

Version 25



Trapeze

Enterprise Asset Management

Shop Activity - Storekeeper

User Guide

Trade Secret | February 2025

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Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Shop Activity Storekeeper - User Guide

Version 25.x

February 2025

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1. Overview

The Shop Activity Storekeeper Portal is designed to provide your organization's storekeepers with a single, easy-to-use portal to all the screens and functions required during their workday. Storekeepers can use the Shop Activity Storekeeper Portal to perform the following functions:

- Manage Part and Commercial Requests
 - Review request line items across multiple requests
 - Act on (issue or order) multiple line items at one time
 - Flag request line items to notify the technician that parts are ready to pick up
- Manage Parts Requisitions
 - Review pending and open parts requisitions
 - Add new parts requisitions
 - Add new line items to parts requisitions
 - Act on requisitions (convert to purchase orders or requests for bid/quote/proposal (B/Q/P))
- Parts Ordering
 - Review pending and open purchase orders
 - Add new purchase orders
 - Add new line items to existing purchase orders
 - Receive line items
- Create New Parts
 - Add new part records to the system

The look and feel of the Shop Activity Storekeeper Portal was designed specifically to make data entry as easy as possible while maximizing its effect on the system.

It is possible to initially hide information on screens through UI Controls. Refer to the *Administrator Guide* for instructions to initially hide information and set up a **More Info** button.

On screens where information is initially hidden, click the **More Info**  button to display additional information. Click the upward facing button to hide the information.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

-  User defined required fields that do not appear in the Web Modules will return validation messages.
-  Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

General Portal Information

The information entered in this section applies to areas throughout the portal.

- When entering information in Task ID and Account ID fields, these fields will narrow down according to entered IDs. If a task ID is entered, the **Account ID** field only display accounts that support that task ID. If an account ID is entered, the **Task ID** field only displays tasks that support that account. If neither of these items are entered yet, all accounts or task IDs display.

2. Understanding the Storekeeper Portal

The Shop Activity Module displays and updates data based on the logged-in user's associated Employee ID. For a user to use the Storekeeper Portal, that user's ID must have a valid Associated Employee ID.

After successfully configuring the Shop Activity Storekeeper Portal, a user may log into Web Modules and click on the Storekeeper Portal tab. Click the Storekeeper tab, to open the main Storekeeper page. This portal is a location based gadget portal.

My Storeroom Portal

Current Location: AKT 1-1 - AKT SPACE 1-1 "" 1 Layout Refresh Off

New/Edit Part Part Issues and Returns Direct Issues Part Transfers

Part Requests

2 Pending Requests	Requests
0 Pending Part Return Requests	Part Return Requests
2 Total Work Orders	

Requisitions

0 Pending line items	Requisitions
0 Total Requisitions	

Purchase Orders

0 Open Line Items	Purchase Orders
0 Pending line items	
0 Total Purchase Orders	

Along the top of the portal, select the location in which you would like to view/manage work. The location selection updates the part request, requisition, and purchase order information on the page. The locations that appear in your drop-down selection box are limited based on your system access settings (Supported PARTS Locations on the Employees – Primary Information screen).

Similar to the Work Management portal, the Storekeeper portal is comprised of gadgets and the main page layout is customizable.

The default layout for this portal shows Part Requests on the left at 50% and Requisitions above Purchase orders on the right at 50%.

My Storeroom Portal

Current Location: AKT 1-1 - AKT SPACE 1-1 "" 1 **Layout** Refresh Off

New/Edit Part Part Issues and Returns Direct Issues Part Transfers

Part Requests

2 Pending Requests	Requests
0 Pending Part Return Requests	Part Return Requests
2 Total Work Orders	

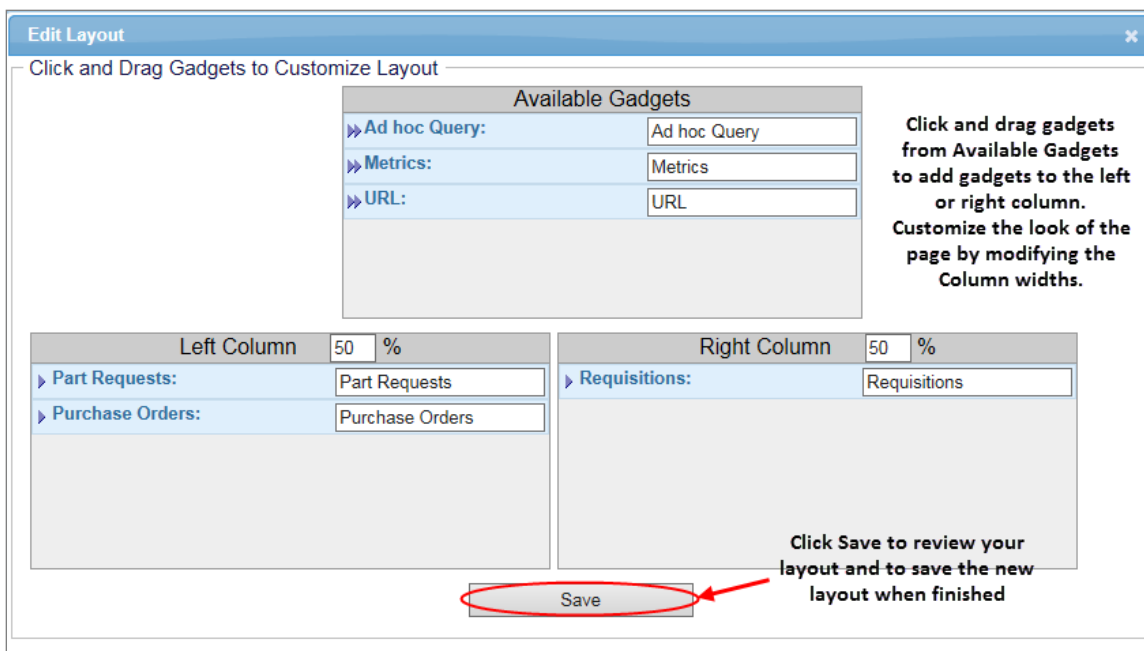
Requisitions

0 Pending line items	Requisitions
0 Total Requisitions	

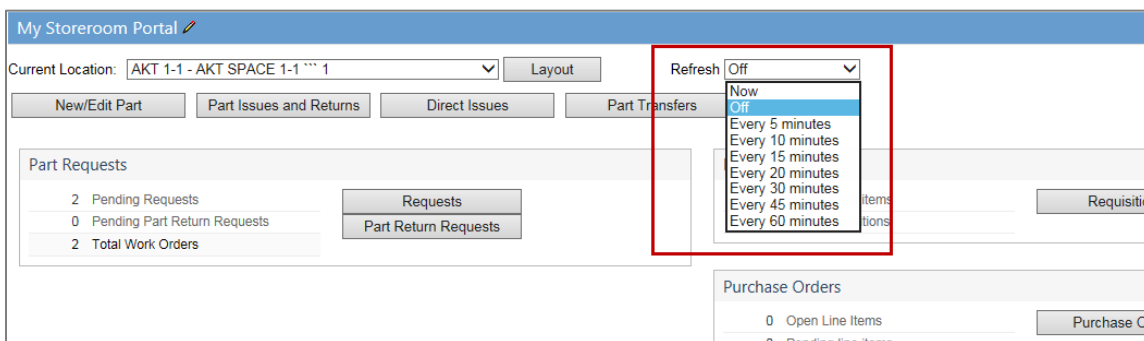
Purchase Orders

0 Open Line Items	Purchase Orders
0 Pending line items	
0 Total Purchase Orders	

1. Click **Layout** to open the Edit Layout dialog.
2. Click and drag gadgets to customize your layout as desired.



3. In the **Refresh** drop-down selection box, select the interval for page refresh. This allows flexibility to refresh the page at various incremental time periods as desired.



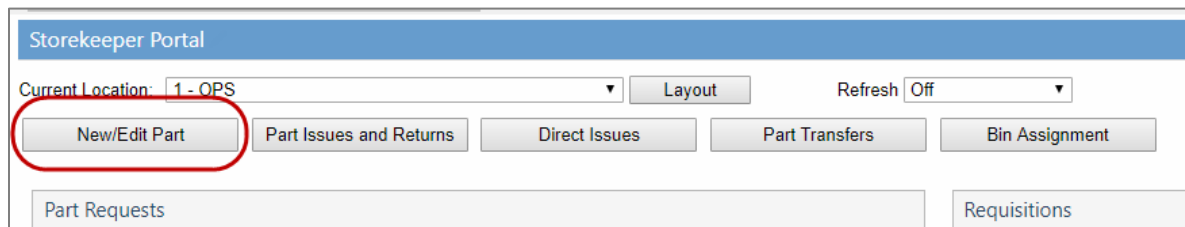
4. After selecting the location, customizing the layout, and setting the refresh time period, you can now use the storekeeper action buttons and gadgets as outlined below.

3. Storekeeper Action Buttons

The action buttons toward the top of the Storekeeper portal main page provide convenient access to create and edit parts, open the Part Issues and Returns screen, open the Direct Issues screen to make for direct issues of parts to equipment IDs, accounts, or departments, and open the Part Transfers screen to make part transfers.

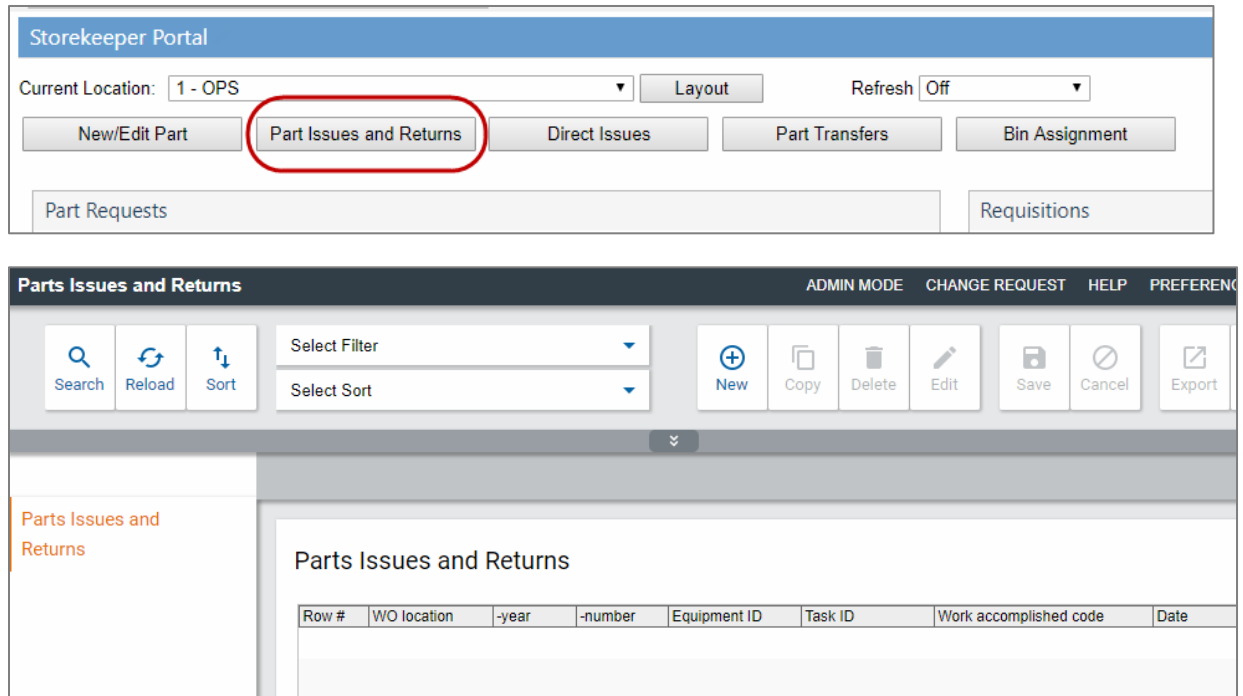
New/Edit Part Button

Clicking the **New/Edit Part** button opens the Part Definition Wizard. Please refer to the [Part Definition Pop-in](#), for more information on how to edit and create parts, add/edit part location records, and add/edit vendor part records.



Part Issues and Returns Button

Click the **Part Issues and Returns** button to go to the Parts Issues and Returns screen where you may perform part issues and returns.



Direct Issues Button

The Direct Issues button either opens the Parts Direct Issue Enterprise Portal screen, or opens the Parts Direct Issues pop-in depending on whether the **Use Direct Issues portal popin instead of Enterprise Portal Direct Issues screen** option is enabled or not. Refer to the Storekeeper Administrator Guide for more information.

Parts Direct Pop-in

Click the **Direct Issues** button to go to the Parts-Direct Issues screen where you may perform direct issues. This opens the Parts Direct Issues pop-in.

The image shows two screenshots from the Storekeeper application. The top screenshot is the 'Storekeeper Portal' interface. It features a header bar with the title 'Storekeeper Portal'. Below the header, there is a 'Current Location' dropdown set to '1 - OPS', a 'Layout' button, and a 'Refresh' dropdown set to 'Off'. A row of buttons includes 'New/Edit Part', 'Part Issues and Returns', 'Direct Issues' (which is circled in red), 'Part Transfers', and 'Bin Assignment'. Below this row are two more buttons: 'Part Requests' and 'Requisitions'.

The bottom screenshot is the 'Direct Issues' pop-in screen. It has a title bar 'Direct Issues' with a close button. The main area is titled 'Add Direct Issues - Line 1'. It contains a form with various fields: 'Asset ID', 'Department ID', 'Account ID', 'Date' (with a calendar icon), 'Document Number', 'Not from Inventory' (checkbox), 'Issuing Location ID', 'Part ID' (with a 'Lookup' button), 'Return' (checkbox), 'Quantity on hand', 'Quantity', 'Unit Price', 'Employee ID', 'Unit Of Measure', 'Comments', 'Bin ID', 'Invoice Date' (with a calendar icon), 'Vendor Invoice', 'NFI Vendor ID', 'Position ID', 'Installed Serial #', 'Removed Serial #', 'Service Request ID', 'Task ID', and 'Operator ID'. Each field has a small '...' button next to it. At the bottom of the form are 'Undo' and 'Add' buttons. Below the form is a section titled 'Pending Direct Issues' which contains a table with columns: 'Line', 'Asset ID', 'Department ID', 'Account ID', 'Date', 'Issuing Location', 'Part ID', and 'Quantity'. At the very bottom are 'Cancel' and 'Save' buttons.

Use this pop-in to enter information for direct issues. Fields include Asset ID, Department ID, Account ID, Date, Document Number, Not from Inventory checkbox, Issuing Location ID, Part ID, Return, Quantity on hand, Quantity, Receipt Unit Price, Employee ID, Unit of Measure, Comments, Bin ID, Invoice Date, Vendor Invoice, NFI Vendor ID, Position ID, Installed Serial #, Removed Serial #, Service Request ID, Task ID, and Operator ID.

To perform a direct issue:

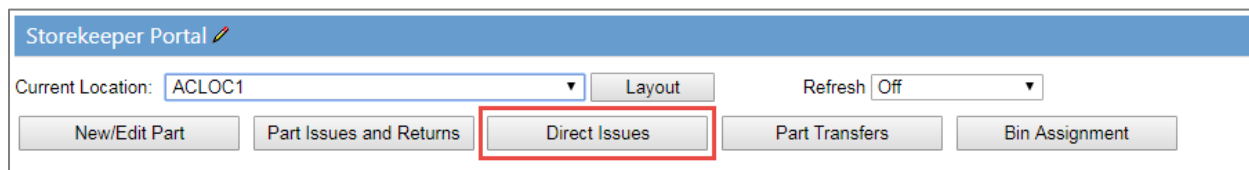
1. From the main Storekeeper portal page, click Direct Issue.

The Parts Direct Issue pop-in displays.

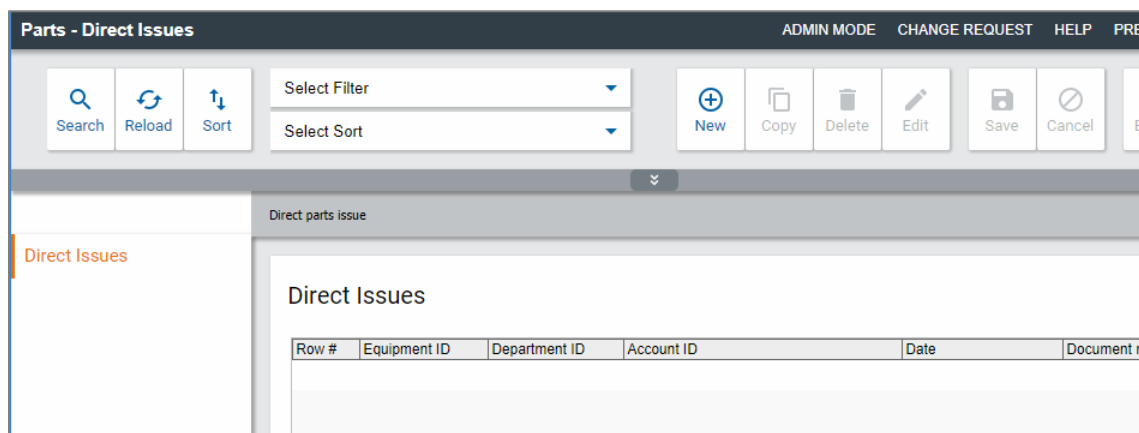
2. Enter all the needed information for the direct issue in the pop-in.
3. Once all information is entered, click **Add**.
4. The pending direct issue displays in the Pending Direct Issues section at the bottom of the pop-in.
5. When you are done adding direct issues, click **Save**.

Enterprise Portal Direct Issue

Click the **Direct Issues** button to go to the Parts-Direct Issues screen where you may perform direct issues.

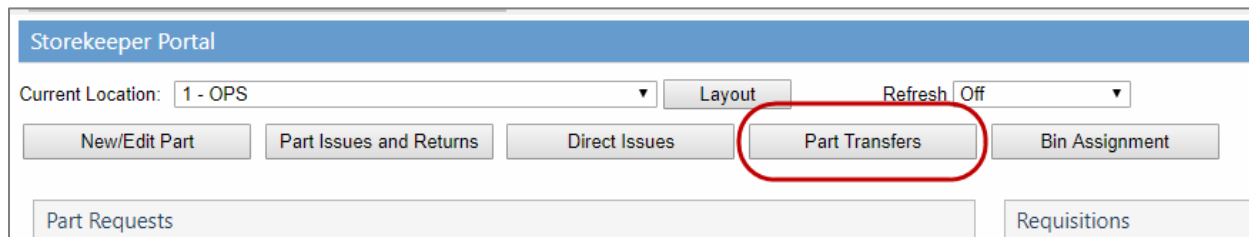


The Parts Direct Issues screen displays where you may perform direct issues.



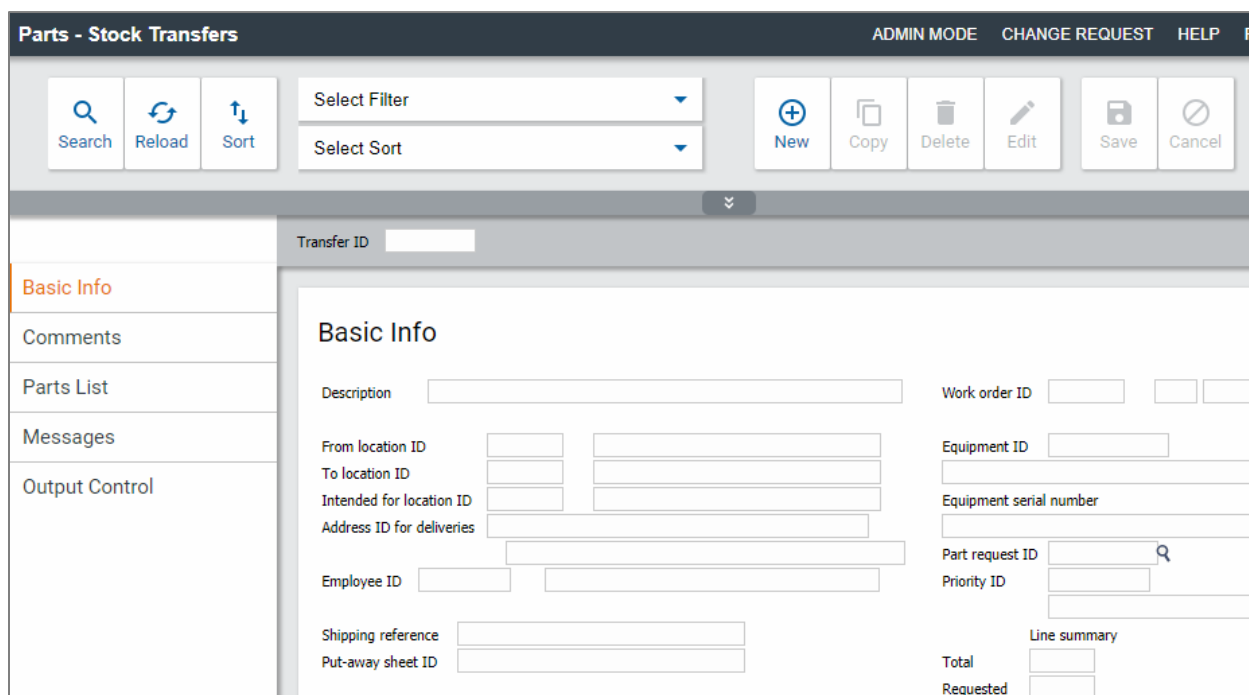
Part Transfers Button

Click the **Part Transfers** button to go to the Enterprise Portal Parts - Transfers screen where you can transfer parts.



The screenshot shows the 'Storekeeper Portal' header. Below it, there's a 'Current Location' dropdown set to '1 - OPS'. To the right are 'Layout' and 'Refresh Off' buttons. A row of buttons includes 'New/Edit Part', 'Part Issues and Returns', 'Direct Issues', 'Part Transfers' (which is circled in red), and 'Bin Assignment'. At the bottom, there are two tabs: 'Part Requests' and 'Requisitions'.

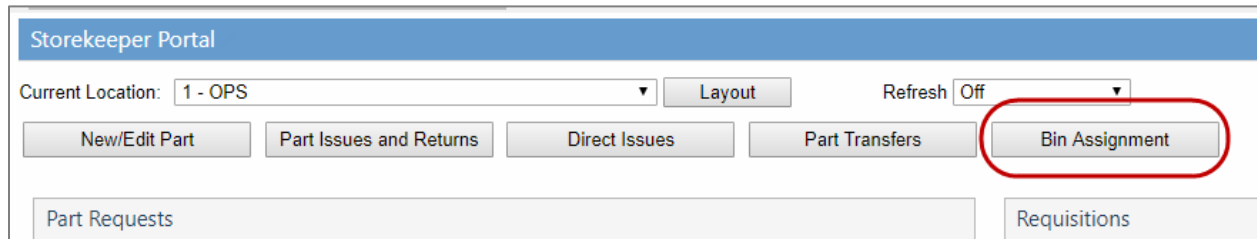
The Parts – Stock Transfers screen displays where you may perform part transfers.



The screenshot shows the 'Parts - Stock Transfers' screen. At the top, there's a dark header with 'ADMIN MODE', 'CHANGE REQUEST', 'HELP', and 'PI'. Below this is a toolbar with icons for Search, Reload, Sort, and a dropdown for 'Select Filter'. To the right of the toolbar are buttons for New, Copy, Delete, Edit, Save, and Cancel. A 'Transfer ID' field is visible. On the left, there's a sidebar with links: Basic Info (highlighted), Comments, Parts List, Messages, and Output Control. The main area is titled 'Basic Info' and contains various input fields: Description, Work order ID, From location ID, To location ID, Intended for location ID, Address ID for deliveries, Equipment ID, Equipment serial number, Part request ID (with a search icon), Priority ID, Employee ID, Shipping reference, Put-away sheet ID, and a 'Line summary' section with 'Total' and 'Requested' fields.

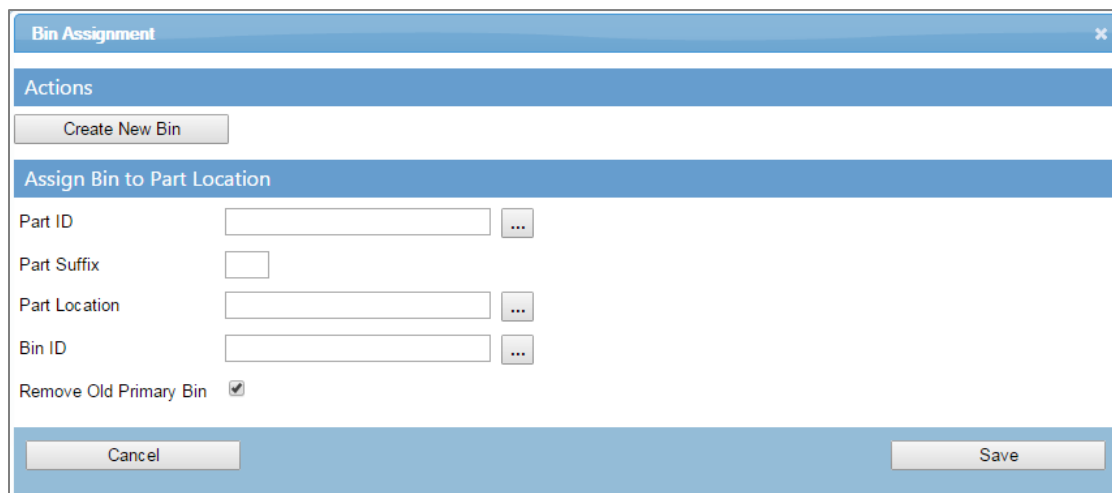
Bin Assignment Button

Click the Bin Assignment button to open the Bin Assignment pop-in where you can create a new bin or assign a bin to a part location.



The screenshot shows the Storekeeper Portal interface. At the top, there's a blue header bar with the text "Storekeeper Portal". Below this, there's a "Current Location" dropdown menu set to "1 - OPS", a "Layout" button, and a "Refresh" dropdown menu set to "Off". Below these, there's a row of buttons: "New/Edit Part", "Part Issues and Returns", "Direct Issues", "Part Transfers", and "Bin Assignment". The "Bin Assignment" button is circled in red. Below this row, there's a "Part Requests" button and a "Requisitions" button.

The Bin Assignment pop-in displays.



The screenshot shows the Bin Assignment pop-in form. It has a title bar "Bin Assignment" with a close button. Below the title bar, there's a section titled "Actions" with a "Create New Bin" button. Below this, there's a section titled "Assign Bin to Part Location" with the following fields: "Part ID" (text input with a dropdown arrow), "Part Suffix" (text input), "Part Location" (text input with a dropdown arrow), and "Bin ID" (text input with a dropdown arrow). There's also a checkbox labeled "Remove Old Primary Bin" which is checked. At the bottom, there are "Cancel" and "Save" buttons.

4. Storekeeper Gadgets

The list of available gadgets for Storekeeper portal is shown in the sections below.



To learn more about customizing your gadget layout and standard gadgets, refer to the *General Application Information* guide.

Standard Gadgets

- Ad hoc Query
- Metrics
- URL

Storekeeper Gadgets

- Change Requests
- Commercial Requests
- Edit or Create New Part
- Incoming Transfer
- Invoices
- Invoice Reconciliation
- Part Labels
- Part Requests
- Pending Core Claims
- Picking Cards
- Purchase Orders
- Purchase Order Review
- Requisitions
- Transfer Requests

Change Request Gadget

The **Change Request** gadget can be used to respond to requests for changes submitted via the Change Request Screen.

1. Click the **ID** link to view the change request.

ID	Screen ID	Screen Name	Status	Description
1	2010	Employees - Primary	PENDING	REQUESTING TO BE MOVED TO THE LATE SHIFT NEXT
2	2037	Work Order Center	PENDING	NEED TO RESCHEDULE THIS WORK ORDER, EQ-
3	2037	Work Order Center	PENDING	PUSHING BACK DUE DATE ON WORK ORDER, WE
5	2037	Work Order Center	PENDING	NEED TO RESCHEDULE THIS WORK ORDER
37	2445	Purchasing Invoices	PENDING	LINK TO ENTERPRISE PURCHASING INVOICES

The Change Requests screen opens and displays the selected record.

Change Requests

ADMIN MODE CHANGE REQUEST HELP PREFERENCES

Search Reload Sort

Select Filter

Select Sort

New Copy Delete Edit Save Cancel Export

Change request ID 3

Basic Info

Proposed Changes

Changed Values

Notes 

Basic Info

Status PENDING View changes Apply changes

Description PUSHING BACK DUE DATE ON WORK ORDER

Screen ID 2037 WORK ORDER CENTER

Action type UPDATE INSERT

Type WORK ORDER CENTER

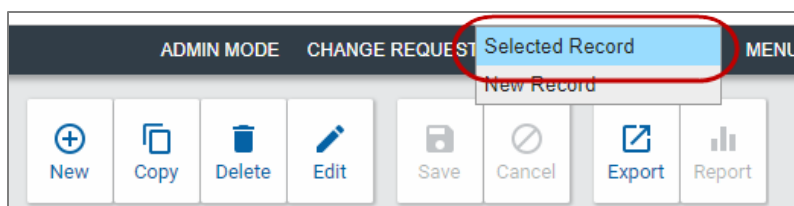
Key values [188:2:ACLOC1][188:3:2014][188:4:8][189:6:0000988]

Change requested by at 05/08/2014 18:12

Requested from screen ID 0

Requested from key values

2. Click **Change Requests** and then click **Selected Record** to review and approve the change request.



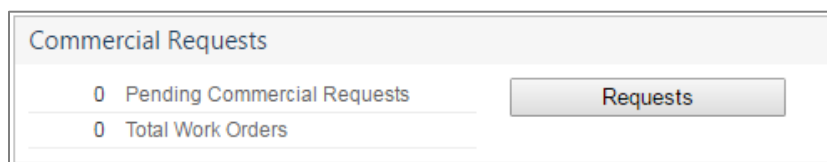
3. Review and update information (if needed).
4. To approve the request, check the **Approved** checkbox. Then click **Save**.

 For more details on how this relates specifically to the Storekeeper Portal workflows, see the [Change Requests for New Parts/Vendors when Responding to Part Requests](#) section below.

 For more base information on Change Requests, see *Change Requests – Reference Guide*.

Commercial Requests Gadget

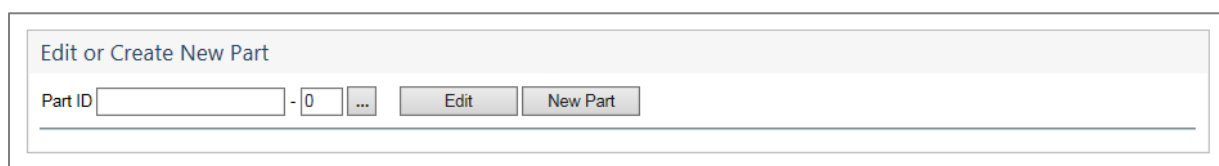
The Commercial Requests gadget provides a summary of pending commercial requests and the number of work orders associated with those commercial requests.



The **Requests** button takes you to the Request Management page. For more information regarding this page, please refer to the [Request Management Page](#) section below.

Edit or Create New Part Gadget

The workflow is the same as the **New/Edit Part** button on the Part Definition pop-in, except there are now two separate buttons for making a new part, or editing an existing report. For more information on this workflow, refer to the [Part Definition Pop-in](#) section.



Incoming Transfers Gadget

The Incoming Transfers gadget allows users who do not have the full administrative rights of a storekeeper to receive transfers that come in to the current location.

Incoming Transfers								
Notification	Transfer ID	From Location	Total Lines	Required	Requested	Transferred	Description	To Location
	467	ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT	1		23/12/2016 10:12 AM	03/01/2017 12:11 PM	TRANSFER FROM ACLOC1 TO ACLOC2	ACLOC2 - CARTWRIGHT HEAVY STORAGE
	474	ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT	1		03/01/2017 10:38 AM	03/01/2017 12:12 PM	AC - URGENT TRANSFER LOC1 TO LOC2	ACLOC2 - CARTWRIGHT HEAVY STORAGE
	475	ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT	1	13/01/2017	09/01/2017 01:48 PM	09/01/2017 01:49 PM	TRANSFER REQUEST FROM PARTS REQUEST SCREEN	ACLOC2 - CARTWRIGHT HEAVY STORAGE

Showing 3 records

Find Transfer

Transfer ID

The Incoming Transfers gadget provides the following functionality:

- View all incoming open transfers to the user's current location.
- Type or filter records for matches within the table by using the Filter field.
- View the Transfer Detail pop-in by clicking on a transfer ID.
- Go to a specific transfer not in the Incoming Transfers gadget list by using the Find Transfer ID field. A non-open transfer or a transfer not being received at that location can have no action taken, it can only be reviewed.

Incoming Transfers Receiving Process

To start receiving transfers, click on a **Transfer ID** to open the Transfer Detail pop-in.

Transfer - 475

Transfer ID	475
Description	TRANSFER REQUEST FROM PARTS REQUEST SCREEN
From Location	ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT
Transfer Requested	09/01/2017 01:48 PM
Date Transferred	09/01/2017 01:49 PM
Priority ID	2 
Request ID	477384
Work Order ID	ACLOC2-2016-2

Transfer Line Items

Line Number	Part ID	Qty Received	To Bin	Action on Qty not Received	Qty not yet Received	Qty
1	10140-0 - ARM-MIRROR ; ARM, MIRROR, FLX-ALL,	1.00			1.00	

Showing 1 record

The Transfer Detail pop-in provides the following functionality:

- View all line items for the transfer.
- Edit information on the transfer lines.
- Receive the transfer.
- View quantity. This value is set to the quantity not yet received for each line item.
 - If you would like to receive partial quantity for a transfer line item, you must either generate a new transfer to track the remaining quantity or send the remaining quantity back to the sending location.
- The Bin ID choice-list takes into account if the part put-away process at that location is AUTO or STAGED. For STAGED parts, only STAGED AREA bins will be shown.



