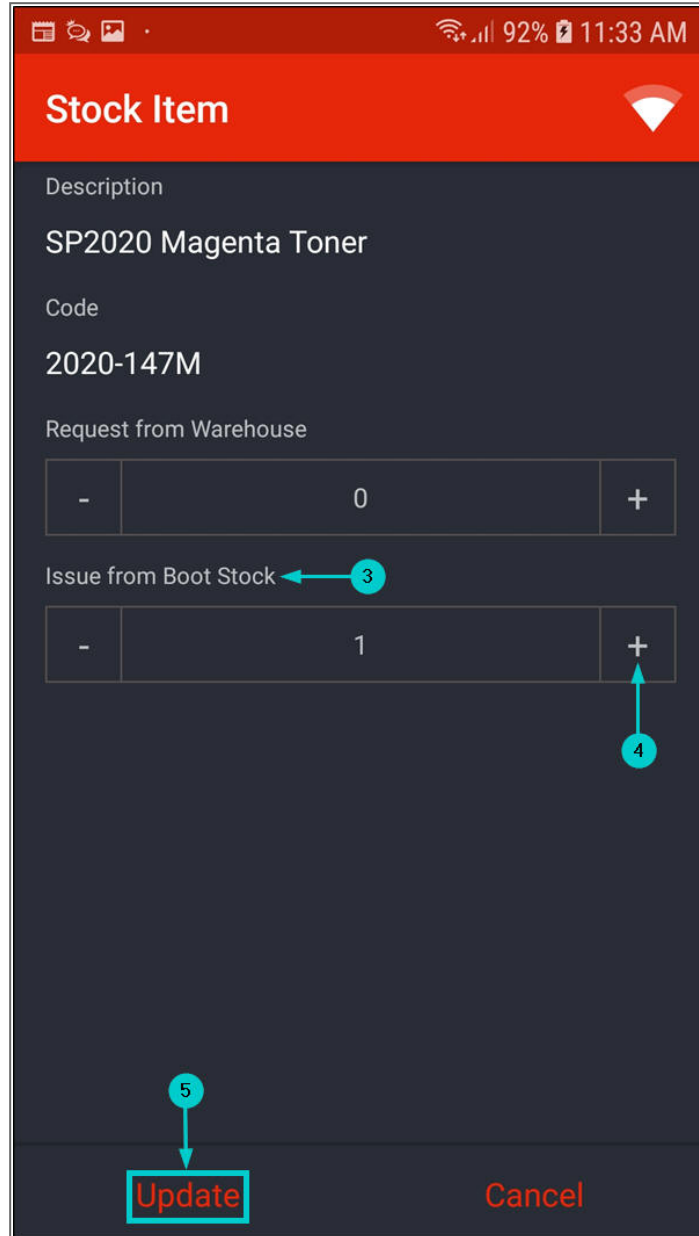
-	1	+
---	---	---

Issue from Boot Stock

-	0	+
---	---	---

Update Cancel

3. In the **Issue from Boot Stock** field,
4. click on the '+' icon to 'add' the same quantity you removed from the initial warehouse.
5. Click on **Update**.

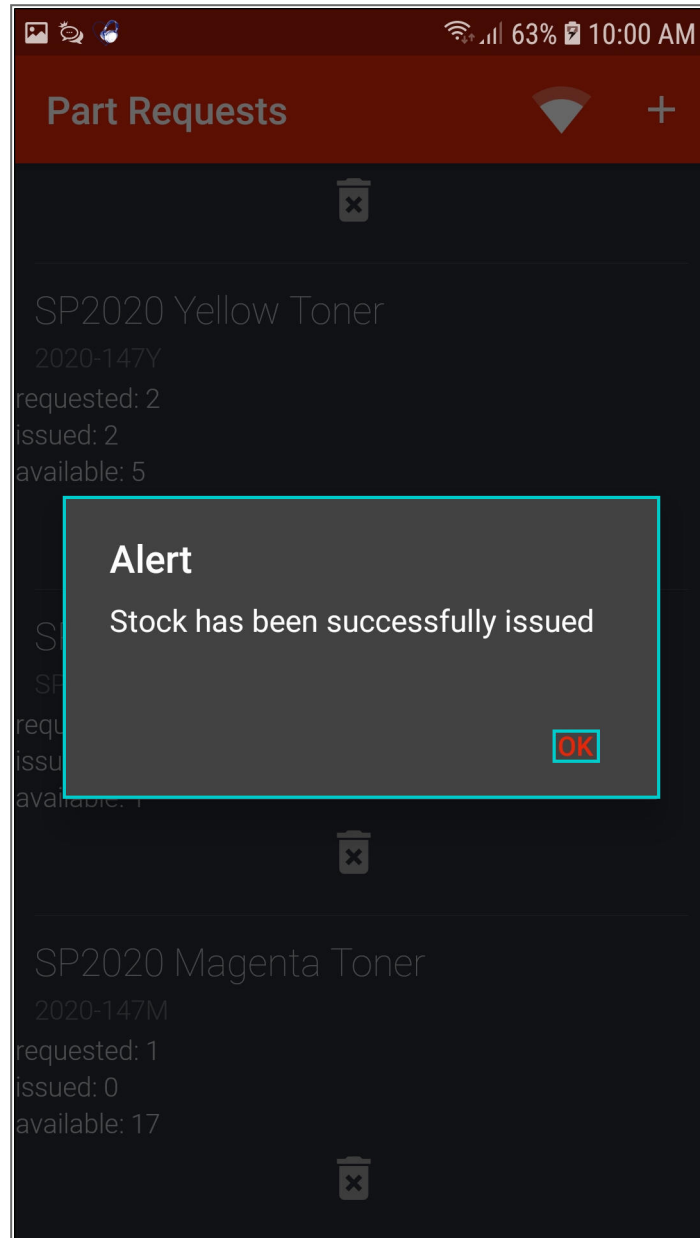


The screenshot shows a mobile application interface for a 'Stock Item'. The title bar is red and contains the text 'Stock Item' and a white Wi-Fi icon. Below the title bar, the following fields are visible:

