

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.

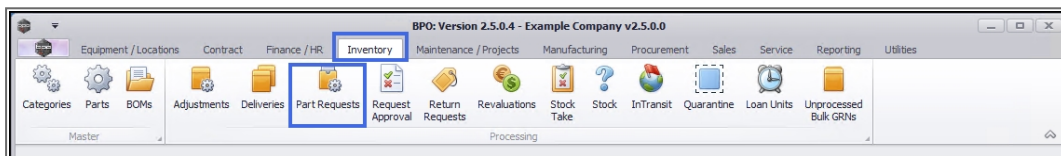
If there is stock on hand - stock can be issued, if not - stock can first be procured and then issued.

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.

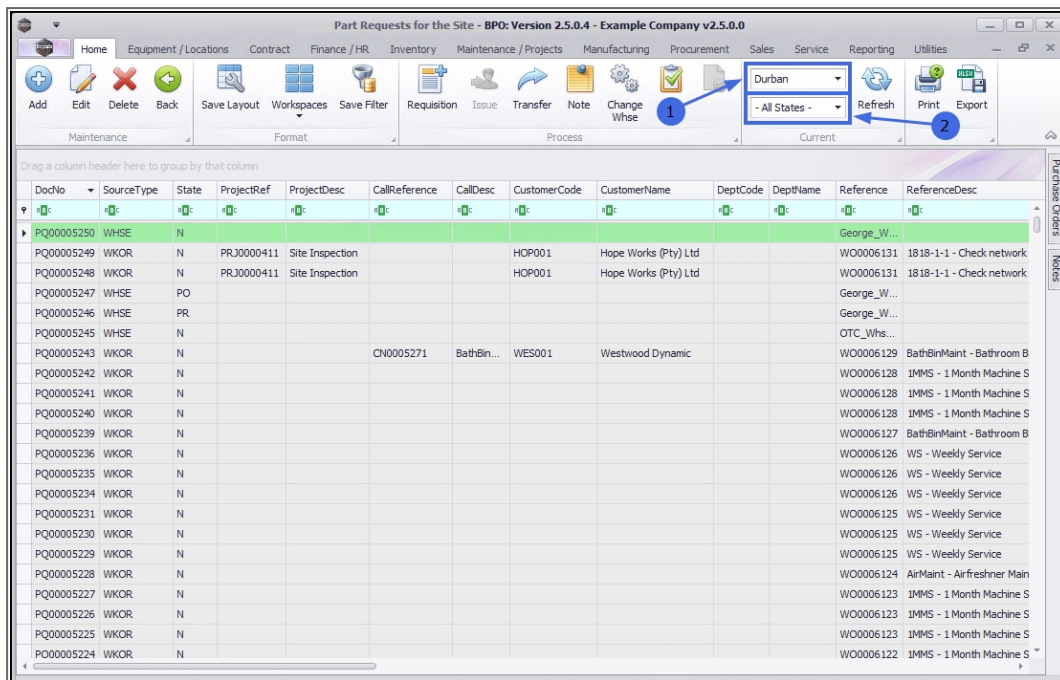
Ribbon Access: *Inventory > Parts Requests*



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.](#)



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.

