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**', for example, the requisitions (and subsequent purchase orders) that need to be raised in order to fulfill the part requests that are on the system.

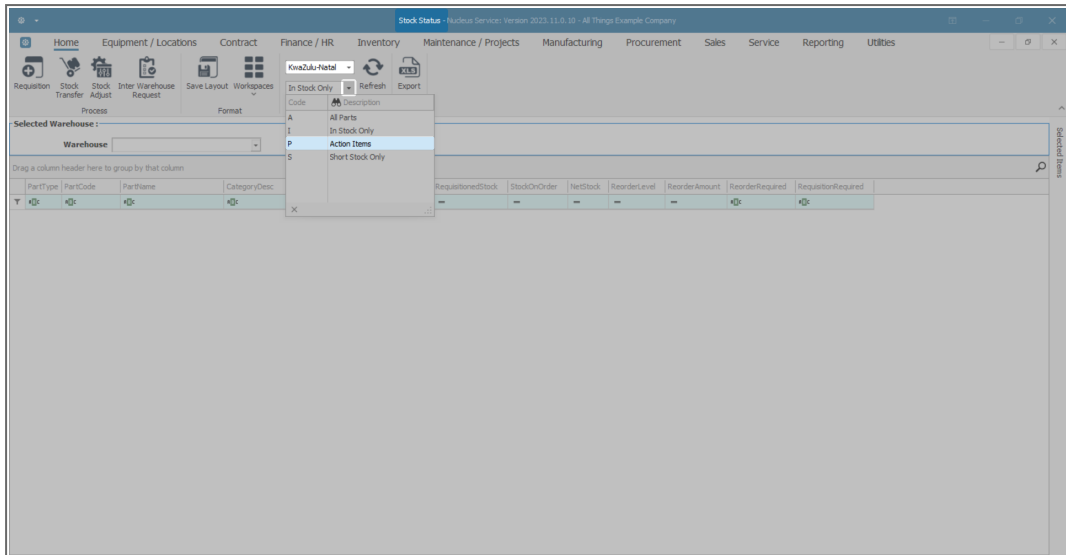A requisition can be raised directly from this **Stock Status** screen.

Ribbon Select **Inventory > Stock**

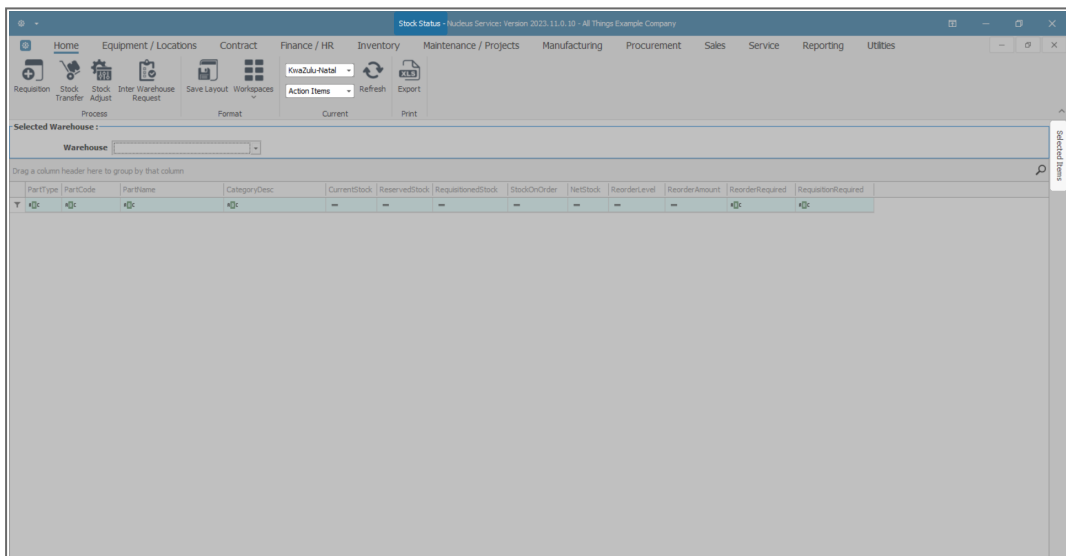- The **Stock Status** screen will be displayed.