Note: The header will adjust showing various fields if they exist on the transfer and will hide header fields if no data exists.

Click the **Receive** button to initiate the incoming transfer. The transfer will be validated and committed to the system. A sheet ID will be generated to group all generated put-away cards related to the transfer.

The type of put-away process set for the part will determine how the put-away card will be generated. A put-away process of AUTOMATIC generates a completed and approved put-away card. A put-away process of STAGED generates a put-away card in PENDING status.

After successfully receiving the transfer, the **Put-away Card Viewer** pop-in will display. If the put-away setting is set to ON RECEIPT, put-away sheet report generation will be triggered or you will be prompted to print part receipt labels.

Put Away Card Viewer			
Put Away Sheet ID	164	Show Cards In Status:	
Put Away Card Count	1	☒ STAGED ☒ BEING STOCKED ☒ STOCKED ☒ AVAILABLE	
Put Away Cards			
Select All Clear Sheet ID Assign Existing Sheet ID Assign New Sheet ID			
	Card ID	149	Status: STAGED Edit
	Sheet ID	164	Qty: 2
	Part ID - Suffix	10140 - 0	Completed: N
	Transfer ID	455	Released: N
			Expedited Allowed: N
Close Print Selected Cards Print Selected Labels			

Invoices

If other users are entering invoice via the Invoice Reconciliation gadget, a Storekeeper can review the state of invoices and number of pending (non-reconciled) invoice line-items in the system using the Invoices gadget. Clicking Invoices will take the storekeeper to an invoice list page to begin doing review of purchasing invoices.

Invoices	
9 Invoice Lines Pending Reconciliation	Invoices
13 Total Invoices	

The Purchasing Invoice page will launch after clicking **Invoices**. Go to the [Purchasing Invoices Page section](#) for additional information on this workflow.

Invoice Reconciliation Gadget

The Invoice Reconciliation gadget allows users to start the Invoice Reconciliation workflows. Using the vendor invoice, identify possible purchase orders using the vendor and newest/oldest receipt dates then click **Match** on one of probable rows. Each row represents a purchase order with receipts that are waiting to be matched to an invoice or are waiting to be reconciled after being matched to an invoice.

The gadget will default the status filter to the PO status set on the "Automatically update purchase order header status when lines are closed and put-away cards approved" setting on Enterprise Purchasing - Setup - Options screen.

Invoice Reconciliation					
Filter by Status WAIT-INVOICE - AWAITING INVOICE ▼					
Action	Purchase Order ID ▼	Vendor ID	Receipts to Reconcile ▲	Most Recent Receipt Date	Oldest Receipt Date
Match	MAIN-2018-0000014	ACME - ACME CORP	5	11/05/2018 12:04	11/05/2018 12:03
Match	MAIN-2018-0000012	ACME - ACME CORP	5	11/04/2018 16:17	11/01/2018 13:05
Match	MAIN-2018-0000011	ACME - ACME CORP	1	11/01/2018 13:00	11/01/2018 13:00



Note: If a receipt already has a vendor invoice number, it does not mean it has been automatically reconciled. Invoice Reconciliation is both identifying that the invoice number matches the receipt and handling costs on the vendor invoice to the receipt.

The Invoice Reconciliation page will launch after clicking **Match**. Go the [Invoice Reconciliation Page](#) section for additional information on this workflow.

Part Labels

This gadget allows you to reprint labels that were printed during various workflow processes.

Part Labels

Show labels for: ☒ Receipt ☒ Control ☒ Transfer ☒ Bin ☒ Rebuild Show labels for days past

Search...

Print	Part ID - Suffix	Description	Keyword	Manuf. Part No	Datetime Printed ▼
Showing 0 records					

To use this gadget effectively, the system option "Track history of labels printed" must be enabled on the Parts Setup Options screen in Enterprise Portal in order to have the system record the data for labels when they are printed.

To reprint labels, click the Print icon which will display in the Print column. The default label printer for the user will be set for the Printer ID and the choice-list is then filtered to the printers with a label type that supports the selected label type.

The gadget provides quick filters that are saved on a per user basis, as well as many columns for data on the printed labels. It is recommended that users review the table to select the fields accordingly.

Part Requests Gadget

The Part Requests gadget provides a summary of pending part requests and the number of work orders associated with those part requests.

Part Requests

7 Pending Requests	Requests
0 Pending Part Return Requests	
3 Total Work Orders	

Part Return Requests

The **Requests** button takes you to the Request Management page. For more information regarding this page, please refer to the [Request Management Page](#) section below.

The **Part Return Requests** button takes you to the Pending Returns page. This button appears only if your settings allow storekeepers to approve part return requests. If configured as such, then it is enabled only if there are pending part return requests. For more information regarding part return requests, please refer to the [Pending Returns Page](#) section below.

Pending Core Claims Gadget

From the Pending Core Claims Gadget, a Storekeeper can see a list of Core Claims which do not have an associated stocking ticket. When a tech brings the related Core to the Storekeeper, they will be able to action the item to create an associated stocking ticket which is automatically associated with the selected Core Claim.

The screenshot shows the 'Pending Core Claims' gadget. It features a header bar with the title 'Pending Core Claims'. Below the header is a table with columns: Claim ID, Part ID, Serial Number, Work Order ID, Equipment ID, and Vendor ID. A 'Receive Core(s)' button is located below the table.

Picking Cards Gadget

On this gadget, use the **Show Cards In Status** checkboxes to choose which cards to display (whether cards waiting to be picked, cards that are currently being picked, or have already been picked). Use the **Filter** field to narrow down the displaying list of cards. The filter responds as you type your filter entry.

The screenshot shows the 'Picking Cards' gadget. It includes a 'Show Cards In Status' section with checkboxes for 'To Be Picked', 'Being Picked', and 'Picked', all of which are checked. Below this is a 'Filter' input field. The main area contains a table with columns: Notifications, Card ID, Status, Bin, and Part ID - Suf. The table displays three rows of data, all with a status of 'BEING PICKED'. Below the table is a 'Showing 5 records' label, a 'View Selected' button, and a 'Find Picking Card' button. At the bottom, there is a 'Card ID' dropdown menu and a 'Go' button.

Card ID: The card ID opens the [Picking Card Detail Pop-in](#).

Part ID – Suffix: This link opens the Parts – Primary Information Enterprise Portal screen to the record for the part ID you clicked.

Transfer ID: This link opens the Parts – Transfers Enterprise Portal screen to the record for the transfer ID you clicked.

Find Picking Card: Use the choice-list to select search criteria (such as card ID), and enter the criteria in the search box. This field only allows exact matches, and does not accept wildcards.

View Selected: Select one or more records and click this button to open the records in the Picking Card Viewer. On the Picking Card Viewer, use the checkboxes on the top-right corner to only display the cards needed. The red hyperlinks connect to the same pages as listed above for the Picking Card gadget information. Click **Edit** to open the [Picking Card Detail Pop-in](#).

Picking Card Viewer

Picking Card Count: 2

Show Cards In Status:

- ☒ TO BE PICKED
- ☒ BEING PICKED
- ☒ PICKED
- ☒ APPROVED

Picking Cards

NO IMAGE AVAILABLE	Card ID	210	Status	BEING PICKED	Edit
	Sheet ID		Qty	3	
	Part ID - Suffix	PART001 - 1	Qty on Hand	322.38	
	Part Desc	MOTOR-WIPER	Transfer ID	523	
	Primary Bin	BIN			
NO IMAGE AVAILABLE	Card ID	209	Status	BEING PICKED	Edit
	Sheet ID		Qty	1	
	Part ID - Suffix	PART001 - 1	Qty on Hand	322.38	
	Part Desc	MOTOR-WIPER			
	Primary Bin	BIN			

Close Print Selected Cards Print Selected Labels

Purchase Orders Gadget

The Purchase Orders section only displays if your organization supports Enterprise Purchasing. The Purchase Orders section provides a count of Purchase Order IDs with PENDING or OPEN line items, as well as counts of the PENDING and OPEN line items.

The **Purchase Orders** button takes you to the Purchase Order Management page. For more information about how to use this page, please refer to the [Purchase Order Management Page](#) section below.

Purchase Orders

4	Open Line Items	Purchase Orders
1	Pending line items	
2	Total Purchase Orders	

Purchase Order Review Gadget

The Purchase Orders gadget allows users who do not have the full administrative rights of a storekeeper to receive purchase order line items.

Purchase Orders								
Notifications	Purchase Order ID	Vendor	Expected ▲	Open Lines	Total Lines	Ordered	Required	Work Orders
	ACLOC1-2014-0000001	LA-VENDOR-01 - GENERAL VENDOR	02/27/2015	3	4	03/17/2014 13:46		2
	ACLOC1-2017-0000001	10001-8361 - EMC ENGINEERING	01/18/2017	1	1	01/18/2017 12:04		0

Showing 2 records

Find Purchase Order

Purchase Order ID

The Purchase Order Review gadget provides the following functionality:

- View all purchase orders with an OPEN line item that have been ordered at the current location.
- Type or filter records for matches within the table by using the Filter field.
- Review a purchase order and update or receive line items on the purchase order by clicking on a purchase order ID.
- Use the Find Purchase Order field to open purchase orders using various criteria.
- Receive notifications of expedited purchase orders in the notification column. Priority codes and the threshold to determine high priority is set on the Locations – Primary Information screen, Printer Info Tab.

Purchase Order Receiving Process

To start the purchase order receiving process, click on a **Purchase Order ID** or find a purchase order by using the Find Purchase Order field. The Purchase Order Detail pop-in will display.

Purchase Order Detail - ACLOC1-2014-0000001

Vendor: LA-VENDOR-01 - GENERAL VENDOR
 Purchase Order ID: ACLOC1-2014-0000001
 Purchase Type: STOCK
 Date Ordered: 03/17/2014 13:46 Required By:
 Expected Delivery: 02/27/2015 11:00
 Lead Days: N/A
 Replenishment Batch ID:

Purchase Order Line Items

PENDING OPEN CLOSED ALL

	Notifications	Line Number	Line Type	Line Item	Qty to Receive	Unit Price	Part Bin ID	Shipping Address
☐		1	STOCK PART	10140-0 - ARM, MIRROR, FLX-ALL, CURBSIDE,	20.00	\$ 10.25		
☐		2	STOCK PART	10016-0 - STOP, DOOR, FLX-ALL, TAILGATE, 1-	24.00	\$ 72.50		
☐		3	STOCK PART	10016-0 - STOP, DOOR, FLX-ALL, TAILGATE, 1-	3.00	\$ 72.50		
		4	COMMERCIAL					

Showing 4 records

Close Review Receipts Receive Checked Review and Receive

The Purchase Order Detail provides the following functionality:

- Click on a Line Number to go to the Purchase Order Line Item Detail pop-in for that item. Some information can be updated but is limited for Storeroom personnel without administrative rights.
- Process more than one item at a time by checking the boxes for any number of line items.
- Review receipts already made on the Purchase Order Detail by clicking the **Review Receipts** button.
- Review related work orders by scrolling to the **Work Orders** column. Commercial lines related to a multi-asset work order must be received one at a time.
- Available fields are limited to relevant fields that personnel who do not have administrative rights can edit. This reduces errors and streamlines the workflow.
- A line item cannot be selected if it is not in the OPEN status.
- Click **Receive Checked** to process checked line items.

- The Receive Info pop-in displays and fields that apply to line items for receipts can be edited.
- Bin ID is available to be selected and is required for STAGED parts. It is needed to track where the part is before it is stocked and released into inventory. Bin ID will default to value depending on if the part follows an AUTOMATIC or STAGED put-away process.
- Click **Create Bin** if you need to define a new bin.

 If the **Receive All** box is checked when the **Receive Checked** button is clicked, the Receipt Info – Receive All pop-in will display indicating it is for all line items. This will receive all lines on the purchase order in a single transaction to generate multiple receipts.

Once the receiving process has been started, the following occurs:

- Put-away card is generated in the state determined by the type of put-away process set.
 - STAGED - Generates a put-away card in PENDING status.
 - AUTOMATIC - Generates a completed and approved put-away card.
- Stocking ticket is generated and added to the put-away card under its movement records.
- Serialized parts are managed depending on the type of put-away process set.
 - STAGED - Serial numbers are optional if process is set to STAGED and part return is not enabled. Serial number collection can be done as part of the stocking process.

- AUTOMATIC - Serial numbers are required and these numbers are added to the completed put-away card.
- A purchase order header status is set to CLOSED once all purchase order lines are closed and all put-away cards are completed and approved.

If commercial work is received, the user will be prompted with a dialog to distribute the costs of the work among the child work orders. The dialog has built-in distribution functionality based on if the child work orders are for non-linear assets, linear assets, or a mix of the two. Once the distribution is confirmed, the commercial work will be issued to the child work orders as part of the receiving process.



Note: The “Include Commercial work on Purchase Order” module setting must be enabled for storeroom personnel to be able to view commercial work.

When the receiving process is finished and a put-away card was generated, the Put-away Card Viewer pop-in will open and show the generated cards.

Put Away Card Viewer																															
Put Away Sheet ID	169																														
Put Away Card Count	1																														
Show Cards In Status:																															
☒ STAGED ☒ BEING STOCKED ☒ STOCKED ☒ AVAILABLE																															
Put Away Cards																															
Select All Clear Sheet ID Assign Existing Sheet ID Assign New Sheet ID																															
NO IMAGE AVAILABLE	<table border="1"> <tbody> <tr> <td>Card ID</td> <td>153</td> <td>Status</td> <td>STAGED</td> <td> Edit </td> </tr> <tr> <td>Sheet ID</td> <td>169</td> <td>Qty</td> <td>3</td> <td></td> </tr> <tr> <td>Part ID - Suffix</td> <td>10016 - 0</td> <td>Completed</td> <td>N</td> <td></td> </tr> <tr> <td>Purchase Order ID</td> <td>EAM-6879-STAGED-REQUEST</td> <td>Released</td> <td>N</td> <td></td> </tr> <tr> <td>Purchase Order Line</td> <td>1</td> <td>Expedited Allowed</td> <td>Y</td> <td></td> </tr> <tr> <td>Receipt ID</td> <td>3</td> <td>Expedited</td> <td>N</td> <td></td> </tr> </tbody> </table>	Card ID	153	Status	STAGED	Edit	Sheet ID	169	Qty	3		Part ID - Suffix	10016 - 0	Completed	N		Purchase Order ID	EAM-6879-STAGED-REQUEST	Released	N		Purchase Order Line	1	Expedited Allowed	Y		Receipt ID	3	Expedited	N	
Card ID	153	Status	STAGED	Edit																											
Sheet ID	169	Qty	3																												
Part ID - Suffix	10016 - 0	Completed	N																												
Purchase Order ID	EAM-6879-STAGED-REQUEST	Released	N																												
Purchase Order Line	1	Expedited Allowed	Y																												
Receipt ID	3	Expedited	N																												
Close Print Selected Cards Print Selected Labels																															

Put-away cards can be grouped onto new sheets by selecting the card and clicking **Assign Existing Sheet ID** or **Assign New Sheet ID**. Any newly created put-away cards will be available for viewing, editing and processing in the Put-away Card gadget.

Click **Print Selected Cards** or **Print Selected Labels** to print any combination of sheets, cards, or labels.

If the Part Put-away Settings are set to ON RECEIPT, automatic put-away sheet report generation will be triggered and you will be prompted to print part receipt labels.

Requisitions Gadget

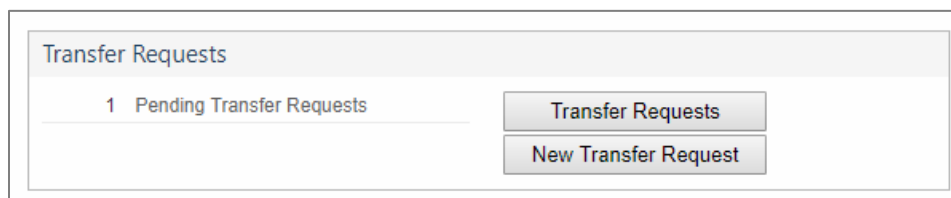
The Requisitions section only displays if your organization supports Enterprise Purchasing. The Requisitions section provides a provides a count of Requisitions with PENDING line items, as well as a count of the line items that are still PENDING.



The **Requisitions** button takes you to the Requisitions Management page to create, modify and review purchase requisitions and turn the requisitions into purchase orders or request for bid/quote/proposal (B/Q/P). For more information about how to use this page, please refer to the [Requisition Management Page](#) section below.

Transfer Requests

The Transfer Requests gadget displays the number of transfer requests that the Transfer Requests Awaiting Receipt list page displays as a quick reference.



Transfer Requests: Opens the Transfer Requests Awaiting Receipt page.

New Transfer Request: Opens the Parts Stock Transfer Detail pop-in.

Viewing Transfer Requests

To view transfer requests:

1. From the Transfer Requests gadget, click **Transfer Requests**.
2. The Transfer Requests Awaiting Receipt page displays.

Transfer Requests Awaiting Receipt

Current Location:

Transfer ID	Description	From location	To location	Delivery Address ID	Employee ID	Priority ID
529	TRANS	LOC1	LOC1		EMPLOYEE	
523	TEST	LOC1	LOC1		EMPLOYEE4	2

Back New Transfer Request

3. If needed, change the **Current Location** to see transfer requests from any locations you need request information.
4. Click the **Transfer ID** to open the Parts Stock Transfer Detail pop-in to see more information. Click **Cancel** to close this pop-in when you are done.
5. Scroll to the right to see more information.

Create a New Transfer Request

1. Click **New Transfer Request** from one of the following locations:
2. The Transfer Requests gadget from the main portal page
3. The Transfer Requests Awaiting Receipt page

The Parts Stock Transfer Detail pop-in displays.

Parts Stock Transfer Detail

Basic Info

Transfer ID: 1363

Employee ID: [redacted]

To Location ID: 1

From Location ID: ...

Description:

Priority ID: ...

Address For Deliveries: ... 1234 ADDRESS LINE 2 ADD

Line Items

Delete	Transfer Status	Transfer Action	Part ID	Part Suffix	Quantity Requested	Quantity On Hand
X		...	... Lookup			

Cancel Save

The Transfer ID, Employee ID and To Location ID fields display and are uneditable.

4. In the header section, enter the **From Location ID**, **Description**, **Priority ID**, and **Address For Deliveries** information, or use the chooser buttons to select information for these fields from the list of entries.
5. In the Line Items section, enter the rest of the information. These fields include **Transfer Action** (Request Transfer, Receive Parts In, or Canceled), **Part ID**, **Part Suffix**, **Quantity Requested**, and **Serial Number**.
6. Once all information is complete, click **Save**, or click **Cancel** to close this pop-in without saving changes.

5. Request Management Page

Click the **Requests** button in the Part Requests gadget on the main Storekeeper page to open the Request Management page.

Request Management

Current Location: ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT Refresh Off

Pending Parts Requests: 5 Pending Commercial Requests: 22 Notify Requests: 0 Ordered Requests: 0

☐	Priority Rank	Notify	Qty Avail?	Request ID	Part ID - Suffix - Description	Manufacturer	Asset ID	Work Order
☐	5		Y	478944	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2
☐	5		Y	479067	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2
☐			N	477008	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		AC-EQ-002	ACLOC1-2015-61
☐			N	476497	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		0000024	ACLOC1-2014-5
☐			N	476497	10300-0-MOTOR-WIPER; MOTOR, WIPER, FLX-ALL, WINDSHIELD, CURBSIDE, HAUSMAN BUS SA		0000024	ACLOC1-2014-5

Current Filter

No filter defined.

Define Filter Clear Filter

Back for Checked Items: Set Notify Flag Process Print Pick Report

Current Location Section

This drop-down shows the location for pending part requests in the list below. You may change the location to view pending part requests at other locations as desired.

Request Management

Current Location: GA01 - OPS GARAGE

Page Refresh Setting

Request Management

Current Location: JHLOC1 - JH LOC Refresh Now

Pending Parts Requests: 1 Pending Commercial Requests: 0 Notify Requests: 0 Ordered Requests: 0

☐	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Description	Manu
☐			Y	475748	JH-EMP-MY EMPLOYEE	JH-P1-0-ABS SENSOR; BRAKE ABS - SENSOR	

Refresh dropdown menu:

- Now
- Off
- Every minute
- Every 3 minutes
- Every 5 minutes
- Every 10 minutes
- Every 15 minutes
- Every 20 minutes
- Every 30 minutes
- Every 45 minutes
- Every 60 minutes

The **Refresh** drop-down selection box provides flexibility to refresh the page at various incremental time periods as desired. Choices are:

- **Off:** No automatic refresh; the page only reloads upon exiting and returning.
- **Now:** One-time refresh that refreshes the page manually at the current moment.
- **Every 1 minute – 60 minutes:** Will automatically refresh the page on user-selected timer.

Pending Parts Requests Tab

This section outlines some of the features of the **Pending Parts Requests** tab.

The **Pending Parts Requests** tab (default) lists the requests that contain line items that need an action to be performed.

All columns can be re-ordered and are sortable with the direction of the arrow indicating the direction of the sort.

- ✓ To change the order of the columns in this table and other similar tables, click and hold on the column title and drag it to the location where you would like it displayed.

Pending Parts Requests: 5				Pending Commercial Requests: 22		Notify Requests: 0		Ordered Requests: 0	
☐	Priority Rank	Notify	Qty Avail?	Request ID	Part ID - Suffix - Description	Manufacturer	Asset ID	Work Order	
☐	5		Y	479067	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2	
☐	5		Y	478944	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2	
☐			N	477008	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		AC-EQ-002	ACLOC1-2015-61	
☐			N	476497	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		0000024	ACLOC1-2014-5	
☐			N	476497	10300-0-MOTOR-WIPER; MOTOR, WIPER, FLX-ALL, WINDSHIELD, CURBSIDE, HAUSMAN BUS SA		0000024	ACLOC1-2014-5	

- **Checkbox:** Check the checkbox located in the far left column of the list to select individual line items for processing as discussed in the [Perform Actions on Part Requests](#) section below.

Pending Parts Requests: 5				Pending Commercial Requests: 22		Notify Requests: 0		Ordered Requests: 0	
☐	Priority Rank	Notify	Qty Avail?	Request ID	Part ID - Suffix - Description	Manufacturer	Asset ID	Work Order	
☐	5		Y	479067	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2	
☐	5		Y	478944	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2	
☐			N	477008	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		AC-EQ-002	ACLOC1-2015-61	
☐			N	476497	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		0000024	ACLOC1-2014-5	
☐			N	476497	10300-0-MOTOR-WIPER; MOTOR, WIPER, FLX-ALL, WINDSHIELD, CURBSIDE, HAUSMAN BUS SA		0000024	ACLOC1-2014-5	

- **Select/Deselect All:** Check the top box to select all the boxes in the list.
- **Priority Rank:** This column displays the priority rank of the request. Priority rank codes may be configured by your organization.
- **Notify:** This column signifies parts are ready. The **Parts Ready**  icon indicates to the technician/supervisor that the part is ready for pickup.
- **Qty Avail:** Displays a **Y** when the Quantity on Hand minus the Quantity Required is greater than or equal to zero. Otherwise, the Qty Avail displays an **N**.



The equation takes into account Quantity Committed based on the setting for that location (Inventory-More Info: "Committed quantity not available for issue").

- **Request ID:** Click this button to open the Part Request Detail page. For more information about this page, please refer to the [Part Request Detail Page](#) section below.

Pending Parts Requests: 5		Pending Commercial Requests: 22		Notify Requests: 0		Ordered Requests: 0		
☐	Priority Rank	Notify	Qty Avail?	Request ID	Part ID - Suffix - Description	Manufacturer	Asset ID	Work Order
☐	5		Y	479067	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2
☐	5		Y	478944	10140-0-ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI		2970	ACLOC1-2014-2
☐			N	477008	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		AC-EQ-002	ACLOC1-2015-61
☐			N	476497	10016-0-STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL		0000024	ACLOC1-2014-5
☐			N	476497	10300-0-MOTOR-WIPER; MOTOR, WIPER, FLX-ALL, WINDSHIELD, CURBSIDE, HAUSMAN BUS SA		0000024	ACLOC1-2014-5

- Other Request Details:
 - **Requested By**
 - **Part ID – Suffix Description:** Part ID is a link to the Parts - Location Information screen
 - **Manuf Part No** (and Manufacturer Name in parentheses)
 - **Comments:** clicking the Comment icon opens a dialog to view long comments)
 - **Quantity Required, On Hand, On Order, Committed:**
 - Clicking the Qty on Order button takes you to the Purchase Order Management page and filters for orders that have line items for this Part ID (if your organization supports Enterprise Purchasing). For more information about this page, please refer to the [Purchase Order Management Page](#) section below.
 - The Quantity Committed and Bin ID are provided.
 - **Action Comment**
 - **Bin ID**
 - **Asset ID** (Asset Viewer icon displays if enabled)
 - The **Asset ID** is a hyperlink that takes you to the appropriate screen to view Asset information
- Note: If the asset ID is a part ID, as in the context relates to that part.
- If enabled, the **Asset Viewer** icon displays in the Asset ID column.

- Clicking the Asset Viewer  icon takes you to the Asset Viewer. Please refer to the *Supervisor or Technician User Guides* for additional information about the Asset Viewer.
- Work Order
 - The **Work Order ID** is a hyperlink to the Work Order Center screen or Internal Work Order Rebuild Center screen depending on the type of work order. Linear Work Order is also supported as a hyperlink. The **Work Order ID** hyperlink only works if your organization uses Enterprise Portal.
- **Work Order Status**
- **Delay**
- **Account ID**
- **Date Requested**
- **Days Open**
- **Date Required**
- **Status:** The status field shows the status of the part request such as pending, ordered, partially received, received, canceled, and completed.
- **Issue Together:** Chain icon  which indicates that the line items on the part request are to be issued together.
- **Delivery Address ID:** Displays the address ID (the code only, no description or details) to storekeepers to verify that the correct address is being processed.
- **Purchase Order ID:** Displays if the part is warrantable and assists with tracking warrantable parts that start their warranty upon receipt.
- **Date/Time Received:** Displays if the part is warrantable to indicate the date and time it was received. This assists with tracking warrantable parts that start their warranty upon receipt.

Pending Commercial Requests Tab

The Pending **Commercial Requests** tab functions and displays similarly to the Pending Parts Request tab. All columns can be re-ordered and are sortable with the direction of the arrow indicating the direction of the sort.

- ✔ To change the order of the columns in this table and other similar tables, click and hold on the column title and drag it to the location where you would like it displayed.

Pending Parts Requests: 10		Pending Commercial Requests: 6		Notify Requests: 4		Ordered Requests: 13	
☐	Priority R...	Request ID	Requested By	Comments	Action Comment	Asset ID	Manufacturer ID
☐		479982	MOLLY-EMP-MOLLY	PLEASE RUSH		CNCAR102	FORD
☐		479983	MOLLY-EMP-MOLLY	RUSH		CNCAR104	FORD
☐		479631	CNEMP001-EMPLOYEE 001	COMMENT FOR COMMERCIAL WORKS 3		CNCAR352	FORD
☐		479989	MOLLY-EMP-MOLLY	PLEASE RUSH		CNLINEAR104	

To Order an item that has been requested, do the following.

1. Check the box next to the line item.
2. Select **Order** from the Checked Items choice-list and click **Process**.

Line items to Order: 1

Work Order: CNLOC1-2014-258 (OPEN) Equipment: CNCAR102: ANCAR102 2012 FORD F150 CAR 102 Edit

Delay Status: Hat No: Parking Stall:

Line Type: **COMMERCIAL**

Action: **ORDER** Remove

Service Request ID:

WAC: 10 ... INSPECTED Task ID: 001 ... ELECTRICAL SYSTEM

Priority ID: ...

Labor Cost: \$ 250 Taxable? ☒ Labor Hours: 1.50

Parts Cost: \$ 300 Taxable? ☒

Misc Cost: \$ 29 Taxable? ☒

Date Required: 10/02/2015

Comment: PLEASE RUSH

Action Comment:

Purchase Order ID ... Vendor ID: CNVENDOR00 ... Vendor Contract ID: ...

Account ID: CNACCT0001 ... UNIT ACCOUNT 0001

Back Save Changes

Commercial line items on purchase orders, requisitions, and receipts display **Labor**, **Parts**, and **Misc Cost** fields with a **Taxable** checkbox to indicate when the cost is taxable.

3. Complete the Line Items to Order Pop-in and click **Save Changes**.

Note: If you have set the action to **Order** and have a quantity on-hand to cover the needed items, a message displays confirming if you still want to order even though you have quantity on hand.

Notify Requests Tab

This section outlines some of the features of the **Notify Requests** tab.

Note: This tab does not display if you have a blank checkbox next to the **Part request ORDER** action does not complete the request option on the Locations screen - Inventory-More Info tab.

- If you have checked the **Default check part request notify flag upon receive/issue from receipt** option on the Locations - Inventory - More Info tab, the Notify Requests tab lists the requests to notify receive or issue from receipt.
- If your organization does not use this workflow, you may choose to hide the tab using User Interface (UI) control.



Note: The **Parts Ready**  icon in the **Notify** column indicates that the storekeeper has set the **Notify** flag on the Request Management page, or checked the **Parts are Ready** box on the Part Request Detail or Parts Issue/Order pages. The **Default check part request notify flag upon receive/issue from receipt** checkbox also automatically checks the **Notify** checkbox.

Pending Parts Requests: 1626			Pending Commercial Requests: 1			Notify Requests: 1		Ordered Requests: 0	
☐	Notify	Qty Avail?	Status	Request ID	Requested By	Part ID	Manufacturer	Comments	
☐		N	COMPLETED	470827	KE-KELLEY	20303-0-SOLVENT- WINDSH; SOLVENT, WINDSHIELD WASHING, WITH ETHANOL, ONE GALLON CONTAI			

Ordered Requests Tab

 The Ordered Requests has data in it depending on your organization's settings. The **Part request ORDER action does not complete the request** setting drives whether or not the Ordered Requests tab will have data in it. This setting is located on the Primary Information screen (Setup > Organizational Structure > Locations > Primary Information). If it is set so the part request ORDER action does NOT complete the request, the order action drops the request from the Pending Parts Requests list and displays it on the Ordered Requests tab.

This section outlines some of the features of the **Ordered Requests** tab.



The **Ordered Requests** tab provides a list of items that have been actioned (to purchase orders or requisitions) but not yet received.



If your organization does not use this workflow, you may choose to hide the tab using User Interface (UI) control.

Pending Parts Requests: 6		Pending Commercial Requests: 0		Notify Requests: 0		Ordered Requests: 3			
Notify	Qty Avail? ▾	Request ID	Part ID			Manufacturer	Comments		
	Y	473977	05EL01098-0-MACHINE SCREW-P; CORONA PART WITH A CROSS REF PART			ALSTOM (24143CR)			

You may scroll to the right to see additional columns as shown in the following two screenshots:

Request Management

Current Location: LMLOC1 - LM LOCATION 1 - SHOP

Pending Parts Requests: 31 Notify Requests: 2 **Ordered Requests: 13**

Action Comment	Bin ID	Asset ID	Work Order	Work Order Status	Delay	Account ID
	LMBIN002-C	LM-MP2.TYT.CUV.05	LM-MP1-2010-1112	OPEN		
		LMMP00L01	LM-MP1-2010-1089	OPEN		
	LMBINLOC101234567890	LMMP00L01	LM-MP1-2010-1089	OPEN		
		LMMP00L01	LM-MP1-2010-1089	OPEN		
		LMMP00L01	LM-MP1-2010-1089	OPEN		
		LMMP00L01	LM-MP1-2010-1089	OPEN		
	LMBIN001	LMMP003	LM-MP1-2010-1088	OPEN		
	LMBIN001	LMMP003	LM-MP1-2010-1088	OPEN		
		LMMP003	LM-MP1-2010-1088	OPEN		

Request Management

Current Location: LMLOC1 - LM LOCATION 1 - SHOP

Pending Parts Requests: 31 Notify Requests: 2 **Ordered Requests: 13**

Account ID	Date Requested	Date Required	Expected Delivery	Vendor	Status	Part
	03/03/2010 10:11	03/08/2010	03/03/2010 09:00	LMVENDOR02 - LM VENDOR 2	ORDERED	LMLOC1-2010-0
	02/05/2010 03:42		02/05/2010 09:00	LMVENDOR02 - LM VENDOR 2	ORDERED	LMLOC1-2010-0
	02/05/2010 03:42		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0
	02/05/2010 03:42		02/05/2010 09:00	20018 - AAA APPLIANCE CORP.	ORDERED	LMLOC1-2010-0
	02/05/2010 03:42		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0
	02/05/2010 03:42		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0
	02/05/2010 03:28		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0
	02/05/2010 03:28		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0
	02/05/2010 03:28		02/05/2010 05:00	LMVENDOR01 - LM VENDOR 1, TEST	ORDERED	LMLOC1-2010-0

Scrolling to the right shows the following additional columns: Action Comment, Bin ID, Asset ID, Work Order, Work Order Status, Delay, Account ID, Date Requested, Date Required, Expected Delivery, Vendor, Status, the Purchase Order/Requisition (PO/Req) that the line was actioned to, and the Issue Together Chain Link (indicating the parts must be issued together). The PO/Req hyperlink takes you to the default replenishment type. So if the default replenishment type is requisition, the link will only take the user to the requisition, even if it has since been moved to a purchase order. Please refer to the [Purchase Order Detail Page](#) and [Requisition Detail Page](#) sections for more details about these pages.

Current Filter Section

The current filter section allows you to define filters for the part requests list. Follow the steps below to define the filter.

1. Click the **Define Filter** button.

Pending Parts Requests: 1		Pending Commercial Requests: 0		Notify Requests: 0		Ordered Requests: 0	
☐	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Description	
☐			Y	475748	JH-EMP-MY EMPLOYEE	JH-P1-0-ABS SENSOR; BRAKE ABS - SENSOR	

Current Filter

No filter defined.

Define Filter Clear Filter

Back for Checked Items: Set Notify Flag Process Print Pick Report

You are taken to the Define Part Request Filter page.