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

State Name

DRB

Refresh Print Export

Drag a column header to group by that column

DocNo	State	PartDesc	PartCode	Quantity	PartType	PartTypeDesc	Reference	CurrentStock	ProjectRef
PQ00000243	WKOR	PR	101 Black Toner	26789-101	1.00	C	Non Serialised Parts	WO00000201	
PQ00000244	WKOR	PO	SP1919 Sprint Colour M...	SP1919	1.00	A	Serialised Equipment	WO00000217	
PQ00000291	WKOR	PR	SP2020 Sprint Colour M...	SP2020	1.00	A	Serialised Equipment	WO00000248	Main Warehouse DBN-A1 0.00 11.00 PRJ000
PQ00000331	WKOR	PR	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000277	Main Warehouse DBN-A1 0.00 2.00
PQ00000519	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO00000431	Assets Warehouse Internal A... 0.00 0.00
PQ00000520	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO00000432	Assets Warehouse Internal A... 0.00 0.00
PQ00000524	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000434	Main Warehouse DBN-A1 0.00 2.00 PRJ000
PQ00000551	WKOR	N	Black Toner SP1919	SP19-147K	2.00	C	Non Serialised Parts	WO00000464	Main Warehouse DBN-A1 1.00 1,028.00
PQ00000556	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000475	Main Warehouse DBN-A1 0.00 2.00 PRJ000
PQ00000565	WKOR	PR	Black toner SP2020	2020-147K	2.00	C	Non Serialised Parts	WO00000479	Main Warehouse DBN-A1 0.00 944.50 PRJ000
PQ00000612	WKOR	N	Black toner SP2020	2020-147K	32.00	C	Non Serialised Parts	WO00000518	Main Warehouse DBN-A1 0.00 944.50
PQ00000640	WKOR	N	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO00000191	Main Warehouse DBN-A1 0.00 8.00
PQ00000641	WKOR	N	Chair	CHA001	1.00	C	Non Serialised Parts	WO00000191	Assets Warehouse Internal A... 0.00 0.00
PQ00000642	WKOR	PR	Sprint copier	SP1818	1.00	A	Serialised Equipment	WO00000114	Assets Warehouse Internal A... 0.00 0.00 PRJ000
PQ00000216	WKOR	PR	SP204 Magenta Toner	204-147M	1.00	C	Non Serialised Parts	WO00001353	Main Warehouse DBN-A1 0.00 14.00
PQ00000220	WKOR	PR	Black Toner	147258	1.00	C	Non Serialised Parts	WO00000201	Main Warehouse DBN-A1 0.00 8.00
PQ00000223	WKOR	PR	Drum	19-687	1.00	C	Non Serialised Parts	WO00000203	Main Warehouse DBN-A1 0.00 4.00
PQ00000225	WKOR	N	ZN Paper	12345ZN	1.00	C	Non Serialised Parts	WO00000204	Carl_Whse 0.00 0.00
PQ00000231	WKOR	PR	SP204 Black Toner	204-147K	1.00	A	Serialised Equipment	WO00000205	Main Warehouse DBN-A1 0.00 6.00 PRJ000
PQ00000227	WKOR	N	Cleaner	CL-100-965	1.00	C	Non Serialised Parts	WO00000202	Main Warehouse DBN-A1 0.00 16.00
PQ00000283	WKOR	GR	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO00000240	Carl_Whse 0.00 8.00
PQ00000613	WKOR	N	Black Toner SP1919	SP19-147K	16.00	C	Non Serialised Parts	WO00000519	Main Warehouse DBN-A1 0.00 1,028.00

