

# 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.

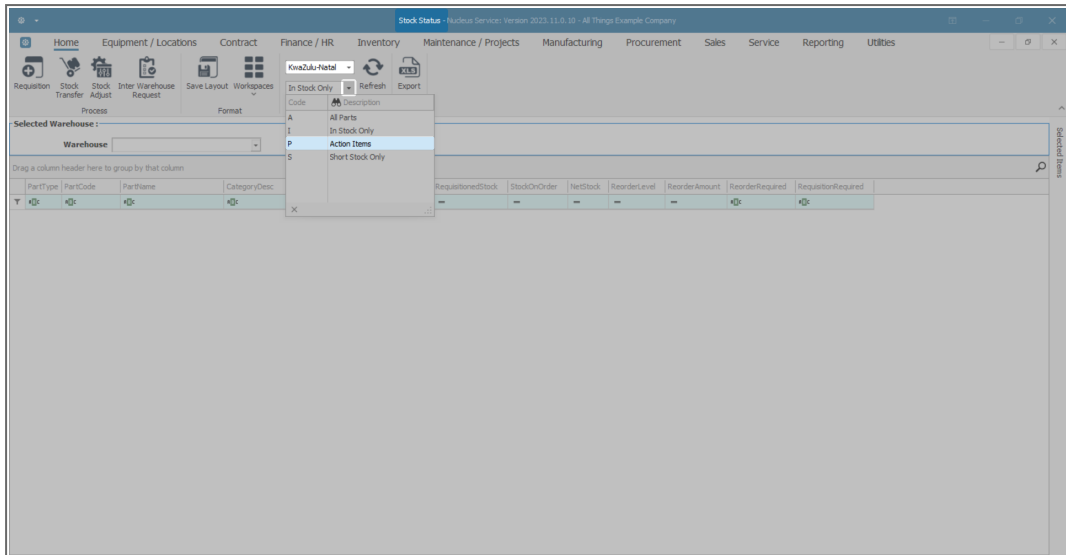
### Ribbon Select Inventory > Stock



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

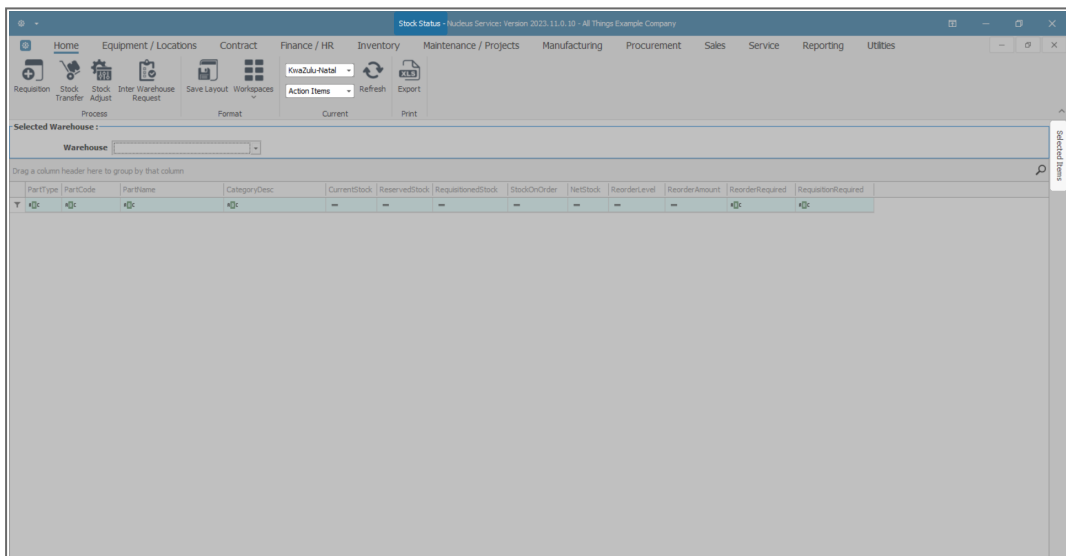
## SELECT SITE AND STATUS

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



## SELECTED ITEMS PANEL

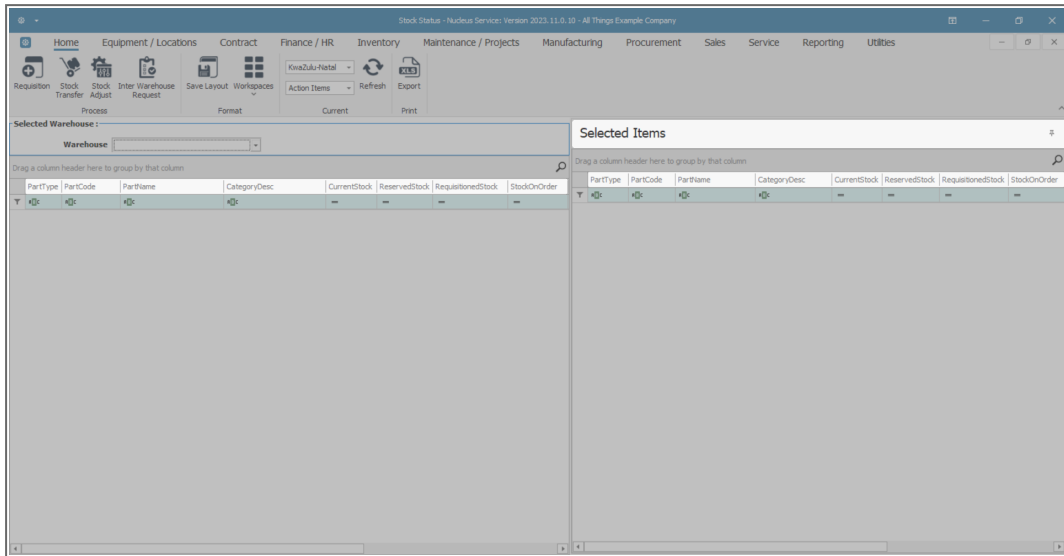
- Click on the **Selected Items** tab.



