

INVENTORY

PART REQUESTS - INTRODUCTION TO PART REQUESTS

WHAT IS A PART REQUEST?

A Part Request in BPO, 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?

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

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.

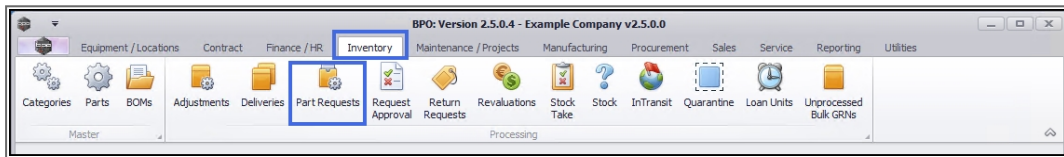
If there is stock on hand - stock can be issued, if not - stock can first be procured and then issued.

A part request can originate from:

- A work order (WKOR)
 - This is a stand alone, non client-specific work order, for example, the company needs an item for an internal project e.g. 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)
 - []
- A work order on a Project (WKOR)
 - []
- A work order on a Production Run (WKOR)
 - []
- A work order linked to a Task Generation (WKOR)
 - []
- A work order linked to a Short Term Contract (WKOR)
 - []
- An OTC Sales Invoice (SINV)
 - This over the counter part request process is always client-related.

- [A POS Lite Invoice \(SINV\)](#)
 - []
- [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 Access: *Inventory > Parts Requests*



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

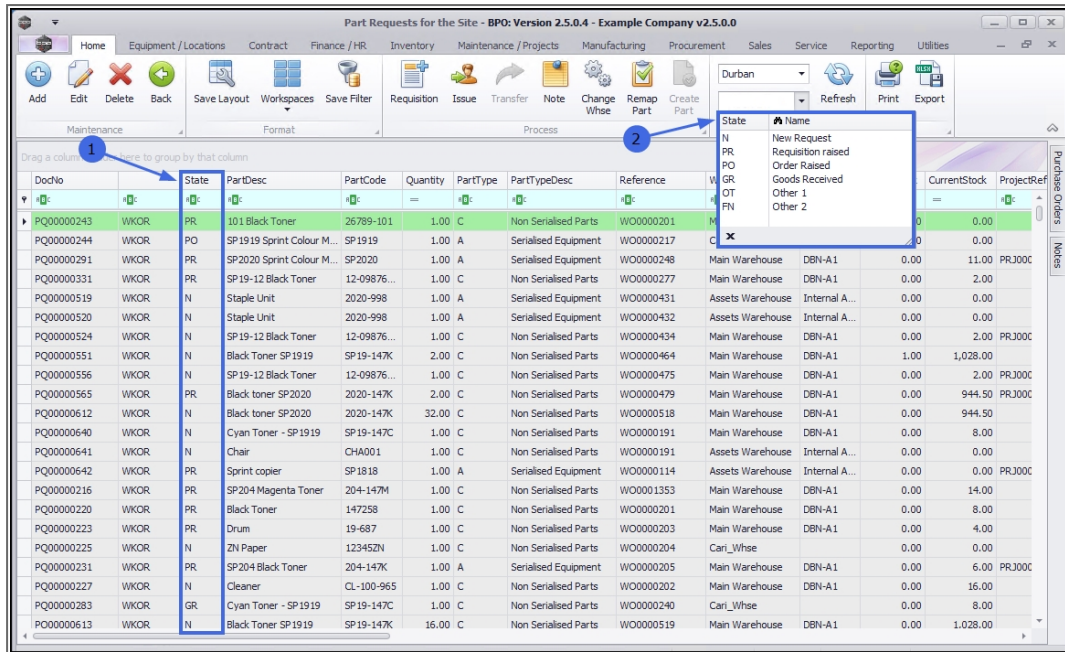
SITE AND STATE FILTERS

1. 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.](#)
2. 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.](#)

DocNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName	DeptCode	DeptName	Reference	ReferenceDesc
PQ00005250	WHSE	N									George_W...	
PQ00005249	WKOR	N	PRJ0000411	Site Inspection			HOP001	Hope Works (Pty) Ltd			WO0006131	1818-1-1 - Check network
PQ00005248	WKOR	N	PRJ0000411	Site Inspection			HOP001	Hope Works (Pty) Ltd			WO0006131	1818-1-1 - Check network
PQ00005247	WHSE	PO									George_W...	
PQ00005246	WHSE	PR									George_W...	
PQ00005245	WHSE	N									OTC_Whs...	
PQ00005243	WKOR	N			CN0005271	BathBin...	WE5001	Westwood Dynamic			WO0006129	BathBinMaint - Bathroom B
PQ00005242	WKOR	N									WO0006128	IMMS - 1 Month Machine S
PQ00005241	WKOR	N									WO0006128	IMMS - 1 Month Machine S
PQ00005240	WKOR	N									WO0006128	IMMS - 1 Month Machine S
PQ00005239	WKOR	N									WO0006127	BathBinMaint - Bathroom B
PQ00005236	WKOR	N									WO0006126	WS - Weekly Service
PQ00005235	WKOR	N									WO0006126	WS - Weekly Service
PQ00005234	WKOR	N									WO0006126	WS - Weekly Service
PQ00005231	WKOR	N									WO0006125	WS - Weekly Service
PQ00005230	WKOR	N									WO0006125	WS - Weekly Service
PQ00005229	WKOR	N									WO0006125	WS - Weekly Service
PQ00005228	WKOR	N									WO0006124	AirMaint - Airfreshner Main
PQ00005227	WKOR	N									WO0006123	IMMS - 1 Month Machine S
PQ00005226	WKOR	N									WO0006123	IMMS - 1 Month Machine S
PQ00005225	WKOR	N									WO0006123	IMMS - 1 Month Machine S
PQ00005224	WKOR	N									WO0006122	IMMS - 1 Month Machine S

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](#)