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

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process

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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	WO00000201		0.00	
PQ00000244	WKOR	PO	SP1919 Sprint Colour M...	SP1919	1.00	A	Serialised Equipment	WO00000217		0.00	
PQ00000291	WKOR	PR	SP2020 Sprint Colour M...	SP2020	1.00	A	Serialised Equipment	WO00000248	Main Warehouse	DBN-A1	11.00 PRJ000
PQ00000331	WKOR	PR	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000277	Main Warehouse	DBN-A1	0.00 2.00 PRJ000
PQ00000519	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO00000431	Assets Warehouse	Internal A...	0.00 0.00
PQ00000520	WKOR	N	Staple Unit	2020-998	1.00	A	Serialised Equipment	WO00000432	Assets Warehouse	Internal A...	0.00 0.00
PQ00000524	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000434	Main Warehouse	DBN-A1	0.00 2.00 PRJ000
PQ00000551	WKOR	N	Black Toner SP1919	SP19-147K	2.00	C	Non Serialised Parts	WO00000464	Main Warehouse	DBN-A1	1.00 1,028.00
PQ00000556	WKOR	N	SP19-12 Black Toner	12-09876...	1.00	C	Non Serialised Parts	WO00000475	Main Warehouse	DBN-A1	0.00 2.00 PRJ000
PQ00000565	WKOR	PR	Black toner SP2020	2020-147K	2.00	C	Non Serialised Parts	WO00000479	Main Warehouse	DBN-A1	0.00 944.50 PRJ000
PQ00000612	WKOR	N	Black toner SP2020	2020-147K	32.00	C	Non Serialised Parts	WO00000518	Main Warehouse	DBN-A1	0.00 944.50
PQ00000640	WKOR	N	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO00000191	Main Warehouse	DBN-A1	0.00 8.00
PQ00000641	WKOR	N	Chair	CHA001	1.00	C	Non Serialised Parts	WO00000191	Assets Warehouse	Internal A...	0.00 0.00
PQ00000642	WKOR	PR	Sprint copier	SP1818	1.00	A	Serialised Equipment	WO00000114	Assets Warehouse	Internal A...	0.00 0.00 PRJ000
PQ00000216	WKOR	PR	SP204 Magenta Toner	204-147M	1.00	C	Non Serialised Parts	WO00001353	Main Warehouse	DBN-A1	0.00 14.00
PQ00000220	WKOR	PR	Black Toner	147258	1.00	C	Non Serialised Parts	WO00000201	Main Warehouse	DBN-A1	0.00 8.00
PQ00000223	WKOR	PR	Drum	19-687	1.00	C	Non Serialised Parts	WO00000203	Main Warehouse	DBN-A1	0.00 4.00
PQ00000225	WKOR	N	2N Paper	123452N	1.00	C	Non Serialised Parts	WO00000204	Carl_Whse		0.00 0.00
PQ00000231	WKOR	PR	SP204 Black Toner	204-147K	1.00	A	Serialised Equipment	WO00000205	Main Warehouse	DBN-A1	0.00 6.00 PRJ000
PQ00000227	WKOR	N	Cleaner	CL-100-965	1.00	C	Non Serialised Parts	WO00000202	Main Warehouse	DBN-A1	0.00 16.00
PQ00000283	WKOR	GR	Cyan Toner - SP1919	SP19-147C	1.00	C	Non Serialised Parts	WO00000240	Carl_Whse		0.00 8.00
PQ00000613	WKOR	N	Black Toner SP1919	SP19-147K	16.00	C	Non Serialised Parts	WO00000519	Main Warehouse	DBN-A1	0.00 1,028.00