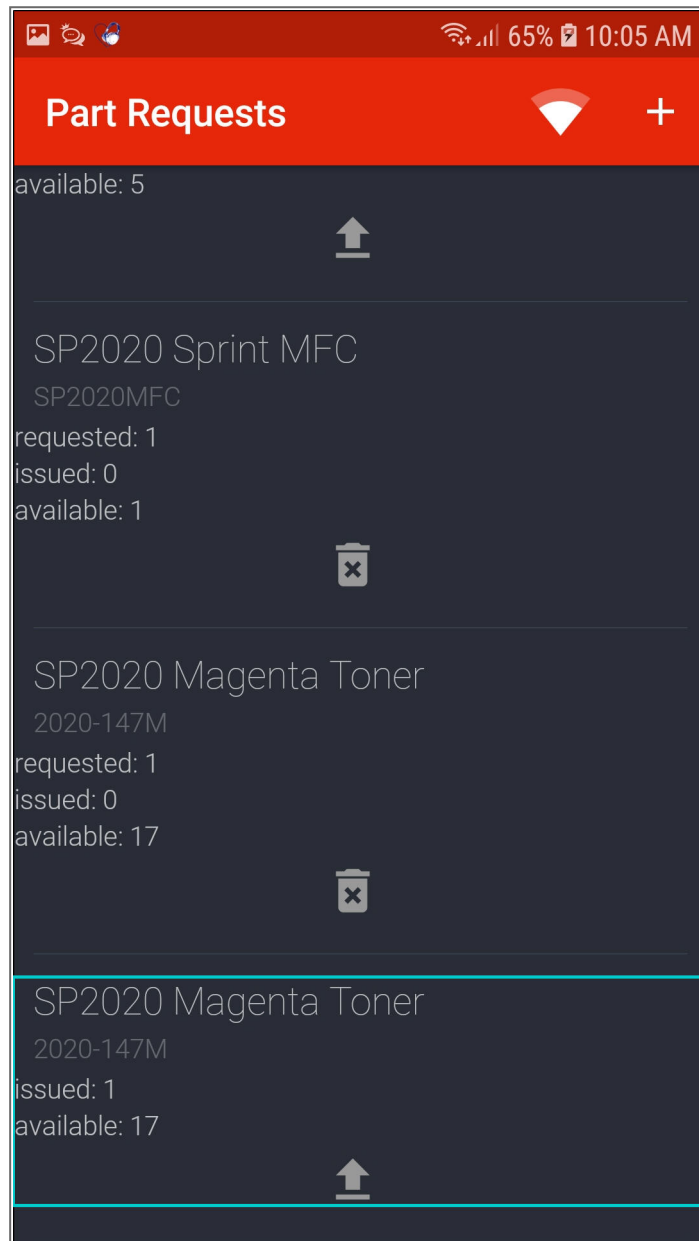
- Description:** SP2020 Magenta Toner
- Code:** 2020-147M
- Request from Warehouse:** A numeric input field with a value of 0, flanked by '-' and '+' icons.
- Issue from Boot Stock:** A numeric input field with a value of 1, flanked by '-' and '+' icons. A red arrow labeled '3' points to the text 'Issue from Boot Stock', and another red arrow labeled '4' points to the '+' icon.

At the bottom of the screen, there are two buttons: 'Update' (highlighted with a red box and a red arrow labeled '5') and 'Cancel'.

- An **Alert** message box will pop up telling you;
  - *Stock has been successfully saved.*
- Click on **Ok**.
- **Note:** The stock will be automatically issued from the *boot stock warehouse.*



- The issued part request will be displayed in the **Part Requests** screen.
  - **Note:** If the part request is not showing all the required details, refresh your **boot stock database** (if stock was issued from the **boot stock warehouse**) and or the **Calls List** screen.



