

INVENTORY

PART REQUESTS - ADD

A <u>new</u> part request raised from the **Part Requests for Part []** screen can only be a warehouse to warehouse (interwarehouse) **transfer** part request.

These interwarehouse transfer part requests are raised as a request to <u>trans</u>fer stock between sites and warehouses.

The request Source Type will be WHSE - Warehouse.

See Part Requests - Introduction to Part Requests for more information about the different "Part Request Source Types" on page 2.

Ribbon Select Inventory > Part Requests



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

Note: Refer to <u>State/Type Selections</u> for more information.

• The State filter will default to '**All States**' upon opening. You do not need to select a specific State to proceed with the add process.

Note: Refer to <u>State/Type Selections</u> for more information.

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- The list of **part requests** displayed will be dependent on the **Site** and **State** selected.
- Click on Add.

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KPQ0000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	2.00	B Class Part				
KPQ00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	Toner Black	SP2020-2671	KZ - Office Supplies	2.00	C Class Part				
KPQ00000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part		M2540		
KPQ00000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part		M2540		
KPQ00000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	1.00	C Class Part				
KPQ00000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	1.00	B Class Part				
KPQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	3.00	A Class Part		ECOSYS M2635dw		
KPQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	1.00	A Class Part		ECOSYS M2635dw		
KPQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part		MX4051		
KPQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part		MX4051		
KPQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	2.00	C Class Part				
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray	SP2020-1992	KZ - Main	2.00	B Class Part				
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	4.00	C Class Part				
	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Staple Unit	SP2020-3671	MTR. Balance	1.00	B Class Part				

- The Add new Part Request screen will open.
- Fill in the required part request **header** details:
 - **Type**: Click on the **drop-down arrow** and select the request type from the list.
 - As you are only able to do a warehouse to warehouse part request directly from the Part Requests listing screen, the <u>only</u> option will be PRTR - Standard Part Request.
 - **Destination Type**: Click on the **drop-down arrow** and select the destination type from the list.
 - As this is a **warehouse** to **warehouse** part request - the only option will 'Warehouse'.
 - **Destination Warehouse**: Click on the **search** button and select from the pop up screen, the final destination warehouse which is to **receive** the requested items.
 - Assigned To: This will auto populate with the name of the employee currently logged on to the system. Click



on the **drop-down arrow** and select an alternative person responsible for the part request, if required.

- Source Warehouse: Click on the search button and select the source warehouse where the requested items are <u>currently stored</u> and will be moved from.
- **Request Date**: These fields will auto populate with the current date and time.
 - Date: Either type in or click on the dropdown arrow and use the calendar function to select an <u>alternative</u> date, if required.
 - Time: Either type in or click on the directional arrows to select an <u>alternative</u> time, if required.

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- Once the request header details have been entered, move down to the **Parts** data grid.
- Click in the **Part Code** field to reveal an **ellipsis** button. Click on this button.

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- The Select a Part screen will pop up.
- Select the **row** of the part you wish to request.
- Click on Ok.

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The **Parts** data grid will populate with the following details of the requested item:

- The first three fields are based on what is set up on the <u>Part Defin</u>ition.
 - **Part Type**: This will populate with the part **type** linked to the part code selected in the previous step.
 - **Part Code**: This will populate with the part **code** selected in the previous step.
 - **Part Desc**: This will populate with the part type **description** linked to the part code.
- The next two fields will populate according to the selection made in the **Source Warehouse** field.
 - Warehouse Name: This will populate with the name of the Source Warehouse.
 - If you wish to change this, go back to the Source Warehouse field and select the alternative warehouse from the 'Select....'



pop up screen. The **Warehouse Name** field will update with the new choice.

- **Bin Name**: This will populate with the name of the bin linked to the Source Warehouse.
 - If there is <u>more than one</u> bin linked to the warehouse, you can select an alternative bin. Click in the field to reveal an **ellipsis** button. Click on this button to display the 'Select...' pop up screen. Select the alternative bin from the list.
- Quantity: Click in this field and either type in or use the directional arrows to select the amount of the item requested.