Quick Filter: Set as Default Remove Default Remove

Define Purchase Order Filter

Purchase order ID

Status

Date ordered range From To

Date expected range From To

Vendor ID

Vendor Store ID

Vendor Contract ID

Purchase type

Approval

Replenishment batch ID

Part ID - Suffix -

WO Loc/Yr/Number

Has unprinted lines

Has open or pending lines YES

Equipment ID

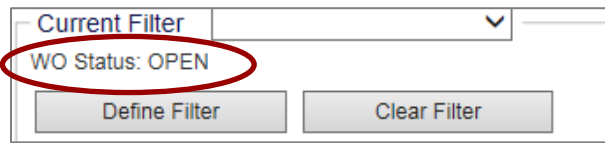
Reset Filter Save Quick Filter as: Save

Cancel Apply Filter

2. Complete the fields as desired and click **Apply Filter**.

 The **Reset Filters** button removes the filter. Clicking the **Cancel** button takes you back to the Request Management page. You can also save the filter as a Quick Filter by entering a name for the quick filter in the **Save Quick Filter as** field and clicking the **Save** button. Once a Quick Filter has been saved, it may be set as the default filter for the Request Management page by clicking the **Set as Default** button. Click the **Remove** button to remove the quick filter from the list. Click the **Remove Default** button to remove the quick filter as the default filter for the Request Management page. Enter a delivery code in the **Deliver Address ID** field to assign a delivery address.

You are returned to the Request Management page with the filtered list displayed.



3. Click Clear Filter to remove the filter.



The filter is removed and the entire list displays.

Actions Section

The **Actions** section at the bottom of the Request Management page allows you to perform the following functions:

- Click the **Back** button to return to the Main Storekeeper page.
- Perform actions on part requests as shown in the [Perform Actions on Part Requests](#) section below.
- Print a Pick List Report that lists all the pending line items for the selected location by clicking the **Print Pick Report** hyperlink on the bottom right of the page.

Pending Parts Requests: 1		Pending Commercial Requests: 0		Notify Requests: 0		Ordered Requests: 0	
☐	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Description	Manufacturer
☐			Y	475748	JH-EMP-MY EMPLOYEE	JH-P1-0-ABS SENSOR; BRAKE ABS - SENSOR	

Current Filter ▼

WO Status: OPEN

Define Filter Clear Filter

Back for Checked Items: Set Notify Flag ▼ Process **Print Pick Report**

 This link only displays if your Storekeeper Portal settings are configured with a Pick List Report.

Perform Actions on Part and Commercial Requests

To perform actions on part requests from this page, select the desired part requests to perform the action on by checking the box on the left side of the parts requests list and follow the steps outlined below for each action type.

☐	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Description	Comments	Qty Reqd	Qty d Hand
☒		N	66	1000-04 - ANDREW BYNUM	P-2018 - 0 - BELTS; BELTS		4.00	0
☐		N	65	1000-04 - ANDREW BYNUM	P-2018 - 0 - BELTS; BELTS	REQUEST FOR ALL REPLACEMENT	4.00	0
☐		Y	62	LMEMPID01 - CHAD WALKER	P-1006 - 98 - BATTERY PROTECT; BATTERY PROTECTOR		1.00	4

Set or Clear the Notify Flag

Setting the Notify flag notifies technicians when parts are ready for pickup.

1. Select **Set Notify Flag** from the **For Checked Items** drop-down box and click the **Process** button.

Back for Checked Items: Set Notify Flag ▼ Process Print Pick Report

The selected part request is updated accordingly.

- To clear the notify flag, select the desired part request by checking the box on the left side of the part requests list. Select **Clear Notify Flag** from the **For Checked Items** drop-down box and click the **Process** button.

Back for Checked Items: **Clear Notify Flag** Process Print Pick Report

The Notify Flag is removed.

	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Description	Manuf Part No	Comments	Qty Reqd	Qty on Hand	Qty on Order	Qty Commit
☐		N	5596	LMEMPID - LYDIA			ALARM MOUNT	1.00		0.00	0.00
☐		Y	5011	LMEMPID - LYDIA	LMPART10 - 0 - MUFFLER; MUFFLER		PART ORDERED VIA IC SK/PART REQUEST LINE	1.00	2.00	8.00	0.00

Order Parts

To order parts from the Request Management page:

- After selecting the specific part request (by placing a check in the box on the left side of the Pending Part Requests list), select **Order** from the **for Checked Items** drop-down box and click the **Process** button.

Request Management

Current Location: 1000 - FULL SERVICE SHOP Refresh Off

Pending Parts Requests: 39 Pending Commercial Requests: 1 Notify Requests: 0 Ordered Requests: 17

	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Descr...	Manufacturer	Comments	Qty Reqd	Qty on Hand
☒			Y	58	001-MOLLY TELLO	P-2003-Q-CLEAR LENS; CLEAR LENS			1	26
☒			Y	54	LMEMPID01-CHAD WALKER	LE-19AS-0-P1; WIPER BLADES	AC DELCO ()		2	25
☒			Y	106	001-MOLLY TELLO	00200004-Q-GASKET; GASKET	AC DELCO (219-223)		1	25
☐			Y	131	001-MOLLY TELLO	P-1002-Q-GASKET; GASKET	KD (13241)		1	18
☐			Y	135	001-MOLLY TELLO	P-2006-Q-BRAKE DRUM; BRAKE DRUM	913 (42256-7243627)		1	49
☐			Y	73	001-MOLLY TELLO	P-2009-Q-THERMASTAT; THERMASTAT			1	16
☐			Y	86	001-MOLLY TELLO	PART009-Q-A / FILTER; AIR FILTER			1	16
☐			Y	89	001-MOLLY TELLO	P-1013-Q-STARTER REBUILD; STARTER			1	5
☐			N	53	001-MOLLY TELLO	XF12-196515-CA-Q-MOTOR ASSY; MOTOR ASSY			1	0

Check box(es) to select desired part requests

Current Filter: No filter defined Define Filter Clear Filter

Select ORDER from dropdown list

Click the Process button

What do you want to do? Back for Checked Items: **Order** Process Print Pick Report

You are taken to the Line Items to Order page where the number of line items display at the top of the page. If there are several line items, use the scrollbar on the right to see the entire list of items. The work order information displays at the top of each line item.

Line items to Order: 3

Work Order: 1000-2010-28 (OPEN) Equipment: C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NRY BLUE CHEV. CAVALIER 4 DOOR SEDAN Edit

Delay Status: Hat No: 12312 Parking Stall: YELLW

Action: ORDER ☐ NFI Part ID: P-2003 Lookup Remove

Manuf Part No: Manufacturer: Part description: CLEAR LENS; CLEAR LENS

Task ID: B1 PM-B1 Qty Ordered: 0.00 Unit Price: 25.5200 Est. Unit Cost: 0.00

WAC: Qty Committed: 0.00 WOs: 0.00 Total: 0.00 Date Required: Bin: ☐ Parts are ready

Qty on Hand: 26.00 Qty Avail: Y

Comment: Purchase Order ID: Vendor ID: V-1000 Vendor Contract ID: Account ID: ☐ Save Changes

Work Order: 1000-2010-9 (OPEN) Equipment: A-1002: A-1002-CHEVMALIBU02 2010 CHVRL MALIBU WHITE CHEV. MALIBU 4 DOOR SEDAN Edit

Delay Status: P - WAITING PARTS Hat No: 426 Parking Stall: YELLW

Action: ORDER ☐ NFI Part ID: 18-19AS Lookup Remove

Manuf Part No: Manufacturer: AC DELCO Part description: *7; WIPER BLADES

Task ID: A PM-A Qty Ordered: 0.00 Unit Price: 23.5300 Est. Unit Cost: 0.00

WAC: Qty Committed: 0.00 WOs: 0.00 Total: 0.00 Date Required: Bin: ☐ Save Changes

Qty on Hand: 25.00 Qty Avail: Y

Comment: Purchase Order ID: Vendor ID: Vendor Contract ID: Account ID: ☐ Save Changes

Back Save Changes

Scroll to see additional line items

 The Line Items to Order page looks slightly different when ordering for Pending Commercial Requests (includes Labor, Parts, and Misc Cost and Taxable information, etc.) but the basic steps remain the same.

Line items to Order: 3

Work Order: CNLOC1-2013-88 (OPEN) Equipment: CNLINEAR104: LINEAR ASSET 104 - ASSET TYPE=STRUCTURE LINEAR EQUIPMENT Edit

Delay Status: Hat No: Parking Stall: ☐ Save Changes

Line Type: COMMERCIAL Remove

Action: ORDER ☐ NFI Service Request ID: Task ID: 01-01 TASK 01-01

WAC: Priority ID: Labor Cost: \$ 100 Taxable? ☒ Labor Hours: 0

Parts Cost: \$ 50 Taxable? ☒ Misc Cost: \$ 15 Taxable? ☒ Date Required: 09/30/2015

Comment: PLEASE RUSH Action Comment: Purchase Order ID: Vendor ID: CNVENDOR00 Vendor Contract ID: Account ID: ☐ Save Changes

2. Click **Edit** to edit the **Delay Status**, **Hat Number** or **Parking Stall** information for the work order.

A Delay Status drop-down box displays along with editable Hat No. and Parking Stall fields.



Note: The Hat No. and Parking Stall fields do not display for Part Rebuild or linear work orders.

3. Select a **Delay Status** or modify the **Hat No.** and **Parking Stall** information as desired.
4. Click **Save** to save your changes.



Note: To stop a delay, select **STOP DELAY** from the drop-down list and click **Save**.



Note: If you have set the action to **Order** and have a quantity on-hand to cover the needed items, a message displays confirming if you still want to order even though you have quantity on hand.

A Successful Update message displays.

⚠ When the Action is ORDER, the Action type drop-down list (below) defaults based on the Location setting for “Default replenishment generation item” as mentioned in the important note below. You may also transfer parts from other locations by selecting the **Transfer From** option from the drop-down list. When **Transfer From** is selected on the part request when choosing the Order action, then the Supplied By location will default as the location.

⚠ Depending on your Locations default settings, part orders will either be converted to purchase orders or requisitions. The **Default replenishment generation item** setting (Purchase Order or Requisition) determines if part orders go to purchase orders or requisitions. Follow menu path: **Setup > Organization Structure > Locations > Primary Information** to set the default.

⚠ The hierarchy is as follows: If the Part ID has a default replenishment (set on the **Parts – Location Information screen, Replenishment tab**), then use that. If not, use the **Location screen, Inventory – Enterprise** setting for default replenishment. Otherwise, use the **Enterprise Purchasing** default replenishment type.

Work Order: 1000-2010-28 (OPEN) Equipment: C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NPY BLUE CHEV. CAVALIER 4 DOOR
 SEDAN Hat No: 12312 Parking Stall: YELLOW

Delay Status: Action: ORDER ☐ NFI Part ID: P-2003 - 0 Lookup Remove

Manuf Part No: Part description: CLEAR LENS; CLEAR LENS Manufacturer:

Task ID: B1 PM-B1 Qty Ordered: 0.00 Unit Price: 25.5200 Est. Unit Cost: 0.00

WAC: Quantity: 1.00 EA Qty Committed: 0.00 WOs: 0.00 Total: 0.00 Date Required: Bln:

Qty on Hand: 26.00 Qty Avail: Y Comment: Action Comment:

Purchase Order ID Vendor ID: V-1000 Vendor Contract ID: ☒ Parts are ready

Account ID

Work Order: 1000-2010-137 (OPEN) Equipment: C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NPY BLUE CHEV. CAVALIER 4 DOOR
 SEDAN Hat No: Parking Stall: YELLOW

Delay Status: Action: ORDER ☐ NFI Part ID: 10100094 - 0 Lookup Remove

Manuf Part No: 219-323 Manufacturer: AC DELCO

Part description: GASKET; GASKET Task ID: BRK-003 CHANGE BRAKE FLUID

Qty Ordered: 1.00 Unit Price: 32.5200 Est. Unit Cost: 0.00

WAC: 03 EXCHANGE - NEW Quantity: 1.00 EA Qty Committed: 0.00 WOs: 1.00 Total: 2.00 Date Required: Bln:

Qty on Hand: 25.00 Qty Avail: Y Comment: Action Comment:

Requisition ID Vendor ID: V-1000 Vendor Contract ID: ☒ Parts are ready

Account ID

To move a part request to a purchase order:

The following example shows a part request that is moving to a Purchase Order.

1. To assign the Part Request to a Purchase Order, enter the **Purchase Order ID** in the field or click the Select icon  to bring up the Parts Ordering selector pop-in (to select the **PO ID** and enter additional information).

The Parts Ordering pop-in displays.

Messages Web Screen Reports

Home Storekeeper Work Mgt Super

Line items to Order: 3

Work Order: 1000-2010-28 (OPEN)

Delay Status: Action: ORDER

WAC: Quantity: 1.00 EA Qty Committed: 0.00

Qty on Hand: 26.00 Qty Avail: Y Total: 0.00 Date Required: Bln:

Comment: Action Comment:

Purchase Order ID  Vendor ID: V-1000 Vendor Contract ID: ☒ Parts are ready

Account ID

Parts Ordering Popin

Parts Ordering

Order to PO ☐ Use Existing ☒ Create New

Vendor ID NAPA AUTO PARTS - FULL SERVICE VNDR

PO ID

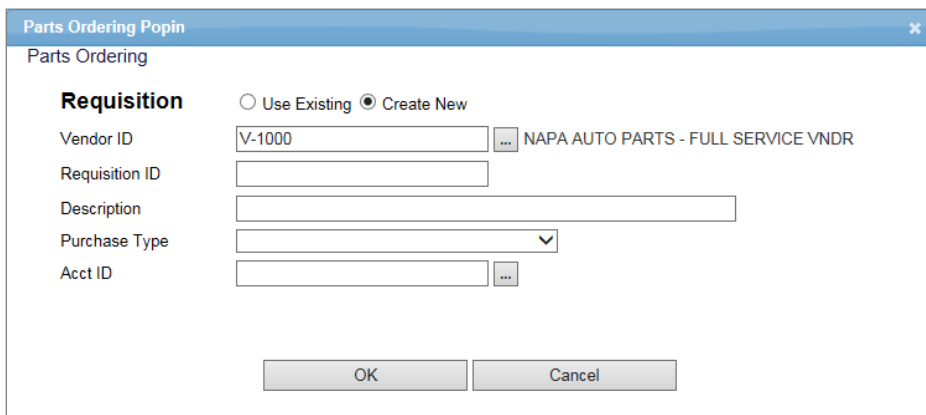
Description

Purchase Type

Acct ID

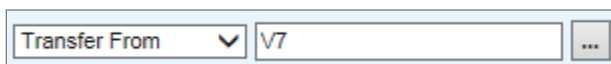
OK Cancel

 If the selection had been to order to a Requisition, the Parts Ordering pop-in looks like the following screenshot and you would follow a process similar to the example provided below for ordering to a purchase order.



Parts Ordering Pop-in for Ordering to Requisition

 When choosing to Transfer From a location, the part transfer location will automatically default to Supplied by Location and would look something like this:



2. On the Parts Ordering Pop-in, the **Vendor ID** defaults from the Part ID Location record (on the Parts – Location Information screen). To select a different Vendor, click the Vendor ID Select  icon and choose a vendor from the choice-list.

 You may also select a Vendor by clicking on the choice-list. Depending on your settings, the Vendors displayed may also display Approved, Rank, and Vendor Contract information. Refer to the *Shop Activity Storekeeper Administrator Guide* for more information about these settings.

Select Vendor ID 199 item(s) found

Vendor ID Starts with:

And contains:

Vendor ID	Name	Approved	Rank	Vendor Contract
1000	NAPA CAR AND PARTS	Y	1	Y
NAP850254510	NAPA AUTO PARTS	Y	2	Y
860298157	SUBIA	Y	3	
ABT161775998	A B TRAILERSy LLC			
ACC270058028	ACCESSORIES UNLIMITED INC			
ACC542105218	ACCESSORIES DEPOT OF NM			
ACL850420442	A CLASSIC GLASS SHOP			
ACM850216187	ACME RADIATOR SERVICE			
ACT850410052	ACTION HOSE INC			
ALB760757139	ALBUQUERQUE AUTO GLASS - TINT			

Page 1 of 20

3. Select the **Use Existing** radio button to order to an existing purchase order or click the **Create New** radio button to create a new purchase order. The sample screenshots show an example for Use Existing PO or Create New PO.

- **Use Existing** – Select the **Use Existing** radio button, select a PO ID from the choice-list (the remaining fields populate from the existing PO), and click **OK**.

Parts Ordering Popin

Parts Ordering

Order to PO

☒ Use Existing ☐ Create New

Vendor ID: V-1000 NAPA AUTO PARTS - FULL SERVICE VNDR

PO ID: 1000-2010-0000002

Description:

Purchase Type: STOCK PART - STOCK PART PURCHA

Acct ID: 000001 ACCOUNT FOR ALL DEPT/LOCS

- **Create New** – Select the **Create New** radio button, complete the fields, and click **OK**.



Note: The PO ID field will automatically populate with the next PO number if you leave the field blank.

Parts Ordering Popin

Parts Ordering

Order to PO ☐ Use Existing ☒ **Create New**

Vendor ID: V-1000 NAPA AUTO PARTS - FULL SERVICE VNDR

PO ID: 1000-2011-0000021 **The PO ID field auto-populates with the incremental PO number.**

Description: LENS PO

Purchase Type: PTYPE1 - PURCHASE TYPE ONE

Acct ID: 000001 ACCOUNT FOR ALL DEPT/LOCS

Click OK.

OK Cancel

The PO ID is filled in on the Line Items to Order page.

Work Order: 1000-2010-28 (OPEN) Equipment: C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NVY BLUE CHEV. CAVALIER 4 DOOR SEDAN Hat No: 12312 Parking Stall: YELLOW

Action: ORDER ☐ NFI Part ID: P-2003 - 0 Lookup Remove

Manuf Part No: Part description: CLEAR LENS; CLEAR LENS Manufacturer:

Task ID: B1 PM-B1

Qty Ordered: 0.00 Unit Price: 25.5200 Est. Unit Cost: 0.00

WOs: 0.00

Qty on Hand: 26.00 Qty Avail: Y Total: 0.00 Date Required: Bin:

Comment:

Action Comment:

Purchase Order ID: 1000-2011-0000021 Vendor ID: V-1000 Vendor Contract ID: Parts are ready

Account ID: 000001 ACCOUNT FOR ALL DEPT/LOCS

- Complete additional fields as desired and click the **Save Changes** button to save the changes to the line item.

Work Order: 1000-2010-28 (OPEN) Equipment: C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NVY BLUE CHEV. CAVALIER 4 DOOR SEDAN Hat No: 12312 Parking Stall: YELLOW

Action: ORDER ☐ NFI Part ID: P-2003 - 0 Lookup Remove

Manuf Part No: Part description: CLEAR LENS; CLEAR LENS Manufacturer:

Task ID: B1 PM-B1

Qty Ordered: 0.00 Unit Price: 25.5200 Est. Unit Cost: 0.00

WOs: 0.00

Qty on Hand: 26.00 Qty Avail: Y Total: 0.00 Date Required: Bin:

Comment:

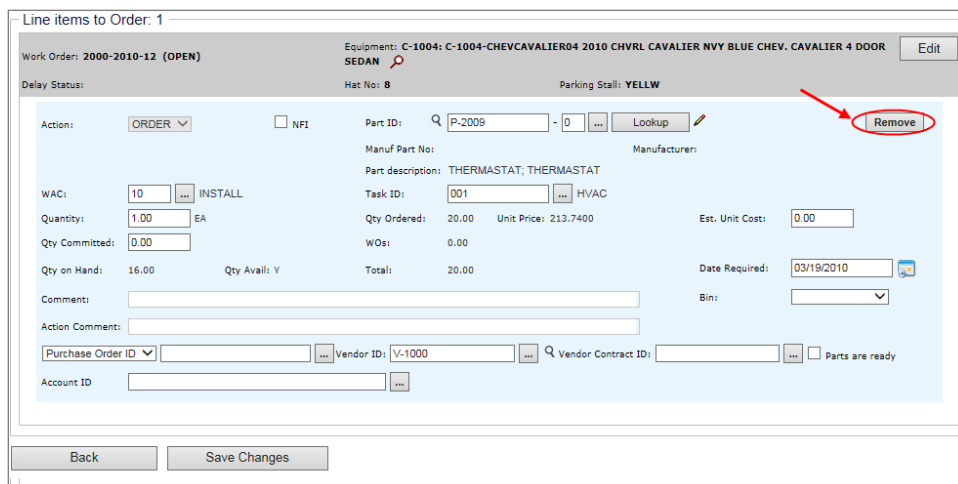
Action Comment:

Purchase Order ID: 1000-2011-0000021 Vendor ID: V-1000 Vendor Contract ID: Parts are ready

Account ID: 000001 ACCOUNT FOR ALL DEPT/LOCS

Back **Save Changes**

- Repeat the same steps to enter the **PO ID** on each line item if there are multiple line items.
- Click the **Remove** button to remove a line item from the order as shown in the example below.



Line items to Order: 1

Work Order: 2000-2010-12 (OPEN) Equipment: C-1004: C-1004-CHEVCAVALIER04 2010 CHVRL CAVALIER NVY BLUE CHEV. CAVALIER 4 DOOR SEDAN Edit

Delay Status: Hat No: 8 Parking Stall: YELLW

Action: ORDER ☐ NFI Part ID: P-2009 - 0 Lookup **Remove**

Manuf Part No: Manufacturer:

Part description: THERMASTAT; THERMASTAT

Task ID: 001 HVAC

WAC: 10 INSTALL

Quantity: 1.00 EA Qty Ordered: 20.00 Unit Price: 213.7400 Est. Unit Cost: 0.00

Qty Committed: 0.00 WOs: 0.00 Total: 20.00 Date Required: 03/19/2010

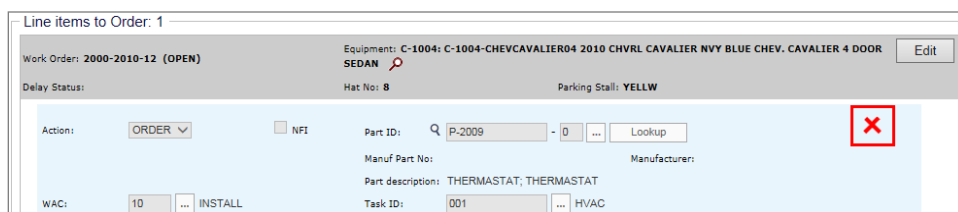
Qty on Hand: 16.00 Qty Avail: Y

Comment: Bin: ☐ Parts are ready

Action Comment: Vendor ID: V-1000 Vendor Contract ID: Account ID: Purchase Order ID: ☐ Parts are ready

Back Save Changes

A red X indicates the line item was removed from the order.



Line items to Order: 1

Work Order: 2000-2010-12 (OPEN) Equipment: C-1004: C-1004-CHEVCAVALIER04 2010 CHVRL CAVALIER NVY BLUE CHEV. CAVALIER 4 DOOR SEDAN Edit

Delay Status: Hat No: 8 Parking Stall: YELLW

Action: ORDER ☐ NFI Part ID: P-2009 - 0 Lookup **X**

Manuf Part No: Manufacturer:

Part description: THERMASTAT; THERMASTAT

Task ID: 001 HVAC

WAC: 10 INSTALL

7. Review the information and click **Save Changes** to complete the order.

After successful processing, you are returned to the Request Management page where the number of pending parts requests has decreased by the number of line items ordered.

Issuing Parts for a Multi-asset Work Order

Issuing parts for a multi-asset work order follows a similar process as a regular issue parts process with some differences.

1. Select the multi-asset work order.
2. Select **Issue** from the **For Checked Items** drop-down box and click **Process**.

Multi-asset Work Order Part Issues - 1 of 1				
Asset Selection	NON-LINEAR			
Multi-asset Work Order ID	LL-LOCA01-2018-155		Work Order Type	REPAIR
Stock Location	LL-LOCA01		Need By	04/16/2018
Part ID	QA-PT-01-0 - PART; BASIC PART 001			
Manuf Part No:			Manufacturer:	QA-01
Requested Qty	6.00 EA			
Select Assets				
Work Order ID	Asset ID	Asset Description	Quantity	Prev. Issue Qty
LL-LOCA01-2018-156	LL-OTHER09		1	1.00
LL-LOCA01-2018-157	LL-OTHER06		0	2.00
LL-LOCA01-2018-158	LL-OTHER03		0	1.00
Totals				
Total Issue Qty	1.00 EA			
Total Request Qty Remaining	1.00 EA			

3. Specify the **Quantity to issue** to each child work order.

- Non-linear assets will have the available part quantity up to the requested amount evenly distributed.
- Linear asset will have the available part quantity up to the requested amount distributed based on each work order's linear area.
- If issue quantities are manually entered and exceed the requested amount, the storekeeper will be asked to confirm they intended this when saving.
- If partial issue is performed, any committed quantity on the request is reduced by the partial issue's part quantity. When performing a final issue that will satisfy remaining request, the part request will be actioned as COMPLETE. The related work order line on the purchase order line for request that is PARTIALLY RECEIVED will have quantity adjusted to the received amount. This allows any remaining ordered parts on the purchase order line to be received into inventory instead of forced to be issued on the work order.

Multi-asset Work Order Part Issues - 1 of 1				
Asset Selection	LINEAR			
Multi-asset Work Order ID	MAIN-2018-7		Work Order Type	REPAIR
Stock Location	MAIN		Need By	03/31/2018
Part ID	HEADLIGHT-FLUID-0 - HEADLIGHT FLUID - KEEP HEADLIGHTS WORKING			
Manuf Part No:	HF-1000		Manufacturer:	ACME MANUF
Requested Qty	50.00 QT		Available Qty	3,355.81 QT
Select Assets				
Work Order ID	Asset ID	Asset Description	Quantity	Prev. Issue Qty
MAIN-2018-9	RD-SPO-000031F	17514 - 19499 E APPLEWAY AV	1.49	2.00
MAIN-2018-10	RD-SPO-000031E	17514 - 19499 E APPLEWAY AV	1.63	10.00
MAIN-2018-11	RD-SPO-000031D	17514 - 19499 E APPLEWAY AV	1.63	10.00
MAIN-2018-12	RD-SPO-000031C	17514 - 19499 E APPLEWAY AV	1.63	10.00
MAIN-2018-13	RD-SPO-000031B	17514 - 19499 E APPLEWAY AV	1.62	10.00
Totals				
Total Issue Qty	8.00 QT			
Total Request Qty Remaining	0.00 QT			

- (Optional) Click **Skip** to individually skip requests.
- Click **Save**.

Send Parts Out

1. From the Request Management page, click the **Picked Requests** tab.
2. Check the boxes next to the line items you want to process.

Request Management

Current Location: MAIN - MAIN LOCATION

Pending Parts Requests: 9 Picked Requests: 4 Pending Commercial Requests: 0 Notify Re

☐	Type	Priority ID	Notify	Qty Avail?	Request ID	Requested By	Assigned To
☒	T			Y	575	EMP0 - EMPLOYEE #0 (DEFAULT EMP)	
☐	T			Y	575	EMP0 - EMPLOYEE #0 (DEFAULT EMP)	
☐	T			N	612	SP	
☐	T			Y	709	SP	

3. In the For Checked Items drop-down list, select Send Parts Out.

Current Filter

No filter defined.

Define Filter Clear Filter Employee ...

Back For Checked Items: Send Parts Out Process Print Pick

4. Click **Process**.
5. The Request Bulk Actions page displays.

Request Bulk Actions

Transfer ID: 559 Work Order ID: Description: TEST 123 Asset ID: 2017 ACME FR72= =Meters: 1-0 MILES; 2-0

From Location: AA - ASSET ADMINISTRATION Shipping Reference: To Location: MAIN - MAIN LOCATION Part Request ID: 0

Delivery Address: ADDRESS-01 - 1234 ADDRESS LINE 2 ADDRESS Priority ID: 2 - URGENT

Employee ID: Requested: 1 Sent Out: 0 Received: 0 Declined: 0 Total: 1

Line Items

EAR PLUGS-0 - SAFETY; DISPOSABLE FOAM EARPLUGS Qty on Hand: 110052

Action: SEND PARTS OUT Assigned Picking Employee ID: ...

Status: REQUEST TRANSFER

Qty Requested: 1 Qty to Send: 1 Qty Deferred: 0 Label Qty: 1

From Bin: ...

Back Save

6. Enter the needed information on this page and click **Save**.

The items are processed and the status is set as Send Parts Out.

6. Pending Returns Page

If configured to approve/deny part return requests, the **Part Return Requests** button shows on the Main Storekeeper page when pending part return requests exist. The button is grayed-out if no pending part return requests exist and you are configured to approve/deny part return requests.

1. Click the **Part Return Requests** button to begin the approval process.

The screenshot shows the 'My Storeroom Portal' interface. At the top, there's a 'Current Location' dropdown set to 'CNLOC1 - REPAIR SHOP 1', a 'Customize' button, and a 'Refresh' dropdown set to 'Off'. Below this is a 'New/Edit Part' button. The main area is divided into three sections: 'Part Requests', 'Requisitions', and 'Purchase Orders'. In the 'Part Requests' section, there are three rows: '16 Pending Part Requests' with a 'Requests' button, '4 Pending Part Return Requests' with a 'Part Return Requests' button (highlighted with a red circle and a red arrow), and '11 Total Work Orders'. The 'Requisitions' section shows '20 Pending line items' and '12 Total Requisitions' with a 'Requisitions' button. The 'Purchase Orders' section shows '15 Open line items', '10 Pending line items', and '15 Total Purchase Orders' with a 'Purchase Orders' button.

After clicking the **Part Return Requests** button on the Main Storekeeper page, the Pending Returns page displays with the pending returns for the selected location.

The screenshot shows the 'Pending Returns' page. At the top, there's a 'Current Working Location' dropdown set to 'CNLOC1 - REPAIR SHOP 1'. Below this is a 'Pending Returns' section. The first work order is 'CNLOC1-2014-116 Equipment: CDC-CAR022: 123456789 2012 FORD F150 CAR 022'. It has a 'Process Requests' button. Below the work order is a table with columns 'Task', 'Part', 'Qty', 'WAC', and 'Reason'. The table contains one row: 'CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES' with 'CNPART003 -0 499; STOCK PART 003', '1.00', 'test', and 'test'. The second work order is 'CNLOC1-2014-172 Equipment: CNCAR200: SNCAR200 2014 FORD F150 CAR 200 - UNDER WARRANTY'. It also has a 'Process Requests' button. Below the work order is a table with columns 'Task', 'Part', 'Qty', 'WAC', and 'Reason'. The table contains three rows: 'CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES' with 'CNPART040 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 040', '1.00', 'test', and 'test'; 'CNTASK002 - TASK 002 - SUPPORTS ALL ASSET CATEGORIES' with 'CNPART043 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 043', '1.00', 'test', and 'test'; and 'CNTASK003 - TASK 003 - SUPPORTS ALL ASSET CATEGORIES' with 'CNPART040 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 044', '1.00', 'test', and 'test'. At the bottom left is a 'Back' button.

2. Click the **Process Requests** button.

This screenshot is identical to the previous one, showing the 'Pending Returns' page. However, the 'Process Requests' button for the first work order 'CNLOC1-2014-116' is now highlighted with a red circle and a red arrow pointing to it.

The Process Returns page displays for the selected work order.

Work Order Info			
Asset ID	CDC-CAR022: 123456789 2012 FORD F150 CAR 022 		
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2014-116	Job Status	OPEN
Job Type	REPAIR	Technician	CDCEMP3 - CLINT CAMSTER EMPLOYEE 3
Unit In	07/22/2014 01:25 PM	Due	07/23/2014 01:25 PM
Meter 1	0 HOURS	Meter 2	0 FLOW
Tasks Completed	0 / 1 (0.00%)	Projected Completion Date	04/27/2015 03:32 PM

Process Returns			
Process	Task:	CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES	
	Returned Part:	CNPART003 -0: 499; STOCK PART 003	
	Issue Location:	CNLOC1 - REPAIR SHOP 1	
	Return Reason:	test	
	Action:	☐ Approve ☐ Deny	
	Reason:		
Back			

3. Select **Approve** or **Deny** and enter a **Reason** if desired.

Work Order Info			
Asset ID	CDC-CAR022: 123456789 2012 FORD F150 CAR 022 		
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2014-116	Job Status	OPEN
Job Type	REPAIR	Technician	CDCEMP3 - CLINT CAMSTER EMPLOYEE 3
Unit In	07/22/2014 01:25 PM	Due	07/23/2014 01:25 PM
Meter 1	0 HOURS	Meter 2	0 FLOW
Tasks Completed	0 / 1 (0.00%)	Projected Completion Date	04/27/2015 03:54 PM

Process Returns			
Process	Task:	CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES	
	Returned Part:	CNPART003 -0: 499; STOCK PART 003	
	Issue Location:	CNLOC1 - REPAIR SHOP 1	
	Return Reason:	test	
	Action:	☒ Approve ☐ Deny	
	Reason:		
Back			

4. Click **Process**. Continue same steps until finished processing returns.

Work Order Info			
Asset ID	CDC-CAR022: 123456789 2012 FORD F150 CAR 022		
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2014-116	Job Status	OPEN
Job Type	REPAIR	Technician	CDCEMP3 - CLINT CAMSTER EMPLOYEE 3
Unit In	07/22/2014 01:25 PM	Due	07/23/2014 01:25 PM
Meter 1	0 HOURS	Meter 2	0 FLOW
Tasks Completed	0 / 1 (0.00%)	Projected Completion Date	04/27/2015 03:54 PM

Process Returns			
Process	Task: CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES Returned Part: CNPART003 -0: 499; STOCK PART 003 Issue Location: CNLOC1 - REPAIR SHOP 1 Return Reason: test Action: ☒ Approve ☐ Deny Reason:		
	WAC: Qty: 1.00 Employee: CNEMP001 - EMPLOYEE 001 Date: 03/16/2015 02:12 PM		

Back

A message displays to indicate approval or denial.

