

# INVENTORY

## PART REQUESTS - INTRODUCTION TO PART REQUESTS

### WHAT IS A PART REQUEST?

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A Part Request in Nucleus Service, is an **internal document** created as an act of 'asking' for a specified quantity of stock, from a specific **site, warehouse** and **bin**.

### HOW IS A PART REQUEST RAISED?

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Part Requests can be raised manually or automatically, depending on the origin and the process.

Part requests, specifically from the **Part Requests Listing** screen, are raised when stock is required for:

- a [sales invoice issue](#) or a [work order issue](#)
- or
- for [direct transfer](#) or [in-transit transfer](#) to another site (branch).

In most company set ups, the company store-person is monitoring this screen. This store-person will not usually have access to the history of the requested part, so will not be required to [edit](#) a request.

The store-person's main responsibility is to facilitate the [direct](#) or [in-transit](#) transfer of a requested part, raise a [requisition for a single item](#), raise a [requisition for multiple items](#) or issue [A, B](#) or [C-Class](#) requested parts.

Depending on your company configuration, part requests are either auto approved, or need to be [authorised manually](#).

### **PART REQUEST SOURCE TYPES**

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Different actions are available depending on the source of the part request, warehouse (**WHSE**), work order (**WKOR**) or, sales invoice (**SINV**), and the desired outcome.

Once stock has been issued, the part request will be removed from the **Part Requests for the Site** listing screen.

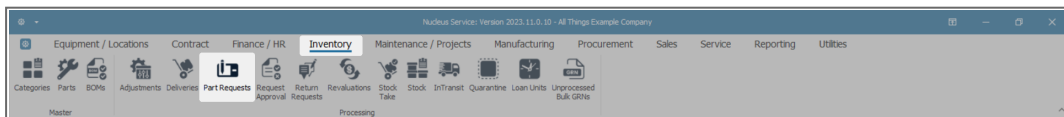
If there is stock on hand - stock can be issued, if not - stock can first be [procured](#) and then issued.

A part request can originate from:

- [A Work Order \(WKOR\)](#)
  - This is a standalone, non-client specific **Work Order**. For example, the company needs an item for an internal project; for instance, an employee requires a monitor. A work order will be created, a part request will be raised, and the procurement process will be triggered.
- [A work order on a Call \(WKOR\)](#)
  - **Parts Requests** are raised in order to notify stores that stock is required for work to be done. The stores person can then pick and issue the stock or, if necessary, raise a purchase requisition for stock to be bought. A part request may be logged directly from a **Call**.
- [A work order on a Project \(WKOR\)](#)

- A part request must be logged from the **Project** in order for stores to issue the stock required.
- [A work order on a Production Run \(WKOR\)](#)
  - The **Bill of Materials** will cover all the parts required, but in case a part has been left off the **BOM**, or a particular production requires a specific item added, then you can add a separate **part request**.
- [A work order linked to a Task Generation \(WKOR\)](#)
  - Single Task Radar generation will create a single work order not linked to a call or project.
- [A work order linked to a Short Term Contract \(WKOR\)](#)
  - This option is for creating a **Call** that can be assigned to a **Technician** in order to collect the machine(s) from the client.
- [An OTC Sales Invoice \(SINV\)](#)
  - This Over the Counter part request process is always client-related.
- [A POS Lite Invoice \(SINV\)](#)
  - The POS (Point of Sales) Invoice screen was created as a simplified Over the Counter Invoice screen.
- [An Inter-warehouse transfer request \(WHSE\)](#)
  - These inter-warehouse transfer part requests are raised as a request to transfer stock between sites and warehouses. The request **Source Type** will be **WHSE - Warehouse**.

### Ribbon Select **Inventory** > **Part Requests**



- The **Part Requests for the Site** screen will display.

## SITE AND STATE FILTERS

- The **Site filter** will be set according to your company configuration. If required, select the **Site** you wish to work in.

For a detailed handling of this topic refer to [Site Selection](#).

- The **State filter** will default to **All States** upon opening. Select the **State** of the part requests that you wish to work with.