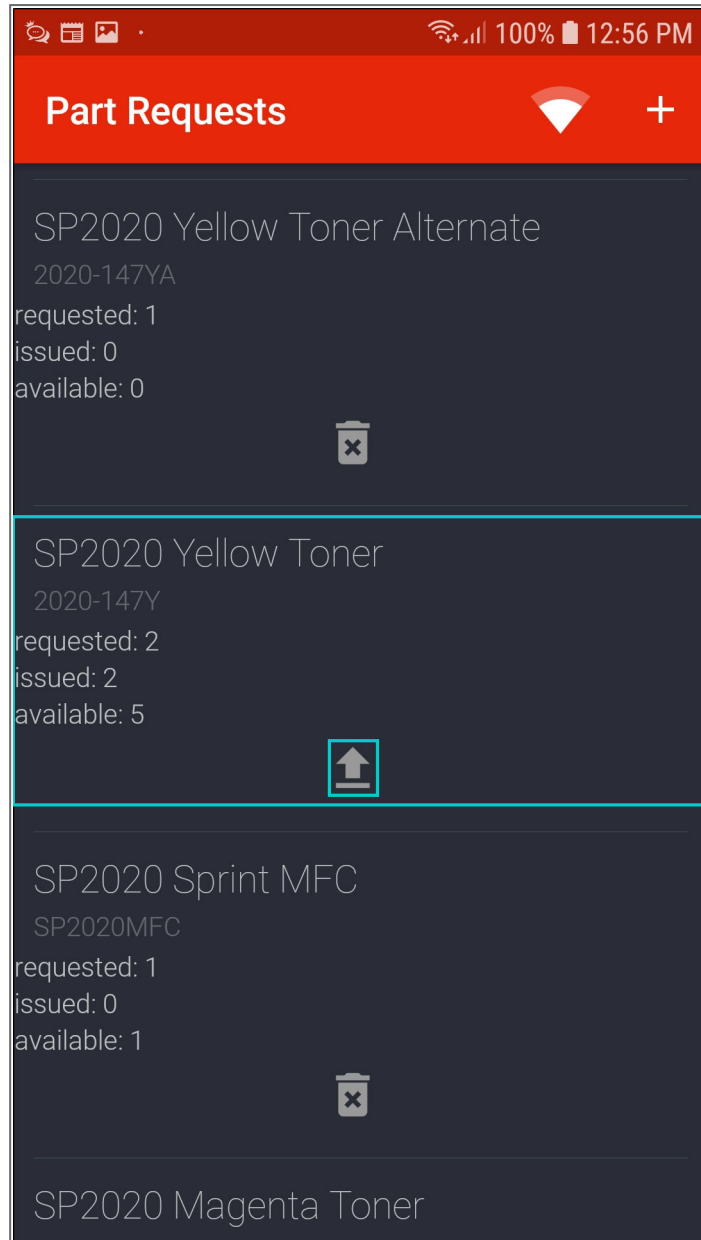
## ***Return Stock***

---

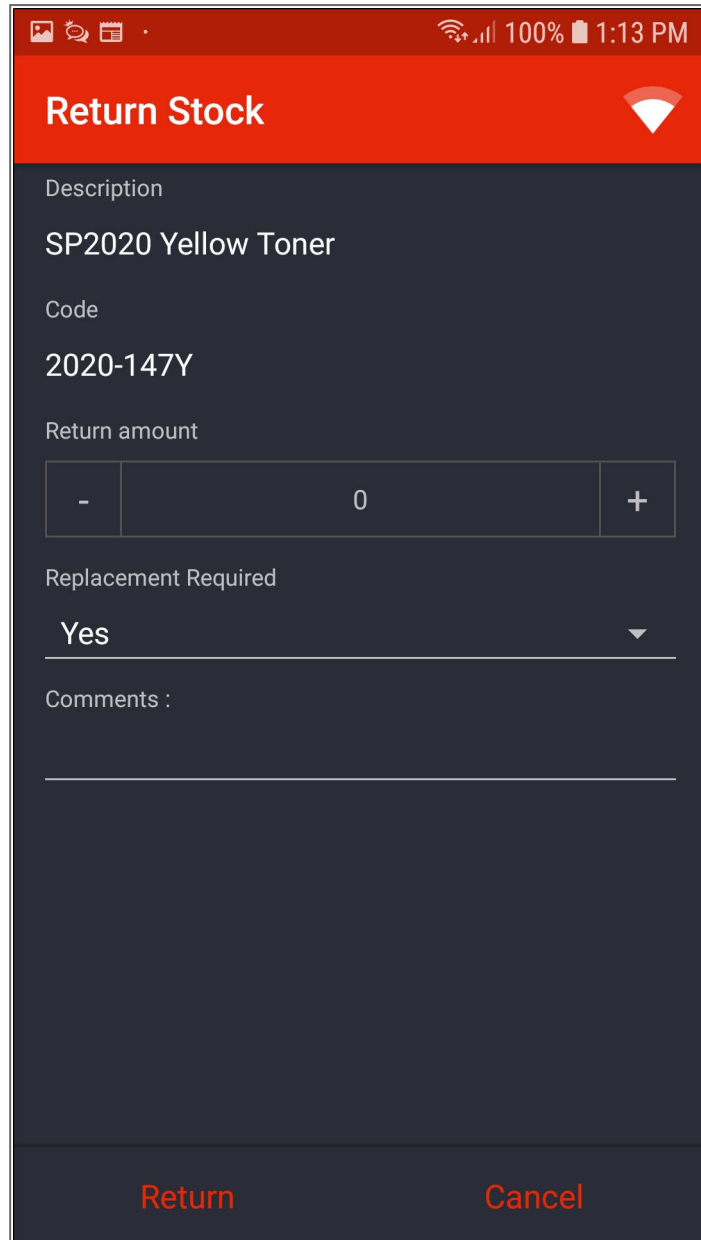
### ***Return Stock without Replacing***

---

- If stock was issued, but is no longer required, you can return the stock.
- Click on the ***Return*** icon on the part request you wish to return stock for.
  - ***Note:*** If you do not see the ***Return*** icon on the part request that you wish to return stock for, refresh the ***Calls List*** screen.



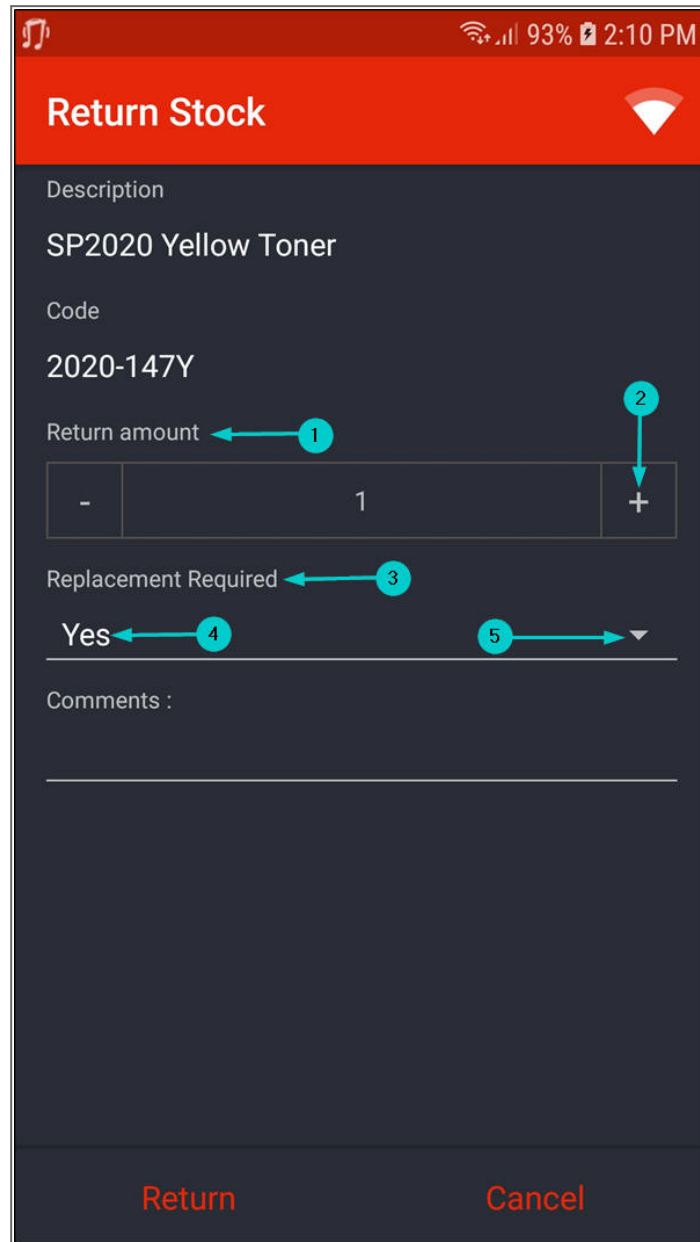
- The **Return Stock** screen will be displayed.



1. In the **Return Amount** field,
2. click on the '+' sign to add the quantity you wish to return.
  - **Note:** The '-' sign is for adjusting the quantity downwards.
3. In the **Replacement Required** field,



4. **Yes** will default.
5. To change this, click on the **down arrow**.