Work Order Info			
Asset ID	CDC-CAR022: 123456789 2012 FORD F150 CAR 022		
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2014-116	Job Status	OPEN
Job Type	REPAIR	Technician	CDCEMP3 - CLINT CAMSTER EMPLOYEE 3
Unit In	07/22/2014 01:25 PM	Due	07/23/2014 01:25 PM
Meter 1	0 HOURS	Meter 2	0 FLOW
Tasks Completed	0 / 1 (0.00%)	Projected Completion Date	04/27/2015 03:56 PM

☒ Request approved.No more return requests for this work order.

Process Returns			
Back			

A message displays to indicate the approval or denial occurred

Back on the Pending Returns Page, the number of pending part return requests is decreased by the number of approvals/denials you made.

Current Working Location:					
CNLOC1 - REPAIR SHOP 1					

Pending Returns					
Work Order: CNLOC1-2014-172 Equipment: CNCAR200: SNCAR200 2014 FORD F150 CAR 200 - UNDER WARRANTY					
					Process Requests
Task	Part	Qty	WAC	Reason	
CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES	CNPART040 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 040	1.00		test	
CNTASK002 - TASK 002 - SUPPORTS ALL ASSET CATEGORIES	CNPART043 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 043	1.00		test	
CNTASK003 - TASK 003 - SUPPORTS ALL ASSET CATEGORIES	CNPART040 -0 BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 044	1.00		test	

Back

*The **Part Return Requests** button on the Storekeeper Main page will be grayed out when there are no pending part return requests remaining.*

My Storeroom Portal

Current Location:
CNLOC1 - REPAIR SHOP 1
Customize
Refresh
Off

New/Edit Part

Part Requests

16 Pending Part Requests
Requests

0 Pending Part Return Requests
Part Return Requests

11 Total Work Orders

Purchase Orders

15 Open line items
Purchase Orders

10 Pending line items

15 Total Purchase Orders

Requisitions

20 Pending line items
Requisitions

12 Total Requisitions

7. Part Request Detail Page

 Storekeeper portal pages with a Part ID field and choice-list include a **Lookup** button linked to the Parts Lookup dialog. This lookup functionality allows for the added lookup of parts through cross reference IDs, with Storekeeper Parts Search Setting, **Default Part Lookup Part ID Search Option**, set to allow lookup by **Xref**. The **Lookup** button will appear as shown in the image below.

Request Detail

Request ID: 476575 Date and Time Requested: 05/05/2015 14:14
 Location ID: AWLOC1 Requested By: JK EMPLOYEE
 Issue Together: ☐

Line Items: 1

Work Order: AMO172-2013-12 (OPEN) Equipment: 0000001: 04RE104872 2005 DETROIT DIESEL S50CNG SERIES 50 DETROIT DIESEL GAS ENGINE Edit
 Delay Status: Hat No: Parking Stall:

Line Type: PART
 Action: (PENDING) ☐ NFI Part ID: 1000 - 0 **Lookup**
 Service Request ID:
 WAC: Task ID:

To view part request detail:

1. Click the **Request ID** button you need on the Request Management page.

Request Management

Current Location: 1000 - FULL SERVICE SHOP Refresh Off

Pending Parts Requests: 39				Pending Commercial Requests: 1		Notify Requests: 0		Ordered Requests: 17	
Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Descr...	Manufacturer	Comments	Qty Req	Qty on Hand
			203	LMEMPID01-CHAD WALKER	P-1000-0-OIL FILTER; OIL FILTER	BG (435734)		1	4
		Y	62	LMEMPID01-CHAD WALKER	P-1006-98-BATTERY PROTECT; BATTERY	()		1	4
		Y	263	1000-11-MARY SMITH	05046-2-BATTERY PROTECT; BATTERY	A/C (574830)		2	24
		Y	261	1000-11-MARY SMITH	05046-2-BATTERY PROTECT; BATTERY	A/C (574830)		4	24
		Y	235	1000-11-MARY SMITH	10W-30-0-TRANSIT; OIL-10W/30	CAB (3479503)		1	27
		Y	258	1000-11-MARY SMITH	OL9-2-*7; DEX COOL	()		8	25
		Y	258	1000-11-MARY SMITH	P-1000-0-OIL FILTER; OIL FILTER	BG (435734)		1	38
		N	53	001-MOLLY TELLO	E6D26700A-2-7; SEAL	()		1	0
		Y	54	LMEMPID01-CHAD WALKER	10255506-0-; LOCK/LATCH GLOVE BOX	()		1	30

The Part Request Detail page displays.

Request Detail

Request ID	475731	Date and Time Requested	07/30/2014 14:23
Location ID	ACA	Requested By	TJ TEST
Issue Together	☐		

Line Items: 1

Work Order: SRMC-2014-30 (OPEN) Equipment: SJ-CAR-TYPEA: TYPE A 2010 TOYOTA CAMRY BILL TYPE A - CAMRY [Edit](#)

Delay Status: Hat No: Parking Stall:

Line Type: PART

Action: ☐ NFI Part ID: 1000 - 0 [Lookup](#) [Edit](#)

Service Request ID:

Manuf Part No: GARRETT1000 Manufacturer: GARRETT

Part description: HOSE-SILICON(RU; HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON

Task ID: A PM SERVICE A

WAC:

Priority ID:

Quantity: 1.00 EA Qty Ordered: 0.00 Est. Unit Cost: 0.00

Qty Committed: 1.00 WOs: 0.00

Qty on Hand: 4.00 Qty Avail: Y Total: 0.00 Date Required:

Comment:

Action Comment:

Bin: NONE0000000001

Vendor ID: 1-666 Vendor Contract ID: ☐ Parts are read

Account ID: 1000.111101.00001.000.00000 TEST Position ID:

The Part Request Detail page provides header information at the top of the page including: Request ID, Date and Time Requested, Location ID, Requested By, and whether or not the parts are to be Issued Together.

 If your organization supports Enterprise Portal, the Request ID is a link to the Part Requests screen.

The work order header information displays at the top of the line items as shown below.

Line Items: 2

Work Order: 1000-2011-1 (OPEN) Equipment: 001207: 1FAFP5825YG187558 2000 FORDX TAURUS WHITE FORD TAURUS STATION WAGON 4DOOR [Edit](#)

Delay Status: Hat No: Parking Stall: YELLOW

Action: ☐ NFI Part ID: 0L9 - 2 [Lookup](#) [Edit](#)

Manuf Part No: Manufacturer:

Part description: *7; DEX COOL

Task ID: B PM-B

WAC:

Quantity: 8.00 EA Qty Ordered: 0.00 Est. Unit Cost: 0.00

Qty Committed: 0.00 WOs: 0.00

Qty on Hand: 25.00 Qty Avail: Y Total: 0.00

Comment:

Action Comment:

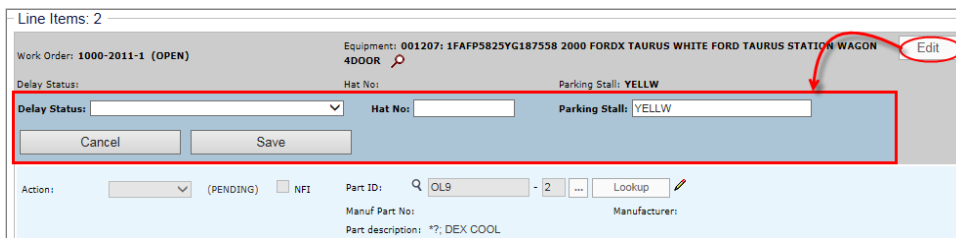
Bin:

☐ Parts are ready

The bottom portion of the page shows the total number of line items and details by work order for the part request.

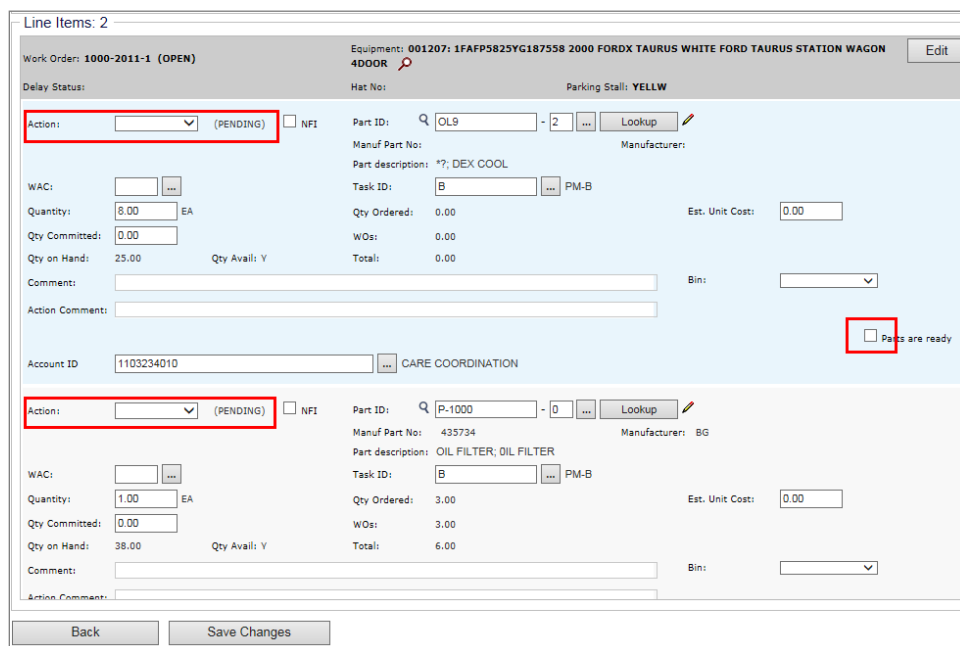
2. Click **Edit** to set a delay status or edit the hat number and parking stall information. To stop a delay, select **STOP DELAY** from the drop-down list.

 Note: The **Hat No.** and **Parking Stall** fields do not display for part rebuild or linear work orders.



3. Click **Save** to save your changes.

Line items without an action against them may be updated. Whereas, the only field that may be edited for line items that have actions against them is the **Parts are ready** checkbox.




To view many line items, use the scroll bar on the right of the page.

To update a line item with no action against it:

1. Select an action from the **Action** drop-down box.

 The **Edit Part Pencil** icon  takes you to the Part Definition Wizard to edit the part information. Please see the [Part Definition Wizard](#) section below for more information. The **Part Location Information Zoom** button  takes you to the Parts- Location Information screen to update part location information as desired.

2. Complete the fields as desired. Clicking the **Task ID Select** icon  limits the selection to those tasks that are associated with the work order.
 - Fields vary depending on the action taken. When issuing, the **Vendor ID** and **Core Value** fields display. Refer to the [Perform Actions on Parts Requests, Issue Parts](#) section for additional information about issuing parts. When ordering, the **Date Required**, **PO ID**, **Vendor ID**, and **Vendor Contract ID** fields display.
 -  **Note:** For Order actions, the Vendor ID choice-list can be configured to show Approved Vendor, Rank, and/or Contract details. See the *Shop Activity Storekeeper Administrator Guide* for setting information to show the additional details.
 - Serialized parts show a serial number box and a removed serial part box. Parts that require positional information will display a **Position** field. Refer to the [Perform Actions on Parts Requests, Order Parts](#) section for additional information about ordering parts.

3. Click Save Changes to save your entries.

Work Order: 1000-2011-1 (OPEN)		Equipment: 001207: 1FAFP5825YG187558 2000 FORDX TAURUS WHITE FORD TAURUS STATION WAGON		Edit
Delay Status:		Hat No:	Parking Stall: YELLOW	
Action: ORDER (PENDING) ☐ NFI	Part ID: OL9 - 2 Lookup			
WAC: 10 INSTALL	Manuf Part No:	Manufacturer:		
Quantity: 8.00 EA	Part description: *7, DEX COOL			
Qty Committed: 0.00	Task ID: B PM-B	Qty Ordered: 0.00	Unit Price: 43.8750	Est. Unit Cost: 0.00
Qty on Hand: 25.00	WOs: 0.00			
Qty Avail: Y	Total: 0.00	Date Required: 04/30/2015 Go		
Comments: MY COMMENTS		Bin:		
Action Comments:				
Purchase Order ID:	Vendor ID: V-1000 Lookup	Vendor Contract ID:	☐ Parts are ready	
Account ID: 1103234010	CARE COORDINATION			
Back	Save Changes			

You are returned to the Request Management page where the Parts Request no longer shows in the Pending Parts Requests list if actions were performed on all line items of the request.

Cancel a Part Request

To cancel a part request line item, follow the steps below.

1. On the Part Request Detail page, select the action, **CANCELED**, on a particular line item.
2. Click the **Save Changes** button.

The screenshot displays the 'Part Request Detail' form. At the top, it shows 'Request ID: 86', 'Location ID: 1000', 'Date and Time Requested: 03/25/2010 09:26 AM', and 'Requested By: MOLLY TELLO'. Below this, the 'Line Items: 1' section is visible. The 'Work Order: 2000-2010-12 (OPEN)' is listed. The 'Equipment' field shows 'C-1004: C-1004-CHEVCAVALIER04 2010 CHVRL CAVALIER NPY BLUE CHEV. CAVALIER 4 DOOR'. The 'Part ID' is 'PART008-D', and the 'Part description' is 'A / FILTER, AIR FILTER'. The 'Action' dropdown menu is set to 'CANCELED', which is circled in red. The 'Save Changes' button at the bottom is also circled in red. Other fields include 'WAC: 10', 'Quantity: 1.00', 'Qty Committed: 0.00', 'Qty on Hand: 16.00', 'Qty Avail: Y', 'Task ID: 001', 'Qty Ordered: 0.00', 'W/Os: 0.00', 'Total: 0.00', 'Est. Unit Costs: 0.00', and 'Parts are ready' checkbox.

You are returned to the Request Management page and the pending part request no longer displays in the list if actions had been performed on all line items of the request.

Approved Parts Ordering

If enabled, settings will allow for defaulting of approved parts vendors and ranking vendors for preference. Vendors can be ranked by order of approval. Upon creation of a purchase order, this setting will require approval prior to ordering from an unapproved vendor or will require manual override to allow the item as **Ok from unapproved vendor**.

Parts Ordering Popin

Parts Ordering

Order to PO ☐ Use Existing ☒ Create New

Vendor ID

PO ID

Description

Purchase Type

Acct ID

Select Vendor ID

Vendor ID Starts with: 6779 item(s) found

1 2 3 4 5 6 7 8 9 A C D J K L M O P Q R T V W

And Vendor ID contains:

Search Reset

Vendor ID	Name	Approved	Rank	Vendor Contract
1000-1322	WILLIAMS DISTRIBUTORS	Y	1	Y
10001-8361	EMC ENGINEERING	Y	2	
1001-6276	CHRIS WRIGHT & TOMICA JACKSON	Y	3	Y
1002-1323	MELANIE M. FISHER	Y		
1003-6277	TONYA SPEAR	Y		
1004-1325	PAYNE, VICTOR E.	Y		
1005-6278	SHEATS, ROBERT	Y		Y
100-5661	SYNAPSE ENERGY ECONOMICS, INC.			
1006-1326	CLARK, SONJI			
1007-1327	PERDUE, ALICIA			

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Next

Requiring Approval for Purchases from Defined Vendors

The option **Approve vendor for part** can be selected from the Vendor/Part Information screen. If checked, the vendor and part have been approved for order. Users can set certain vendors as approved and to require approval of other vendors.

Vendor/Part Information ADMIN MODE CHANGE REQUEST HELP PREFERENCE

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel Export

Vendor ID Part ID Part suffix

Basic Info

Unit of purchase Purchase/issue factor Manufacturer part number

Current order unit price Price type Expiration date

Comments

Warranty start UPON INSTALLATION UPON DELIVERY

☐ Entry complete ☒ Approved vendor for part

Vendor rank Discount percentage Surcharge percentage

Row #	Delete	Unit of measure	Description	Qty range low	Qty range high	Unit price

Also included in this release is the new Purchase Types checkbox, **Require approved vendor for STOCK PART line items**.

If **Require approved Vendor for STOCK PART line items** is set and a vendor is not set as an approved vendor for the part, the Storekeeper cannot OPEN the PO without selecting to manually approve the selected vendor.

The checkbox on the Enterprise Purchasing – Purchase Orders Line Items tab that allows you to indicate **OK from unapproved vendor**. If this box is NOT checked, it will return a validation error message as shown in the screenshot below.

➡ Check the box **OK from unapproved vendor** to approve a line item that requires approval of the vendor

⚠ This **OK from Unapproved Vendor** checkbox is also available on the following pages in the Storekeeper portal:

Purchase Order Detail Edit pop-in:

Line #	Part or Comment	Manuf Part No	Manufacturer	OK from Unapproved Vendor	Qty Ordered	Qty not yet Received	Unit price
1	1000-01 HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	GARRETT1000	GARRETT	☒	1		1.00
2	1000-01 HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON			☒	2		2.00

Part Vendor pop-in:

Part Vendor

Part: 1001-0 - PLUG, BRASS, SIZE 1/8 INCH, TYPE WEATHER HEAD, MUST BE PACKA

Vendor ID: RA-VENDOR RICHARD'S VENDOR FULL SERVICE

Unit of Purchase: EA EACH

Manufacturer Part Number:

Current Order Unit Price: 0.0000

Price Type:

Expiration Date:

Discount Percentage: 0.000

Approved vendor for part: ☒

Comments:

Vendor Lead Time (days): 0

Minimum Order Quantity: 1.00

Core Credit Value: 0.00

Warranty Life: 0 Months 0 Meter Units

Expected Life: 0 Months 0 Meter Units

Warranty Start: ☒ On Install ☐ On Delivery

Buttons: Cancel Save Delete

Approved Vendor Sorting and Ranking

To encourage use of an approved vendor when creating a PO from a parts request, approved vendors will now show all approved vendors first, and sort them by rank.

The option for setting rank of the vendor is available with the **Approve vendor for part** on the Vendor/Part Information screen, Basic Info tab:

The screenshot shows the 'Vendor/Part Information' screen with the 'Basic Info' tab selected. The 'Vendor rank' field is circled in red. The 'Approve vendor for part' checkbox is also visible and checked.

Row #	Delete	Unit of measure	Description	Qty range low	Qty range high	Unit price

From the Parts Ordering Pop-in, when actioning a Part Request in Storekeeper Portal to a Requisition or Purchase Order, choose the Vendor ID Choice-list

The screenshot shows the 'Parts Ordering Popin' dialog box. The 'Vendor ID' field is circled in red. The 'Create New' radio button is selected.

Requisition

Use Existing ☐ Create New ☒

Vendor ID:

Requisition ID: ACA-2015-0000002

Description:

Purchase Type: STOCK - STOCK

Acct ID: SRMC-0001 SRMC BLANKET ACCOUNT

OK Cancel

In this choice-list you will now see if the Vendor is approved, what their rank is, and if there is an active Vendor Contract:

Vendor ID	Name	Approved	Rank	Vendor Contract
1000-1322	WILLIAMS DISTRIBUTORS	Y	1	
1179-6009	DIAMOND DISTRIBUTORS INC.			
1278-7250	PTC INDUSTRIES, INC.			
1303-7260	APPLIED INDUSTRIAL TECHNOLOGIES			

Part Lookup, Edit, and New ID Request

From the **New/Edit Part** button, you can access the Part Definition pop-in where you can search, enter, or update the Part ID on the request.

Part Definition

Part Definition

Edit Existing Part ID: - 0

Part ID: JH-P1 Manufacturer Name:

Suffix: 0 Manufacturer Part Number:

Keyword: ABS SENSOR ABS SENSOR

Short Description: BRAKE ABS - SENSOR

Product Category: C.000 COMMON-COMMON ITEM

Part Classification: 1 ROUTINE

Basic Info | Recent Purchase Orders | Recent Work Orders | Cross References | Tasks

Stock Locations: 1

	Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
Q	JHLOC1 - JH LOC		EA	11	415.8800	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.

Vendors: 1

	Vendor	Manufacturer Part ID	Order Price	Comments
Q	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.		0.0000	



Note: There is a Serial Numbers tab that also displays on the Part Definition Pop-in if the part you are working with is a serialized part.

From here, you can choose from the following:

- Click **Edit** the selected part.
- Click the **New Part** button to enter a new part; this clears the form to enter a new part directly on this page.
- Click the Request New Part button to request a new Part ID. This opens the Change Request form for the **Parts – Primary Information** Screen:

Parts - Primary Information ADMIN MODE CHANGE REQUEST HELP

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel

Part ID [] Part suffix [] New part/location/inventory

Basic Info

Keyword [] Short description []

Product category ID 01 PRODUCT CATEGORY 01

Part classification ID []

VMRS code []

Date and time added []

Associated file []

☐ Tire ☐ Core ☐ Controlled substance ☐ Item is fabricated/rebuilt with

Kit type NONE ASSEMBLED UNASSEMBLED

- Click the **Request New Vendor** button to request a new Vendor ID.

These ID requests are then shown in the Change Request Gadget discussed in the [Storekeeper Gadgets](#) section.

For more details on New Part ID Requests see the [Part Definition Pop-in, Request a New ID](#) section.

8. Invoice Reconciliation Page

On the Invoice Reconciliation page, tabs display with a table of all non-commercial receipts and commercial receipts tied to the purchase order. Each row allows you to see the receipt costs in order to assign a vendor invoice number, to either match or enter invoice costs, and to identify discrepancies. Commercial and non-commercial receipts vary but the fields shown as commercial receipts support a labor, parts, and miscellaneous cost compared to a quantity and unit cost.

Invoice Reconciliation

Vendor **ACME - ACME CORP** Purchase Order ID **MAIN-2018-0000012**

Select Vendor Invoice For New Lines **ACME-18-10-1102101 - Invoice ID: 22**
☐ Show only non-reconciled receipts

Receipts Pending Reconciliation

Commercial Pending Reconciliation

☐	Match	Line	Receipt	Description	Vendor Invoice	Date Received	Is Return	Receipt Qty	Receipt Price	Receipt Total
☐	☐	1	13	FLUID: HEADLIGHT FLUID - KEEP HEADLIGHTS WORKING		11/01/2018 13:05	☐	7.00	\$ 10.00	\$ 70.00
☐	☐	2	14	DENT: BODY KIT FOR MINOR DENT REPAIR	ACME-18-10-	11/01/2018 13:05	☐	2.00	\$ 28.75	\$ 57.50
☐	☐	2	20	DENT: BODY KIT FOR MINOR DENT REPAIR	ACME-18-10-1102101	11/01/2018 13:06	☐	1.00	\$ 28.75	\$ 28.75
☐	☐	5	58	SHIPPING CHARGE		11/04/2018 15:46	☐	1.00	\$ 14.40	\$ 14.40

Showing 4 records

Totals

Receipts Total	\$ 283.96
Invoice Total	\$ 163.08
Discrepancy Total	\$ -36.48

Back

Save

It is expected that a user would have a stack of vendor invoices from the vendor either electronically or on paper outside of the system. The first and most critical action is to enter a vendor invoice number and do the first pass of identifying receipts to the invoice.

To enter a vendor invoice number:

1. Create a new purchasing invoice within the system using the **Add New Invoice** button on the bottom-right of the page. This will present the user with a dialog.

2. Enter the invoice date and vendor invoice number.
3. Click **Save**.

Once the user has saved this information, a purchasing invoice record will be created in the system with the vendor ID and vendor invoice number that can be matched to a receipt.

New Purchasing Invoice

Invoice ID

42

Vendor ID

ACME - ACME CORP

Description

ACME PARTS

Vendor Invoice

ACME-12-11111156

Invoice Date

11/11/2018



Cancel

Create

 Note: The system uses a purchasing invoice ID in conjunction with a vendor invoice number to allow the system to have a unique and known ID regardless of the form/usage of the vendor invoice number.

At the top of the invoice reconciliation page, there is a drop-down list to select a vendor invoice number to default onto the receipts. This list will include the newly created vendor invoice number and its purchasing invoice date as well as any existing vendor invoice numbers and purchasing invoices on receipts. Any action performed on a receipt that does not have a vendor invoice number will automatically be populated with the selected vendor invoice number.

 Note: If a vendor invoice number was entered on a receipt, it will not show in the drop-down list without a purchasing invoice ID tied to it. They will show on the receipts but the page will not allow receipts to be saved without creating an invoice.

Invoice Reconciliation

Vendor

ACME - ACME CORP

Purchase Order ID

MAIN-2018-0000012

Vendor Invoice

ACME-12-11-111104 - Date: 11/11/2018

☒ Show only non-reconciled receipts

Receipts Pending Reconciliation

Commercial Pending Reconciliation

	Match	Line	Receipt	Description	Vendor Invoice	Date Received
☐						

By default, only receipts that are non-reconciled are shown to help guide users to work that needs to be done. A toggle checkbox "Show non-reconciled receipts" will force the table to show only receipts that can be actioned on or allow the user to see all receipts in case they need to review other receipts tied to a vendor invoice number already.

Select receipts that match to the vendor invoice. Each of the following scenarios could be the case:

1. For receipts that match the invoice with no difference in costs (meaning no discrepancy between the receipt entered into the system and the vendor invoice), click the **Match** checkbox. This will select the receipt, add the vendor invoice number, enter the invoice quantity and costs, mark the receipt as reconciled, and will enter the default resolution ID for a match.
2. For receipts that are on the invoice but do not match, the user should enter in the invoice quantity and/or costs (this will also automatically select the receipt and enter in the vendor invoice no selected above). After entry, the page will check if the entered values match and calculate any discrepancy.



Note: The portal settings can allow automatic reconcile and default resolution ID if the entered invoice quantity and/or costs are less than the values entered on the receipt in the system.

3. As long as a receipt is not reconciled, users can revisit the receipt to adjust the invoice values, or reassign the vendor invoice number.

Receipts Pending Reconciliation				Commercial Pending Reconciliation		
☐	Match	Line ▲	Receipt	Description	Vendor Invoice	Date Received
☒	☒	1	13	FLUID; HEADLIGHT FLUID - KEEP HEADLIGHTS WORKING	ACME-12-111 ...	11/01/2018 13:05
☒	☐	2	14	DENT; BODY KIT FOR MINOR DENT REPAIR	ACME-18-10- ...	11/01/2018 13:05
		2	20	DENT; BODY KIT FOR MINOR DENT REPAIR	ACME-18-10-1102101	11/01/2018 13:06

Clicking the save button will commit the receipt and invoice data. It will process each purchasing invoice until all receipts are saved.



Note: The Invoice Reconciliation page supports creating a shipping receipt quickly using the "Add New Shipping Receipt" button. However, this does require a reload of the page if a new receipt is made to ensure any data is entered and saved.

New Receipt

Purchase Order ID: MAIN-2018-0000012

Line No: 6

Line Item Type: SHIPPING

Date Received: 11/12/2018 00:03

Description: SHIPPING CHARGE

Other ID: SHIPPING CHAF

...

SHIP CHARGE

Price: 21.13

Discount Pct:

Net Price: 21.1300

Sales Tax Amount: 0.00

Sales Tax Rate: 0.00

Total Cost: 21.13

Cancel

Save

9. Purchasing Invoices Page

On the purchasing invoice list page, the storekeeper will be shown a full list of purchasing invoices entered into the system and some summary information. The purchasing invoice list provides support for quick filters that the storekeeper can define and save for usage to help filter down invoices they intend to review.

By default, the table will show all invoices that are not in a CLOSED state, have invoice lines that need to be reconciled, and have invoice lines tied to receipts at the current working location.

Purchasing Invoices: 10

Current Location: MAIN - PRIMARY GARAGE

Search...

Invoice ID	Description	Purchase Order ID	Vendor Invoice Number	Status	Invoice Date	Vendor	Receipt Total	Invoice Total	Discrepancy Total
19	ACME VENDOR INVOICE DESC	Multiple (2)	ACME-18-10-11021232	INV-PENDING	03/11/2018	ACME - ACME CORP	\$ 159.33	\$ 177.00	\$ 17.67
20		MAIN-2018-0000012	ACME-18-10-11021232	INV-PENDING	02/11/2018	ACME - ACME CORP	\$ 136.83	\$ 78.00	\$ 58.83
21		MAIN-2018-0000012	ACME-18-10-11021232	INV-PENDING	02/11/2018	ACME - ACME CORP	\$ 136.83	\$ 107.33	\$ 29.50
22		MAIN-2018-0000012	ACME-18-10-1102101	INV-PENDING	02/11/2018	ACME - ACME CORP	\$ 62.73	\$ 55.75	\$ 6.98
26		MAIN-2018-0000014	ACME-14-11051213	INV-PENDING	05/11/2018	ACME - ACME CORP	\$ 186.25	\$ 100.00	\$ 86.25
34	TEST INVOICE	MAIN-2018-0000014	ACME-1108808	INV-PENDING	08/11/2018	ACME - ACME CORP	\$ 30.00	\$ 0.00	\$ 30.00
39	BRAKE PARTS	MAIN-2018-0000007	NAPA-P100001	INV-PENDING	11/11/2018	NAPA - NAPA AUTO PARTS	\$ 540.00	\$ 0.00	\$ 540.00
42	ACME PARTS	MAIN-2018-0000012	ACME-12-11111156	INV-PENDING	11/11/2018	ACME - ACME CORP	\$ 14.40	\$ 0.00	\$ 14.40
43	INVOICE TEST	Multiple (2)	ACME-12-11-111104	INV-PENDING	11/11/2018	ACME - ACME CORP	\$ 610.00	\$ 0.00	\$ 610.00

Current Filter

Has lines to reconcile: YES

Define Filter

Clear Filter

The Purchase Order ID column displays the ID associated to the purchasing invoice. Clicking the link will take you to the Enterprise Portal Purchase Order Screen if you have rights to view that screen. If more than one purchase order is associated with the purchasing invoice, the column will show “Multiple” and you can click the link to see a list of the associate purchase order.

It is expected that the storekeeper searches out invoices with discrepancies to perform adjustments. It is intended they would use the Discrepancy Total column to identify and review these. Clicking on the **Invoice ID** will redirect to the Invoice Detail page.

Quick Filter:

Set as Default

Remove Default

Remove

Define Invoice Filter

Invoice ID

...

Vendor ID

ACME

...

ACME CORP

Vendor invoice

Status

INV-PENDING

...

PENDING DATA ENTRY

Invoice Date

__/__/__

Has lines to reconcile

YES

Reset Filters

Save Quick Filter as: ACME PENDING

Save

10. Invoice Detail Page

Basic Info													
Invoice ID	19					Vendor ID	ACME - ACME CORP						
Invoice Number	ACME-18-10-11021232												
Description	ACME VENDOR INVOICE DESC												
Status	INV-PENDING					PENDING DATA ENTRY			Invoice Total \$ 270.00 Receipt Total \$ 159.33 Discrepancy Total \$ -110.67				
Invoice Date	11/03/2018												
Invoice Lines													
Delete	Purchase Order ID	Line Number	Receipt	Description	Is Return	Receipt Qty	Receipt Price	Receipt Labor	Receipt Parts	Receipt Misc	Receipt Total	Invoice Qty	Invoice Price
☐	MAIN-2018-0000012	3	15	CLEANING SERVICE	☐	0.00	\$ 0.00	\$ 54.78	\$ 21.22	\$ 3.33	\$ 79.33		
☐	MAIN-2018-0000014	3	17	BATTERY AUTO BATTERY	☐	1.00	\$ 80.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 80.00	2	90.00

The Invoice Detail page is divided up into several sections and provides support for several aspects of the invoice as a whole:

- Basic Info - High level invoice information. The most important of these will likely be the Status for closing out invoices upon review to a CLOSED state. We also show a high level of invoice total vs receipts total from invoice lines.
- Invoice Lines - The table provides similar functionality to Invoice Reconciliation but with a few differences.
 - Users can delete invoice lines entirely if need be. This would remove a receipt's reconciled information tied to the invoice line if done.
 -  Note: The delete checkbox is only available if the user unchecks the reconciled checkbox. This is done to ensure you intend to do this.
 - Purchase Order ID links directly to Purchase Order Detail page
- Notes and Comments support for coordinating and noting actions taken on invoice. It is expected this will be used by storekeepers for recording brief notes on activities taken to handle a discrepancy on an invoice line.
- Files support for viewing and uploading files.

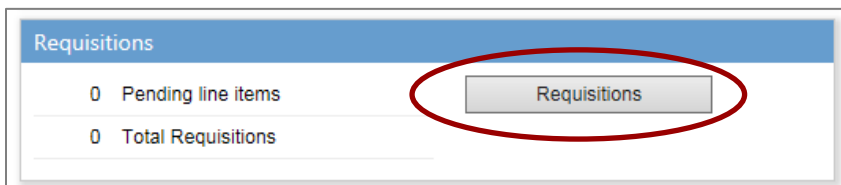
It is expected that a storekeeper will make use of Enterprise Portal screen alongside the Invoice Detail page for performing corrections as dictated by their organization's process. This can include part/inventory adjustments, work order charges, and direct charges to departments and accounts.

Once all invoice lines are reconciled and all information is put on the invoice detail to then put the invoice into a status of CLOSED.

11. Requisition Management Page

This section provides an overview of the Requisition Management Page.

➡ On the Main Storekeeper page, click the **Requisitions** button.



The Requisition Management page displays.

 A screenshot of the 'Requisition Management' page. At the top, there is a header 'Requisition Management'. Below it, a 'Current Location' dropdown menu is set to 'ACA - ASSET CENTRAL ADMINISTRATION', and a 'New Requisition' button is to its right. A section titled 'Requisitions: 5' contains a table with the following data:

Requisition ID	Status	Requested	Days Open	Lead Days	Need by	Vendor
ACA-2015-0000006	OPEN	04/29/2015	43	N/A		
ACA-2015-0000004	OPEN	04/28/2015	44	N/A		
ACA-2015-0000005	OPEN	04/28/2015	44	N/A		
ACA-2015-0000003	OPEN	04/28/2015	44	N/A		
ACA-2015-0000001	OPEN	04/14/2015	58	N/A		

 Below the table is a horizontal scrollbar. At the bottom, there is a 'Current Filter' dropdown, a 'Has Lines Not Actioned: YES' label, 'Define Filter' and 'Clear Filter' buttons, and a 'Back' button.