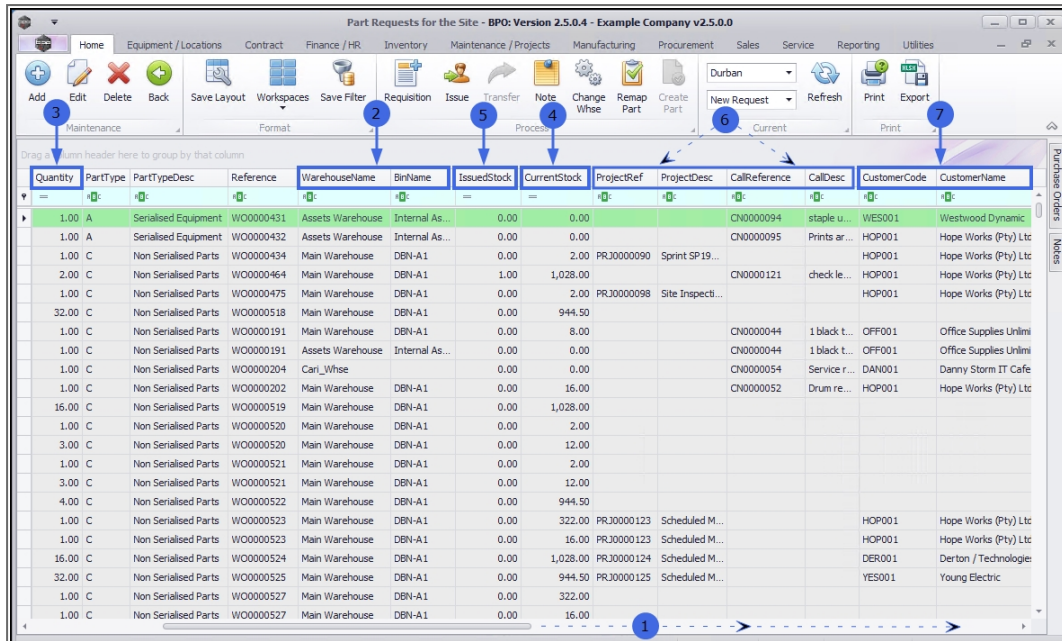
DocNo	State	PartDesc	PartCode	Quantity	PartType	PartTypeDesc	Reference	Warehouse	Bin	CurrentStock	ProjectRef		
PQ00000243	WKOR	PR	101 Black Toner	26789-101	1.00	C	Non Serialised Parts	WO0000201					
PQ00000244	WKOR	PO	SP1919 Sprint Colour M...	SP1919	1.00	A	Serialised Equipment	WO0000217					
PQ00000291	WKOR	PR	SP2020 Sprint Colour M...	SP2020	1.00	A	Serialised Equipment	WO0000248	Main Warehouse	DBN-A1	0.00	11.00	PRJ000
PQ00000331	WKOR	PR	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO0000277	Main Warehouse	DBN-A1	0.00	2.00	
PQ00000519	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO0000431	Assets Warehouse	Internal A...	0.00	0.00	
PQ00000520	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO0000432	Assets Warehouse	Internal A...	0.00	0.00	
PQ00000524	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO0000434	Main Warehouse	DBN-A1	0.00	2.00	PRJ000
PQ00000551	WKOR	N	Black Toner SP1919	SP19-147K	2.00	C	Non Serialised Parts	WO0000464	Main Warehouse	DBN-A1	1.00	1,028.00	
PQ00000556	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO0000475	Main Warehouse	DBN-A1	0.00	2.00	PRJ000
PQ00000565	WKOR	PR	Black toner SP2020	2020-147K	2.00	C	Non Serialised Parts	WO0000479	Main Warehouse	DBN-A1	0.00	944.50	PRJ000
PQ00000612	WKOR	N	Black toner SP2020	2020-147K	32.00	C	Non Serialised Parts	WO0000518	Main Warehouse	DBN-A1	0.00	944.50	
PQ00000640	WKOR	N	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO0000191	Main Warehouse	DBN-A1	0.00	8.00	
PQ00000641	WKOR	N	Chair	CHA001	1.00	C	Non Serialised Parts	WO0000191	Assets Warehouse	Internal A...	0.00	0.00	
PQ00000642	WKOR	PR	Sprint copier	SP1818	1.00	A	Serialised Equipment	WO0000114	Assets Warehouse	Internal A...	0.00	0.00	PRJ000
PQ00000216	WKOR	PR	SP204 Magenta Toner	204-147M	1.00	C	Non Serialised Parts	WO0001353	Main Warehouse	DBN-A1	0.00	14.00	
PQ00000220	WKOR	PR	Black Toner	147258	1.00	C	Non Serialised Parts	WO0000201	Main Warehouse	DBN-A1	0.00	8.00	
PQ00000223	WKOR	PR	Drum	19-687	1.00	C	Non Serialised Parts	WO0000203	Main Warehouse	DBN-A1	0.00	4.00	
PQ00000225	WKOR	N	2N Paper	123452N	1.00	C	Non Serialised Parts	WO0000204	Carl_Whse		0.00	0.00	
PQ00000231	WKOR	PR	SP204 Black Toner	204-147K	1.00	A	Serialised Equipment	WO0000205	Main Warehouse	DBN-A1	0.00	6.00	PRJ000
PQ00000227	WKOR	N	Cleaner	CL-100-965	1.00	C	Non Serialised Parts	WO0000202	Main Warehouse	DBN-A1	0.00	16.00	
PQ00000283	WKOR	GR	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO0000240	Carl_Whse		0.00	8.00	
PQ00000613	WKOR	N	Black Toner SP1919	SP19-147K	16.00	C	Non Serialised Parts	WO0000519	Main Warehouse	DBN-A1	0.00	1,028.00	

PART REQUEST DETAILS

1. **Scroll right** in the parts data grid to view *all* the details regarding a part request.