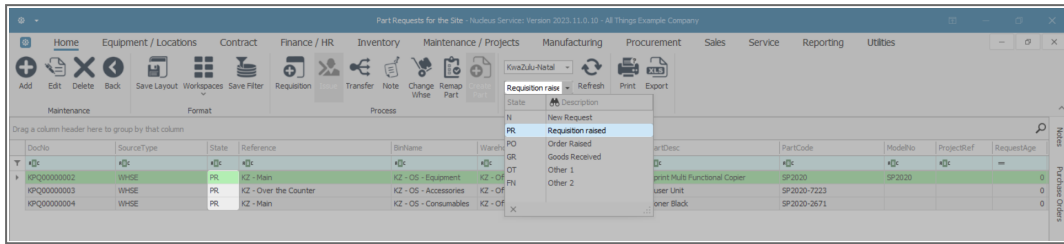
For a detailed handling of this topic refer to [State/Type Selection](#).

Date	SourceType	State	Reference	DefName	WarehouseName	PartTypeDesc	PartDesc	PartCode	ModelNo	ProjectRef	RequestAge	Notes
KPQ0000002	WHSE	PR	KZ - Main	KZ - OS - Equipment	KZ - Office Supplies	A Class Part	Sprint Multi Functional Copier	SP2020			0	
KPQ0000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	KZ - Office Supplies	B Class Part	Fuser Unit	SP2020-7223			0	
KPQ0000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	KZ - Office Supplies	C Class Part	Toner Black	SP2020-2671			0	

## PART REQUEST STATES

- Where purchasing is required, the part request **State** will update as the [procurement process](#) is followed (where stock is bought specifically against the request):
  - N**: New Request
  - PR**: Requisition Raised
  - PO**: Order Raised
  - GR**: Goods Received
  - OT**: Other 1
  - FN**: Other 2

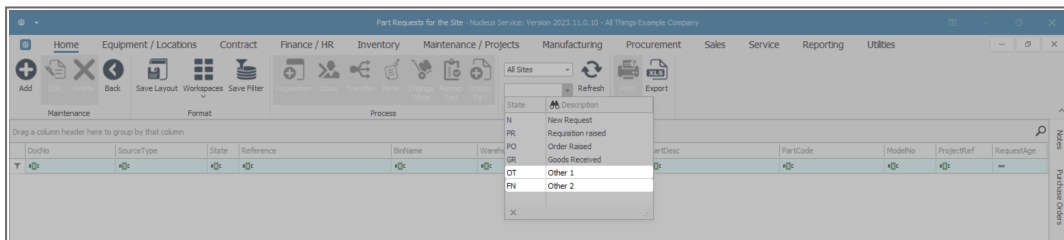
- You can filter part requests by the **Item State** to action the requests accordingly.



## OTHER STATES

- There are 2 default states: **Other 1** and **Other 2** which can be renamed based on your company's requirements.
- Additional States can also be added, if required.

For a detailed handling of this topic refer to [Static Data - Part Requests State](#).



## PART REQUEST DETAILS

- Scroll right** in the parts data grid if you cannot view all the details regarding a part request.

Amongst other relevant information, each part request row will indicate:

- Which **warehouse** and **bin** location it has been requested against.
- The **quantity** requested.
- The **current stock** of the requested item.

- The **issued stock** amount.
- If the request is linked to a **Call** or **Project**.
- Which **customer** is linked to that Call or Project.

Reference	RequestStatus	PartCode	PartDesc	PartType	ModelNo	PartTypeDesc	WarehouseName	Quantity	BinName	IssuedStock	RequiredDate	CurrentStock	Comments	Status
KZ - Main	Approved	SP2020	Spring Multi Functional Copier	A	SP2020	A Class Part	KZ - Office Supplies	2.00	KZ - OS - Equipment	0.00	03 Apr 2024	0.00		A
KZ - Over the Counter	Approved	SP2020-7	Fuser Unit	B		B Class Part	KZ - Office Supplies	2.00	KZ - OS - Accessories	0.00	03 Apr 2024	0.00		A
KZ - Main	Approved	SP2020-2	Toner Black	C		C Class Part	KZ - Office Supplies	2.00	KZ - OS - Consumables	0.00	03 Apr 2024	0.00		A

## VIEW LINKED PURCHASE ORDERS

If a part request has purchase orders raised against it, these can be viewed from this screen.