Current Location Drop-down

The Current Location drop-down allows you to select the location from which to view the requisitions.

 A screenshot of the 'Current Location' drop-down menu. The menu is a white box with a red border. It contains the text 'Current Location' followed by a dropdown arrow. The selected option is '1000 - FULL SERVICE SHOP'.

New Requisition Button

The **New Requisition** button takes you to the New Requisition page. See the [Create a New Requisition](#) section below for details on how to create a new requisition.



Requisition Management
Current Location: 1000 - FULL SERVICE SHOP

New Requisition

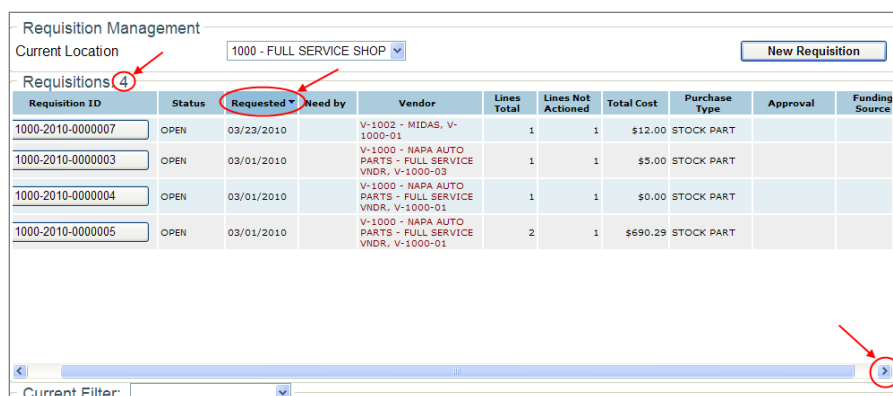
Requisitions Section

The Requisitions section displays the total number of requisitions at the top with a list of Requisitions and various details about each. The default view shows requisitions that have line items that are not actioned.

The columns are sortable and the section is scrollable. Click the column title to sort on it. The direction of the arrow shows the direction of the sort.



If your organization uses Enterprise Portal, the Vendors are hyperlinks to the **Vendors – Primary Information** screen.



Requisition Management
Current Location: 1000 - FULL SERVICE SHOP

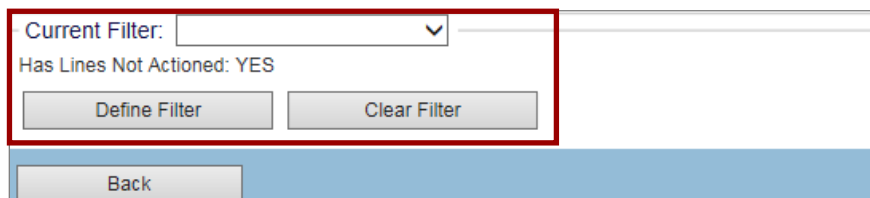
Requisitions 4

Requisition ID	Status	Requested	Need by	Vendor	Lines Total	Lines Not Actioned	Total Cost	Purchase Type	Approval	Funding Source
1000-2010-0000007	OPEN	03/23/2010		V-1002 - MIDAS, V-1000-01	1	1	\$12.00	STOCK PART		
1000-2010-0000003	OPEN	03/01/2010		V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR, V-1000-03	1	1	\$5.00	STOCK PART		
1000-2010-0000004	OPEN	03/01/2010		V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR, V-1000-01	1	1	\$0.00	STOCK PART		
1000-2010-0000005	OPEN	03/01/2010		V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR, V-1000-01	2	1	\$690.29	STOCK PART		

Current Filter: [Filter Icon]

Current Filter Section

The Current Filter section allows you to create filters for the requisition list. See the [Current Filter Section](#) above to understand how to create a filter as a similar process is followed for creating filters throughout Web Modules.



Current Filter: [Dropdown]

Has Lines Not Actioned: YES

Define Filter **Clear Filter**

Back

Back Button

Click the **Back** button to return to the Main Storekeeper page.

The screenshot shows a filter section with a 'Current Filter' dropdown, a 'Has Lines Not Actioned: YES' label, and 'Define Filter' and 'Clear Filter' buttons. Below this is a blue bar containing a 'Back' button, which is circled in red.

Create a New Requisition

Follow the steps below to create a new requisition.

1. Click the **New Requisition** button.

The screenshot shows the 'Requisition Management' header with a 'Current Location' dropdown set to 'ACA - ASSET CENTRAL ADMINISTRATION'. To the right of the dropdown is a 'New Requisition' button, which is circled in red. Below the header is a table of requisitions.

Requisition ID	Status	Requested	Days Open	Lead Days	Need by	Vendor
ACA-2015-0000006	OPEN	04/29/2015	43	N/A		
ACA-2015-0000004	OPEN	04/28/2015	44	N/A		
ACA-2015-0000005	OPEN	04/28/2015	44	N/A		
ACA-2015-0000003	OPEN	04/28/2015	44	N/A		
ACA-2015-0000001	OPEN	04/14/2015	58	N/A		

The New Requisition page displays.

The screenshot shows the 'New Requisition' form with the following fields:

- Purchase Type: STOCK (with a dropdown arrow)
- Requisition ID: CNLOC1-2015-0000012
- Location ID: CNLOC1 - REPAIR SHOP 1 (with a dropdown arrow)
- Description: (empty text field)
- Vendor ID: (empty text field with a dropdown arrow)
- Vendor Store ID: (empty text field with a dropdown arrow)
- Needed By: (calendar icon)
- Account ID: CNACCT0001 (with a dropdown arrow) UNIT ACCOUNT 0001
- Status: OPEN - OPEN (with a dropdown arrow)
- Funding Source: (empty text field with a dropdown arrow)
- Notification Template: (empty text field with a dropdown arrow)

 The Funding Source field is used for tracking grant or capital funding source information with your requisitions and purchase orders. If you have licensed Capital Planning, you may setup funding sources on the Capital Funding Source Type screen (**Setup > Equipment Management > Capital Planning > Funding Source Types**). While entering a requisition, purchase order, or a receipt, you may select a

funding source for that element. If you do not have Capital Planning licensed, then you may still enter in a funding source at the element level, but it will not be validated.

2. Complete the fields and click **Save**.



See the *Help* for information about settings for automatic number generation for requisitions, purchase orders, etc. (**Enterprise Purchasing > Options > Purchase Types**).

The Requisition Line Item Number 1 page displays.

Requisition Line Item Number 1

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000001
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

[Edit Requisition](#)
[New Note](#)

Line Item Details

Line item type: STOCK PART Date ordered: Action:
 Part ID: Part ID Verified Valid Part ID
 Manuf Part No: Manufacturer
 Part description: Product Category
 Description: Other ID
 Default Unit Price: Fuel/fluid Type
 Qty ordered: Unit Price: Unit of Measure
 Status: PENDING - PENDING Date Required:
 Location: MSTLOC MST LOCATION 1 - SHOP
 Vendor Contract ID:
 Account ID: KACCT2 2ND ACCT
 Funding Source: PRIMARY FUND PRIMARY FUNDS
 Eq Planning Project ID:
 External Rebuild Serial No:

Work Orders: 0

Delete	Location	Year	Number	Qty	Task ID	WAC	Equipment ID	Department ID	Account ID
☐									

Accounting Info

Shipping Amount: Sales Tax Rate: 7.0000

[Back](#) [Save](#)

The Requisition Header information displays on the top-left of the page with a hyperlink to the Requisition Detail page (if your organization uses Enterprise Purchasing).



The hyperlink is different depending on the page you are on. For example, it goes to the EP Requisition screen if you are on the Requisition Detail page. However, if you are on any other requisition page (other than the Requisition Detail page), the link takes the user to the Requisition Detail page.

Refer to the [Edit Requisition](#) and [New Note](#) sections below for information about editing the requisition and adding a note to the header.

3. Enter **Line Item Details**, **Work Order**, and **Accounting Info** if desired and click **Save** to save the line item.

- **Line item type** choices are: Stock Part, Non-Stock Part, Commercial, Fee, Shipping, Fuel, Ext Rebuild, and Equipment.
- **Action** choices are Purchase Order and Request for B/Q/P.
- **Status** choices are displayed as Status ID – Description and are customer created. Statuses can be created on the **Enterprise Purchasing > Setup > Statuses**.
- **Task ID** choices are limited to tasks associated with the work order.

The Storekeeper portal pages with a Part ID field and choice-list now include a **Lookup** button linked to the Parts Lookup dialog.

This lookup functionality allows for the added lookup of parts through cross reference IDs, with Storekeeper Parts Search Setting, **Default Part Lookup Part ID Search Option**, set to allow lookup by **Xref**.

Part ID Lookup

Stock Location

AWLOC1 - ALEX LOCATION

Search by Text

Part ID

contains

10

No Xref

Description

contains

Product Category

contains

Reset

Search

Search by Defined Lists

Task ID

...

Lookup

Task Parts

Please choose a Part ID - Parts found: 3

Search:

Part ID	Suf	Description	Category	On Hand	On Order	Manuf Part No	Manufacturer
1000	0	HOSE-SILICON(RU; HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	B.999	365.00	0.00	97-9999-600-0 SNP1000-0 ALSTOM1000-0 BTK1000-0 ALSTOM1000 6', HOSE-0 GARRETT1000 6', HOSE-0 BOMBARDIER-1000-0	SNAP ON ALSTOM ALSTOM GARRETT BOMBARDIER
10000	0	KIT- BUS AVL IN; KIT, BUS AVL INSTALLATION, KIT CONSISTS OF ALL PARTS, EXCEPT	1.999	194.00	0.00	Cross References: BUSAVL-0	
10001	0	RADIO- AVL; RADIO, AVL, BUS, MOTOROLA MCS-2000 RADIO, USED IN BUSES AND	1.999	150.00	4.00	Cross References: FCN1639A-0	

Showing 1 to 3 of 3 entries

Cancel

- To add new line items to the requisition, click the **New Line Item** button and follow the same steps as above.

Requisition Detail

Vendor

Requisition ID

ACA-2015-0000008

Purchase type

STOCK

Date ordered

06/11/2015 07:23 PM

Needed By

Lead Days

N/A

Replenishment batch ID

New Line Item

Files

Edit Requisition

Attributes

New Note

Comments

Line Items: 1

PENDING

OPEN

CLOSED

ALL

Edit Line Items

Expand All

Collapse All

	Work Orders	Line #	Part or Comment	Vendor Part No	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Location
☐	☐	1	10-0 - PART 300				2.00	\$ 15.00	OPEN	ACA - ASSET CENTRAL ADMINISTRATION
	Work Order ID		Equipment	Department	Account	Hat Number		Task		Qty
	ACA-2015-7		MIRABEAU PARK - 55.51 ACRES SPOKANE VALLEY CITY PARK	PARKS - PARKS AND REC				ELECTRICAL - CIRCUIT BOARD / PRINTED C.B.		2.00

12. Requisition Detail Page

After creating a requisition or clicking on a **Requisition ID** button on the Requisition Management page, the **Requisition Detail** page displays.

Requisition Detail

Vendor

Requisition ID: **ACA-2015-0000008**

Purchase type: STOCK

Date ordered: 06/11/2015 07:23 PM

Needed By:

Lead Days: N/A

Replenishment batch ID:

New Line Item | Files

Edit Requisition | Attributes

New Note | Comments

Line Items: 1

PENDING OPEN CLOSED ALL

Edit Line Items | Expand All | Collapse All

Work Orders	Line #	Part or Comment	Vendor Part No	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Location
☐	1	10-0 - PART 300				2.00	\$ 15.00	OPEN	ACA - ASSET CENTRAL ADMINISTRATION

Work Order ID	Equipment	Department	Account	Hat Number	Task	Qty
ACA-2015-7	MIRABEAU PARK - 55.51 ACRES SPOKANE VALLEY CITY PARK	PARKS - PARKS AND REC			ELECTRICAL - CIRCUIT BOARD / PRINTED C.B.	2.00

Back | Line Item(s) Action | ID | ... | Apply to Checked | Apply to All | Print Selected Lines

Click the **Requisition ID** hyperlink on the Requisition Management page to go to the Requisition Detail page.

Requisition Management

Current Location: ACA - ASSET CENTRAL ADMINISTRATION

New Requisition

Requisitions: 6

Requisition ID	Status	Requested	Days Open	Lead Days	Need by	Vendor
ACA-2015-0000008	OPEN	06/11/2015	0	N/A		
ACA-2015-0000006	OPEN	04/29/2015	43	N/A		
ACA-2015-0000004	OPEN	04/28/2015	44	N/A		
ACA-2015-0000005	OPEN	04/28/2015	44	N/A		
ACA-2015-0000003	OPEN	04/28/2015	44	N/A		
ACA-2015-0000001	OPEN	04/14/2015	58	N/A		

The Requisition Detail page displays and defaults to ALL statuses. However, the last Line Item Status selected on a currently viewed item is remembered.

Line Items: 1

PENDING OPEN CLOSED ALL

Edit Line Items | Expand All | Collapse All

Work Orders	Line #	Part or Comment	Vendor Part No	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Location
☐	1	10-0 - PART 300				2.00	\$ 15.00	OPEN	ACA - ASSET CENTRAL ADMINISTRATION

The top left of the Requisition Detail page has detailed requisition header information including hyperlinks to the **Vendors – Primary Information** and **Enterprise Purchasing – Requisitions** screens.



For the **Vendor** and **Requisition ID** link to work, your organization must have Enterprise Portal installed and configured.

The top right section of the Requisition Detail page shows notes (if any) from the requisition and allows you to add a new line item, edit the requisition header, add a note, files, attributes and comments. Please refer to the [Edit PO Header](#), [Add a New Line Item](#), [Edit the Requisition](#), and [Add a New Note](#), [Add a File](#), [Add Attributes](#), and [Add Comments](#) sections below for instructions on how to perform these tasks.

	New Line Item	Files
	Edit Requisition	Attributes
	New Note	Comments

Add a New Line Item

To add a new line item to a requisition, follow the steps below. Note: Only a single multi-asset work order is allowed per line item when the line item type is commercial

1. Click **New Line Item**.

Requisition Detail

Vendor	20208 - A-1 BATTERY
Requisition ID	MSTLOC-2013-0000002
Purchase type	PTYPE1
Date ordered	
Replenishment batch ID	

New Line Item

Files

Edit Requisition

Attributes

New Note

Comments

Line Items: 1

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL [Edit Line Items](#) [Expand All](#) [Collapse All](#)

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	PENDING	MSTLC LOCAT

Actions

Line Item(s) Action [Apply to Checked](#) [Apply to All](#) [Print Selected Lines](#)

[Back](#)

You are taken to the Requisition Line Item Number # page for a new line item.

2. On this page, you may choose from the following drop-down selection boxes:

- **Line item type** (Stock Part, Non-Stock Part, Commercial, Fee, Shipping, Fuel, External Rebuild, or Equipment)
- **Action** (Purchase Order or Request for B/Q/P)
- **Status** (Potential statuses are PENDING, OPEN, and CLOSED). The **Status** displays as Status ID – Description (created on the **Data > Enterprise Purchasing > Setup > Statuses** screen).



In order to use the **Verified Valid Part ID** checkbox when creating a brand new part number, users must go to the GUI and set the following option: "Enterprise Purchasing Setup Options - Default Data for New Parts Added During Ordering." Users also need to set the default product category ID, and any other default information for this checkbox to work properly.



The **Edit Part Pencil** icon  takes you to the Part Definition Wizard to edit the part information. Please see the [Part Definition Wizard](#) section below for more information. The **Part Location Information Zoom** button  takes you to the Parts- Location Information screen to update part location information as desired.

3. Complete the fields as desired and click **Save** to save the new line item.



The Work Orders section of the Requisition Detail page shows more information when you scroll to the right including: **Labor Cost, Parts Cost, Misc Cost, Est Total Cost, Position, Request ID**, and a **Service Request ID** drop-down. Commercial multi-asset work orders will display the number of assets associated with the work order.

Requisition Line Item Number 2

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

[Edit Requisition](#)
[New Note](#)

Line Item Details

Line item type: STOCK PART Date ordered: 01/28/2013 09:45 Action: PURCHASE ORDER
 Part ID: PART00001 - 0 Verified Valid Part ID
 Manufacturer:
 Part description: BATTERY Product Category: 026 BODY PARTS - BUS
 Description: BUS BATTERY Other ID: ALL APPLIES TO ALL LINE TYPES
 Default Unit Price: Fuel/fluid Type:
 Qty ordered: 1 Unit Price: Unit of Measure: EA EACH
 Status: PENDING - PENDING Date Required: 01/31/2013 09:45
 Location: MSTLOC MST LOCATION 1 - SHOP
 Vendor Contract ID:
 Account ID: KACCT2 2ND ACCT
 Funding Source: PRIMARY FUND PRIMARY FUNDS
 Eq Planning Project ID:
 External Rebuild Serial No:

Work Orders: 0

Delete	Location	Year	Number	Qty	Task ID	WAC	Equipment ID	Department ID	Account ID
☐	MSTLOC	2012	37	1	Y-S	03	0010	MW	MSTACCT1

Accounting Info

Shipping Amount: Sales Tax Rate: 7.0000

[Back](#) [Save](#)

You are returned to the Requisition Detail page with the new line item at the bottom of the list.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

[New Line Item](#) [Files](#)
[Edit Requisition](#) [Attributes](#)
[New Note](#) [Comments](#)

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL [Edit Line Items](#) [Expand All](#) [Collapse All](#)

	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	PENDING	MSTLOC LOCAL1
☐	2	PART00001-0: BATTERY			1	\$0.00	PENDING	MSTLOC LOCAL1

Actions

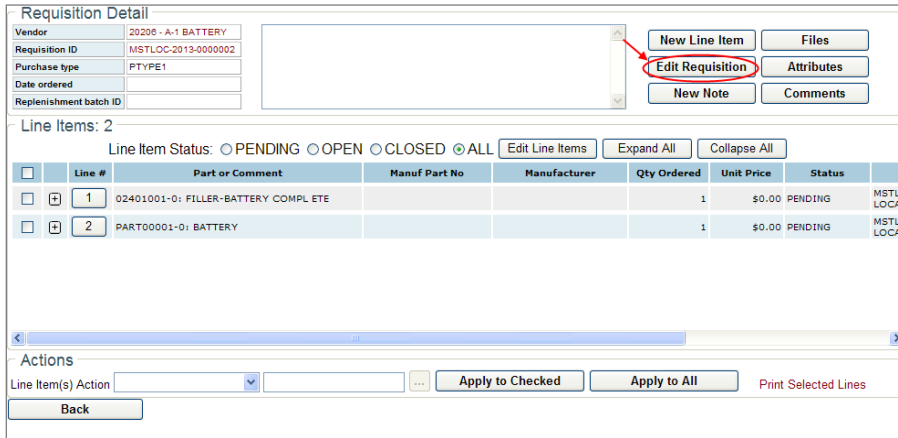
Line Item(s) Action: [Apply to Checked](#) [Apply to All](#) [Print Selected Lines](#)

[Back](#)

Edit the Requisition

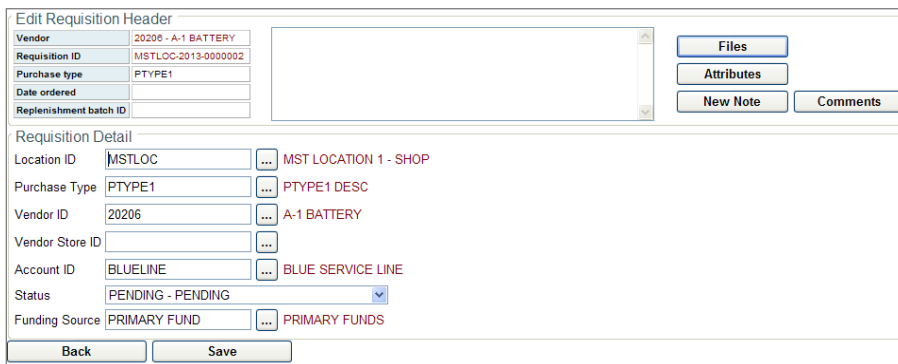
To edit the requisition header, follow the steps below.

1. Click the **Edit Requisition** button on the Requisition Detail page.



The screenshot shows the 'Requisition Detail' page. At the top, there are fields for Vendor (20206 - A-1 BATTERY), Requisition ID (MSTLOC-2013-0000002), Purchase type (PTYPE1), Date ordered, and Replenishment batch ID. To the right of these fields are buttons for 'New Line Item', 'Files', 'Edit Requisition' (circled in red), 'Attributes', 'New Note', and 'Comments'. Below these fields is a section for 'Line Items: 2'. It includes a table with columns: Line #, Part or Comment, Manuf Part No, Manufacturer, Qty Ordered, Unit Price, Status, and MSTLC LOCAT. The table contains two items: Line 1 (02401001-0: FILLER-BATTERY COMPL ETE) and Line 2 (PART0001-0: BATTERY). Below the table is an 'Actions' section with a dropdown for 'Line Item(s) Action', buttons for 'Apply to Checked', 'Apply to All', and 'Print Selected Lines', and a 'Back' button.

You are taken to the Edit Requisition Header page.



The screenshot shows the 'Edit Requisition Header' page. It has fields for Vendor (20206 - A-1 BATTERY), Requisition ID (MSTLOC-2013-0000002), Purchase type (PTYPE1), Date ordered, and Replenishment batch ID. To the right of these fields are buttons for 'Files', 'Attributes', 'New Note', and 'Comments'. Below these fields is a section for 'Requisition Detail' with fields for Location ID (MSTLOC), Purchase Type (PTYPE1), Vendor ID (20206), Vendor Store ID, Account ID (BLUELINE), Status (PENDING - PENDING), and Funding Source (PRIMARY FUND). Each field has a dropdown arrow and a label to its right. At the bottom are 'Back' and 'Save' buttons.

2. Complete the fields as desired and click **Save** to save your entries. Please refer to the [Add a File](#), [Add Attributes](#), [Add a New Note](#), and [Add Comments](#) sections below for instructions on how to perform these tasks.



This page is where you may change the **Status** of the requisition to **OPEN** to allow an Order or Request for B/Q/P action to be performed on it.

Edit Requisition Header

Vendor

20206 - A-1 BATTERY

Requisition ID

MSTLOC-2013-0000002

Purchase type

PTYPE1

Date ordered

Replenishment batch ID

Files

Attributes

New Note

Comments

Location ID

MSTLOC

...

MST LOCATION 1 - SHOP

Purchase Type

PTYPE1

...

PTYPE1 DESC

Vendor ID

20206

...

A-1 BATTERY

Vendor Store ID

...

Account ID

BLUELINE

...

BLUE SERVICE LINE

Status

OPEN - OPEN

Funding Source

PRIMARY FUND

...

PRIMARY FUNDS

Back

Save

You are returned to the Requisition Detail page with the header information updated accordingly.

Add a New Note

To add a new note to the requisition, follow the steps below.

1. Click **New Note** on the Requisition Detail page.

Requisition Detail

Vendor

20206 - A-1 BATTERY

Requisition ID

MSTLOC-2013-0000002

Purchase type

PTYPE1

Date ordered

01/28/2013 10:00

Replenishment batch ID

New Line Item

Files

Edit Requisition

Attributes

New Note

Comments

Line Items: 2

Line Item Status:

☐ PENDING

☐ OPEN

☐ CLOSED

☒ ALL

Edit Line Items

Expand All

Collapse All

	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	OPEN	MSTLC LOCAT
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

You are taken to the Requisition Notes page.

Requisition Notes

Vendor

20206 - A-1 BATTERY

Requisition ID

MSTLOC-2013-0000002

Purchase type

PTYPE1

Date ordered

01/28/2013 10:00

Replenishment batch ID

Files

Attributes

Comments

Existing Notes

New Note

Line number:

Back

Save New Note

2. Select the line item number for the note (or leave blank for the note to apply to the Requisition Header).
3. Enter the note, and click **Save New Note** to save the note.

You are returned to the Requisition Detail page where the new note displays in the notes box.

The screenshot shows the 'Requisition Detail' page. At the top, there's a header with fields for Vendor, Requisition ID, Purchase type, Date ordered, and Replenishment batch ID. To the right of these fields is a text area for a note, which contains the text: '--- 01/28/2013 10:06 - MOLLYT - MOLLYS ID --- APPLIES TO LINE NUMBER 2 --- PLEASE RUSH. ---'. Below the header is a section for 'Line Items: 2'. It shows a table with columns: Line #, Part or Comment, Manuf Part No, Manufacturer, Qty Ordered, Unit Price, Status, and Location. There are two line items: Line 1 (02401001-0: FILLER-BATTERY COMPLETE) and Line 2 (PART00001-0: BATTERY). Below the table is an 'Actions' section with a dropdown for 'Line Item(s) Action', buttons for 'Apply to Checked', 'Apply to All', and 'Print Selected Lines', and a 'Back' button.

Add a File

To add a file, URL, or report link:

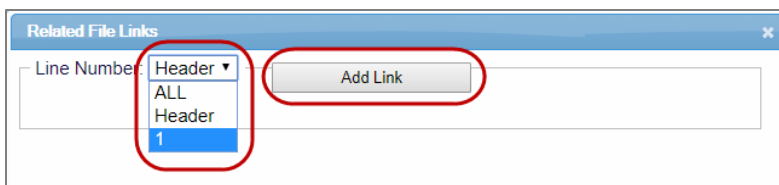
1. Click **Files**.

 Note: The **Files** button can be accessed through the Requisition Detail page or Purchase Order Detail page.

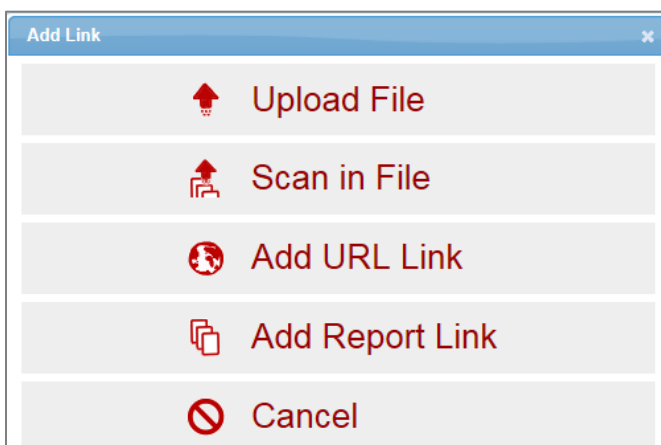
The screenshot shows the 'Purchase Order Detail' page. It has a header with fields for Vendor, Purchase order ID, Purchase type, Date ordered, Expected Delivery, Needed By, Lead Days, and Replenishment batch ID. To the right of these fields is a text area for a note. Below the header is a section for 'Line Items: 1'. It shows a table with columns: Work Orders, Line #, Part or Comment, Vendor Part No, Qty Ordered, Qty not yet Received, Unit price, Status, Location, and Line Item Type. There is one line item. To the right of the table is a section with buttons: 'New Line Item', 'Edit PO Header', 'New Note', 'Files', 'Attributes', and 'Comments'. The 'Files' button is highlighted with a red circle.

The Related File Links pop-in displays.

2. Select the desired line numbers and click **Add Link**.



The Add Link dialog displays. Choose to upload a file, scan in a file, add a URL link, add a report link, or cancel.



The subsequent dialog that displays will be one of the following (for more information, see the appropriate section directly below this list):

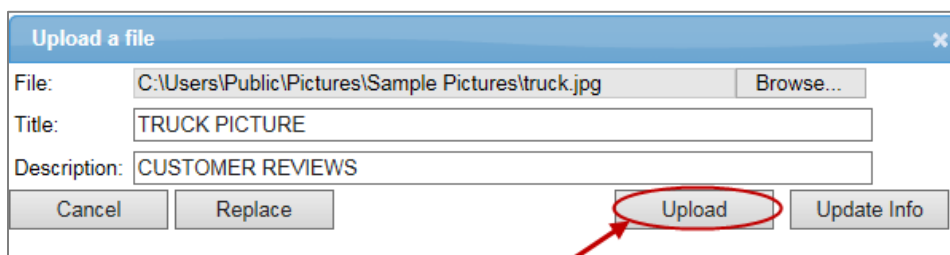
- **Upload File:** Enables you to upload a file with an optional title and description.
 - **Scan in File:** Enables you to scan a file with a title and description.
 - **Add URL Link:** Enables you to link to a network resource (e.g., a web site or a shared network file on your company's intranet).
 - **Add Report Link:** Enables you to point to a Web Modules report (currently only Crystal Reports are supported).
-  **Note:** For report links, farpt:/// is automatically added to the file name when you save.
- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.

Upload File

To upload a file:

➡ Enter the file, title (optional), and description (optional), and click **Upload** to upload the file.

 Note: As a precaution, do not upload .exe and .dll files, or extremely large files.



The file displays in the **Related File Links** section.

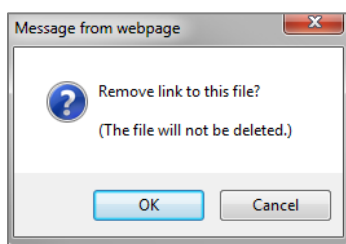


Once a file has been added, you may delete, update, or view the file as shown below.

To delete an uploaded file:

1. Click the  icon to delete the link to the file.

A dialog will confirm that you want to remove the link to the file.



2. Click **OK** to remove the link.

To edit a file:

➡ Click the edit pencil icon to update the file.

The Upload a file edit dialog displays with the following buttons:

- i. **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top, right corner.
- ii. **Replace:** Allows you to replace the uploaded file with a different uploaded file, but keep the same basic information.

- a. Click the **Replace** button and a validation message displays.
- b. Click **Yes**.
- c. In the new **Upload a file** dialog, enter the new information and click **Upload**.

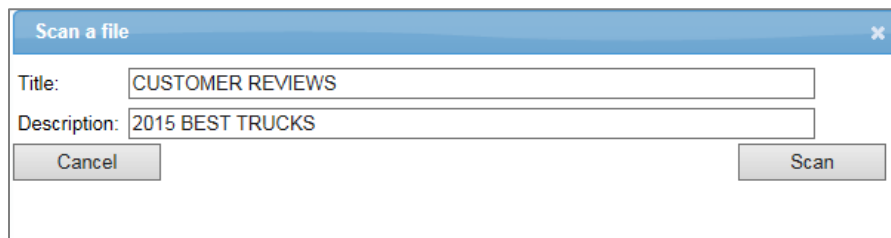
The original file is not deleted from the server, but unless you preserve the original fafile:/// URL, you will not be able to access the old file any more.

- iii. **Update Info:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.

- a. Hover over the zoom  icon to view the file information and click the zoom  icon to go to the file.

Scan in File

When you click **Scan**, the ActiveX control uses a scanner to scan and upload an image. If the ActiveX control is not loaded, the **Scan** button is disabled.

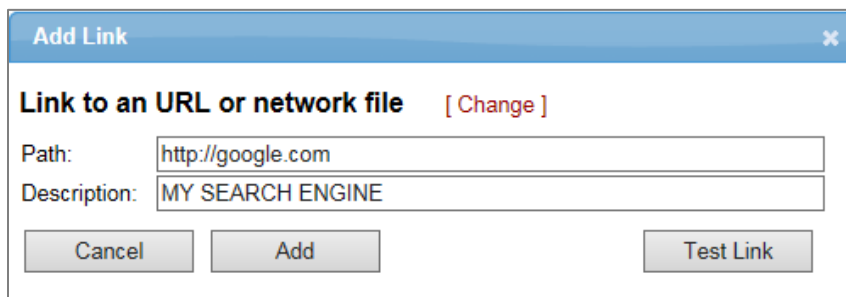


A dialog box titled "Scan a file" with a close button (X) in the top right corner. It contains two text input fields: "Title:" with the text "CUSTOMER REVIEWS" and "Description:" with the text "2015 BEST TRUCKS". At the bottom, there are two buttons: "Cancel" on the left and "Scan" on the right.

Add URL Link

To add a URL link:

1. Click **Add URL Link**.
2. Enter the **Path** and **Description** and click **Test Link** to test the link.
3. Click **Add** to add the link.



A dialog box titled "Add Link" with a close button (X) in the top right corner. It has a section header "Link to an URL or network file" followed by a "[Change]" link. Below this are two text input fields: "Path:" with the text "http://google.com" and "Description:" with the text "MY SEARCH ENGINE". At the bottom, there are three buttons: "Cancel" on the left, "Add" in the middle, and "Test Link" on the right.

The URL link displays in the Related File Links section:



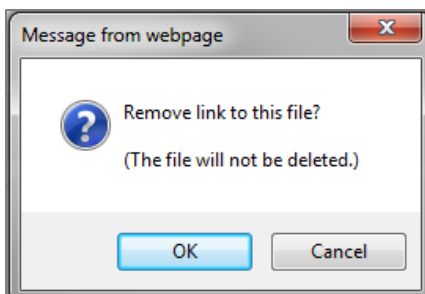
A section titled "Related File Links" containing a list of two links. Each link entry consists of a red 'X' icon, a pencil icon, the link text, and a magnifying glass icon. The first entry is "Truck Picture" with the description "CUSTOMER REVIEWS". The second entry is "http://google.com" with the description "MY SEARCH ENGINE".

Once a URL link has been added, you may delete, update, or view the link.

To delete a link:

1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.