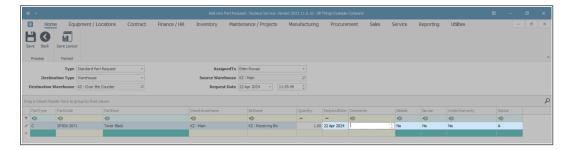
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Fill in the details for the following fields, as required:

- **Required Date**: This will populate with the date that the part request is created.
 - This can be changed. Either type in the alternative date or click in the field to display a drop-down arrow.
 Click on the arrow to display the calendar function.
 Use the calendar to select an alternative date.
- **Comments: Type directly in this text box**, any comment regarding this part request, if required.
- The following fields are uneditable:
 - **Billable**: As this is an interwarehouse part request, it is <u>not</u> billable and this field will be inactive (greyed out).



- Is Loan: As this is an interwarehouse part request, it is not a loan item and this field will be inactive (greyed out).
- Under Warranty: As this is an interwarehouse part request, it is <u>not</u> under warranty and this field will be inactive (greyed out).
- **Status**: This field will populate with **A Active** and is uneditable.



- You can follow the process to add <u>multiple</u> lines to the part request, if required.
- **Tab** along the row or press **Enter** on your keyboard to create a new row.
 - In this example, an **A**-**class** part has been added to the data grid.
- When you have finished adding the part request details, **Tab** along the row, or press **Enter** until a <u>new row</u> is created.

Note: If a new row is <u>not</u> created, an <u>error message</u> will appear on the screen and you will not be able to **save** the part request information.

• Click on Save.



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- A Part Request Processing message box will pop up informing:
 Part Request No. [] saved successfully.
- Take note of the new **Part Request No.** to enable you to find it.
- Click on **OK**.

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- You will return to the **Part Request for the Site** listing screen.
- Use the <u>Auto Filter Row</u> or scroll down the list until you find the part request number.
- In this example, you will note that there are **2** rows created for the same part request. This is because **2** different parts were requested.



						Part Requests for the Site - Nucleus Service:								
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KE	P000000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	Toner Black	SP2020-2671	KZ - Office Supplies	2.00	C Class Part				
KF	PQ00000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part		M2540		
KE	PQ00000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part		M2540		
KF	PQ00000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	1.00	C Class Part				
KF	PQ00000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	1.00	B Class Part				
KF	PQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2635dw	KZ - Main	3.00	A Class Part		ECOSYS M2635dw		
KF	PQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2635dw	KZ - Main	1.00	A Class Part		ECOSYS M2635dw		
KF	PQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part		MX4051		
KF	PQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part		MX4051		
KF	PQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	2.00	C Class Part				
KF	PQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray	SP2020-1992	KZ - Main	2.00	B Class Part				
KF	PQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	4.00	C Class Part				
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- Scroll right to view all the details including Current Stock.
- You can now follow the process to <u>raise a requisition</u> to fulfil this part request.

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	2.00 B Class Part						03 Apr 2024	0.00	Approved	В	0.00			
	2.00 C Class Part						03 Apr 2024	0.00	Approved	С	0.00			
	1.00 A Class Part		M2540				04 Apr 2024	0.00	Approved	A	8.00			
	1.00 A Class Part		M2540				04 Apr 2024	0.00	Approved	A	8.00			
	1.00 C Class Part						04 Apr 2024	0.00	Approved	С	305.00			
	1.00 B Class Part						04 Apr 2024	0.00	Approved	В	0.00			
	3.00 A Class Part		ECOSYS M2635dw				04 Apr 2024	0.00	Approved	Α	4.00			
	1.00 A Class Part		ECOSYS M2635dw				04 Apr 2024	0.00	Approved	Α	4.00			
	1.00 A Class Part		MX4051				05 Apr 2024	0.00	Approved	A	0.00			
	1.00 A Class Part		MX4051				05 Apr 2024	0.00	Approved	A	0.00			
	2.00 C Class Part						18 Apr 2024	0.00	Approved	С	300.00	New Request Item		
	2.00 B Class Part						19 Apr 2024	0.00	Approved	В	20.00			
	4.00 C Class Part						19 Apr 2024	0.00	Approved	С	305.00			
	1.00 B Class Part						19 Apr 2024		Approved	В	50.00			
	1.00 A Class Part		SP 500				22 Apr 2024		Approved	A	50.00			
	1.00 C Class Part						22 Apr 2024	0.00	Approved	С	300.00	New part request raised		

Related Topics

Part Requests - Edit (View) Part Requests - Delete

MNU.032.002