State Name
N New Request
PR Requisition raised
PO Order Raised
GR Goods Received
OT Other 1
FN Other 2

Refresh Print Export

Purchase Orders Notes

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

Part Requests for the Site - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete Back Save Layout Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part New Request Refresh Print Export

3 2 5 4 6 7

Drag a column header here to group by that column

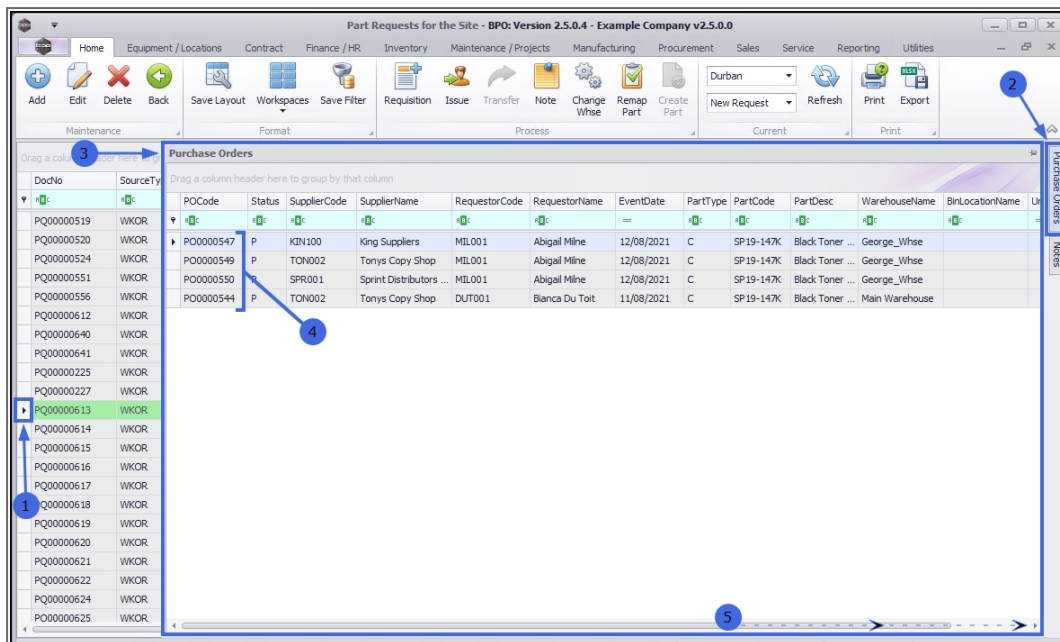
Quantity	PartType	PartTypeDesc	Reference	WarehouseName	BinName	IssuedStock	CurrentStock	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerCode	CustomerName
1.00	A	Serialized Equipment	WO0000431	Assets Warehouse	Internal As...	0.00	0.00			CN0000094	staple u...	WES001	Westwood Dynamic
1.00	A	Serialized Equipment	WO0000432	Assets Warehouse	Internal As...	0.00	0.00			CN0000095	Prints ar...	HOP001	Hope Works (Pty) Ltd
1.00	C	Non Serialized Parts	WO0000434	Main Warehouse	DBN-A1	0.00	2.00	PRJ0000090	Sprint SP19...			HOP001	Hope Works (Pty) Ltd
2.00	C	Non Serialized Parts	WO0000464	Main Warehouse	DBN-A1	1.00	1,028.00			CN0000121	check le...	HOP001	Hope Works (Pty) Ltd
1.00	C	Non Serialized Parts	WO0000475	Main Warehouse	DBN-A1	0.00	2.00	PRJ0000098	Site Inspect...			HOP001	Hope Works (Pty) Ltd
32.00	C	Non Serialized Parts	WO0000518	Main Warehouse	DBN-A1	0.00	944.50						
1.00	C	Non Serialized Parts	WO0000191	Main Warehouse	DBN-A1	0.00	8.00			CN0000044	1 black t...	OFF001	Office Supplies Unlimi
1.00	C	Non Serialized Parts	WO0000191	Assets Warehouse	Internal As...	0.00	0.00			CN0000044	1 black t...	OFF001	Office Supplies Unlimi
1.00	C	Non Serialized Parts	WO0000204	Carl Whse		0.00	0.00			CN0000054	Service r...	DAN001	Danny Storm IT Cafe
1.00	C	Non Serialized Parts	WO0000202	Main Warehouse	DBN-A1	0.00	16.00			CN0000052	Drum re...	HOP001	Hope Works (Pty) Ltd
16.00	C	Non Serialized Parts	WO0000519	Main Warehouse	DBN-A1	0.00	1,028.00						
1.00	C	Non Serialized Parts	WO0000520	Main Warehouse	DBN-A1	0.00	2.00						
3.00	C	Non Serialized Parts	WO0000520	Main Warehouse	DBN-A1	0.00	12.00						
1.00	C	Non Serialized Parts	WO0000521	Main Warehouse	DBN-A1	0.00	2.00						
3.00	C	Non Serialized Parts	WO0000521	Main Warehouse	DBN-A1	0.00	12.00						
4.00	C	Non Serialized Parts	WO0000522	Main Warehouse	DBN-A1	0.00	944.50						
1.00	C	Non Serialized Parts	WO0000523	Main Warehouse	DBN-A1	0.00	322.00	PRJ0000123	Scheduled M...			HOP001	Hope Works (Pty) Ltd
1.00	C	Non Serialized Parts	WO0000523	Main Warehouse	DBN-A1	0.00	16.00	PRJ0000123	Scheduled M...			HOP001	Hope Works (Pty) Ltd
16.00	C	Non Serialized Parts	WO0000524	Main Warehouse	DBN-A1	0.00	1,028.00	PRJ0000124	Scheduled M...			DER001	Derton / Technologies
32.00	C	Non Serialized Parts	WO0000525	Main Warehouse	DBN-A1	0.00	944.50	PRJ0000125	Scheduled M...			YES001	Young Electric
1.00	C	Non Serialized Parts	WO0000527	Main Warehouse	DBN-A1	0.00	322.00						
1.00	C	Non Serialized Parts	WO0000527	Main Warehouse	DBN-A1	0.00	16.00						

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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.

