

INVENTORY

PART REQUESTS - NOTE

It may be necessary to add a note to a part request, which could also involve manually changing the part request **state**. For example the request could be partially issued, with the remaining stock requested on back-order. This would need to be **noted** and the request state manually changed to '**Requisition raised**'. This can be done using the **Note** button in the ribbon toolbar.

This can be done via the **Part Requests from the Site** screen or the [Part Request for the Part \[\]](#) screen.

For this process, you will be navigating from the **Part Requests from the Site** screen.

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 [Site Selection](#) for more information.

- The **Status** field will auto-populate with **All States**. This does not need to be changed in order for you to add a Note. However, you can click on the drop-down arrow and select a specific part request state from the list, if required.

SELECT PART REQUEST

- Select the **row** of the part request that you wish to **add** a note to.
- Note that the part request is currently in the **N-New** state.
- Click on the **Note** ribbon toolbar button.

DocNo	SourceType	State	Reference	PartDesc	PartCode	WarehouseName	BinName	Quantity	RequireDate	PartTypeDesc	CurrentStock	ModelNo	CustomerName
KPQ0000005	WHSE	N	K2 - Main	Copier Multi Function	M2540	K2 - Office Supplies	K2 - OS - Electronics	1.00	04 Apr 2024	A Class Part	8.00	M2540	
KPQ0000006	WHSE	N	K2 - Main	Copier Multi Function	M2540	K2 - Office Supplies	K2 - OS - Electronics	1.00	04 Apr 2024	A Class Part	8.00	M2540	
KPQ0000007	WHSE	N	K2 - Over the Counter	Toner Black	SP2020-2671	K2 - Main	K2 - Receiving Bin	1.00	04 Apr 2024	C Class Part	303.00		
KPQ0000009	WHSE	N	K2 - Main	Fuser Unit	SP2020-7223	K2 - Office Supplies	K2 - OS - Accessories	1.00	04 Apr 2024	B Class Part	0.00		
KPQ0000012	WHSE	N	K2 - Over the Counter	Sharp MX-4051 A3 color multifunctional printer	M4051	K2 - Electronics	K2 - EL - Equipment	1.00	05 Apr 2024	A Class Part	0.00	M4051	
KPQ0000013	WHSE	N	K2 - Arts and Craft	Sharp MX-4051 A3 color multifunctional printer	M4051	K2 - Electronics	K2 - EL - Equipment	1.00	05 Apr 2024	A Class Part	0.00	M4051	
KPQ0000017	WHSE	N	K2 - Over the Counter	Toner Black	SP500-2671	K2 - Main	K2 - Receiving Bin	2.00	18 Apr 2024	C Class Part	300.00		
KPQ0000018	WHSE	N	K2 - Home and Garden	Paper Tray	SP2020-1992	K2 - Main	K2 - Receiving Bin	2.00	19 Apr 2024	B Class Part	20.00		
KPQ0000018	WHSE	N	K2 - Home and Garden	Toner Black	SP2020-2671	K2 - Main	K2 - Receiving Bin	4.00	19 Apr 2024	C Class Part	303.00		
KPQ0000019	WHSE	N	K2 - Over the Counter	Staple Unit	SP2020-3671	K2 - Main	K2 - Receiving Bin	1.00	19 Apr 2024	B Class Part	50.00		
KPQ0000021	WHSE	N	K2 - Over the Counter	Sprint Multi Functional Copier	SP300	K2 - Main	K2 - Receiving Bin	1.00	22 Apr 2024	A Class Part	80.00	SP300	
KPQ0000021	WHSE	N	K2 - Over the Counter	Toner Black	SP500-2671	K2 - Main	K2 - Receiving Bin	1.00	22 Apr 2024	C Class Part	300.00		
KPQ0000022	WHSE	N	K2 - Over the Counter	Toner Yellow	M2540-003	K2 - Main	K2 - Receiving Bin	1.00	22 Apr 2024	C Class Part	0.00	M2540-003	
KPQ0000023	WHSE	N	K2 - Over the Counter	Paper Tray	SP2020-1992	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	B Class Part	0.00		
KPQ0000023	WHSE	N	K2 - Over the Counter	Staple Unit	SP2020-3671	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	B Class Part	0.00		
KPQ0000023	WHSE	N	K2 - Over the Counter	Fuser Unit	SP2020-7223	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	B Class Part	0.00		
KPQ0000023	WHSE	N	K2 - Over the Counter	High Yield Reset Lever Gear	SP2020-6143	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	C Class Part	0.00		
KPQ0000023	WHSE	N	K2 - Over the Counter	Maintenance Kit	SP2020-7652	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	C Class Part	0.00		
KPQ0000023	WHSE	N	K2 - Over the Counter	Toner Black	SP2020-2671	K2 - Electronics	K2 - EL - Electronics	1.00	22 Apr 2024	C Class Part	0.00		
KPQ0000027	SNV	N	K2D0000003	Sprint Multi Functional Copier	SP300	K2 - Main	K2 - Receiving Bin	3.00	26 Apr 2024	A Class Part	53.00	SP300	MIRA Buhill CC
KPQ0000028	SNV	N	K2D0000002	Wiper Blade	SP2020-5598	IN - Main	IN - Receiving Bin	2.00	26 Apr 2024	C Class Part	0.00		Banker Wraith Security