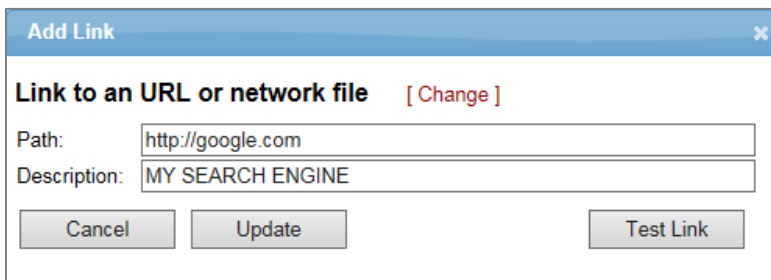


2. Click **OK** to remove the link.

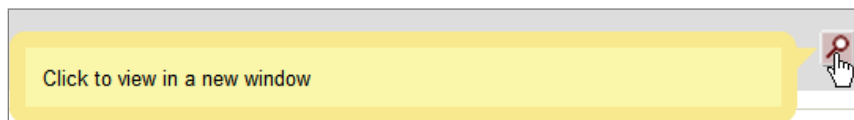
To edit a link:

➡ Click the pencil  icon to update the link.

The Add Link Edit dialog displays where you may change, update, and test the link.



- **Change:** Allows you to select a different type of link.
- **Update:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.
- **Test Link:** Allows you to test the link.
- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.
- Hover over the zoom  icon to see the message, or click the zoom icon in order to view the URL link in a new window.



Add Report Link

The **Add Report Link** button enables you to point to a web modules report (currently only Crystal Reports are supported).



Note: For report links, farpt:/// is automatically added to the file name when you save.

To add a link to a report:

1. From your web browser, copy the part of the report's URL that identifies the report. This link contains the folder name (seen below as Shop Activity) and the name of the report (Work Order Detail.rpt).

For example:

- http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt
becomes
 - Shop Activity/Work Order Detail.rpt
2. Paste the report identifier string (path) and description.
 3. Click **Test Link** to test the link.
 4. Click **Add** to add the report link.

The 'Add Link' dialog box has a title bar with a close button. It contains a section titled 'Link to a report' with a '[Change]' link. Below this are two input fields: 'Path:' containing 'equipment info/fa-eqinvlist.rpt' and 'Description:' containing 'EQUIPMENT INVENTORY LIST'. At the bottom are three buttons: 'Cancel', 'Add', and 'Test Link'.

The report link displays in the **Related File Links** section:

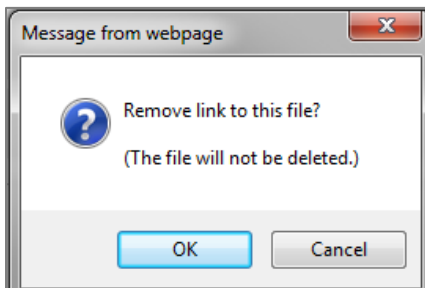
The 'Related File Links' section is a table-like list. Each row has a red 'X' icon, a pencil icon, a text entry, and a magnifying glass icon. The entries are: 'Truck Picture CUSTOMER REVIEWS', 'http://google.com MY SEARCH ENGINE', and 'farpt:///equipment info/fa-eqinvlist.rpt EQUIPMENT INVENTORY LIST'.

Once a report link has been added, you may delete, update or view the link as described below.

To delete the link:

1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.

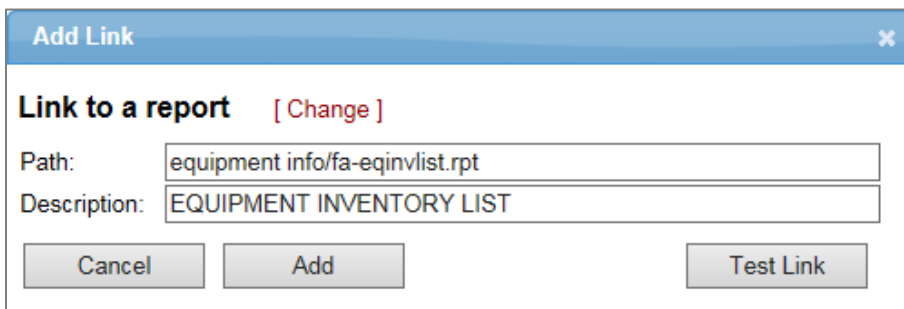


2. Click **OK** to remove the link.

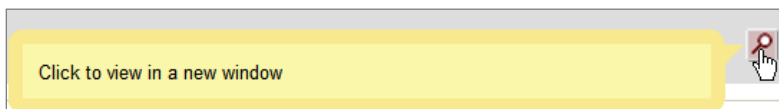
To edit the link:

1. Click the edit pencil icon to update the link.

*The **Add Link** dialog displays where you may change, edit, update, and test the link.*



- **Change:** Allows you to select a different type of link.
 - **Add:** Enter the correct information and click the Add button.
 - **Test Link:** Allows you to test the link.
 - **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.
2. Hover over the zoom icon to see the message to click the zoom icon in order to view the report in a new window.



Add Attributes

- To add attributes to a requisition, click **Attributes**.

The screenshot shows the 'Requisition Detail' page. At the top, there are fields for Vendor (20205 - A-1 BATTERY), Requisition ID (MSTLOC-2013-0000002), Purchase type (PTYPE1), Date ordered (01/28/2013 10:00), and Replenishment batch ID. To the right, there is a text area with the message: '01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID -- APPLIES TO LINE NUMBER 2 -- PLEASE RUSH. ---'. Below these fields are buttons for 'New Line Item', 'Files', 'Edit Requisition', 'Attributes' (circled in red), 'New Note', and 'Comments'. The 'Line Items' section shows two items: Line 1 (02401001-0: FILLER-BATTERY COMPLETE) and Line 2 (PART00001-0: BATTERY). At the bottom, there is an 'Actions' section with a dropdown for 'Line Item(s) Action' and buttons for 'Apply to Checked', 'Apply to All', and 'Print Selected Lines'.

The Attributes pop-in displays and existing attributes, if any, appear in the list.

The screenshot shows the 'Attributes' pop-in window. At the top, there is a 'Line:' dropdown menu set to 'All' and a 'New Attribute' button. Below this is a search bar labeled 'Search:'. A table is displayed with the following columns: 'Line Number', 'Attribute ID', 'Attribute Name', 'Text Value', 'Numeric Value', and 'Date'. The table is currently empty, with the message 'No data available in table' displayed below it. At the bottom, there is a scroll bar.

- To create an attribute, select the desired lines from the drop-down and click **New Attribute**.

The screenshot shows the 'Attributes' pop-in window. The 'Line:' dropdown menu is now set to '1'. The 'New Attribute' button is circled in red. The table below is still empty, with the message 'No data available in table' displayed below it. At the bottom, there is a scroll bar.

The Attributes pop-in displays.

Attributes

New

Line Number: 1
 Date Value:
 Attribute ID: ...
 Numeric Value:
 Text Value:
 Comments:
 Path and File name:

Save
Cancel

Line: 1

Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Date
No data available in table					

- Complete the fields and click **Save** to save the attribute to the list.

Attributes

New

Line Number: 1
 Date Value: 01/28/2013
 Attribute ID: WEIGHT ...
 Numeric Value: 70
 Text Value: 70 lbs
 Comments: battery weight
 Path and File name: http://www.scrapmetalforum.com/smf-shop/

Save
Cancel

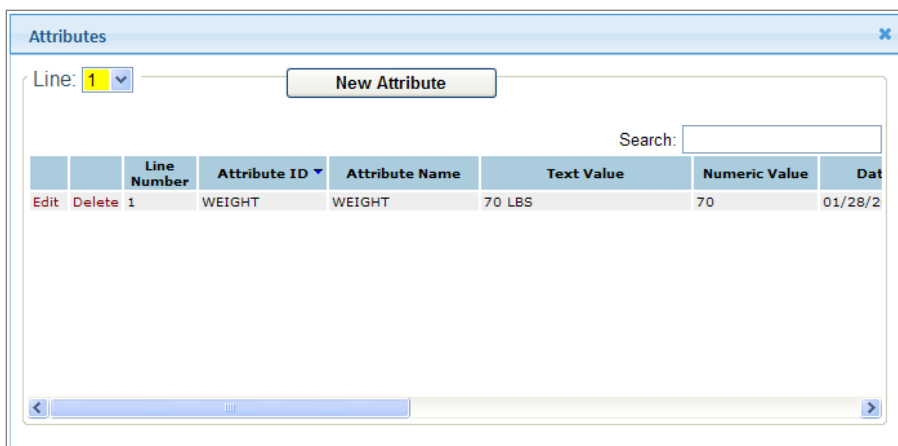
Line: 1

Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Date
No data available in table					

- Click the magnifying glass icon to open the Add Link pop-in as mentioned in the [Add a File](#) section above.

The attribute is added to the Attributes pop-in list.

- Note: The header or line number is highlighted in the drop-down list when it has an attribute associated with it.



Attributes

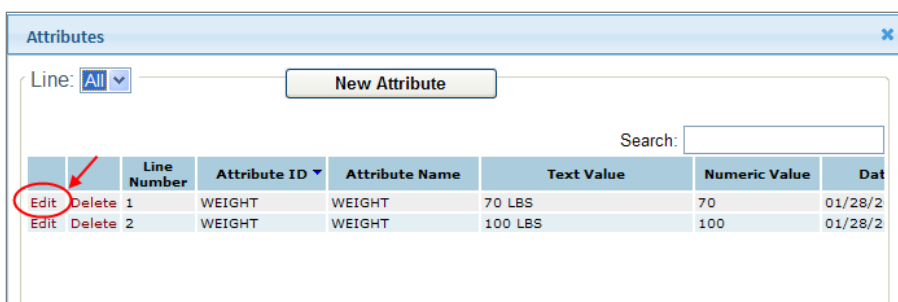
Line: 1

New Attribute

Search:

	Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Date
Edit Delete	1	WEIGHT	WEIGHT	70 LBS	70	01/28/2

- Continue adding attributes to line numbers as desired by selecting the line number, clicking **New Attribute** and following the above instructions.
- To edit an attribute, click the **Edit** link.



Attributes

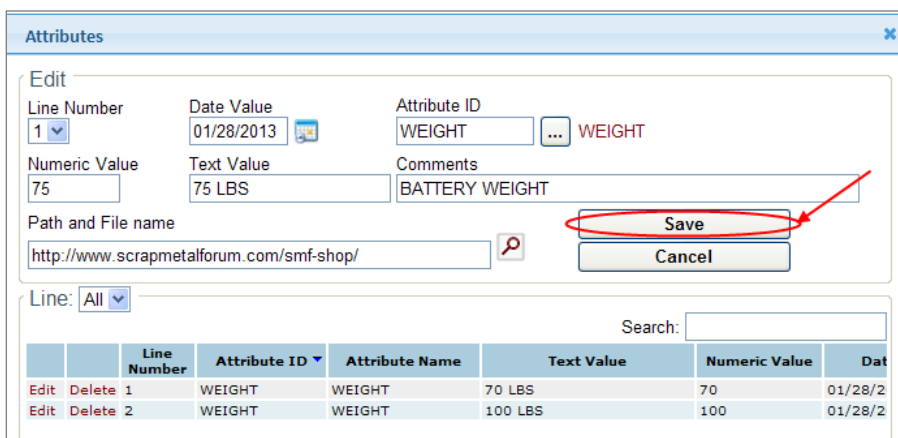
Line: All

New Attribute

Search:

	Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Date
Edit Delete	1	WEIGHT	WEIGHT	70 LBS	70	01/28/2
Edit Delete	2	WEIGHT	WEIGHT	100 LBS	100	01/28/2

- Edit the information accordingly and click **Save**.



Attributes

Edit

Line Number: 1

Date Value: 01/28/2013

Attribute ID: WEIGHT

Numeric Value: 75

Text Value: 75 LBS

Comments: BATTERY WEIGHT

Path and File name: http://www.scrapmetalforum.com/smf-shop/

Save

Cancel

Line: All

Search:

	Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Date
Edit Delete	1	WEIGHT	WEIGHT	70 LBS	70	01/28/2
Edit Delete	2	WEIGHT	WEIGHT	100 LBS	100	01/28/2

- To delete an attribute, click **Delete**.

Attributes

Line: All

New Attribute

Search:

		Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Dat
Edit	Delete	1	WEIGHT	WEIGHT	75 LBS	75	01/28/2
Edit	Delete	2	WEIGHT	WEIGHT	100 LBS	100	01/28/2

The attribute is deleted from the list as shown in the screenshot below.

Attributes

Line: All

New Attribute

Search:

		Line Number	Attribute ID	Attribute Name	Text Value	Numeric Value	Dat
Edit	Delete	1	WEIGHT	WEIGHT	75 LBS	75	01/28/2

- Click the **X** in the upper-right corner to close the pop-in.

Add a Comment

- Click the **Comments** button to go to the Comments pop-in where the existing comments, if any, display.

Comments

Line: Header

ITEMS NEEDED ASAP

Save Comments

- To associate a comment with the header or a particular line, select Header or the line number from the drop-down.

Comments

Line: Header

ITEMS NEEDED ASAP

Save Comments

A Comments pop-in for the selected line displays.

Comments

Line: 1

Item tends to be on backorder.

Save Comments

3. Enter the comment, and click **Save Comments**.

Comments

Line: 1

Item tends to be on backorder.

Save Comments

You are returned to the main Requisition or Purchase Order Detail page.

4. On the Main Requisition or Purchase Order Detail page click **Comments** to view the header comments.

Requisition Detail

Vendor: 20208 - A-1 BATTERY

Requisition ID: MSTLOC-2013-0000002

Purchase type: PTYPE1

Date ordered: 01/28/2013 10:00

Replenishment batch ID:

--- 01/28/2013 10:06 - MOLLYT - MOLLYS ID ---

APPLIES TO LINE NUMBER 2 --

PLEASE RUSH.

New Line Item Files

Edit Requisition Attributes

New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Location
1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	OPEN	MSTLC LOCAT
2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

Actions

Line Item(s) Action

Apply to Checked Apply to All Print Selected Lines

Back

The Comments pop-in displays the Header comments (highlighting indicates line/header association).

Comments

Line: Header

USE ONLY 10 FT. STEEL POLE

Save Comments

5. On the Line Item Detail page, click **Comments** to see the comments associated with a particular line item.

Requisition Line Item Number 1

Vendor: V-1002 - MIDAS, V-1000-01
 Requisition ID: 1000-2010-0000007
 Purchase type: STOCK PART
 Date ordered: 03/23/2010 14:20
 Replenishment batch ID:

Files
 Edit Requisition
 New Note
 Comments

Line Item Details

Line item type: STOCK PART
 Date ordered: 03/23/2010 14:20
 Part ID: NS11
 Part description: SWITCH
 Description: CASTERS
 Qty ordered: 2
 Unit Price: 5.0000
 Unit of Measure: EA
 Product Category: TRANSIT
 Other ID: LINE ITEM OTH
 LINE ITEM OTHER ID 001
 Fuel/fluid Type: EA
 Unit of Measure: EACH

The Comments pop-in displays the specific comments for the specific line item (highlighting indicates line/header association).

Comments

Line: 1
 TENDS TO BE ON BACK-ORDER.
 Save Comments

Line Items Section

The Line Items section of the Requisition Detail or Purchase Order Detail pages display the line items on the requisition or purchase order. The displayed columns will vary depending on the line item type chosen.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Location
1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	OPEN	MSTLC LOCAT
2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

Actions
 Line Item(s) Action:
 Back

The total number of line items (depending on the selected status) is displayed at the top of the section. The **Line Item Status** radio button allows you to see the various line items with different statuses on the requisition. The Line Items List updates according to the status selected.

1. Click **Edit Line Items** to edit the quantity or price of line items.

Requisition Detail

Vendor: 20205-A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL **Edit Line Items** Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	Loc
1	02401001-0: FILLER-BATTERY COMPL ETE			1	\$0.00	OPEN	MSTLC LOCAT
2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

Actions
 Line Item(s) Action:

The Requisition Detail Edit pop-in displays.

Requisition Detail Edit

Line Items: 2
 Line Item Status: ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit price	Status	Loc
1	02401001-0: FILLER-BATTERY COMPL ETE			1	0.0000	OPEN	MSTLOC - LOCATION
2	PART00001-0: BATTERY			1	0.0000	CLOSED	MSTLOC - LOCATION

- Edit the Qty Ordered or the Receipt Unit Price and click **Save** to save your changes.

Requisition Detail Edit

Line Items: 2
 Line Item Status: ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit price	Status	Loc
1	02401001-0: FILLER-BATTERY COMPL ETE			2	50.0000	OPEN	MSTLOC - LOCATION
2	PART00001-0: BATTERY			1	0.0000	CLOSED	MSTLOC - LOCATION

The Requisition Management or Purchase Order Detail page displays with the updated quantity and price information.

- Click **Expand All** to show the work orders associated with the requisition line items.



Note: You can also click the + button in the far left column to expand the view.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYP01
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCA1
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCA1

Actions

Line Item(s) Action:

The associated work order information displays.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYP01
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCA1
		Work Order ID	Equipment	Hat Number	Task	Qty		
		MSTLOC-2012-13	KGCOMP001: F4 2002 A/C MOTOR T8408 A/C MOTOR TEST		A - PM SERVICE A	1		
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCA1
		Work Order ID	Equipment	Hat Number	Task	Qty		
		MSTLOC-2012-37	0010: TGA1RR830212 1994 TMC T80206 94-TMC-T80206		Y-S - STATE INSPECTION	1		

Actions

Line Item(s) Action:



Click the **Equipment** hyperlink to open the Enterprise Portal Equipment screen (if your organization uses the Enterprise Portal).

- Click **Collapse All** or the – button in the far left column to collapse the view.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCA1
		Work Order ID: MSTLOC-2012-13 Equipment: KGCOMP001: F4 2002 A/C MOTOR T8408 A/C MOTOR TEST Hat Number: A - PM SERVICE A Task: Qty: 1						
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCA1
		Work Order ID: MSTLOC-2012-37 Equipment: 0010: TGA1RR830212 1994 TMC T80206 94-TMC-T80206 Hat Number: Y-S - STATE INSPECTION Task: Qty: 1						

Actions

Line Item(s) Action:

The page returns to the original view.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCA1
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCA1

Actions

Line Item(s) Action:

The checkbox on the far left side of the Line Items list allows you to select a particular line item while checking the box at the top left corner of the list selects all the line items as shown in the screenshot below.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☒	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☒	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCA1
☒	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCA1

Actions

Line Item(s) Action:

Information included in the Line Items section is as follows: Line #, Part or Comment, Manufacturer Part Number, Manufacturer, Quantity Ordered, Quantity not yet Received, Receipt Unit Price, Status, Location, Line Item Type, Date Ordered, and

Funding Source. The Funding Source field is used for tracking grant or capital funding source information with your requisitions and purchase orders. If you have licensed Capital Planning, you may setup funding sources on the Capital Funding Source Type screen (Setup > Equipment Management > Capital Planning > Funding Source Types).

Line Items: 5

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Qty Ordered	Unit Price	Status	Location	Line Item Type
☐	1	RA-PART-TEST-2-0: FIFO PRICING Mfr Part No: FRAM: 1492ASDF 3.5	5.00	\$5.24	OPEN	RALOC-01 - RICHARD'S	STOCK PART
☐	2	CNPART007-1: SERIALIZED BUS ENGINE Mfr Part No: WIN123	1.00	\$500.00	CLOSED	RALOC-01 - RICHARD'S	EXT REBUILD

5. Click a line number in the **Line #** column to open the Line Item Details page.

Refer to the [Create a Requisition](#) section for more information about this page.

Actions Section

In the Actions section of the Requisition Detail page, Storekeepers may perform actions on the requisition such as:

- Moving the requisition to a purchase order
- Moving the requisition to a Request for Bid/Quote/Proposal (B/Q/P)
- Deleting the requisition.

 Requisitions (and line items) must be in OPEN status in order to perform Purchase Order or Request for B/P/Q actions.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
Requisition ID: MSTLOC-2013-0000002
Purchase type: PTY001
Date ordered: 01/28/2013 10:00
Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYSID --
APPLIES TO LINE NUMBER 2 --
PLEASE RUSH.

New Line Item Files
Edit Requisition Attributes
New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCAL
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAL

Actions

Line Item(s) Action: ... Apply to Checked Apply to All Print Selected Lines

Back

The following sections outline how to perform an action on a line item.

Move to a Purchase Order

To move a line item to a purchase order, follow the steps below.

1. Check the box next to the specific line item to select the desired line items.
 2. Select **PURCHASE ORDER** from the **Line Item(s) Action** drop-down.
 3. Click the Choice-list  button to select the desired Purchase Order number.
 4. Click **Apply to checked** (if you checked specific line items) or **Apply to all**.
-  Leave the **Line Item(s) Action** field blank to move to a new purchase order.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYP1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☒	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	OPEN	MSTLC LOCAT
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

Actions

Line Item(s) Action: PURCHASE ORDER  MSTLOC-2013-0000001  **Apply to Checked** Apply to All Print Selected Lines

Back

The requisition line item now shows with Status of CLOSED.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYP1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

-- 01/28/2013 10:06 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	02401001-0: FILLER-BATTERY COMPL ETE			2	\$50.00	CLOSED	MSTLC LOCAT
☐	2	PART00001-0: BATTERY			1	\$0.00	CLOSED	MSTLC LOCAT

Actions

Line Item(s) Action: PURCHASE ORDER  MSTLOC-2013-0000001  Apply to Checked Apply to All Print Selected Lines

Back

On the Requisition Line Item Detail page, the Date Ordered, Action, and Purchase Order Number display.

Requisition Line Item Number 1

Vendor: 20206-A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000002
 Purchase type: PTYPE1
 Date ordered: 01/28/2013 10:00
 Replenishment batch ID:

01/28/2013 10:06 - MOLLYT - MOLLYS ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE RUSH.

Files
 Edit Requisition
 Attributes
 New Note
 Comments

Line Item Details

Line item type: STOCK PART
 Date ordered: 01/28/2013 08:45
 Action: PURCHASE ORDER
 MSTLOC-2013-0000001

Part ID: 02401001
 Part description: FILLER-BATTERY COMPLETE
 Description: BATTERY
 Qty ordered: 2
 Status: CLOSED - CLOSED
 Location: MSTLOC
 Vendor Contract ID: KACCT2
 Account ID: 2ND ACCT
 Funding Source: PRIMARY FUND
 Eq Planning Project ID:

Default Unit Price: 0.0000
 Unit Price: 50.0000
 Unit of Measure: EA
 Date Required:

Work Orders: 1

Delete	Location	Year	Number	Qty	Task ID	WAC	Equipment ID	Department ID	Account ID
☐	MSTLOC	2012	13	1	A	03	KGCOMP001	1DEPT	47-1372-108945

Accounting Info

Shipping Amount: 0.00
 Sales Tax Rate: 7.0000

Back Save

Move to Request for Bid/Quote/Proposal (B/Q/P)

To move a line item to Request for B/Q/P, follow the steps below.

1. Place a check in the box to the left of the item to select the line items you want.
2. Select **Request for B/Q/P** as the **Line Item(s) Action**.
3. Select a **Request ID** from the **Select** box  or leave blank to create a new Request for B/Q/P ID and.
4. Click **Apply to checked** (or **Apply to all** if you want to select all line items).

Requisition Detail

Vendor: JH-CONCOURSE - CONCOURSE HEAVY TRUCK REPAIR
 Requisition ID: MSTLOC-2013-0000003
 Purchase type: PTYPE1
 Date ordered: 01/28/2013 14:08
 Replenishment batch ID:

New Line Item
 Files
 Edit Requisition
 Attributes
 New Note
 Comments

Line Items: 1

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status
1	CEPART1-0: JP			1	\$1000.00	OPEN

Actions

Line Item(s) Action: REQUEST FOR B/Q/P
 Apply to Checked
 Apply to All
 Print Selected Lines

Back

A message indicates successful update and the line item's Status now shows as **CLOSED**.

Requisition Detail

Vendor: JH-CONCOURSE - CONCOURSE HEAVY TRUCK REPAIR
 Requisition ID: MSTLOC-2013-0000003
 Purchase type: PTYP1
 Date ordered: 01/28/2013 14:06
 Replenishment batch ID: Successful update.

Line Items: 1

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	CEPART1-0: JP			1	\$1000.00	CLOSED	MSTLC LOCAT

Actions

Line Item(s) Action: REQUEST FOR B/Q/P ... Apply to Checked Apply to All Print Selected Lines

Back

The Requisition Line Item # Detail page displays the Date Ordered, Action, and Request ID number.

Requisition Line Item Number 1

Vendor: JH-CONCOURSE - CONCOURSE HEAVY TRUCK REPAIR
 Requisition ID: MSTLOC-2013-0000003
 Purchase type: PTYP1
 Date ordered: 01/28/2013 14:06
 Replenishment batch ID: Successful update.

Line Item Details

Line item type: STOCK PART Date ordered: 01/28/2013 14:06 Action: REQUEST FOR B/Q/P MSTLOC-2013-0000001

Part ID: CEPART1 Verified Valid Part ID

Manuf Part No: JP Product Category: JPPC JP PRODUCT CATEGORY

Description: Other ID:

Qty ordered: 1 Unit Price: 1000.0000 Unit of Measure: EA EACH

Status: CLOSED - CLOSED Date Required:

Location: MSTLOC MST LOCATION 1 - SHOP

Vendor Contract ID: Account ID: KACCT2 2ND ACCT

Funding Source: PRIMARY FUND PRIMARY FUNDS

Eq Planning Project ID: External Rebuild Serial No:

Work Orders: 0

Delete	Location	Year	Number	Qty	Task ID	WAC	Equipment ID	Department ID	Account ID
☐									

Accounting Info

Shipping Amount: 0.00 Sales Tax Rate: 7.0000

Back Save

Delete a Line Item

To delete a line item, follow the steps below.

1. To select the line item, place a check in the box to the left of the item.
2. Select **Delete** from the **Line Item(s) Action** drop-down.
3. Click **Apply to Checked** (or click **Apply to All** if desired).

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000004
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 3
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	BLP003-0: BL PART			2	\$89.99	PENDING	MSTLI LOCA
☐	2	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	\$39.99	PENDING	MSTLI LOCA
☒	3	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	2	\$50.00	PENDING	MSTLI LOCA

Actions
 Line Item(s) Action: DELETE Apply to Checked Apply to All Print Selected Lines
 Back

The following dialog box displays.

Message from webpage

Checked lines will be permanently deleted. Continue?

OK Cancel

- Click **OK**.

The selected item shows **Deleted** in the Line # column.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-0000004
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Successful update.
 Line Items: 3
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☐	1	BLP003-0: BL PART			2	\$89.99	PENDING	MSTLI LOCA
☐	2	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	\$39.99	PENDING	MSTLI LOCA
☒	Deleted		57147-4-1468716	JH-BT MOTORS	2	\$50.00	CLOSED	MSTLI LOCA

Actions
 Line Item(s) Action: DELETE Apply to Checked Apply to All Print Selected Lines
 Back

Print Selected Lines

The **Print Selected Lines** hyperlink only shows if the report setting was set during configuration.

1. Check the boxes to the left of the items you wish to print.
2. Click the **Print Selected Lines** hyperlink to print the report.

Requisition Detail

Vendor: 20206 - A-1 BATTERY
 Requisition ID: MSTLOC-2013-00000004
 Purchase type: PTYPE1
 Date ordered:
 Replenishment batch ID:

New Line Item Files
 Edit Requisition Attributes
 New Note Comments

Line Items: 3

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Status	
☒ 1	BLP003-0: BL PART			2	\$89.99	PENDING	MSTL LOCA
☒ 2	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	\$39.99	PENDING	MSTL LOCA
Deleted		57147-4-1468716	JH-BT MOTORS	2	\$50.00	CLOSED	MSTL LOCA

Actions

Line Item(s) Action:

Back Button

- ➡ Click the **Back** button to go back to the Requisition Management page.

Deleted 57147-4-1468716 JH-BT MOTORS 2 \$50.00 CLOSED MSTL
LOCA

Actions

Line Item(s) Action:

The Requisition Management page displays.

Requisition Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP

Requisitions: 1

Requisition ID	Status	Requested	Need by	Vendor	Lines Total	Lines Not Actioned	Total Cost	Purchase Type	Approval	
MSTLOC-2013-00000004	PENDING	01/28/2013		20206 - A-1 BATTERY	2	2	\$235.37	PTYPE1		PR1 FUN

Current Filter:

Has Lines Not Actioned: YES

13. Purchase Order Management Page

Click the **Purchase Orders** button (on the Main Storekeeper Portal page) or the **Qty on Order** button (on the Request Management page), you are taken to the **Purchase Order Management** page.



The **Purchase Order Management** page is only available if your organization supports Enterprise Purchasing.

The Purchase Order Management page below displays upon clicking the Purchase Orders button on the Main Storekeeper Portal page:

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 2

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66833 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		

Current Filter: ▼

Has Open or Pending Lines: YES

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts



Vendor is a hyperlink to the **Vendors – Primary Information** screen which is only available if your organization utilizes Enterprise Portal. In this instance the Purchase Order list filters on 'Has Open or Pending Lines: YES.'

The Purchase Order Management page below displays upon clicking the Qty on Order button on the Request Management page:

Purchase Order Management

Current Location: LMLOC1 - LM LOCATION 1 - SHOP New PO

Purchase Orders: 1

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
LMLOC1-2010-0000048	OPEN	02/03/2010		LMVENDOR01 - LM VENDOR 1, TEST	11	11	\$12,025.44	POS		

Current Filter: ▼

Part Suffix: 0, Has Open or Pending Lines: YES, Part ID: LMPART11

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts



In this instance, the Purchase Order list filters on '**Part Suffix 0, Has Open or Pending Lines: YES, Part ID: Part #**' since you selected a specific part number that has been ordered.

Current Location Section

The Purchase Order Management page's Current Location section allows you to select (from a drop-down selection box) the shop in which you would like to view/manage the purchase orders. The location selection updates the purchase order information on the page.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 3

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01158 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66853 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		

Current Filter: Has Open or Pending Lines: YES

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts

New PO Button/Create a Purchase Order



Storekeeper portal pages with a Part ID field and choice-list now include a **Lookup** button linked to the Parts Lookup dialog. This lookup functionality allows for the added lookup of parts through cross reference IDs with the Storekeeper Parts Search Setting **Default Part Lookup Part ID Search Option** set to allow lookup by **Xref**.

To create a new purchase order:

1. Click the **New PO** button to create a new purchase order.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP

[New PO](#)

Purchase Orders: 3

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66853 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		

Current Filter:

Has Open or Pending Lines: YES

What do you want to do?

Clicking **New PO** takes you to the New Purchase Order page.

 See the *Help* for information about settings for automatic number generation for purchase orders, requisitions, etc (**Data > Enterprise Purchasing > Options > Purchase Types**).

- Complete the fields and click **Save** to save the information.

New Purchase Order

Purchase Type: ... STOCK

Purchase Order ID:

Location ID:

Description:

Vendor ID: ...

Vendor Store ID: ...

Account ID: ... PO ACCOUNT

Status:

Expected Delivery: 

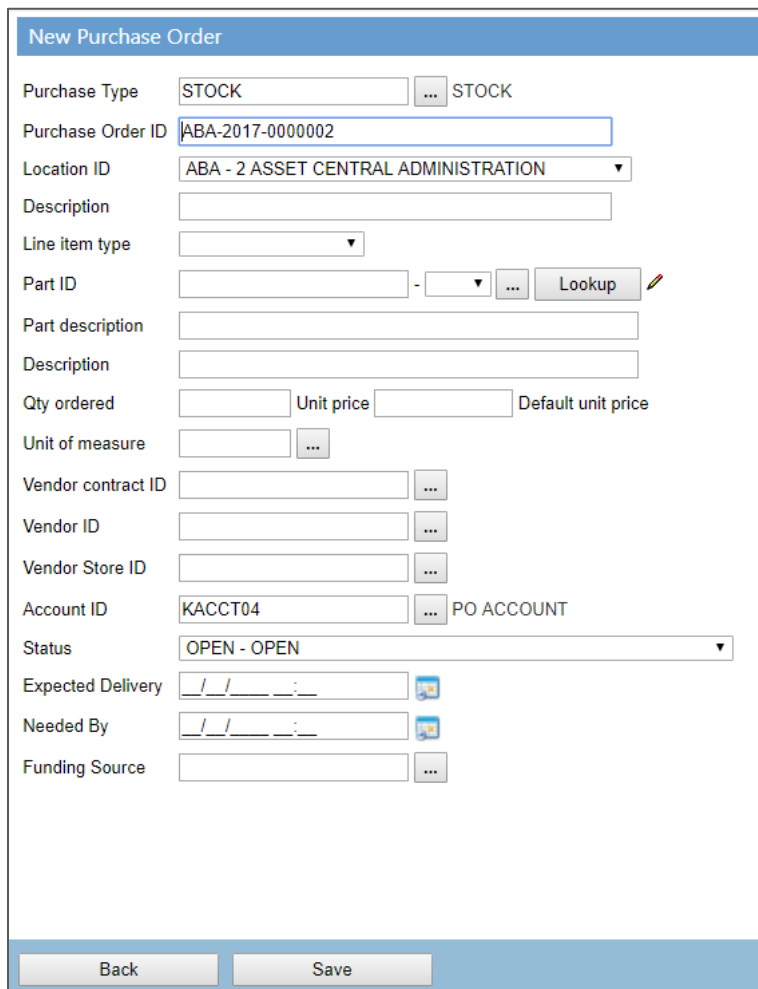
Needed By: 

Funding Source: ...

 Statuses are user defined. A purchase order with **Pending** status may indicate the purchase order has not yet been sent to the vendor (and it will not have an Ordered Date). Whereas, a purchase order with **Open** status may indicate the purchase order has been sent to the vendor. A **Closed** status may indicate the items have been received or the order was cancelled.

 The Funding Source field is used for tracking grant or capital funding source information with your requisitions and purchase orders. If you have licensed Capital Planning, you may setup funding sources on the Capital Funding Source Type screen (**Capital Planning > Funding Source Types**). While entering a requisition, purchase order, or a receipt, you may select a funding source for that element. If you do not have Capital Planning licensed, then you may still enter in a funding source at the element level, but it will not be validated.