- Select the **row** of the part request where you wish to view the linked purchase orders.
- Click on the **Purchase Orders** tab.
- The **Purchase Orders** docking panel will open.
- All the purchase orders linked to the selected part request will be listed in the data grid.
- **Scroll right** to see all the information columns in this panel.

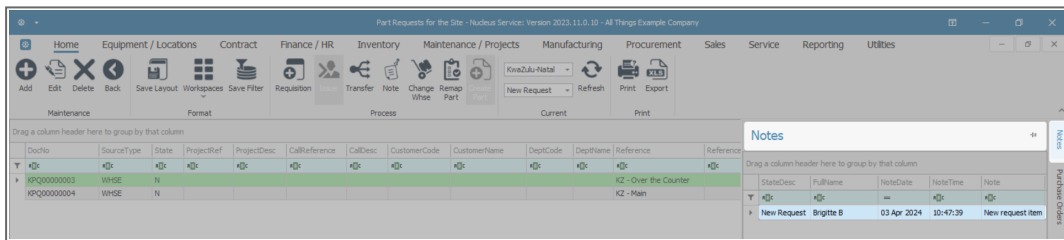
POCode	Status	SupplierCode	SupplierName	RequestorCode
KP00000003	WHSE	N		
KP00000004	WHSE	N		

## VIEW RELATED NOTES

If a part request has notes linked to it, these notes can be viewed from this screen.

- Select the **row** of the part request where you wish to view the linked **Notes**.
- Click on the **Notes** tab.
- The **Notes** docking panel will open.
- All the **Notes** linked to the selected part request will be listed in the data grid.
- The following details are recorded here:
  - **Status Description**
  - **Full Name** of the person who created the note
  - **Note Date**
  - **Note Time**
  - **Note** contents

Refer to part requests [Notes](#) for further information on how **Notes** are created.

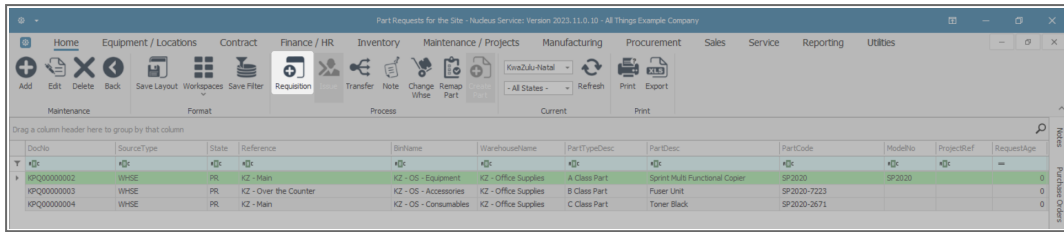


## PART REQUEST ACTION BUTTONS

### REQUISITION

The Requisition button is used to raise a requisition for a [single part request](#) or for [multiple part requests](#).

This process is used if there is no stock available and you wish to buy stock specifically for a request.



DocNo	SourceType	State	Reference	BinName	WarehouseName	PartTypeDesc	PartDesc	PartCode	ModelNo	ProjectRef	RequestAge
KPQ00000002	WHSE	PR	KZ - Main	KZ - OS - Equipment	KZ - Office Supplies	A Class Part	Sprint Multi Functional Copier	SP2020			0
KPQ00000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	KZ - Office Supplies	B Class Part	Fuser Unit	SP2020-7223			0
KPQ00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	KZ - Office Supplies	C Class Part	Toner Black	SP2020-2671			0