- A **Procurement - Request Note** message box will pop up with the following prompt:
 - Are you sure you want to add a note against this part request item?
- Click on **Yes**.

Procurement - Request Note

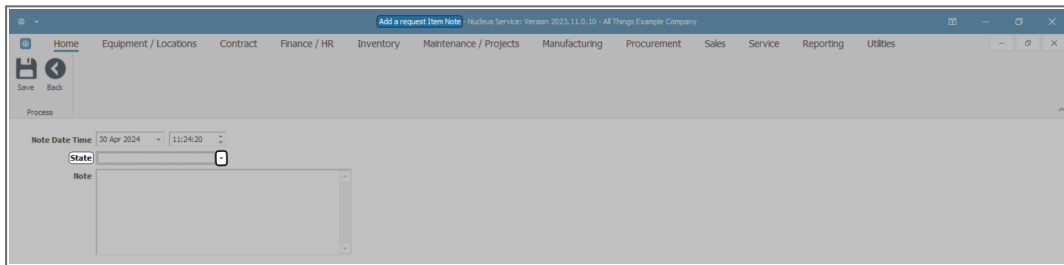
Are you sure you want to add a note against this part request item?

Yes No

- The **Add a request Item Note** screen will be displayed.

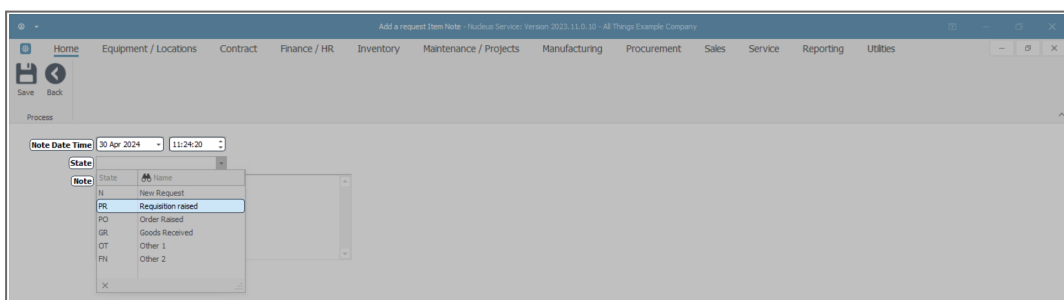
ADD NOTE DETAILS

- **Note Date Time:** These fields will auto populate with the current date and time.
 - You can either **type in** or click on the drop-down arrow and use the **calendar function** to select an alternative **date** if required.
 - You can either **type in** or use the **arrow indicators** to select an alternative **time** if required.
- **State:** Click on the **drop-down arrow** in this field.



The screenshot shows the 'Add a request Item Note' screen. The 'Note Date Time' field is populated with '30 Apr 2024' and '11:24:20'. The 'State' field is currently empty, and the 'Note' field is also empty.

- The **State menu** will display.
- Select the state that **corresponds** with the note that you are creating for the part request.
- In this example, **Requisition Raised** is selected.

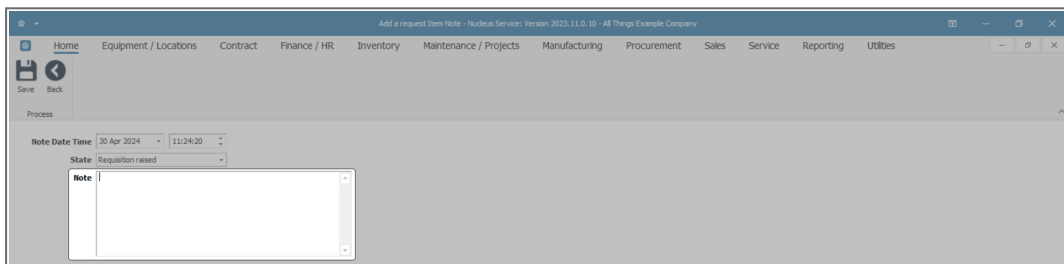


The screenshot shows the 'Add a request Item Note' screen with the 'State' menu open. The menu options are: 'N: Item Request', 'PR: Requisition raised', 'PO: Order Raised', 'GR: Goods Received', 'OT: Other 1', and 'FN: Other 2'. The 'PR: Requisition raised' option is selected.