 If the option Enable parts workflow on creation of a purchase order or requisition is enabled, the New Purchase Order screen options will vary, as shown below:



The screenshot shows the 'New Purchase Order' form with the following fields and values:

- Purchase Type: STOCK
- Purchase Order ID: ABA-2017-0000002
- Location ID: ABA - 2 ASSET CENTRAL ADMINISTRATION
- Description: (empty)
- Line item type: (empty)
- Part ID: (empty) - (empty) ... Lookup
- Part description: (empty)
- Description: (empty)
- Qty ordered: (empty) Unit price: (empty) Default unit price: (empty)
- Unit of measure: (empty) ...
- Vendor contract ID: (empty) ...
- Vendor ID: (empty) ...
- Vendor Store ID: (empty) ...
- Account ID: KACCT04 ... PO ACCOUNT
- Status: OPEN - OPEN
- Expected Delivery: (empty)
- Needed By: (empty)
- Funding Source: (empty) ...

At the bottom of the form are two buttons: Back and Save.

To choose a vendor contract in the **Vendor contract ID** field, click the chooser button. This opens the Vendor Contracts pop-in where you can choose between vendor contracts according to the vendor you have chosen, or click the **All Vendor Contracts** tab to see all vendor contracts.

Vendor Contracts

Vendor Contract List

Vendor Contracts All Vendor Contracts

Search...

Vendor Contract	Description	Purchasing Limit	Amount Used	Vendor
Close				

The Purchase Order Line Item Number (#) page displays.

Purchase Order Line Item Number 1

Vendor: 1-666 - DEFAULT VENDOR - 1-666
 Purchase order ID: AWLOC1-2014-0000004
 Purchase type: STOCK
 Date ordered:
 Expected Delivery:
 Needed By: 06/20/2014 12:00
 Lead Days: N/A
 Replenishment batch ID:

Files
 Edit PO Header
 New Note
 Attributes
 Comments

Line Item Details

Line item type: STOCK PART
 Part ID: 235/85R16
 Part description: TIRE TRUCK 235/85/R16
 Description:
 Tank ID:
 Qty ordered: 1.00 Unit price: 0.0000 Default unit price: 0.0000
 Status: PENDING - PENDING
 Location: AWLOC1 ALEX LOCATION
 Vendor contract ID:
 Account ID: 1000.531005.15531.000.0 PERRY GARAGE BUS MAINTENANCE
 Funding Source:
 Eq Planning Project ID:
 External Rebuild Serial No:

Date required: 06/20/2014 12:00 PM
 Date ordered: / /
☐ Verified Valid Part ID ☐ OK from unapproved vendor
 Product Category: B.019 BUS-TIRES/WHEELS AND HUBS
 Other ID:
 Fuel/fluid type:
 Unit of measure: EA EACH
 Expected delivery: / /
 Lead Days: 0

Work Orders: 1

Delete	Cancel	Location	Year	Number	Qty	Task ID	WAC	Equipment ID	De
☐	☐	AWLOC1	2014	75	1.00	01-01		351	BT-PE
☐	☐								

Accounting Info

Shipping Amount: 0.00 Sales Tax Rate: 7.0000

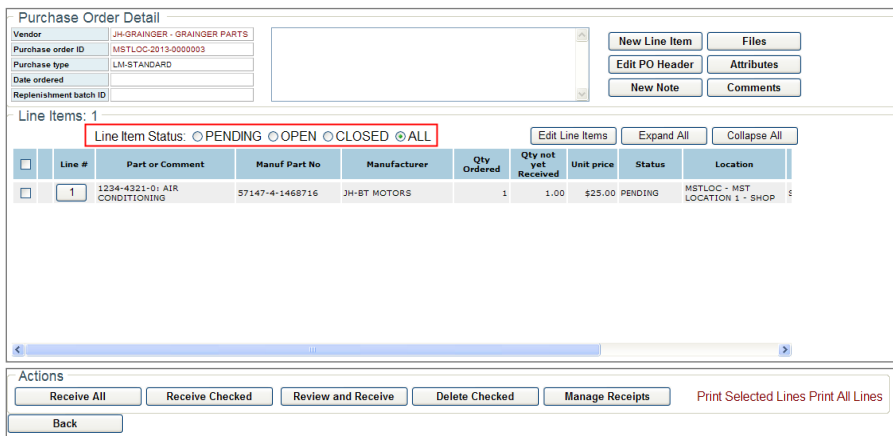
Receipts: 0

Line Number	Return	Qty	Unit Price	Discount Percent	Net Unit Price	Location ID	Received	Vendor Co
Back Save Part Receipts								

3. Select the **Line item type** (Stock Part, Non-Stock Part, Commercial, Fee, Shipping, Fuel, External Rebuild, or Equipment), complete the fields and click the **Save** button to save the line item.

 Refer to the [Edit PO Header](#) and [New Note](#) sections below for information about editing the PO Header and adding a new note to the purchase order or line items.

The Purchase Order Detail page displays defaulting to line items with statuses representing OPEN status as shown below.



 The new line item may default to OPEN depending on your settings and status definitions. If you don't see it in the OPEN list, click the **PENDING** radio button.

You have created a new Purchase Order with a line item. You may continue adding line items by clicking the New Line Item button if desired.

Refer to the [Purchase Order Detail Page](#) section below for more information about this page.

Purchase Orders Section

The Purchase Orders section shows the total number of purchase orders for your selected location at the top of the list and provides a list of Purchase Order IDs and their Status, Ordered Date, Expected Date, Vendor (with link to Vendors – Primary Information screen), Lines Total, Lines Open, Total Cost, Purchase Type and Approval information.

 Statuses are user defined. A purchase order with **Pending** status may indicate the purchase order has not yet been sent to the vendor (and it will not have an Ordered Date). Whereas, a purchase order with **Open** status may indicate the purchase order has been sent to the vendor. A **Closed** status may indicate the items have been received or the order was cancelled.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 4

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000003	PENDING		01/31/2013	JH-GRAINGER - GRAINGER PARTS	1	0	\$26.75	LM-STANDARD		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66853 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND

Current Filter: Has Open or Pending Lines: YES

[Define Filter](#) [Clear Filter](#)

What do you want to do?

[Back](#) [Manage Receipts](#)

Clicking on a **Purchase Order ID** button takes you to the Purchase Order Detail page. Please refer to the [Purchase Order Detail Page](#) section below for more information about this page.



When the Expected date has passed, the expected date is bolded in red.

Current Filter Section

The Current Filter section allows you to define/clear the filter for the Purchase Order list. Follow the steps below to define and clear a filter.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 4

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000003	PENDING		01/31/2013	JH-GRAINGER - GRAINGER PARTS	1	0	\$26.75	LM-STANDARD		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66853 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND

Current Filter: Has Open or Pending Lines: YES

[Define Filter](#) [Clear Filter](#)

What do you want to do?

[Back](#) [Manage Receipts](#)

1. Click the **Define Filter** button.

The Define Purchase Order Filter page displays.

 The **Lookup** button is linked to the Parts Lookup dialog. This lookup functionality allows for looking up parts through cross reference IDs, when the Storekeeper Parts Search Setting **Default Part Lookup Part ID Search Option** is set to allow lookup by **Xref**.

2. Complete the fields as desired and click the **Apply Filter** button.

 To save as a quick filter, enter a filter name in the **Save Quick Filter as:** field and click the **Save** button. To save the quick filter as the default, click the **Set as Default** button. To remove the quick filter as the default, click the **Remove** button. To remove a default quick filter, select the quick filter with an asterisk, and click the **Remove Default** button.

The Purchase Order Management page displays with the list of purchase orders according to your selected filter.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 1

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		

Current Filter: Has Open or Pending Lines: YES, Purchase Type: STANDARD

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts

- Click **Clear Filter** to clear the filter and return to the default filter.



Note: This is not the default quick filter.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 4

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000003	PENDING		01/31/2013	JH-GRAINGER - GRAINGER PARTS	1	0	\$26.75	LM-STANDARD		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66853 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND

Current Filter: Has Open or Pending Lines: YES

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts

The Back Button

➡ Click the **Back** button on the Purchase Order Management page to go back to the Main Storekeeper Portal page.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 4

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000003	PENDING		01/31/2013	JH-GRAINGER - GRAINGER PARTS	1	0	\$26.75	LM-STANDARD		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66833 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND

Current Filter: Has Open or Pending Lines: YES

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts

The Main Storekeeper Portal page displays.

Manage Receipts Button

➡ Click the **Manage Receipts** button to go to the Manage Receipts page where you can review receipt information, assign or overwrite Batch IDs, and print reports showing receipts filtered to a Batch ID.

Purchase Order Management

Current Location: MSTLOC - MST LOCATION 1 - SHOP New PO

Purchase Orders: 4

Purchase Order ID	Status	Ordered	Expected	Vendor	Lines Total	Lines Open	Total Cost	Purchase Type	Approval	Funding Source
MSTLOC-2013-0000002	PENDING			01188 - JANEY ASSOCIATES	1	0	\$0.00	STANDARD		
MSTLOC-2013-0000003	PENDING		01/31/2013	JH-GRAINGER - GRAINGER PARTS	1	0	\$26.75	LM-STANDARD		PRIMARY FUND
MSTLOC-2012-0000002	PENDING			66833 - MIDWEST BUS CORPORATION	2	0	\$536.07	LM-PO		
MSTLOC-2013-0000001	PENDING			20206 - A-1 BATTERY	2	0	\$107.00	PTYPE1		PRIMARY FUND

Current Filter: Has Open or Pending Lines: YES

Define Filter Clear Filter

What do you want to do?

Back Manage Receipts

The Manage Receipts page displays.

Manage Receipts

Show Filters Received By: MOLLYT

Receipts: Showing 12 of 12

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Recd
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000149	6	CN SERIALPART009-0 - SERIALIZED PART FOR USE ON PLANES TRAINS AND AUTOMOBILES	CNLOC1-SERIAL009-0	BOSCH	1@412.00		03/07/2012 11:
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000149	3	CN PART032-0 - TEST	GE-ENGINE	GE	1@45.00		03/07/2012 11:
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000149	4	CN PART007-0 - EXCHANGEABLE PART			1@45.00		03/07/2012 11:
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000149	6	CN PART060-0 - WARRANTABLE PART	KJL-ASDHA.SCFAS0	BOSCH	1@2000.00		03/07/2012 11:
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000149	7	CN PART009-0 - TEST PART			1@500.00		03/07/2012 11:
☐	CNSHOP001 - COMMERCIAL WORK VENDOR	CNLOC1-2009-0000077	1	CN PART001-0 - TEST			10@52.50		03/06/2012 11:

What do you want to do with checked items?

Batch ID

Leave blank to use default Batch ID

Actions
Assign Checked

On this page, you can review receipt information, assign or overwrite Batch IDs, and print reports showing receipts filtered to a Batch ID. Refer to the [Manage Receipts Button](#) in the Purchase Order Detail Page section below for additional information about this page.

14. Purchase Order Detail Page

When you create a new purchase order or click a **Purchase Orders** button on the Purchase Order Management page, the Purchase Order Management page displays. Click the Purchase Order ID to view the Purchase Order Detail page.

Purchase Order Management

Current Location New PO

Purchase Orders: 18

Search...

Purchase Order ID	Description	Status	Ordered	Vendor	Total Cost	Purchase Type
-LOC-2018-0000078		OPEN	01/14/2019	10001-8361-EMC ENGINEERING	\$ 12,854.76	COMMERCIAL ONLY
-LOC-2018-0000075	TEST	OPEN	01/10/2019	10001-8361-EMC ENGINEERING	\$ 138.16	STOCK
-LOC-2018-0000058	EAM-12101 TESTING	OPEN	11/06/2018	10001-8361-EMC ENGINEERING	\$ 11,400.00	ALL
-LOC-2018-0000047	PO LOOKUP TESTING	OPEN	08/22/2018	10001-8361-EMC ENGINEERING	\$ 2.14	STOCK
-LOC-2018-0000046	APP TESTING	OPEN	08/03/2018	10001-8361-EMC ENGINEERING	\$ 160.69	STOCK
-LOC-2018-0000043		OPEN	06/13/2018	10001-8361-EMC ENGINEERING	\$ 96.39	COMMERCIAL ONLY
-LOC-2018-0000038	MAWO TESTING	OPEN	06/11/2018	10001-8361-EMC ENGINEERING	\$ 12,500.25	COMMERCIAL ONLY

Current Filter

Has Open or Pending Lines: YES

Define Filter Clear Filter

Back Manage Receipts

The Purchase Order Detail page displays.

Purchase Order Detail

Vendor: 10001-83

Purchase order ID:

Purchase type: COMMERCIAL ONLY

Account ID: 000-0001-00

Date ordered: 01/14/2019 12:05 PM

Status: OPEN

Expected Delivery: 01/14/2019 12:00 PM

Needed By: 01/14/2019 12:00 PM

Lead Days: N/A

Replenishment batch ID:

New Line Item Files

Edit PO Header Attributes

New Note Comments

Line Items: 12

PENDING OPEN CLOSED ALL Edit Line Items Expand All Collapse All

	Work Orders	Line #	Part or Comment	Qty Ordered	Status	Location	Line Item Type	Date Ordered	Expected Delivery	Lead Days	Funding Source
☐	☐	1	CML TESTING	0.00	CLOSED		COMMERCIAL	01/14/2019 12:06 PM	01/14/2019 12:00 PM	N/A	
☐	☐	2	CML TESTING	0.00	CLOSED		COMMERCIAL	01/14/2019 12:06 PM	01/14/2019 12:00 PM	N/A	
☐	☐	3	CML TESTING	0.00	CLOSED		COMMERCIAL	01/14/2019 12:06 PM	01/14/2019 12:00 PM	N/A	

Purchase Order Detail Section

The purchase order header information includes a link to the Vendors – Primary Information and Enterprise Purchasing – Purchase Orders screens.



For the **Vendor** and **Purchase order ID** links to work, your organization must have Enterprise Portal installed and configured.

The top right section of the Purchase Order Detail page shows notes (if any) from the purchase order and allows you to add a new line item, edit the PO header and add a new note. Refer to the [Add a New Line Item](#), [Edit the Requisition](#) (same workflow for PO), and [Add a New Note](#), [Add a File](#), [Add Attributes](#), and [Add Comments](#) sections below for instructions on how to perform these tasks.

Edit PO Header

Use the Edit PO Header button to edit information for the PO as needed. Use the following procedure to edit the header. This applies to both the PO headers and Requisition page headers.

To edit the PO header:

1. From the Purchase Order Detail page, click **Edit PO Header**.

The screenshot shows the 'Purchase Order Detail' page. On the left, there is a table with the following data:

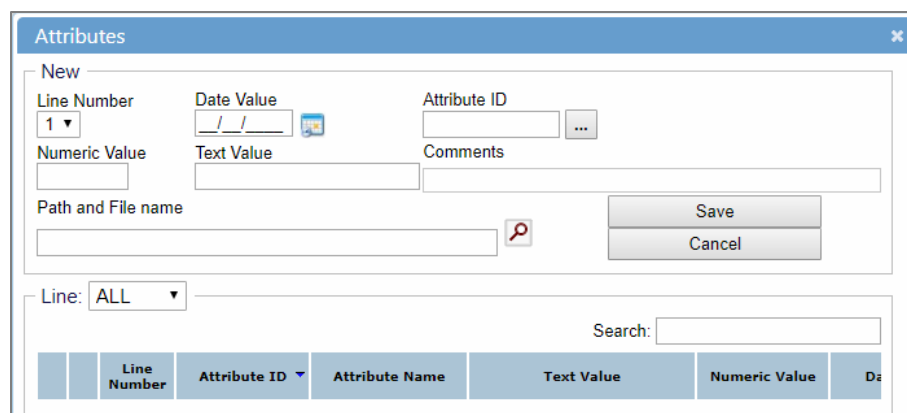
Vendor	
Purchase order ID	CATA-2015-0004119
Purchase type	CAPITAL
Account ID	KACCT04
Date ordered	
Status	SL PO
Expected Delivery	
Needed By	
Lead Days	N/A
Replenishment batch ID	

In the center, there is a large empty rectangular box. On the right side, there is a vertical stack of buttons: 'New Line Item', 'Files', 'Edit PO Header', 'Attributes', 'New Note', and 'Comments'. The 'Edit PO Header' button is circled in red.

The Edit Purchase Order Header displays.

2. Edit the fields in the bottom section of the page to edit the header of the PO. There are also additional fields that displays on this page that will display on the header if you enter information.
3. There are also several buttons to add additional information. Each item for additional information can be added to either the header or you can choose a specific line of the purchase order.
 - **Files:** Add files or links. Use the same process as defined in the [Add a File](#) section.
 - **Attributes:** Add attributes to the PO.
4. On the Attributes pop-in, click **New Attribute**.

5. Enter the attribute information in the fields.



The 'Attributes' dialog box is used for adding or editing attributes for a purchase order line item. It includes fields for Line Number, Date Value, Attribute ID, Numeric Value, Text Value, Comments, and Path and File name. There are 'Save' and 'Cancel' buttons. Below the fields is a 'Line' dropdown set to 'ALL' and a 'Search' field. At the bottom is a table header with columns: Line Number, Attribute ID, Attribute Name, Text Value, Numeric Value, and Date.

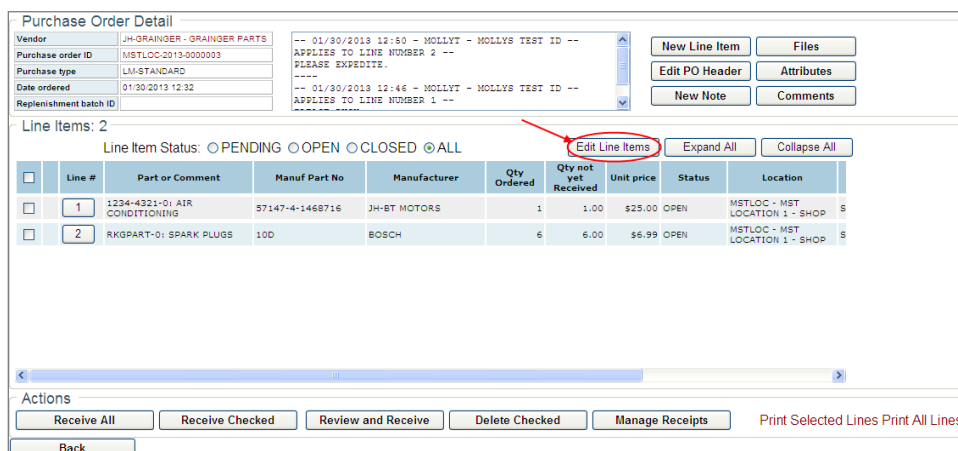
6. When you are done entering the information, click **Save**.
 - New Note: Add a note to the PO. The edit page for notes displays existing notes, and an area to type a new note before clicking **Save New Note**.
 - Comments: Enter a new comment, then click **Save Comments**.

Line Items Section

The Line Items section of the Purchase Order Detail page displays the line items on the purchase order. The displayed columns will vary depending on the line item type chosen.

The total number of line items (depending on the selected status) is displayed at the top of the section. **Line Item Status** radio buttons allow you to see the various line items with different statuses on the purchase order. The Line Items List updates according to the status selected. Note: Only a single multi-asset work order is allowed per line item when the line item type is commercial

1. Click the **Edit Line Items** button to edit the Quantity Ordered or Receipt Unit Price information. Note: User must have access to the Purchase Orders screen in order to be able to access the Purchase Order Line Item page.



The 'Purchase Order Detail' page shows a summary of the purchase order at the top, including Vendor (JH-GRAINER - GRAINER PARTS), Purchase order ID (MSTLOC-2013-0000003), Purchase type (LM-STANDARD), Date ordered (01/30/2013 12:32), and Replenishment batch ID. Below this is a section for 'Line Items: 2'. It includes a 'Line Item Status' filter with radio buttons for PENDING, OPEN, CLOSED, and ALL (selected). There are buttons for 'Edit Line Items' (highlighted with a red circle), 'Expand All', and 'Collapse All'. A table lists the line items:

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
1	1234-4321-01 AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$25.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
2	RKGPART-01 SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

At the bottom, there is an 'Actions' section with buttons: 'Receive All', 'Receive Checked', 'Review and Receive', 'Delete Checked', 'Manage Receipts', and 'Print Selected Lines Print All Lines'. A 'Back' button is also present.

The Purchase Order Detail Edit pop-in displays.

Purchase Order Detail Edit

Line Items: 2

Line Item Status: ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location	Line I Typ
1	1234-4321-01 AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	25.0000	OPEN	MSTLOC - MST LOCATION 1 - SHOP	STOCK F
2	RKG PART-01 SPARK PLUGS	10D	BOSCH	6	6.00	8.9900	OPEN	MSTLOC - MST LOCATION 1 - SHOP	STOCK F

Cancel Save

2. Edit the **Qty Ordered** and/or **Receipt Unit price** as desired and click the **Save** button.

Purchase Order Detail Edit

Line Items: 2

Line Item Status: ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location	Line I Typ
1	1234-4321-01 AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	20.0000	OPEN	MSTLOC - MST LOCATION 1 - SHOP	STOCK F
2	RKG PART-01 SPARK PLUGS	10D	BOSCH	6	6.00	8.9900	OPEN	MSTLOC - MST LOCATION 1 - SHOP	STOCK F

Cancel Save

The Purchase Order Detail page displays with updated information.

3. Click the **Expand All** button to show the work orders associated with the purchase order line items.

 Note: You can also click the + button in the far left column to expand the view.

Purchase Order Detail

Vendor: JH-GRANGER - GRAINGER PARTS

Purchase order ID: MSTLOC20130000003

Purchase type: LM-STANDARD

Date ordered: 01/30/2013 12:32

Replenishment batch ID: ---

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
1	1234-4321-01 AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$20.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
2	RKG PART-01 SPARK PLUGS	10D	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

The associated work order information displays.

Purchase Order Detail

Vendor: JH-GRAINER - GRAINGER PARTS
 Purchase order ID: MSTLOC-2013-0000003
 Purchase type: LM-STANDARD
 Date ordered: 01/30/2013 12:32
 Replenishment batch ID:

-- 01/30/2013 12:50 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE EXPEDITE.

 -- 01/30/2013 12:46 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 1 --

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☒	1	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$20.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
		Work Order ID: Equipment		Hat Number	Task	Qty	Status		
		MSTLOC-2012-13 KGCMP001: F4 2002 A/C MOTOR T8408 A/C MOTOR TEST			A - PM SERVICE A	1			
☐	2	RKGPART-0: SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back

The Equipment link takes you to the Equipment screen.

- Click the **Collapse All** button or the – button in the far left column to collapse the view.

Purchase Order Detail

Vendor: JH-GRAINER - GRAINGER PARTS
 Purchase order ID: MSTLOC-2013-0000003
 Purchase type: LM-STANDARD
 Date ordered: 01/30/2013 12:32
 Replenishment batch ID:

-- 01/30/2013 12:50 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE EXPEDITE.

 -- 01/30/2013 12:46 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 1 --

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☒	1	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$20.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
		Work Order ID: Equipment		Hat Number	Task	Qty	Status		
		MSTLOC-2012-13 KGCMP001: F4 2002 A/C MOTOR T8408 A/C MOTOR TEST			A - PM SERVICE A	1			
☐	2	RKGPART-0: SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back

The page returns to the original view.

Purchase Order Detail

Vendor: JH-GRAINER - GRAINGER PARTS
 Purchase order ID: MSTLOC-2013-0000003
 Purchase type: LM-STANDARD
 Date ordered: 01/30/2013 12:32
 Replenishment batch ID:

-- 01/30/2013 12:50 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE EXPEDITE.

 -- 01/30/2013 12:46 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 1 --

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$20.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	2	RKGPART-0: SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back



Note: The checkbox on the far left side of the Line Items list allows you to select a particular line item while checking the box at the top left corner of the list selects all the line items as shown in the screenshot below.

Purchase Order Detail

Vendor: JH-GRAINER - GRAINER PARTS
 Purchase order ID: MSTLOC-2013-0000003
 Purchase type: LM-STANDARD
 Date ordered: 01/30/2013 12:32
 Replenishment batch ID:

-- 01/30/2013 12:50 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE EXPEDITE.

 -- 01/30/2013 12:46 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 1 --

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 2
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☒ 1	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	1.00	\$20.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP S
☒ 2	RKGPART-0: SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP S

Actions
 Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines
 Back

The following information is included in the Line Items section table:

- Line #
- Part or Comment
- Manufacturer Part Number
- Manufacturer
- Quantity Ordered
- Quantity not yet Received
- Receipt Unit Price
- Status
- Location
- Line Item Type
- Date Ordered
- Expected Delivery
- Lead Days
- Funding Source - Used for tracking grant or capital funding source information with requisitions and purchase orders. If you have licensed Capital Planning, you may set up funding sources on the Capital Funding Source Type screen (Setup > Equipment Management > Capital Planning > Funding Source Types).

- Requisition ID – Shows the most recent source item that generated the purchase order. Provides a quick way to link to the originating requisition if it exists.



Click one of the buttons in the Line # column to open the Purchase Order Line Item Number page.

Actions Section

The Actions section of the page features five buttons, a **Print All Lines** hyperlink, and a **Print Selected Lines** hyperlink if defined in the settings. The buttons and hyperlink are outlined in the sections that follow.



Purchase order line items need to be OPEN in order to be received.

Receive All Button

1. On the Purchase Order Detail page, click the **Receive All** button to receive all the parts for the line items listed.

Purchase Order Detail

Vendor: JH-GRAINER - GRAINER PARTS
 Purchase order ID: MSTLOC-2013-0000003
 Purchase type: LM-STANDARD
 Date ordered: 01/30/2013 12:32
 Replenishment batch ID:

-- 01/30/2013 12:50 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 2 --
 PLEASE EXPEDITE.

 -- 01/30/2013 12:46 - MOLLYT - MOLLYS TEST ID --
 APPLIES TO LINE NUMBER 1 --

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
1	1234-4321-0: AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	0.00	\$20.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
2	RKGPART-0: SPARK PLUGS	100	BOSCH	6	6.00	\$6.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back

The Accounting Info – Receive All pop-in displays.

Accounting Info - Receive All

Sales Tax Rate: 7.0000
 Shipping Amount: 0.00
 Allocate shipping amount to stock parts being received: ☐
 Vendor Invoice:
 Batch ID:
☐ Use Default Batch ID
 Document Number:

OK Cancel

- Complete the fields and click the **OK** button. Enter the Sales Tax Rate, Shipping Amount, Allocation of shipping amount to stock parts being received, Vendor Invoice, Batch ID (check the box to use a default Batch ID), and Document Number as desired.



If a shipping amount allocation has been set for the purchase type, it defaults after entering an amount in the Shipping Amount field.

Accounting Info - Receive All

Sales Tax Rate: 7.0000

Shipping Amount: 2.00

Allocate shipping amount to stock parts being received: EQUALLY TO EACH LINE RECEIVED

Vendor Invoice: 514714-7

Batch ID:

☒ Use Default Batch ID

Document Number: 542265

OK Cancel

The Purchase Order Detail page displays the line items depending on the Line Item Status display selection you have chosen.

Purchase Order Detail

Vendor: JH-GRAINGER - GRAINGER PARTS

Purchase order ID: MSTLOC-2013-00000093

Purchase type: LM-STANDARD

Date ordered: 01/30/2013 12:32

Replenishment batch ID:

Line Items: 2

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
1	1234-4321-01 AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1	0.00	\$20.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
2	RKGPART-01 SPARK PLUGS	10D	BOSCH	6	0.00	\$6.99	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All Receive Checked Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back

Receive Checked Button

- Select specific line items for receipt and click the **Receive Checked** button to receive parts on certain line items.

Purchase Order Detail

Vendor: 20206 - A-1 BATTERY
 Purchase order ID: MSTLOC-2013-0000001
 Purchase type: PTYPE1
 Date ordered: 01/31/2013 11:21
 Replenishment batch ID:

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 4
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	PART0001-0: BATTERY			1	1.00	\$15.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	2	02401001-0: FILLER-BATTERY COMPLETE			2	2.00	\$50.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☒	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	1.00	\$1100.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	Deleted		DAVE STURGEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All **Receive Checked** Review and Receive Delete Checked Manage Receipts Print Selected Lines Print All Lines

Back

Depending on UI controls, the Accounting Info dialog may display.

Accounting Info -

Vendor invoice:

Batch ID:

☐ Use default Batch ID

Document Number:

OK Cancel

- If the dialog displays, enter the Vendor invoice number and click **OK**. (The vendor invoice number is copied to all selected line items.)

Accounting Info - Receive Checked

Vendor Invoice: 253175

Batch ID:

☒ Use Default Batch ID

Document Number: 4224

OK Cancel

The parts are received for the chosen line items and, depending on the Line Item Status selection you have chosen, the list displays line items and statuses.

Purchase Order Detail

Vendor20208 - A-1 BATTERY

Purchase order IDMSTLOC-2013-0000001

Purchase typePTYPE1

Date ordered01/31/2013 11:21

Replenishment batch ID

New Line Item

Edit PO Header

New Note

Files

Attributes

Comments

Line Items: 4

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Edit Line Items

Expand All

Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	PART00001-0: BATTERY			1	1.00	\$15.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	2	02401001-0: FILLER- BATTERY COMPL ETE			2	2.00	\$50.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	0.00	\$1100.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
☐	Deleted		DAVE STURGEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receive All

Receive Checked

Review and Receive

Delete Checked

Manage Receipts

Print Selected Lines

Print All Lines

Back

Review and Receive Button

To review each line item's detail prior to receiving the parts:

1. Select specific line items on the Purchase Order Detail page and click the **Review and Receive** button.

Purchase Order Detail

Vendor: 20206 - A-1 BATTERY
 Purchase order ID: MSTLOC-2013-0000001
 Purchase type: PTYPE1
 Date ordered: 01/31/2013 11:21
 Replenishment batch ID:

New Line Item Files
 Edit PO Header Attributes
 New Note Comments

Line Items: 4
 Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL
 Edit Line Items Expand All Collapse All

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☒	1	PART00001-0: BATTERY			1	1.00	\$15.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☒	2	02401001-0: FILLER-BATTERY COMPL ETE			2	2.00	\$50.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	0.00	\$1100.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
☐	Deleted		DAVE STURGEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions
 Receive All Receive Checked **Review and Receive** Delete Checked Manage Receipts Print Selected Lines Print All Lines
 Back

The first line item's receipt page displays.

Receiving Purchase Order Line Item Number 1

Vendor: 10001-8361 - EMC ENGINEERING
 Purchase order ID: 1-2016-0000001
 Purchase type: COMMERCIAL
 Date ordered: 02/18/2016 01:07 PM
 Expected Delivery: 02/20/2016 12:00 PM
 Needed By:
 Lead Days: N/A
 Replenishment batch ID:

Files
 Edit PO Header Attributes
 New Note Comments

Receipt

Line item type: COMMERCIAL
 Part ID: [] - [0] [Lookup]
 Part description: []
 Description: TEST
 Tank ID: []
 Qty remaining: 0.00 Qty ordered: 0.00 Default unit price: 0.0000
 Qty received: 0.00 Unit price: 0.0000
 Status: OPEN - OPEN
 Receiving location: 1 OPS
 Account ID: A4 RG ACT4
 Vendor invoice: []
 Vendor contract ID: []
 Date ordered: 02/18/2016 01:08 PM
☐ Verified valid part ID ☐ Return
 Product Category: []
 Other ID: []
 Fuel/fluid type: []
 Discount Pct: 0.000 Unit of measure: []
 Date and time: 12/29/2016 10:40 AM Receipt label qty: 0.00
 Bin ID: []
 Use Default Batch ID: ☐ [] Document Number: []

Back Receive Do Not Receive Receipts Screen

 Scroll to the right in the Work Order section to see the Delay Code, Hat Number, Parking Stall, Position, Serial Number, Removed Serial Number, Commercial Part ID, Commercial Part Quantity, a link to the original Request (if your organization uses Enterprise Portal), and Service Request ID fields.

2. Review the information, make updates as desired. Enter serial numbers and accounting information, if necessary.



Note: When you are receiving multiple items, if you enter the invoice number in the first item and click receive. Line items after this will default to the previously entered invoice number.

3. To add a batch ID to the receipt page, use the chooser button next to the **Use Default Batch ID** checkbox.
 - Choose a batch ID from the list to apply to this receipt. The list filters to all batch IDs used on this purchase order previously.

If the **Return** checkbox is checked, batch IDs from previous returns will display. These return batch IDs do not display if **Return** is not checked.

- To make the batch ID the default batch ID, check the **Use Default Batch ID** checkbox. This will be the batch ID used for all items you chose to review and receive until you choose a different ID.
4. Click **Receive** to receive the parts.

The next selected line item's Receipt page displays along with a successful message to indicate successful receipt.



Click the **Do Not Receive** button when you decide not to receive the parts. The next selected line item's Receipt page will display. Click the **Receipts Screen** button to go to the Enterprise Purchasing - Receipts screen. This option is only available if Enterprise Purchasing is active.

Once you have received (or not received) all the selected line items, the Purchase Order Detail page displays with the line items showing depending on which Line Item Status you have selected to show.

Purchase Order Detail

Vendor	20206 - A-1 BATTERY
Purchase order ID	MSTLOC-2013-0000001
Purchase type	PTYPE1
Date ordered	01/31/2013 11:21
Replenishment batch ID	

Receipt successful.

Line Items: 4

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
1	PART00001-0: BATTERY			1	0.00	\$15.99	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
2	02401001-0: FILLER-BATTERY COMPL ETE			2	0.00	\$50.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	0.00	\$1100.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
Deleted		DAVE STURGEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions

Receiving Multi-asset Work Order Commercial Requests

When performing the receipt on a multi-asset work order commercial request, a dialog will open that will distribute the costs across the child work orders automatically. After confirming the cost distribution is correct, the costs will be posted to the child work orders after the purchase order line is successfully received.