SELECT SITE AND STATUS

- Select the **Site**.
    - In this image **KwaZulu-Natal** has been selected.
- Select the **status** - this should be set to **Action Items**.
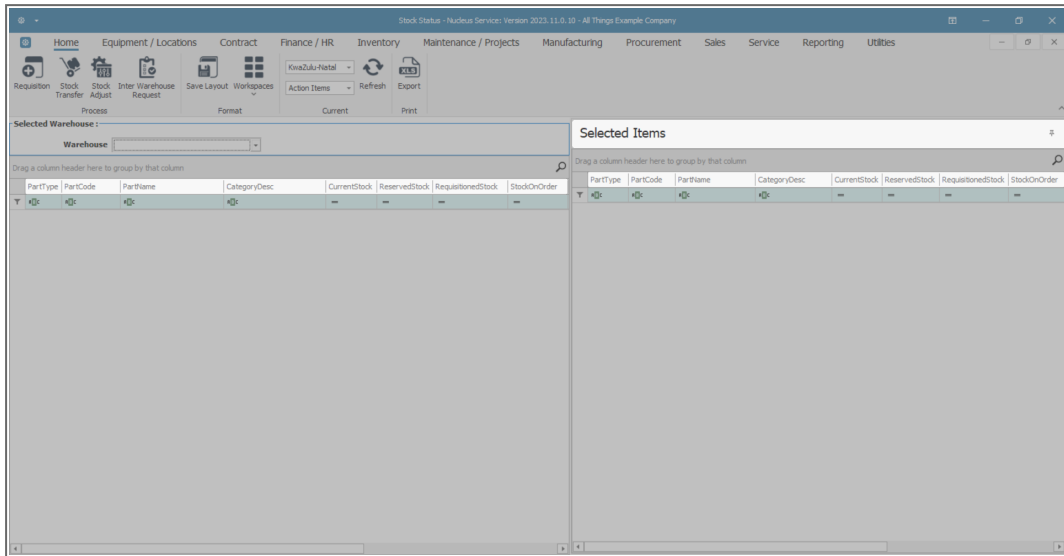
SELECTED ITEMS PANEL

- Click on the **Selected Items** tab.

- The **Selected Items** panel will be **expanded**.
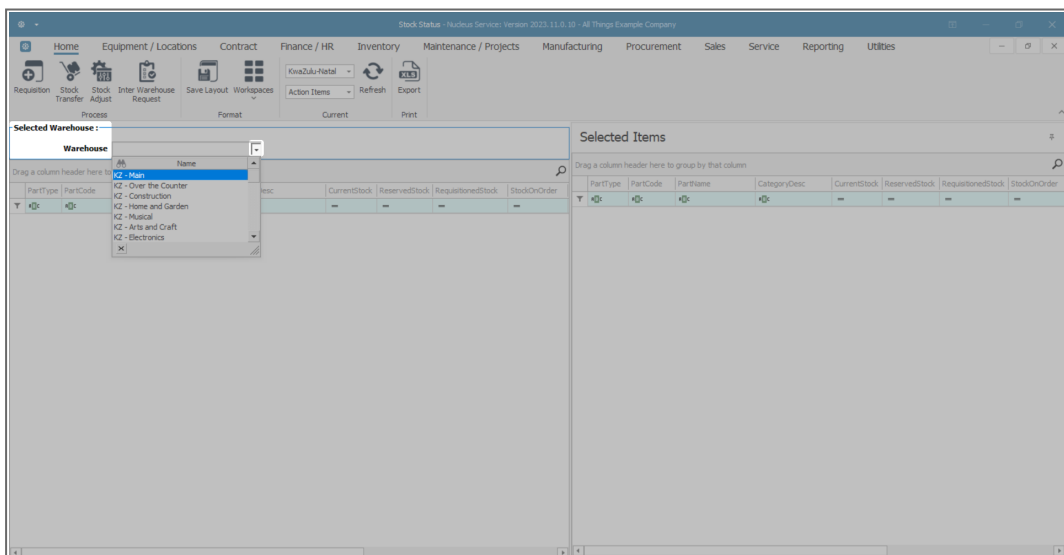- **Dock** this panel to make it easier to work in.

Refer to Docking Panels and Save Layout for detailed handling on these topics.

Note: You will see that this **Selected Items** panel contains exactly the same column details as the **Selected Warehouse** panel.

SELECT THE WAREHOUSE

- Click on the drop-down arrow in the **Warehouse** field and select the warehouse.
  - In this image, **KZN Main** has been selected.

- 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.
- **Adjust** the screen or **Scroll right** if you cannot view the **Requisition Required** column.
- You will note that the **Requisition Required** column has filtered for all the **'Yes'** Requisitions Required.
- The **Process** action buttons are greyed out as they cannot be used yet.

ACTION PART REQUEST

- Select an **item line** in the **Selected Warehouse** frame.
- **Drag** and **drop** this item line into the **Selected Items** panel.

- As the item line is **dropped** in the **Selected Items** frame.
- The **Process** action buttons will become **'live'** and you will now be able one of the following:

CREATE A REQUISITION

- Create a Requisition

TRANSFER STOCK

- Transfer Stock

ADJUST STOCK

- Adjust Stock

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**.

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