Return Stock

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Return amount

- 1 +

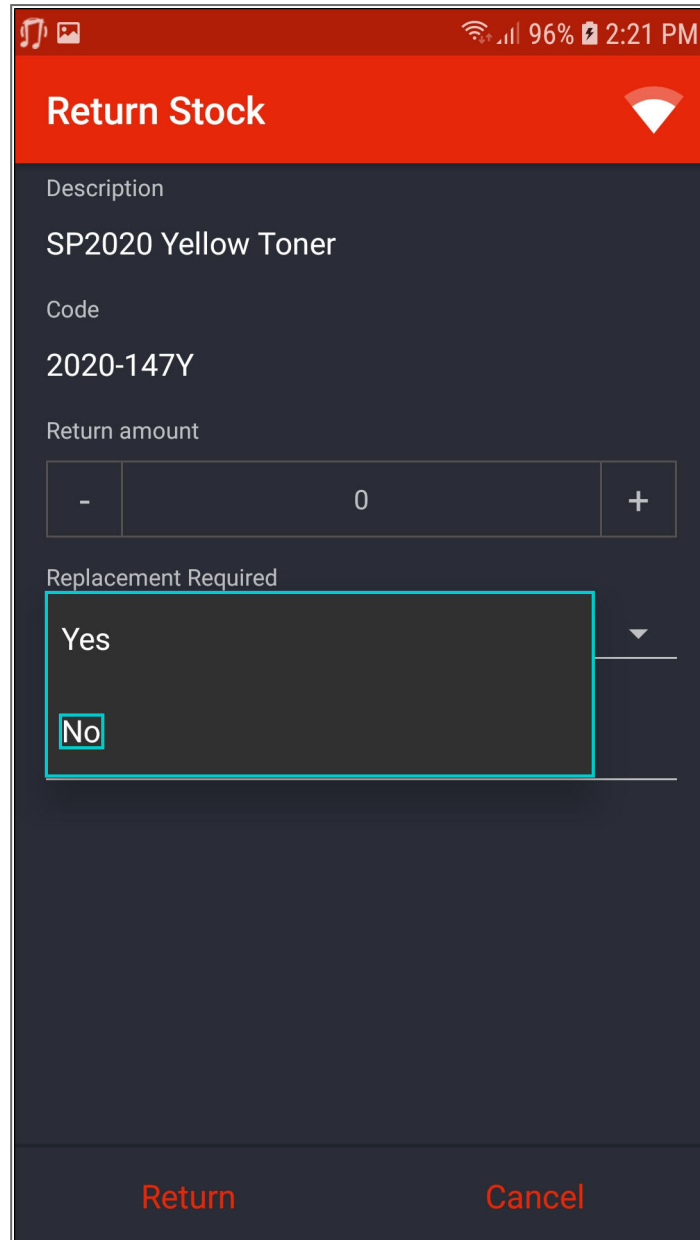
Replacement Required

Yes

Comments :

Return Cancel

- A **menu** will be displayed.
- Select **No** from the menu.



**Return Stock**

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Return amount  
- 0 +

Replacement Required  
Yes  
No

Return Cancel

1. The **Replacement Required** field will now be populated with **No**.
2. Type in the relevant comments.
3. Click on **Return**.

- **Note 1:** A **return request** for the storeman to action and return stock to either the

*boot stock warehouse* / 'main' *warehouse* is raised in **BPO** for items issued from either from *boot stock warehouse* or 'main' *warehouse*.

- **Note 2:** The part request will remain closed in **BPO**.

**Return Stock**

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Return amount  
- 1 +

Replacement Required  
No

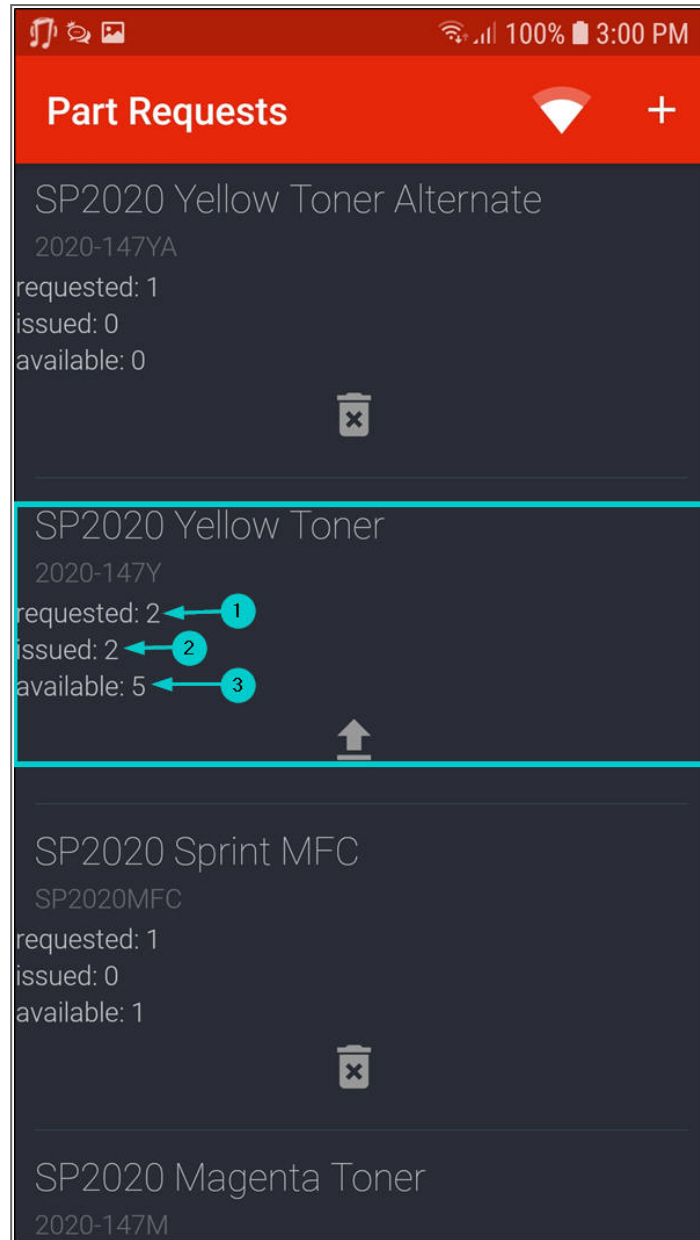
Comments :  
Part no longer required.

Return Cancel

- You will return to the **Part Requests** screen.
- In **TechConnect**, the
  1. requested quantity,
  2. issued quantity
  3. and available quantity

on the part request will not change until the **return request is actioned** in **BPO**.

- **Note:** After the return request has been actioned, the **available** quantity will only change if stock was issued from **boot stock warehouse**.