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

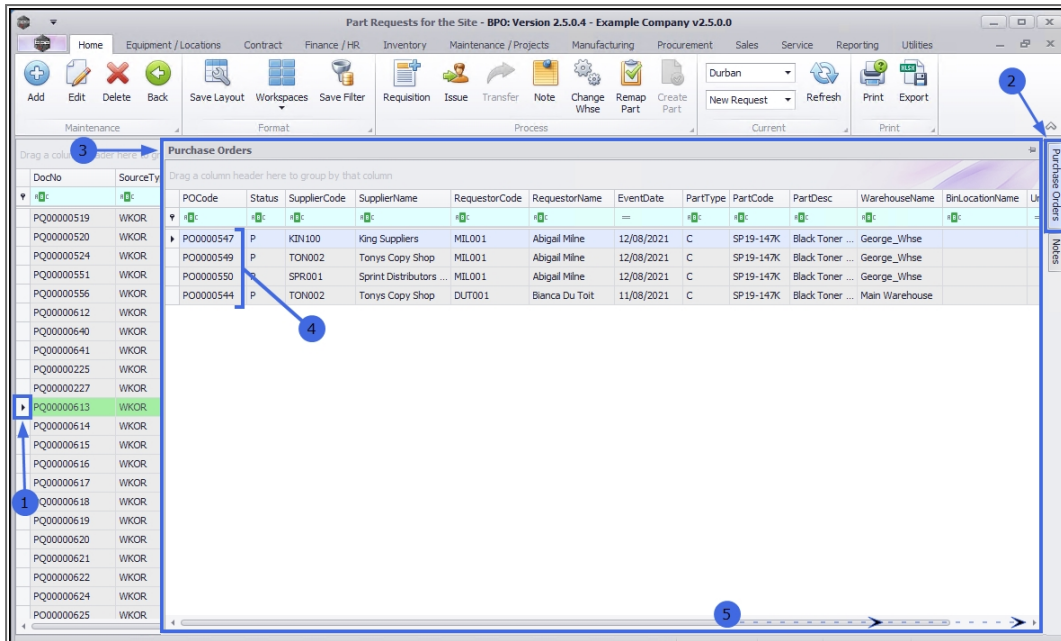
2. Which **warehouse** and **bin** location it has been requested against
3. The **quantity** requested
4. The **current stock** of the requested item
5. The **issued stock** amount
6. If the request is linked to a **Call** or **Project**
7. Which **customer** is linked to that call or Project