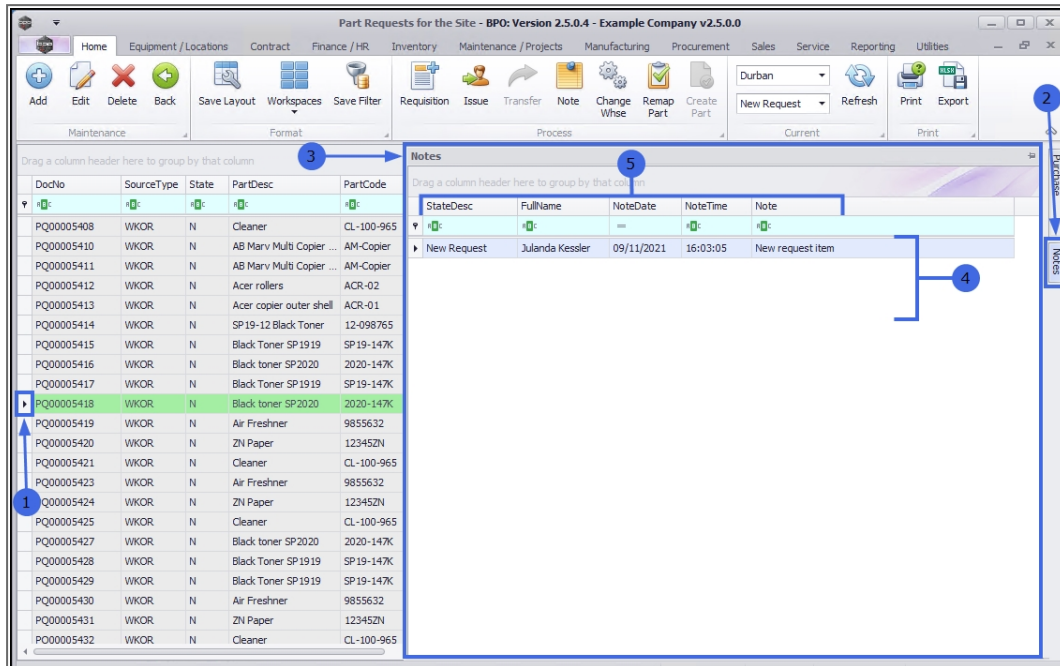


VIEW RELATED NOTES

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

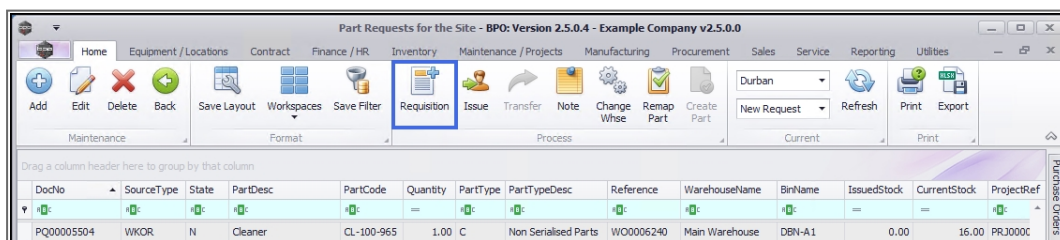
Refer to part requests [Notes](#) for further information on how notes are created.



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.

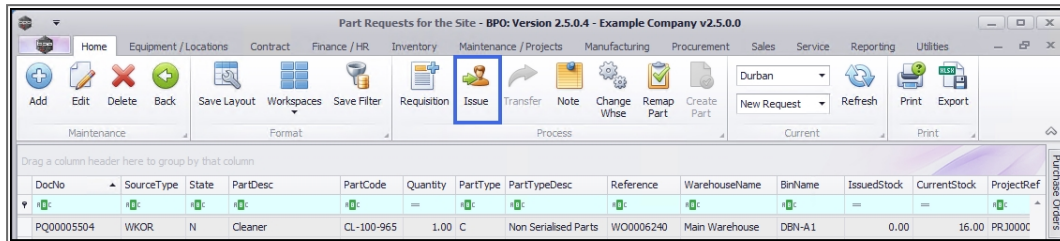


ISSUE

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.

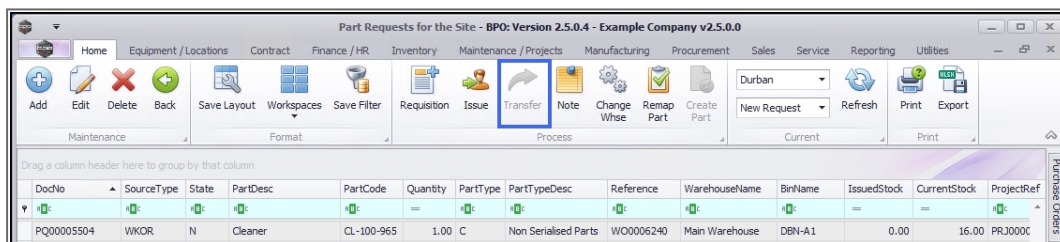
- **Note:** The final option is only available if this part is already linked to a substitute/alternative part.



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.