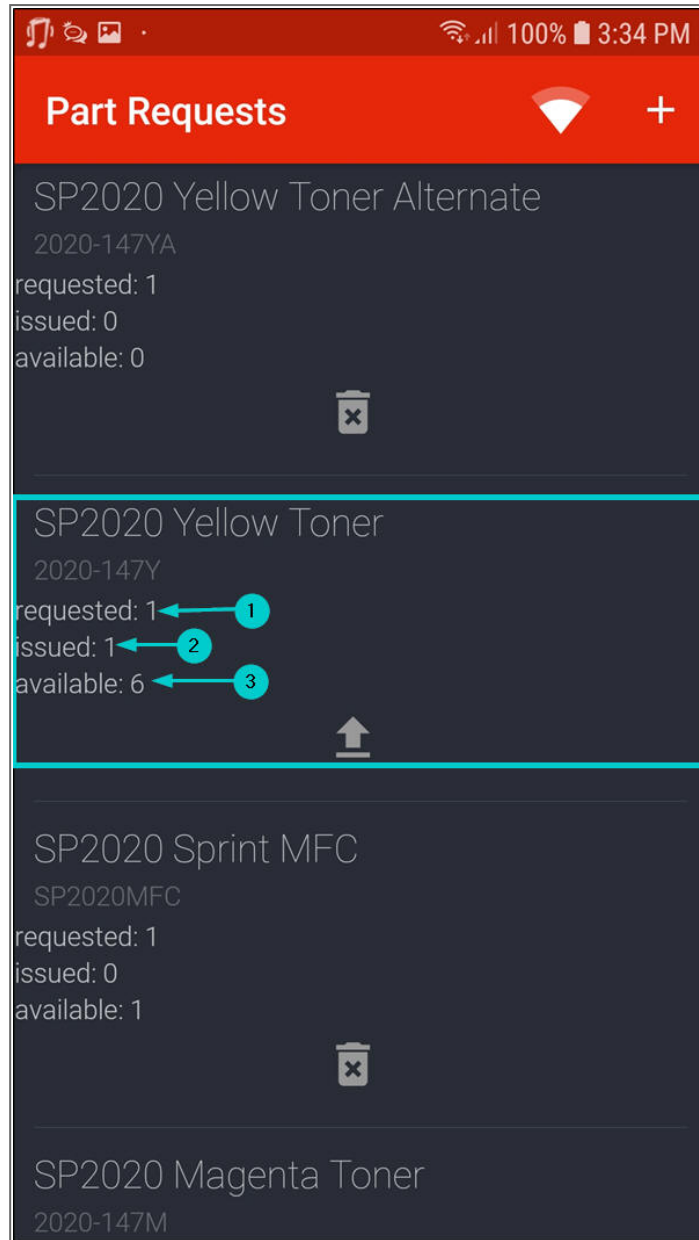


- After the **return request has been actioned**, refresh your **boot stock database** (if stock was issued from the **boot stock warehouse** and your **Calls List** screen.
- The
  1. requested quantity,
  2. issued quantity and

3. available quantity (if the stock was issued from the **boot stock warehouse**)

will change to reflect the part return.

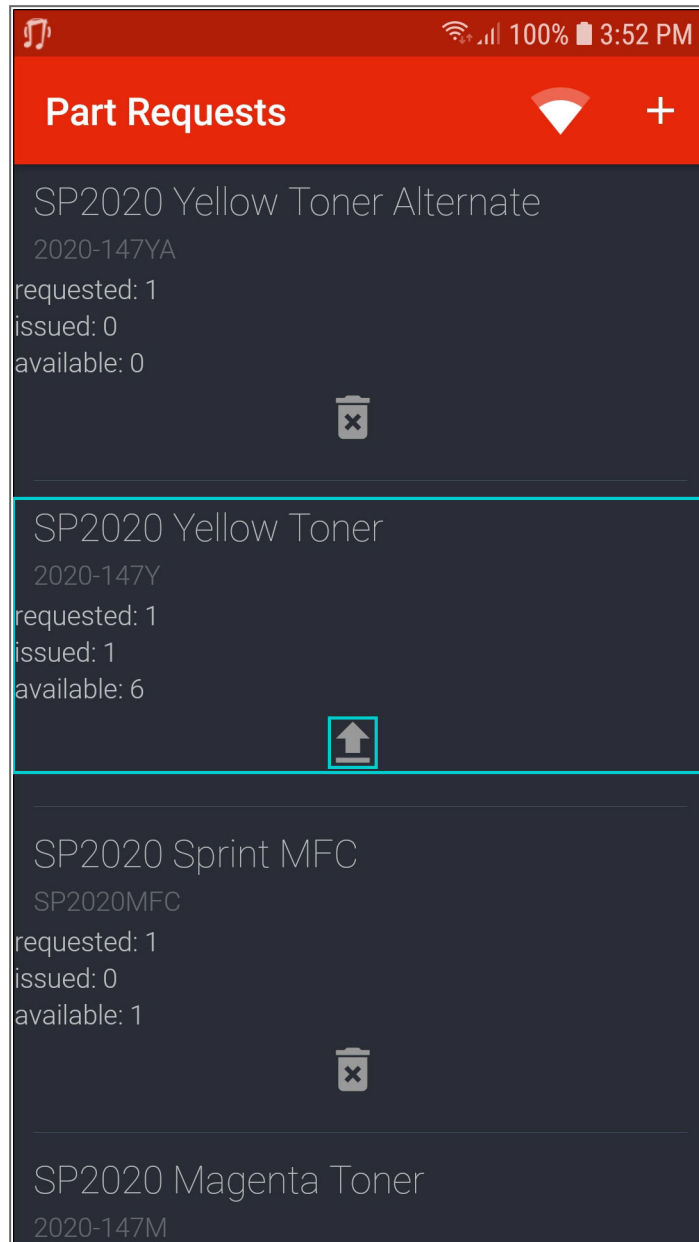
- **Note:** After actioning the part return, the **available** quantity will only change if stock was initially issued from **boot stock warehouse**.