VIEW LINKED PURCHASE ORDERS

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

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

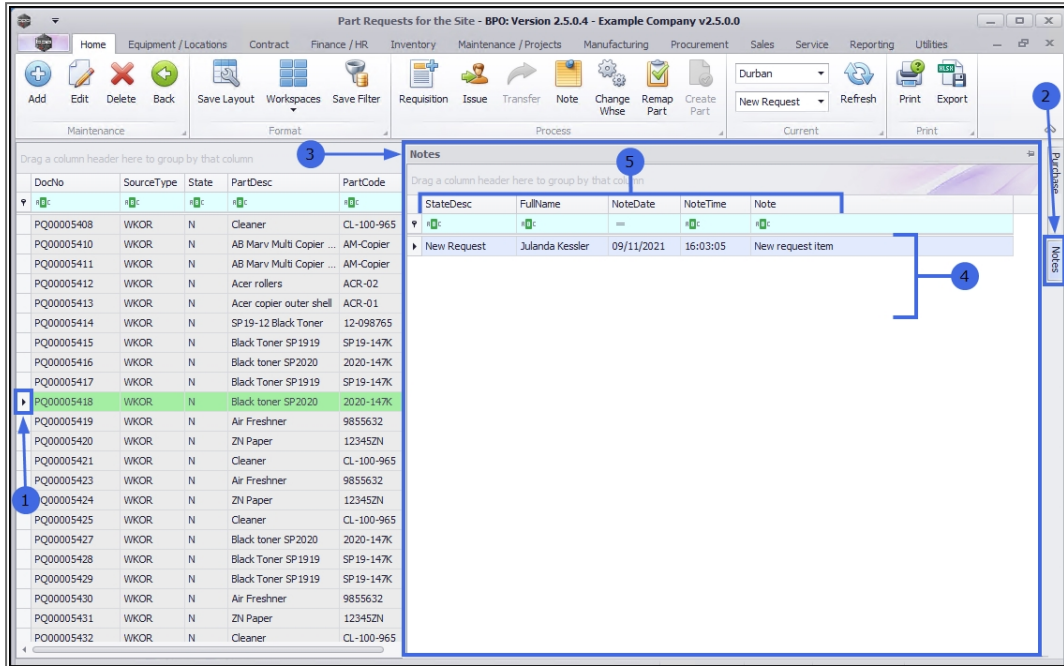


VIEW RELATED NOTES

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

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

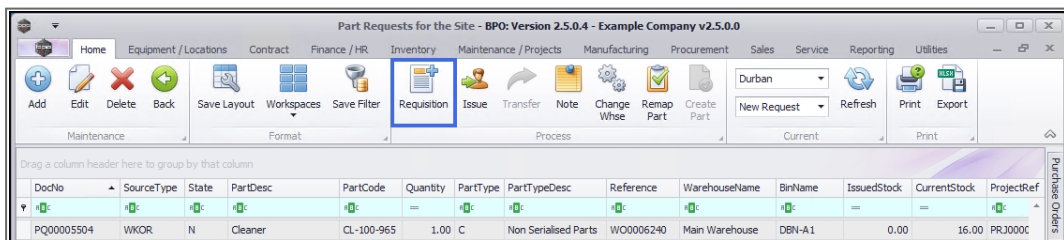
Refer to part requests [Notes](#) for further information on how notes are created.



PART REQUEST ACTION BUTTONS

REQUISITION

The Requisition button is used to raise a create 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.

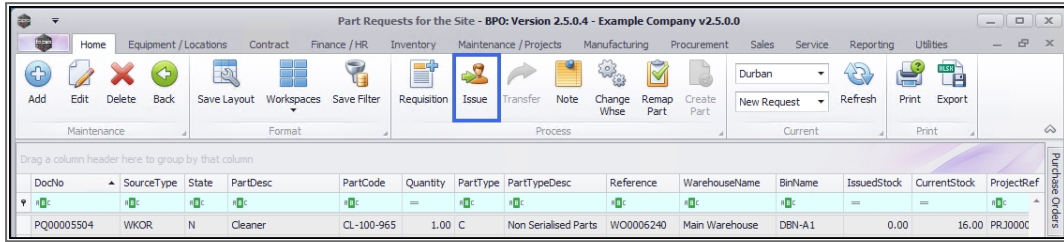


ISSUE

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 an **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 if 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.

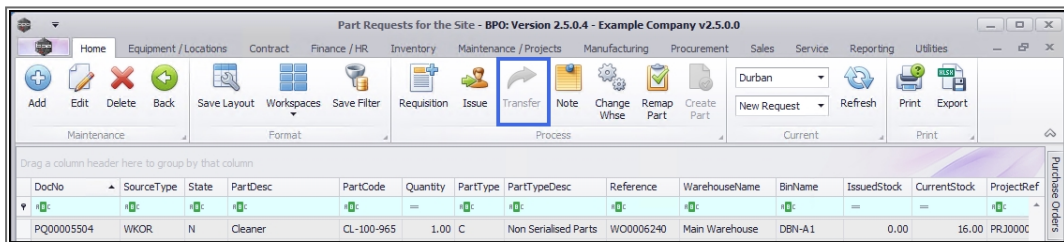
- **Note:** The final option is only available if this part is already [linked to a substitute/alternative](#) part.



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.

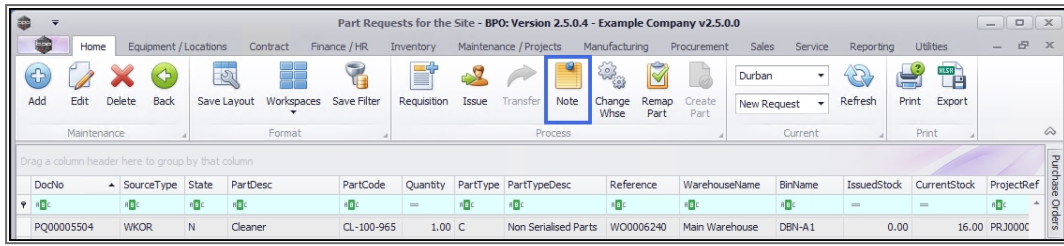
With either transfer process, you can [edit the transfer quantity](#) or [delete an item from the transfer request](#).