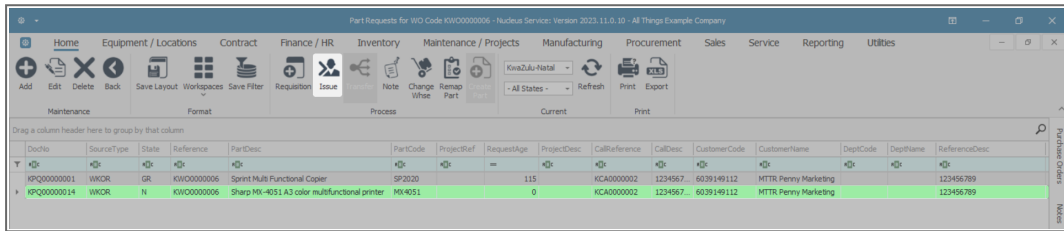
## ISSUE

The **Issue** button is used to fulfil the following processes:

- [Issue Stock linked to a Sales Invoice](#): If you do have stock on hand, you can **Issue** the stock for a part request linked to an OTC transaction.
- [Issue Stock linked to a Work Order](#): If you do have stock on hand, you can **Issue** the stock for a part request linked to a work order.
- [Issue an A or B-Class Part](#): The process for issuing an **A** or **B-Class** part is different than from a **C-Class** part. Click on the link to find out more.
- [Issue a C-Class Part](#): The process for issuing a **C-Class** part is different than from an **A** or **B-Class** part. Click on the link to find out more.
- [Issue Partial Stock Quantity A-Class Parts](#): You can issue partial quantities of requested **A** or **B-Class** parts.
- [Issue Partial Stock Quantity C-Class Parts](#): You can issue partial quantities of requested **C-Class** parts.
- [Issue an Internal Asset](#): Part requests against the 'Asset warehouse' for Internal Assets will be raised when [converting a Sales Order to the New Deal Rental](#) process. If the assets requested are currently in stock, the system will prompt you to transfer the stock to the asset warehouse, which will [convert the stock to an asset](#) and then give you the ability to issue the internal assets.



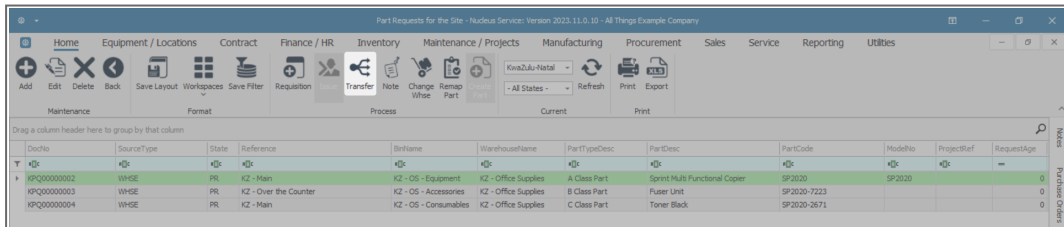
- [View and Issue the available Alternative Substitute Parts for Issue](#): If you do not have stock on hand of the original part, you can see what alternatives are available for issue. If there is stock available, you can issue the alternative substitute part instead.
  - **Note**: The final option is only available if this part is already [linked to a substitute/alternative](#) part.



## TRANSFER

If there is a request from another site (branch). You can do a [direct stock transfer](#) or an in [in-transit stock transfer](#) from this screen, depending on your company configuration.

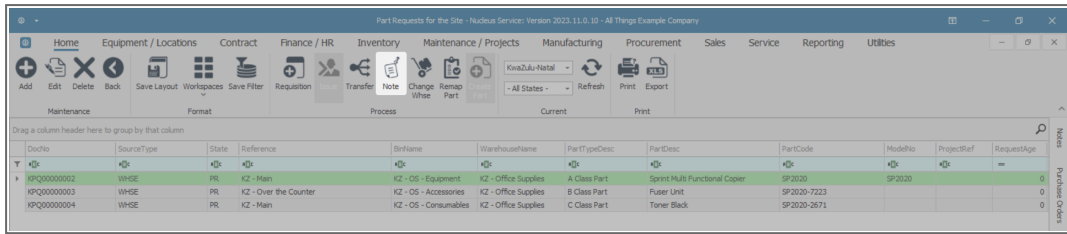
With either transfer process, you can [edit the transfer quantity](#) or [delete an item from the transfer request](#).