### ***Return and Replace Stock***

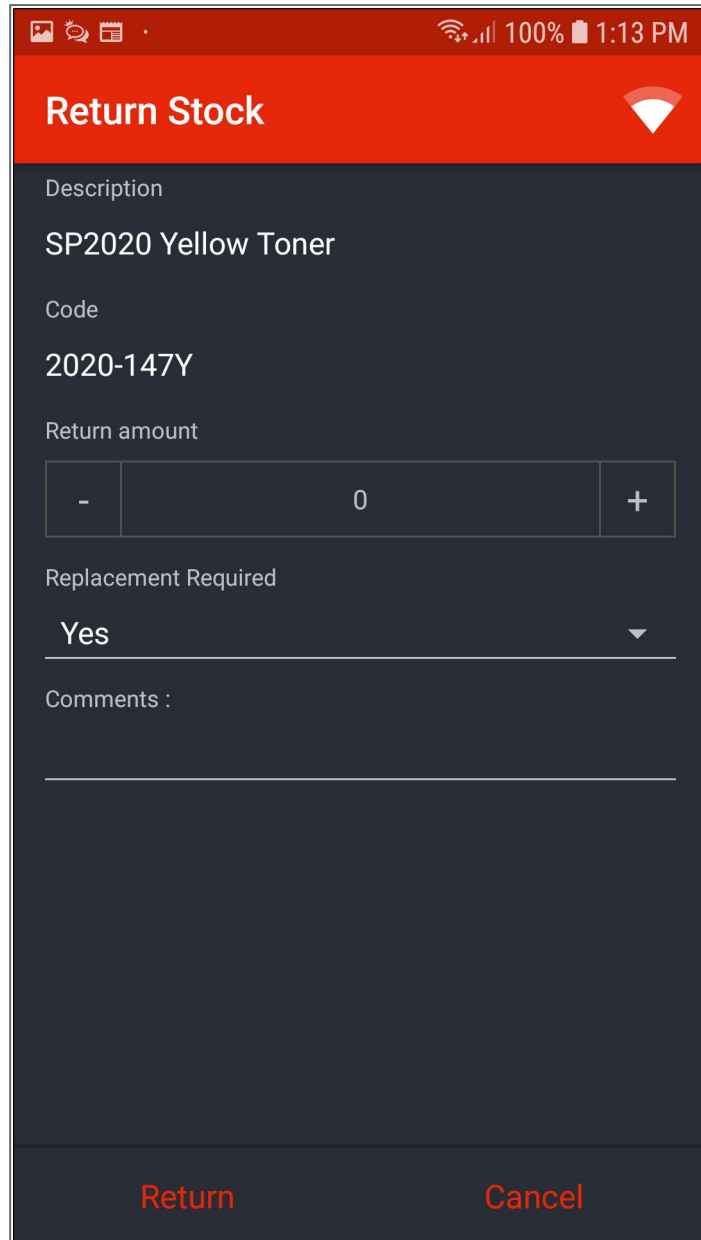
- If stock was issued, but was faulty and is still required, you can return and replace the stock.
- Click on the ***Return*** icon on the part request you wish to return and replace stock for.

- **Note:** If you do not see the **Return** icon on the part request that you want to return stock for, refresh the **Calls List** screen.



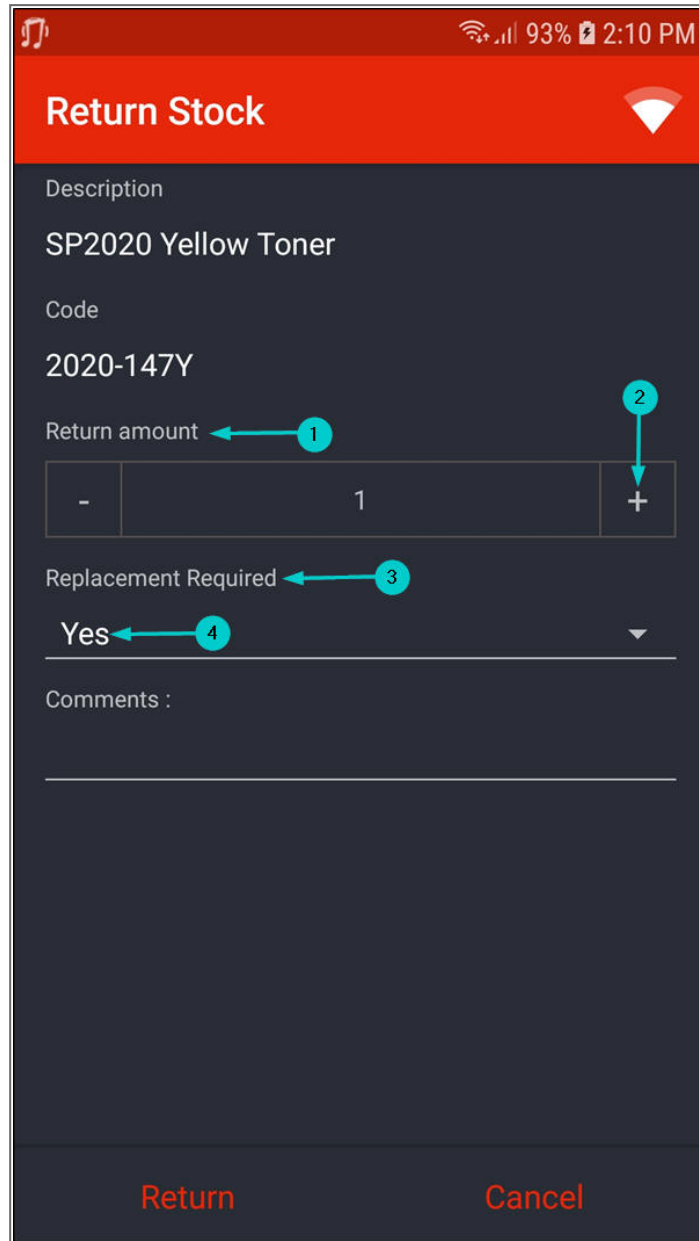
- The **Return Stock** screen will be displayed.





1. In the **Return Amount** field,
2. click on the '+' sign to add the quantity you wish to return.
  - **Note:** The '-' sign is for adjusting the quantity downwards.
3. In the **Replacement Required** field,

4. **Yes** will default and you do not have to change this since the stock has to be replaced.



1. Type in the relevant comments.
2. Click on **Return**.

- **Note:** A return request is raised in **BPO**. The storeman will need to **action the return the request** to move the stock back into the **boot stock warehouse / 'main' warehouse** for items issued from **boot stock warehouse / 'main' warehouse**.