ADD NOTE

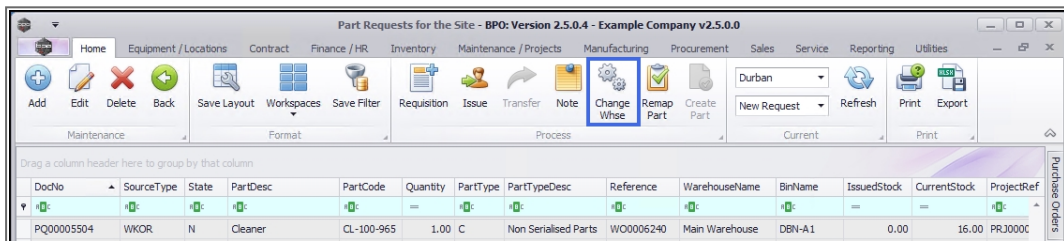
You can add a **note** to a selected part request which can subsequently change the request **state**.

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



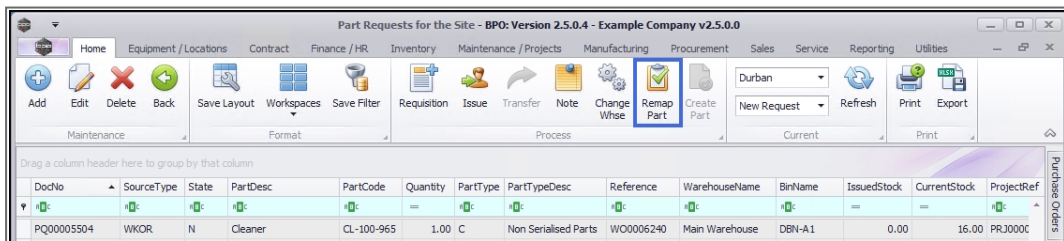
CHANGE WAREHOUSE

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.

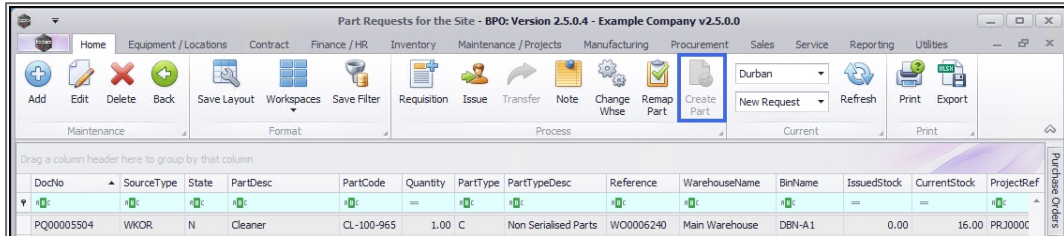


CREATE PART

The [Create Part](#) functionality is no longer available in BPO2.

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.

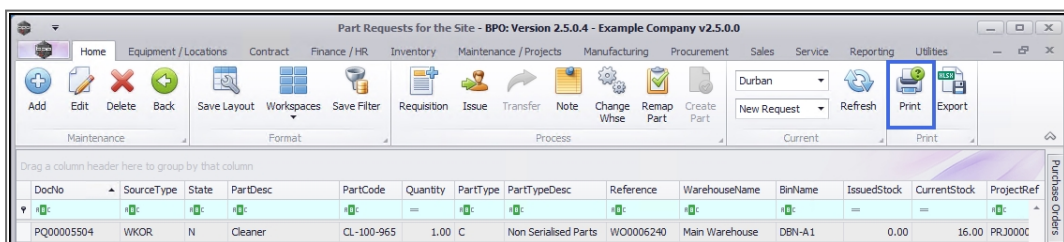


PRINT PICKING SLIP

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](#)



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