## ADD NOTE

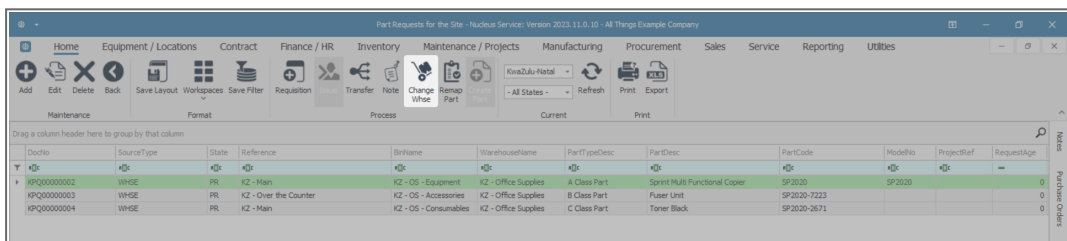
You can add a **Note** to a selected part request which can subsequently change the request **state**.

Refer to part requests [Notes](#) for further information.



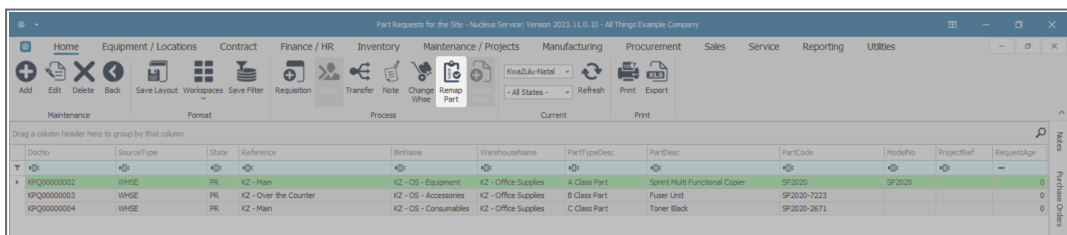
## CHANGE WAREHOUSE

Use the [Change Warehouse](#) button if the part was requested against the incorrect warehouse or if the requested warehouse does not have stock of the part.



## REMAP PART

If a part request was raised for an incorrect part, the store-person can [remap](#) the requested part to the correct part.



## CREATE PART

The [Create Part](#) functionality is no longer available in Nucleus Service.

This feature was essentially a precursor to creating a new part code.

It allowed the person logging the part request to request a new part which was not yet registered in the Part Listing screen. The store-person, who received the request for this new part, would then log the full details of the new part in the Part listing screen and stock of this new part would be requisitioned.

DocNo	SourceType	State	Reference	BinName	WarehouseName	PartTypeDesc	PartDesc	PartCode	ModelNo	ProjectRef	RequestAge	Purchase Order
KPQ00000002	WHSE	PR	KZ - Main	KZ - OS - Equipment	KZ - Office Supplies	A Class Part	Sprint Multi Functional Copier	SP2020	SP2020		0	0
KPQ00000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	KZ - Office Supplies	B Class Part	Fuser Unit	SP2020-7223			0	0
KPQ00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	KZ - Office Supplies	C Class Part	Toner Black	SP2020-2671			0	0

## PRINT PICKING SLIP

A **Picking Slip** can be used to pick the stock from the warehouse, before it is issued.

The picking slip options may differ depending on the origin of the part request:

- [Request origin - sales invoice](#)
- [Request origin - work order](#)
- [Request origin - project work order](#)
- [Request origin - warehouse](#)

DocNo	SourceType	State	Reference	BinName	WarehouseName	PartTypeDesc	PartDesc	PartCode	ModelNo	ProjectRef	RequestAge	Purchase Order
KPQ00000002	WHSE	PR	KZ - Main	KZ - OS - Equipment	KZ - Office Supplies	A Class Part	Sprint Multi Functional Copier	SP2020	SP2020		0	0
KPQ00000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	KZ - Office Supplies	B Class Part	Fuser Unit	SP2020-7223			0	0
KPQ00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	KZ - Office Supplies	C Class Part	Toner Black	SP2020-2671			0	0

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