**Return Stock**

Description  
SP2020 Yellow Toner

Code  
2020-147Y

Return amount  
- 1 +

Replacement Required  
Yes

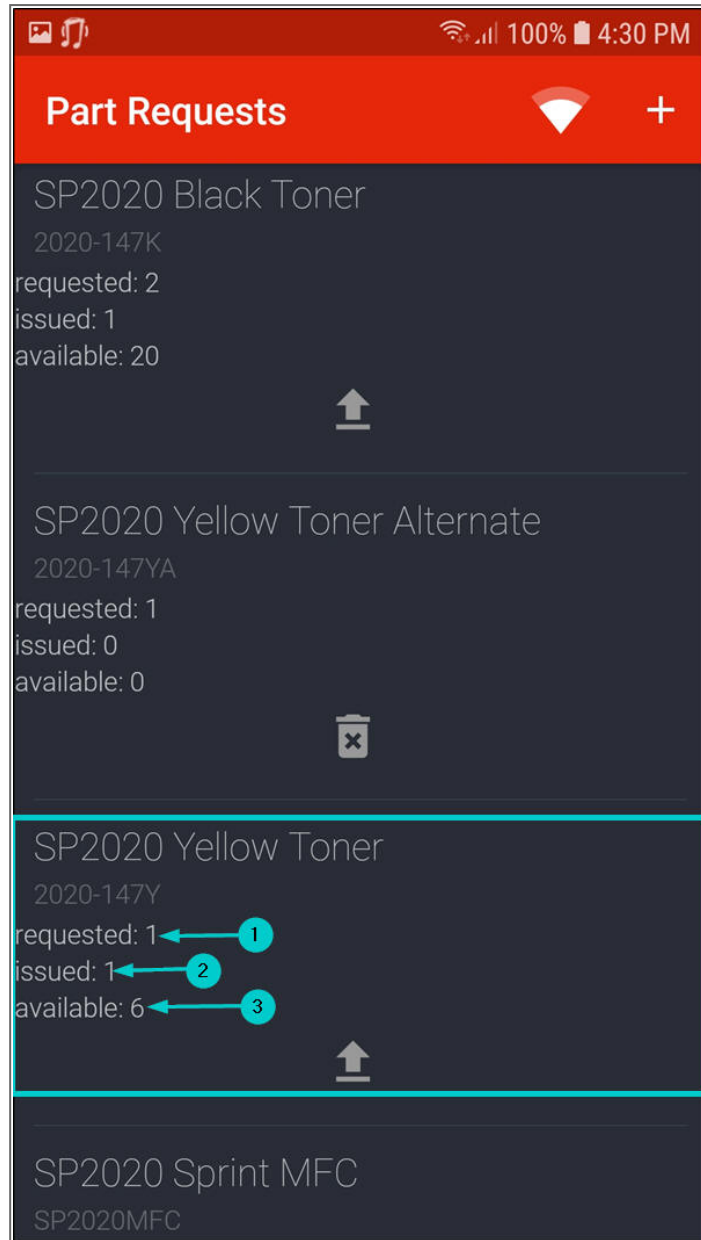
Comments :  
Faulty, replacement needed

**Return** Cancel

- You will return to the **Part Requests** screen.
- In **Tech Connect**, the
  1. requested quantity,
  2. issued quantity and
  3. available quantity (if stock was issued from **boot stock warehouse**)

on the part request will not change until the **return request is actioned** in **BPO**.

- **Note:** After the return request has been actioned, the **available** quantity will only change if stock was initially issued from the **boot stock warehouse**.

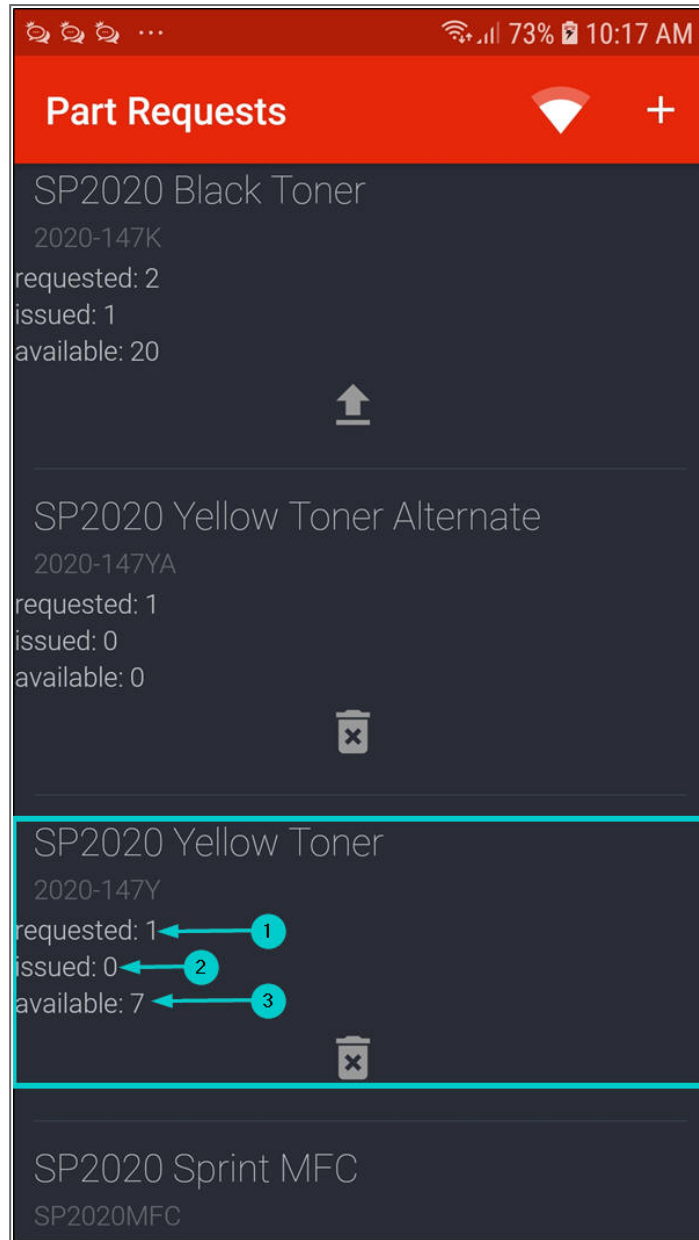


- After the **return request has been actioned** and before the part is replaced, if you refresh your **boot stock database** (if stock was issued from the **boot stock warehouse**) and your **Calls List** screen.
- The

1. requested quantity,
2. issued quantity and
3. available quantity (if the stock was issued from the **boot stock warehouse**)

will change to reflect the part return.

- **Note:** After actioning the part return, the **available** quantity will only change if stock was initially issued from the **boot stock warehouse**.