- For example, there may be several part requests raised for this part. A large **part requisition** may have been raised by the

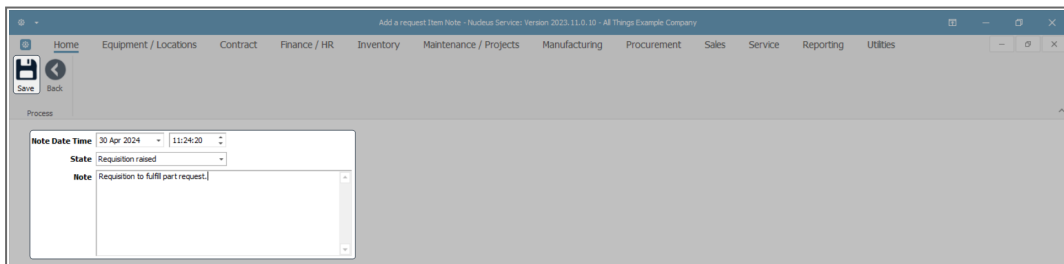
company to fulfil **all** these part requests, rather than creating a request for **each individual** request.

- It would be prudent to note on the individual part requests, such as this one, that a requisition has been raised. Therefore the person monitoring the part request listing screen can see that instead of raising a requisition against this part, it would be judicious to wait for the large requisition of goods to be received and then the requested parts could be issued.
- In the **Note** field, type in a **reason** for the state change.



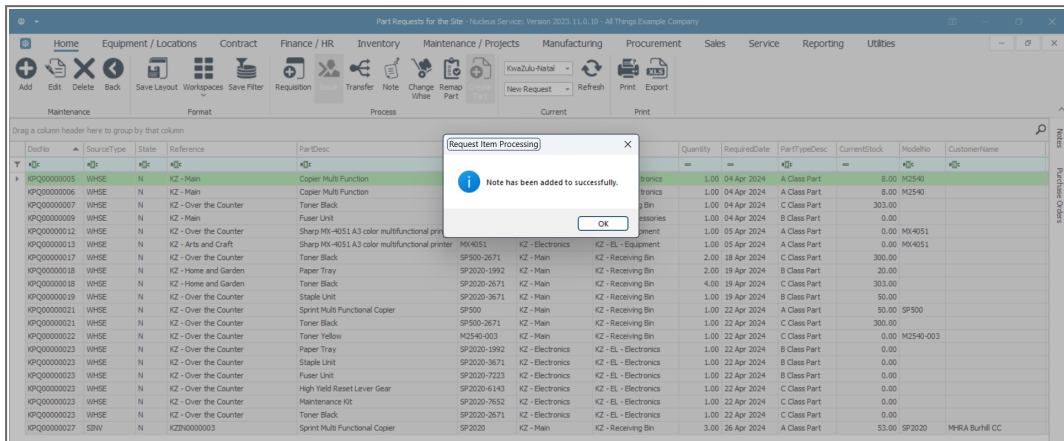
SAVE NOTE

- When you have finished editing the fields in this screen, click on **Save**.



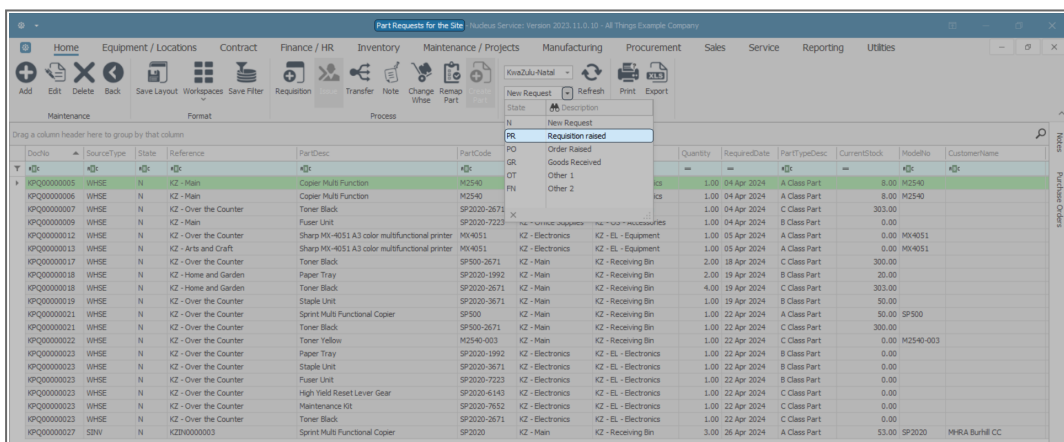
- You will return to the **Part Requests for the Site** screen.
- A **Request Item Processing** message box will pop up advising the following:

- Note has been added to successfully.
- Click on **OK**.