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

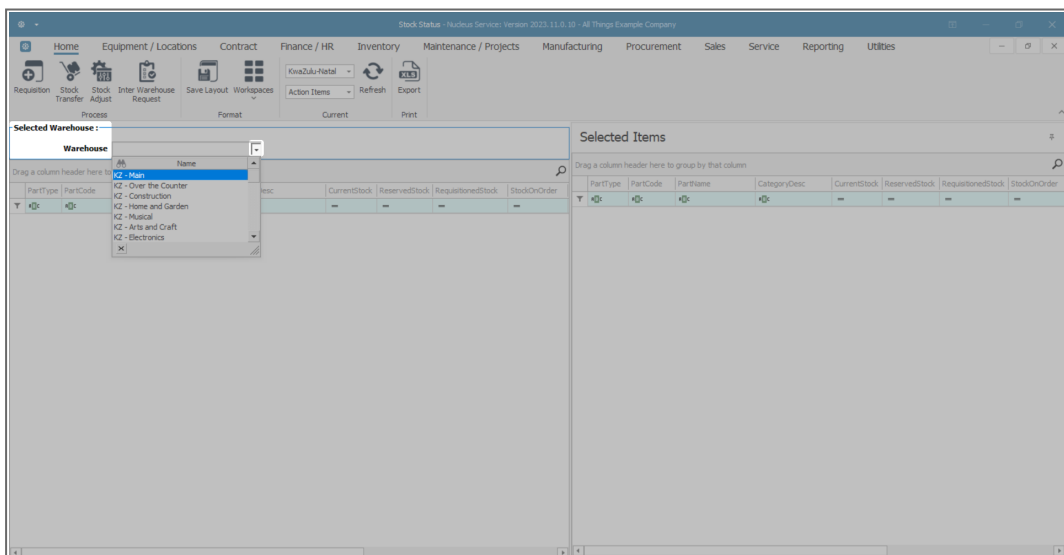
Refer to [Docking Panels](#) and [Save Layout](#) for detailed handling on these topics.

**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.

The screenshot shows the 'Inventory' module in the CO3 system. The 'Selected Warehouse' is set to 'Z - Man'. The main table displays a list of parts, all of which are 'Fuser Heat Roller' units. The 'RequisitionRequired' column is filtered to show only 'Yes' values. The 'Process' buttons are greyed out.

PartType	PartCode	PartName	CategoryDesc	CurrentStock	ReservedStock	RequisitionedStock	StockOnOrder	NetStock	ReorderLevel	ReorderAmount	ReorderRequired	RequisitionRequired
C	SP500-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	A990-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	17550-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	A963-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	19140-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	A3007-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	M500P-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	C9800-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	K3500-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	Y13721-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	A300-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	H147SP-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	F9314-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	196200-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	SP1470-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	CT3690-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	D86547-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	E0259-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	PW8520-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	GL6547-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	EC736-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	F8858-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes
C	Q4964-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00	0.00	40.00	50.00	No	Yes

## ACTION PART REQUEST

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

The screenshot shows the 'Action Items' window in the CO3 system. The main table displays a list of stock items with columns for PartType, PartCode, PartName, Category/Desc, Current Stock, Reserved Stock, Requisition Stock, Stock On Order, Test Stock, Reorder Level, Reorder Amount, Reorder Required, and Requisition Required. The item 'SP2020 Sprint Multi Functional Copier' is highlighted in green. On the right, the 'Selected Items' panel is visible, showing a list of the selected item's details.

- 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**.



# Action Items

Stock Status - Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Requestion | Stock Transfer | Stock Adjust | Inter Warehouse Request | Save Layout | Workspaces | KivaZulu Retail | Action Items | Refresh | Export | Format | Current | Print

Selected Warehouse: Warehouse (KZ - Main)

Drag a column header here to group by that column

PartType	PartCode	PartName	CategoryDesc	CurrentStock	ReservedStock	RequisitionedStock	StockOnOrder
A	SP2020	Sprint Multi Functional Copier	Retail - Office Supplies - Equipment	40.00	0.00	0.00	0.00
B	SP2020-7223	Fuser Unit	Retail - Office Supplies - Accessories	36.00	0.00	0.00	0.00
C	SP2020-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	SP500-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	A990-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	T7550-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	A9653-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	M1405-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	A500T-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	M500P-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	C9000-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	K3000-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	Y13721-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	A300-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	H1473P-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	F9114-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	MF6000-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	SP1470-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	CT3690-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	D6547-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	S21208-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	F18520-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00
C	Q6547-8649	Fuser Heat Roller	Retail - Office Supplies - Spares	0.00	0.00	0.00	0.00

Selected Items

Drag a column header here to group by that column

PartType	PartCode	PartName	CategoryDesc	CurrentStock	ReservedStock	RequisitionedStock	StockOnOrder
A	SP2020	Sprint Multi Functional Copier	Retail - Office Supplies - Equipment	40.00	0.00	0.00	0.00

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