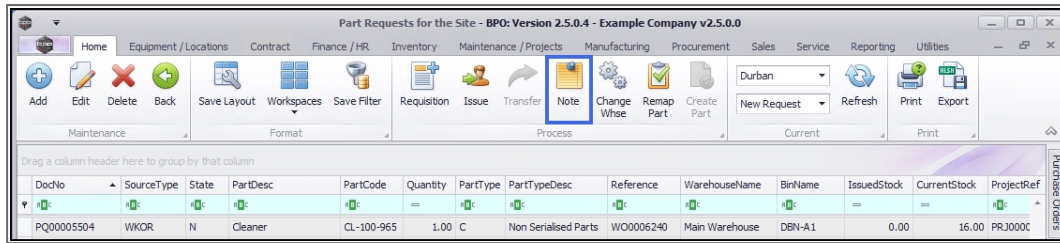
With either transfer process, you can edit the transfer quantity or delete an item from the transfer request.



ADD NOTE

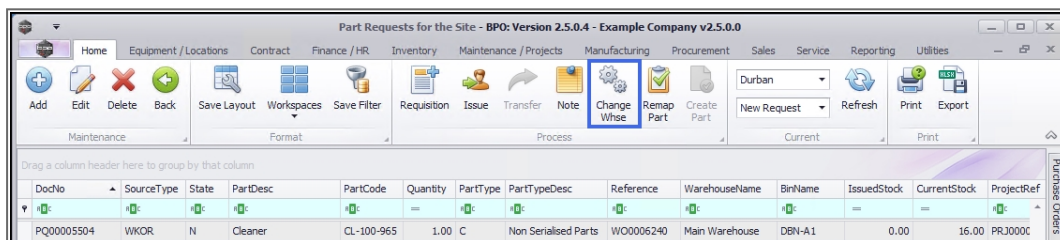
You can add a **note** to a selected part request which can subsequently change the request **state**.

Refer to part requests Notes for further information.



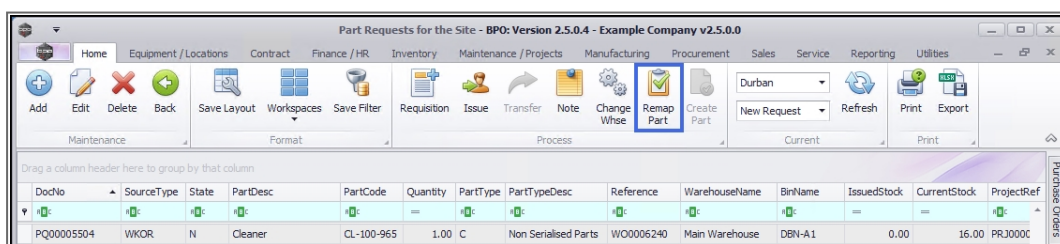
CHANGE WAREHOUSE

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.

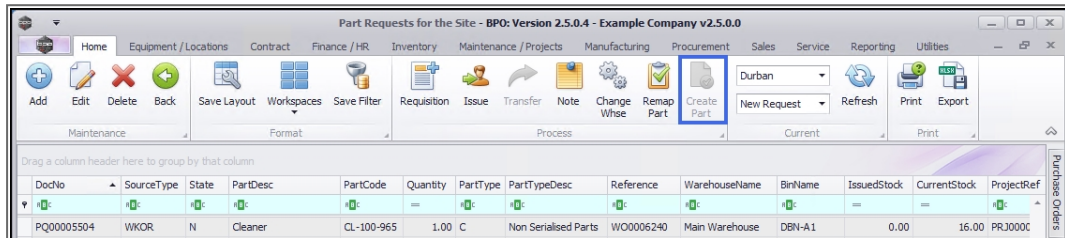


CREATE PART

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.

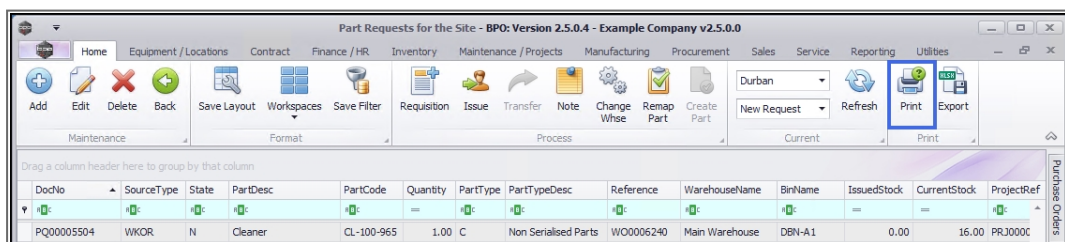


PRINT PICKING SLIP

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](#)



BPO.MNU.032