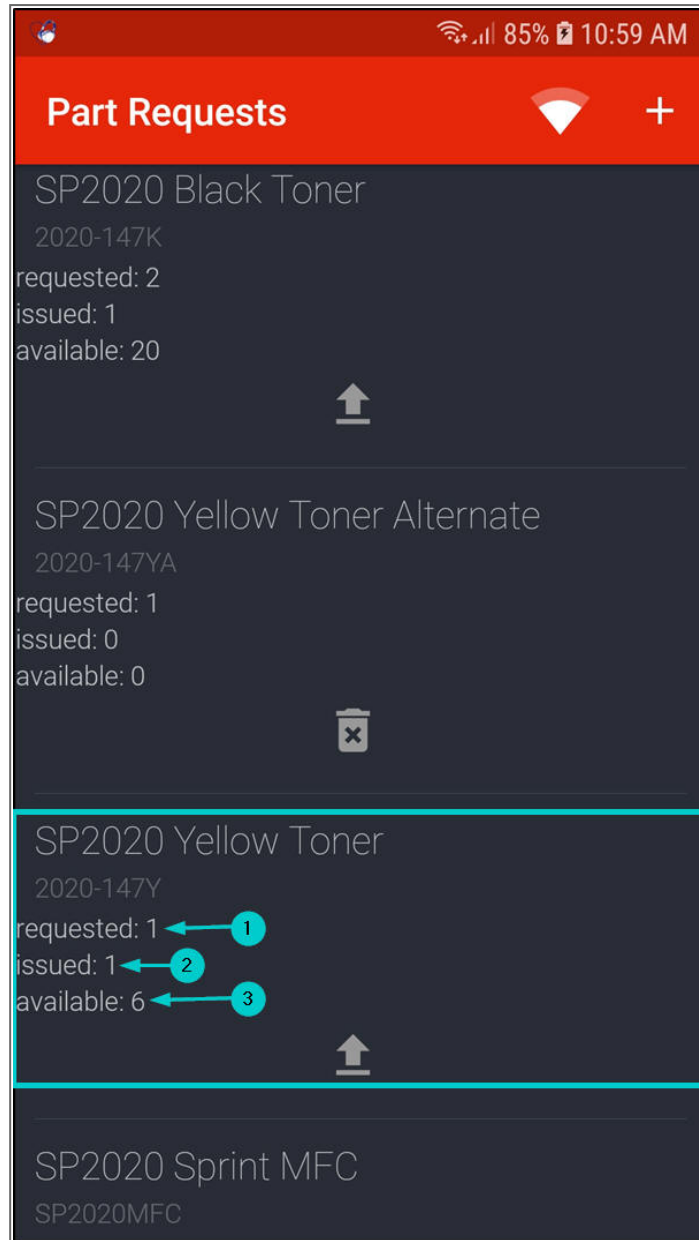
- **Note:** After actioning the part return, the replacement item has to be issued to the auto re-opened part request either from the warehouse or boot stock warehouse.

- After the replacement item has been issued, refresh your [boot stock database](#) (if stock was issued from the **boot stock warehouse**) and [Calls List](#) screen.
- The
  1. requested quantity,
  2. issued quantity and
  3. available quantity (if the stock was issued from the **boot stock warehouse**)

will change to reflect the replacement part issue.

- **Note:** After issuing the replacement part, the **available** quantity will only change if stock was issued from the **boot stock warehouse**.





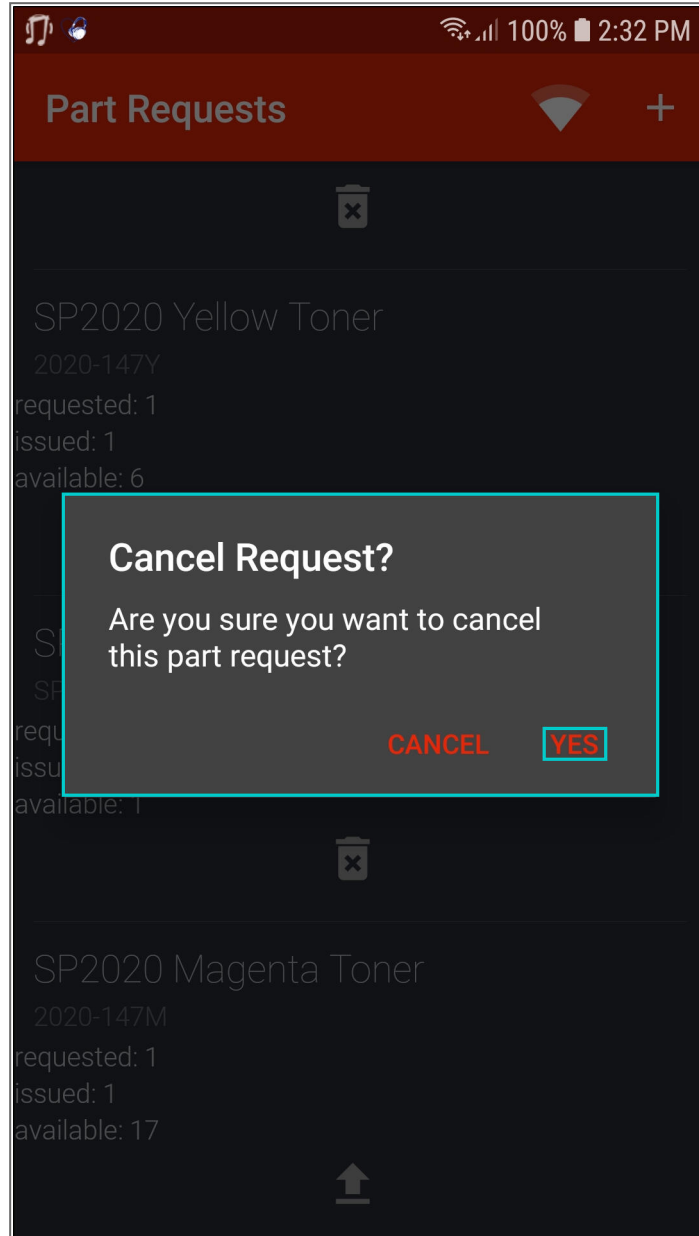
### **Delete A Part Request**

- **Tech Connect** allows you to delete a part request that has not been issued.
- In the **Part Requests** screen, click on the **Delete** icon on the part request you wish to delete.

- **Note:** If you do not see the **Delete** icon on the part request that you wish to delete, refresh the [Calls List](#) screen.



- A **Cancel Request?** message box will pop up asking you;
  - *Are you sure you want to cancel this part request?*
- Click on **Yes**.



- The part request will be removed from the **Part Requests** screen.



### ***Request Additional Stock***

- You can request additional stock from the 'main' **warehouse** or **boot stock warehouse**.
- Click on the part request you wish to request additional stock for.



- The **Stock Item** screen will be displayed.
- Follow the steps outlined in **Add a Part Request from Boot / 'Main' Warehouse or 'Main' Warehouse.**

Stock Item

Description  
SP2020 Magenta Toner

Code  
2020-147M

Request from Warehouse

-	0	+
---	---	---

Issue from Boot Stock

-	0	+
---	---	---

Update Cancel

MNU.150.006