VIEW UPDATED PART REQUEST STATUS

- Click on the **drop-down arrow** in the **Status** field.
- Select the **state** that you changed the record to.
- In this example, the state was changed to '**Requisition raised**'.



- The screen will now only display the part requests in the selected '**Requisition raised**' state.
- You can now view the manually changed part request in this screen.

DocNo	SourceType	State	Reference	PartDesc	PartCode	WarehouseName	BinName	Quantity	RequiredDate	PartTypeDesc	CurrentStock	ModelNo	CustomerName
KPQ0000003	WHSE	PR	K2 - Over the Counter	Fuser Unit	SP2020-7223	K2 - Office Supplies	K2 - OS - Accessories	2.00	03 Apr 2024	B Class Part	0.00		
KPQ0000004	WHSE	PR	K2 - Main	Toner Black	SP2020-2671	K2 - Office Supplies	K2 - OS - Consumables	2.00	03 Apr 2024	C Class Part	0.00		
KPQ0000010	WHSE	PR	K2 - Over the Counter	Kyocera Digital Printer	EC0515 M263	K2 - Main	K2 - Receiving Bin	3.00	04 Apr 2024	A Class Part	4.00	EC0515 M26355dw	
KPQ0000011	WHSE	PR	K2 - Over the Counter	Kyocera Digital Printer	EC0515 M263	K2 - Main	K2 - Receiving Bin	1.00	04 Apr 2024	A Class Part	4.00	EC0515 M26355dw	
KPQ0000022	WHSE	PR	K2 - Over the Counter	SP500 Colour Copier	SP500-001	K2 - Main	K2 - Receiving Bin	1.00	22 Apr 2024	A Class Part	0.00	SP500-001	
KPQ0000028	SNV	PR	K2IN000002	Wiper Blade	SP2020-5598	IN - Main	IN - Receiving Bin	2.00	26 Apr 2024	C Class Part	0.00		Barrier Wraight Security
KPQ0000030	SNV	PR	K2IN000004	Sprint Multi Functional Copier	SP2020	K2 - Main	K2 - Receiving Bin	3.00	29 Apr 2024	A Class Part	53.00	SP2020	Carne Ocsoft CC

VIEW ADDED NOTE

- Click on the **Notes** tab on the right side of the screen.

StateDesc	FullName	NoteDate	NoteTime	Note
Requestion raised	Brigitte B	30 Apr 2024	11:24:30	Requestion to fulfil part request.

- The **Notes** panel will expand.
- The following note **details** have been recorded:
 - The **State Description**.
 - The **name of the employee** logged on to the system who added the note.
 - The **Date** and **Time** the note was logged.
 - The **reason** why the note was added.

StateDesc	FullName	NoteDate	NoteTime	Note
Requestion raised	Brigitte B	30 Apr 2024	11:24:30	Requestion to fulfil part request.

Related Topics

- [Part Requests - Note](#)
- [Part Requests - Edit \(View\)](#)
- [Part Requests - Delete](#)
- [Part Requests - Requisition - Single Item](#)
- [Part Requests - Requisition - Multiple Items](#)
- [Part Requests - Issue - Stock Linked to a Sales Invoice \(SINV\)](#)
- [Part Requests - Issue - Stock Linked to a Work Order \(WKOR\)](#)
- [Part Requests - Issue - A or B-class Parts](#)
- [Part Requests - Issue - C-class Parts](#)
- [Part Requests - Issue - Partial Quantity of A-class Parts](#)
- [Part Requests - Issue - Partial Quantity of C-Class Parts](#)
- [Part Requests - View and Issue Alternative/Substitute Parts](#)
- [Part Requests - Issue - Internal Assets](#)
- [Part Requests - Transfer - Direct](#)
- [Part Requests - Transfer - In-transit](#)
- [Part Requests - Note](#)
- [Part Requests - Change Warehouse](#)
- [Part Requests - Remap Part](#)
- [Part Requests - Create Part](#)
- [Part Requests - Print \(Picking Slip\) for Part Request originating from a Sales Invoice \(SINV\)](#)

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