Multi-asset Work Order Commercial Issues

Asset Selection	MIXED	Work Order Type	REPAIR
Multi-asset Work Order ID	LOC-2018-375	Need By	03/16/2018
Labor Cost	\$ 1,500.00	Labor Tax Rate	\$ 7.1234
Parts Cost	\$ 2,500.00	Parts Tax Rate	\$ 7.1234
Misc Cost	\$ 3,500.00	Misc Tax Rate	\$ 0.0000

Select Assets

Work Order ID	Asset ID	Asset Description	Labor Cost	Parts Cost	Misc Cost
LOC-2018-380	E6-MTDAMP-MT02	FIRE SYSTEM DAMPER	15.38	25.58	35.71
LOC-2018-385	E5-DAMP-EM29	FIRE SYSTEM DAMPER	15.38	25.58	35.71
LOC-2018-411	N2-DAMP-EM18	FIRE SYSTEM DAMPER	15.38	25.58	35.71
LOC-2018-422	N4-DAMP-EM35	FIRE SYSTEM DAMPER	15.38	25.58	35.71

Showing 79 records

Applied Costs

Applied Labor Total	\$ 1,507.12	Applied Parts Total	\$ 2,507.12	Applied Misc Total	\$ 3,500.00
Applied Non-linear Total	\$ 3,757.12	Applied Linear Total	\$ 3,757.12		

Delete Checked

- To delete a line item, place a check in the box for the line item and click the **Delete Checked** button.

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	PART0001-0: BATTERY			1	1.00	\$15.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	2	02401001-0: FILLER-BATTERY COMPL ETE			2	2.00	\$50.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	1.00	\$1100.00	PENDING	MSTLOC - MST LOCATION 1 - SHOP
☒	4	00118002-0: ROD	GEON	FRAM	5	5.00	\$79.00	PENDING	MSTLOC - MST LOCATION 1 - SHOP

Actions

A dialog displays to verify you want to permanently delete the item.

- Click **OK** to continue.

Message from webpage

Checked lines will be permanently deleted. Continue?

The Purchase Order Detail page displays **Successful Update**, and the line number displays as deleted.

Purchase Order Detail

Vendor: 20208 - A-1 BATTERY

Purchase order ID: MSTLOC-2013-0000001

Purchase type: PTYPE1

Date ordered: 01/31/2013 11:21

Replenishment batch ID:

Successful update.

Line Items: 4

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

☐	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	PART0001-0: BATTERY			1	1.00	\$15.99	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	2	02401001-0: FILLER-BATTERY COMPL ETE			2	2.00	\$50.00	OPEN	MSTLOC - MST LOCATION 1 - SHOP
☐	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	1.00	\$1100.00	PENDING	MSTLOC - MST LOCATION 1 - SHOP
☒	Deleted		GEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions

Manage Receipts Button

1. Click the **Manage Receipts** button to review the received parts details, assign a Batch ID, or overwrite a Batch ID.

Purchase Order Detail

Vendor: 100-5661 - SYNAPSE ENERGY ECONOMICS, INC.
 Purchase order ID: RGL0CB-2013-0000001
 Purchase type: JUST-IN-TIME
 Date ordered: 03/13/2013 02:21 PM
 Expected Delivery:
 Needed By:
 Lead Days: N/A
 Replenishment batch ID:

New Line Item
 Edit PO Header
 New Note
 Files
 Attributes
 Comments

Line Items: 1

PENDING OPEN CLOSED ALL

Edit Line Items Expand All Collapse All

	Work Orders	Line #	Part or Comment	Vendor Part No	Qty Ordered	Qty not yet Received	Unit price	Status	Location	Line Item Type	Date Ordered	Expected Delivery	
☐		1	VERIFIEDPART-0 - VERIFIED PART ID TEST 1		1.00	0.00	\$ 5.50	CLOSED	RGL0CB - RG LOCATION B	NON-STOCK PART	03/13/2013 02:22 PM	03/13/2013 12:00 PM	N/A

Receive All Receive Checked Review and Receive Print Selected Lines
 Back Delete Checked Manage Receipts Print All Lines

The Manage Receipts screen displays the received parts information.

Manage Receipts

Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Recd
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLET E			2@50.00		01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

What do you want to do with checked items?

Batch ID:
 Leave blank to use default Batch ID

Actions: Assign Checked Process

2. To filter the receipts, click the **Show Filters** hyperlink and complete the filter fields as desired to narrow your receipt list.

Manage Receipts

Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Recd
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLET E			2@50.00		01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

3. Click the **Apply Filter** button to filter the Receipts.

Manage Receipts

▼ Hide Filters

Purchase Order ID: MSTLOC-2013-0000001

Received By: MOLLYT

Part

-

Lookup

Batch ID

Received By

MOLLYT

...

☐ Only show receipts without a Batch ID

Apply Filter

Purchase Order ID

MSTLOC-2013-0000001

...

Received Date

/

/

Location

...

Clear Filter

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Recd
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLETE			2@50.00		01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

To assign a Batch ID, follow the steps below.

1. Select a part receipt without a Batch ID by checking the box for the received part.

Manage Receipts

Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Rece
☒	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLETE			2@50.00		01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

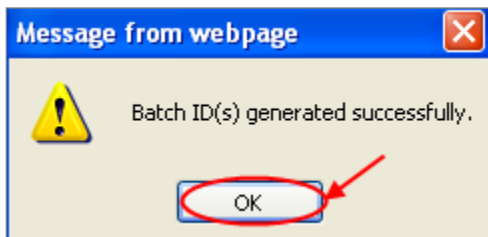
2. Enter a Batch ID in the Batch ID field (or leave the Batch ID field blank to use a default Batch ID) and click the **Process** button to assign the Batch ID to the checked item.

What do you want to do with checked items?

Batch ID
51701500
Leave blank to use default Batch ID

Actions
Assign Checked **Process**

A message indicates the Batch ID was successfully generated.



3. Click **OK**.

The Batch ID shows for the received part.

Manage Receipts

Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Rece
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLETE			2@50.00	51701500	01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

To overwrite a Batch ID:

1. Select the part received by checking the box next to the received part, enter the correct Batch ID, and click the **Process** button.

▼ Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Rece
☒	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLETE			2@50.00	51701500	01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

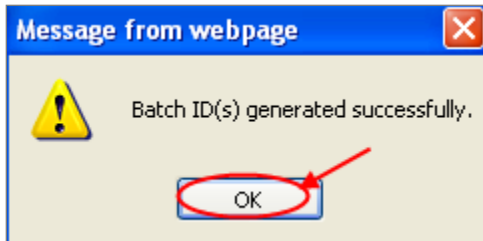
What do you want to do with checked items?

Batch ID
51701
Leave blank to use default Batch ID

Actions
Assign Checked
Receipts

Process Print All

A message indicates the Batch ID was generated successfully.



2. Click **OK**.

The new Batch ID shows for the part.

Manage Receipts

▼ Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Rece
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER-BATTERY COMPLETE			2@50.00	51701	01/31/2013 14:02
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99		01/31/2013 13:54
☐	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00		01/31/2013 13:52

What do you want to do with checked items?

Batch ID
51701
Leave blank to use default Batch ID

Actions
Assign Checked
Receipts

Process

To print a receipt report:

1. Click the **Batch ID** hyperlink or select reports with a Batch ID.
2. Click the **Print All Receipts** hyperlink. The report shows receipts filtered to the Batch ID.

Manage Receipts

Show Filters Purchase Order ID: MSTLOC-2013-0000001 Received By: MOLLYT

Receipts: Showing 3 of 3

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Recd
☒	20206 - A-1 BATTERY	MSTLOC-2013-0000001	2	02401001-0 - FILLER- BATTERY COMPL ETE			2@50.00	51701	01/31/2013 14:02
☒	20206 - A-1 BATTERY	MSTLOC-2013-0000001	1	PART00001-0 - BATTERY			1@15.99	5170147	01/31/2013 13:54
☒	20206 - A-1 BATTERY	MSTLOC-2013-0000001	3	1234-4321-0 - AIR CONDITIONING	57147-4-1468716	JH-BT MOTORS	1@1100.00	517484	01/31/2013 13:52

What do you want to do with checked items?

Batch ID: 517484
Leave blank to use default Batch ID

Actions: Assign Checked Process **Print All Receipts**

Print Selected Lines/Print All Lines Hyperlinks

1. The **Print Selected Lines** and **Print All Lines** hyperlinks on the Purchase Order Detail page only show if the report settings were set during configuration. Check the specific lines.
2. Click the **Print Selected Lines** hyperlink to print the Selected Lines report.
3. Click the **Print All Lines** hyperlink to print the All Lines report.

Purchase Order Detail

Vendor: 20206 - A-1 BATTERY
Purchase order ID: MSTLOC-2013-0000001
Purchase type: PTYPE1
Date ordered: 01/31/2013 11:21
Replenishment batch ID:

New Line Item Files
Edit PO Header Attributes
New Note Comments

Line Items: 4
Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

	Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location
☐	1	PART00001-0: BATTERY			1	0.00	\$15.99	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
☐	2	02401001-0: FILLER- BATTERY COMPL ETE			2	0.00	\$50.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
☐	3	1234-4321-0: AIR	57147-4-1468716	JH-BT MOTORS	1	0.00	\$1100.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP
☐	Deleted		DAVE STURGEON	FRAM	5	5.00	\$79.00	CLOSED	MSTLOC - MST LOCATION 1 - SHOP

Actions: Receive All Receive Checked Review and Receive Delete Checked Manage Receipts **Print Selected Lines Print All Lines**

Back

Back Button

Click **Back** to go back to the Purchase Order Management page.

Part Definition Pop-in

The sections below describe how to use the Part Definition pop-in page to perform various functions including: creating a part, searching for parts, requesting a new ID (adding/editing part, stock, and vendor part information; viewing purchase orders, work orders and cross references; and managing part tasks), and creating change requests for new parts/vendors when responding to part requests.

Create a New Part

1. On the Main Storekeeper Portal page, click the **New/Edit Part** button.

My Storeroom Portal

Current Location: AWLOC1 - ALEX LOCATION Layout Refresh Off

New/Edit Part Part Issues and Returns Direct Issues Part Transfers

The Part Definition pop-in page displays.



Note: The Serial Numbers tab will only display when you are working with a serialized part.

Part Definition

Edit Existing Part ID - 0 Lookup Edit New Part Request New Part

Part ID SJ-SERIALIZED Suffix 0 Keyword Short Description Product Category Part Classification Serial number format Warning if issued out of order NEVER

Manufacturer Name Manufacturer Part Number

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks Serial Numbers

Stock Locations: 1 ADD

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
SRMC - ST RITA MEDICAL CENTER		EA	0	0.0000	

Vendors: 0 ADD Request New Vendor

Vendor	Manufacturer Part ID	Order Price	Comments
--------	----------------------	-------------	----------

Cancel Apply

 **Note:** When arriving on the Part Definition pop-in page from the Main Storekeeper page to create a new part, it assumes you will be creating a new part and there is no need to click the **New Part** button to enter new part information.

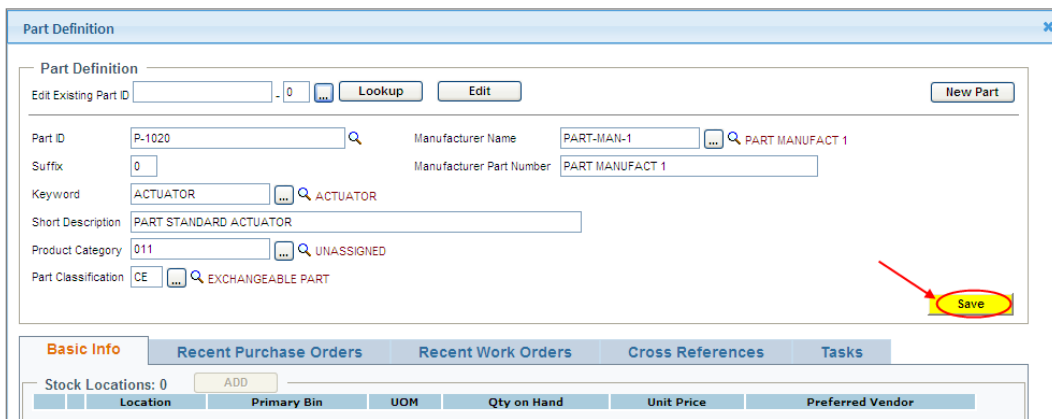
 **Note:** Settings control the **Request New Part** and **Request New Vendor** buttons on the Part Definition pop-in when responding to a Part Request. If rights are not set, the buttons will be hidden. If you have access to these buttons, refer to the section below, Request New ID- When Responding to Part Requests, for additional information.

 See the Shop Activity Storekeeper Administrator Guide, New ID Request Settings section for setting proper rights to access these buttons.

 You may use User Interface (UI) control to set part definition fields as read-only or hide the **Edit**, **New Part**, **Save** or **Zoom**  buttons.

 The Part Definition pop-in page and its associated screens contain several **Zoom** buttons  and hyperlinks to the respective Enterprise Portal or screens associated with the fields. The **Zoom** buttons and hyperlinks are only visible if you have access to the respective screens. You may hover over the **Zoom** button or hyperlink to see which screen is associated with the field as shown below.

2. Complete the **Part Definition** fields and click the **Save** button.



 If the default product category for new parts entered in Primary (Parts > Setup > Options) is set to **Enable automatic part numbering when creating a part** (Data > Parts Items > Setup > Product Categories), the Parts Wizard will automatically populate a part number. Product category can also be defined to auto-number parts. Otherwise, you will need to type in the part number when creating a new part.

 **Note:** If you enter a part that is a serial part, when you click **Save**, the Serial Numbers tab appears.

The Basic Info pop-in displays.

Basic Info

Part: P-1023-0 - LIGHT WEIGHT ACTUATOR

Inventory Location ID: CNLOC1

Unit of Measure:

Primary Bin:

New Bin: ☐

Manufacturer name:

Manufacturer part number:

Preferred Vendor ID:

Initial Qty:

Unit Price:

Stock Management

Inventory month: NONE

Stock status: STOCKED

Count Group:

Replenishment

Replenishment method: NONE

 When creating a new part, if the current selected location is a parts location and the user has rights to that location, then the current selected parts location defaults in the **Inventory Location ID** field. Otherwise, if the user's session location is a parts location, then the user's session location defaults in the **Inventory Location ID** field.

3. Complete the **Basic Info** fields.

Basic Info

Part: P-1120-0 - PART STANDARD ACTUATOR

Inventory Location ID: CNLOC1

Unit of Measure: EA EACH

Primary Bin: 1-CNLOC1 BIN 1

New Bin: ☐

Manufacturer name: PART-MAN-1

Manufacturer part number: PART MANUFACT 1

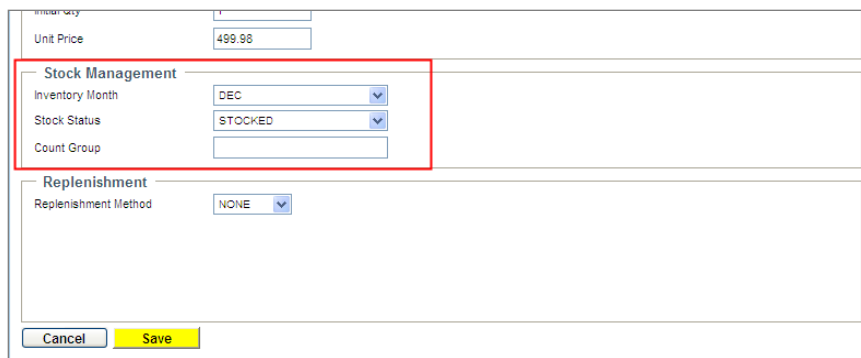
Preferred Vendor ID: SVVEND1 SW

Initial Qty: 1

Unit Price: 499.98

Stock Management

4. Complete the Stock Management section with **Inventory month**, **Stock status**, and **Count Group**.



Inventory 1

Unit Price 499.98

Stock Management

Inventory Month DEC

Stock Status STOCKED

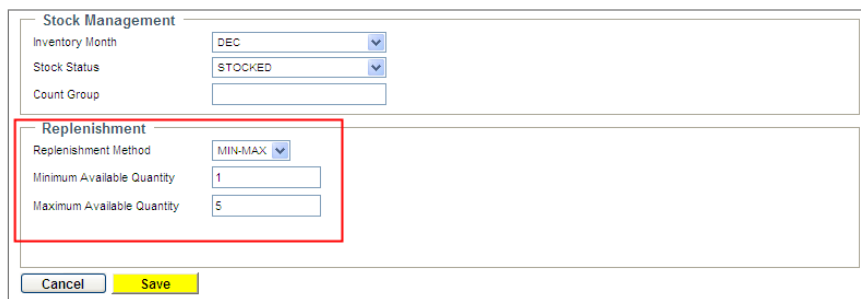
Count Group

Replenishment

Replenishment Method NONE

Cancel Save

5. Complete the Replenishment section with the desired Replenishment method and associated quantities. The fields in this section are based on the chosen method, e.g., EOQ method: Reorder Point, Reorder Quantity, and Safety stock level and MIN-MAX method: Minimum available quantity and Maximum available quantity.



Stock Management

Inventory Month DEC

Stock Status STOCKED

Count Group

Replenishment

Replenishment Method MIN-MAX

Minimum Available Quantity 1

Maximum Available Quantity 5

Cancel Save



Vendor information does not have to be entered at this time. If no vendor information is entered, the next page will show no information in the Vendor section, but it can be added at any time by clicking the associated **Add** button.

6. Click the **Save** button.



Replenishment

Replenishment Method MIN-MAX

Minimum Available Quantity 1

Maximum Available Quantity 5

Cancel Save

The Part Definition pop-in displays with Part, Location and Vendor information as entered on the previous screens.

Lookup a Part

1. On the Main Storekeeper Portal page, click the **New/Edit Part** button.

The Part Definition pop-in page displays.

2. Click the **Lookup** button.

The Part ID Lookup pop-in displays

The **Stock Location** is a drop-down list of the user's supported stock locations. The **Stock Location** defaults.

3. If desired, select a different stock location from the drop-down box.



Selecting a different location only affects the search, and will not be set as the stock location on the Post Work Order Parts page.

4. In the **Search by Text** area of the pop-in, you may search using **Part IDs** (with various choices to search cross reference parts), **Descriptions**, or **Product Categories**.
 - To search for parts by entering a **Part ID**, select a choice from the drop-down box to assist in the part number search (i.e., **equals**, **starts with**, **ends with** or **contains**). Enter the number in the field. The default for the Part ID search option drop-down list depends on portal settings. This drop-down list has the following choices:
 - **Include Xref** (with the **...even if xref part ID exists as stock part option** checked (ON)): Searches the part IDs and the cross references and includes cross referenced parts that also are stocked as parts themselves. **Include Xref** (with the **...even if xref part ID exists as stock part** option unchecked (OFF)): Searches the part IDs and the cross references and does not include cross referenced parts that are themselves stocked part IDs.
 - **Only Xref**: Searches only the cross references
 - **No Xref**: Searches only the part IDs and not the cross references
 - **Manuf Part Only**: Searches only Manufacturer part IDs and not cross references or part IDs

Use the filter by clicking on the **Search** button. A list of parts with the desired number, that are stored at the location, is displayed below in the Please Choose a Part ID list.

- To search for parts by entering a **Description**, select a choice from the drop-down box to assist in the description search (i.e., **equals, starts with, ends with or contains**). Enter the description in the field. Execute the filter by clicking on the **Search** button. A list of parts with the matching description is displayed below in Please Choose a Part ID list.



If you have Documoto™ set up AND your work order equipment's equipment type has a document ID defined, then when in the Part ID Lookup pop-in, a **Zoom**  icon displays to the left of the parts in the search results. Clicking the **Zoom** icon opens up Documoto™, attempts to search for that part, and brings the user straight to the part, if possible.

Please choose a Part ID - Parts found: 73

	Part ID	Suf	Description
	04653-20090-71	0	KIT; KIT -
	04653-20100-71	0	KIT; KIT- PACKING TOYOTA
	11253-76001-71	0	GASKET; GASKET - LIFTER

- To search for parts by entering a **Product Category**, select a choice from the drop-down box to assist in the description search (i.e., **equals, starts with, ends with, or contains**). Enter the description in the field. Click **Search** to run the search. A list of parts with the matching product category is displayed below in Please Choose a Part ID list.
5. In the **Search by Defined Lists** area of the pop-in, you may enter a **Task ID** or click the **Task ID Lookup** button to select a task from the Choose a Task pop-in. Then, click the **Task Parts** button to see the list of parts associated with the task (on the Repair tab in the GUI and/or Enterprise Portal).

Upon selecting the desired part from the resulting parts list displayed, the number and suffix are loaded into the fields on the Part Definition pop-in page.

Request a New ID

New Vendor or Part ID request full details are provided in this section. Based on settings, you may be able to create a Change Request a new Part or Vendor ID while responding to Part Requests. For additional information, please see the section below, [Change Requests for New Parts/Vendors when Responding to Part Requests](#).

Edit a Part

1. On the Main Storekeeper Portal page, click the **New/Edit Part** button.

The Part Definition pop-in page displays.

2. Enter an Existing Part ID (or select a Part ID by clicking the Search  button) and click the **Edit** button to edit the part.

Part Definition

Part Definition
 Edit Existing Part ID: P-1020 - 0 [Lookup] **Edit** [New]

Part ID: [] [Q] Manufacturer Name: [] [Q]
 Suffix: 0 Manufacturer Part Number: [] [Q]
 Keyword: [] [Q] UNASSIGNED
 Short Description: []
 Product Category: 011 [Q] UNASSIGNED
 Part Classification: [] [Q]

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 0 [ADD]

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
----------	-------------	-----	-------------	------------	------------------

Vendors: 0 [ADD]

Vendor	Manufacturer Part ID	Order Price	Comments
--------	----------------------	-------------	----------

The part's information displays.

Part Definition

Part Definition
 Edit Existing Part ID: [] - 0 [Lookup] [Edit] [New]

Part ID: P-1020 [Q] Manufacturer Name: [] [Q]
 Suffix: 0 Manufacturer Part Number: [] [Q]
 Keyword: ACTUATOR [Q] ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011 [Q] UNASSIGNED
 Part Classification: CE [Q] EXCHANGEABLE PART

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 2 [ADD]

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 2 [ADD]

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	
VENDOR1 - VENDOR1 NAME	5462	2.0700	



Note: The following fields only display in these circumstances:



Manufacturer Name and **Manufacturer Part Number** will display on the Part Definition pop-in if the system-wide option to allow updating of manufacturer name and manufacturer part number on the Parts - Primary Information screen is ACTIVE and manage parts ordering and EOQ values is not CENTRALLY.



Serial Number Format and **Warning if issued out of order** show if there is an entry in the **Serial Number Format** or **Warning if issued out of order** fields.

- If desired, click the **Part ID Zoom** button to go to the Parts – Primary Information screen to see primary information.

The remaining sections outline how to edit and review various part information.

Edit Basic Part Information

1. To edit the basic information that shows in the upper left area of the Part Wizard, change the desired information.
2. Click **Save**.

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	
VENDOR1 - VENDOR1 NAME	5462	2.0700	

Successful update displays with a successful save.

Keyword: ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011
 Part Classification: CE
Successful update.

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 2 **ADD**

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Edit or Delete a Stock Location

To edit or delete a part's stock location, follow the steps below.

1. On the Main Storekeeper page, click the **New/Edit Part** button.

My Storeroom Portal

Current Location: AKT 1-1 - AKT SPACE 1-1 ~ 1 **Layout** Refresh Off

New/Edit Part Part Issues and Returns Direct Issues Part Transfers

Part Requests

2 Pending Requests	Requests
0 Pending Part Return Requests	
2 Total Work Orders	

Requisitions

0 Pending line items
0 Total Requisitions

The Part Definition pop-in displays.

Part Definition

Part Definition
 Edit Existing Part ID: 0 **Lookup** **Edit** **New**

Part ID: Manufacturer Name:
 Suffix: 0 Manufacturer Part Number:
 Keyword:
 Short Description:
 Product Category: 011 **UNASSIGNED**
 Part Classification:

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

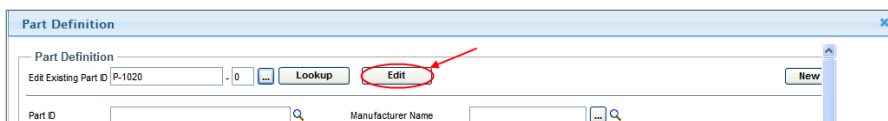
Stock Locations: 0 **ADD**

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
----------	-------------	-----	-------------	------------	------------------

Vendors: 0 **ADD**

Vendor	Manufacturer Part ID	Order Price	Comments
--------	----------------------	-------------	----------

2. Enter the Part ID in the **Edit Existing Part ID** field and click the **Edit** button.



Part Definition

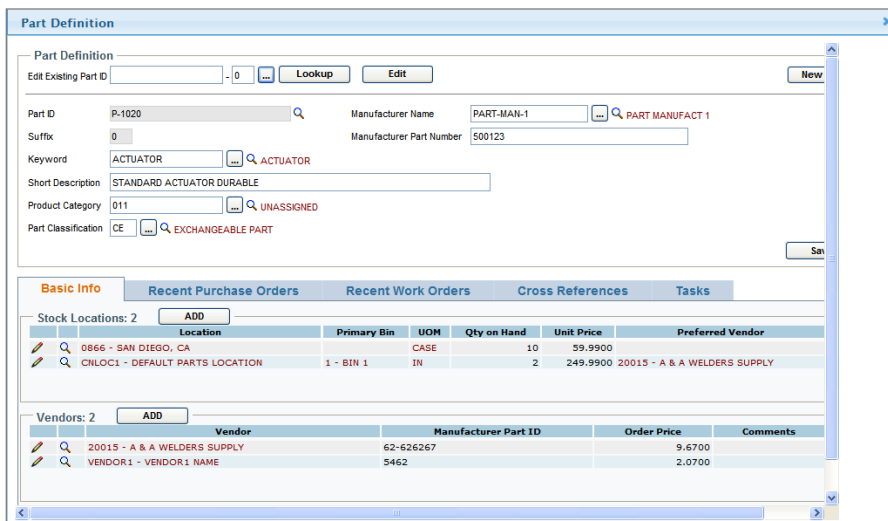
Part Definition

Edit Existing Part ID: P-1020

Lookup Edit New

Part ID: Manufacturer Name:

The part's information displays.



Part Definition

Part ID: P-1020 Manufacturer Name: PART-MAN-1

Suffix: 0 Manufacturer Part Number: 500123

Keyword: ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011

Part Classification: CE

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

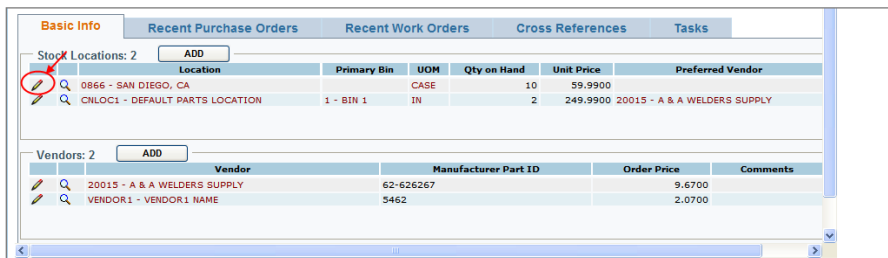
Stock Locations: 2

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	
CHLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 2

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	
VENDOR1 - VENDOR1 NAME	5462	2.0700	

- On the **Basic Info** tab, click the Edit Pencil icon  next to the desired location in the **Stock Locations** section.



Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 2

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	
CHLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 2

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	
VENDOR1 - VENDOR1 NAME	5462	2.0700	

The Basic Info pop-in displays.

4. Complete the fields as desired and click the **Save** button.

 **Note:** You may also delete a stock location from here by clicking the **Delete** button.

The Part Wizard displays the updated stock location information.

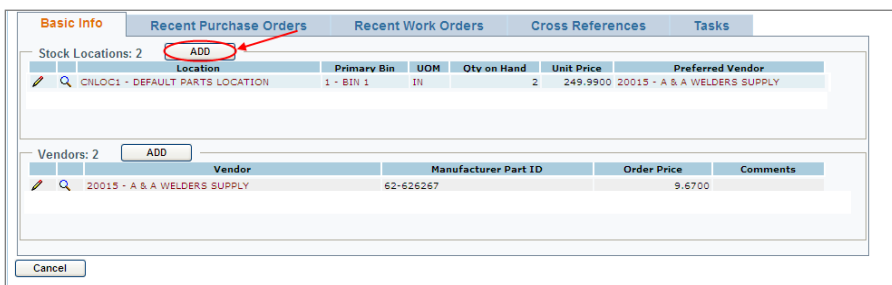
Basic Info						
Recent Purchase Orders						
Recent Work Orders						
Cross References						
Tasks						
Stock Locations: 2						
ADD						
Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor	
0866 - SAN DIEGO, CA	CASE	IN	10	59.9900	CNSHOP004 - PARTS VENDOR	
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY	

Add Stock Locations

 In the Shop Activity Storekeeper Part Wizard, location security applies to Stock Locations. Users are only able to see the locations for which they have been granted access.

Once you have pulled part information into the Part Wizard, follow the steps below to add stock locations.

1. Click the Stock Locations **ADD** button to add stock locations to the part.



Basic Info | Recent Purchase Orders | Recent Work Orders | Cross References | Tasks

Stock Locations: 2 **ADD**

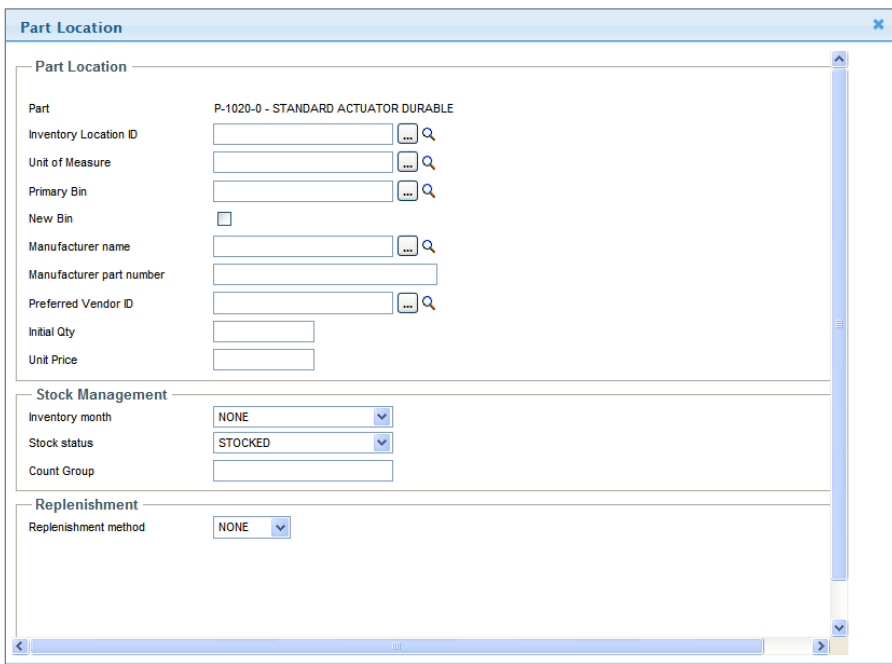
Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 2 **ADD**

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	

Cancel

The Part Location page displays.



Part Location

Part: P-1020-0 - STANDARD ACTUATOR DURABLE

Inventory Location ID: 

Unit of Measure: 

Primary Bin: 

New Bin: ☐

Manufacturer name: 

Manufacturer part number:

Preferred Vendor ID: 

Initial Qty:

Unit Price:

Stock Management

Inventory month:

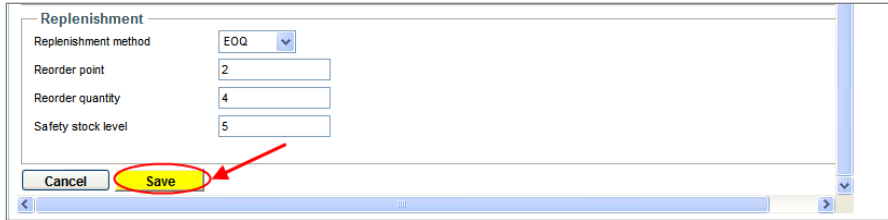
Stock status:

Count Group:

Replenishment

Replenishment method:

2. Complete the fields and click the **Save** button to save your entries.



Replenishment

Replenishment method: EOQ

Reorder point: 2

Reorder quantity: 4

Safety stock level: 5

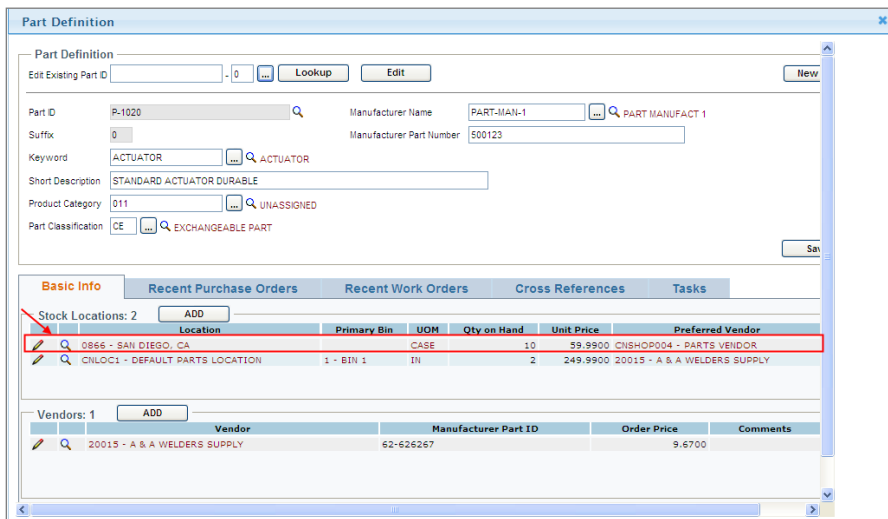
Buttons: Cancel, Save

A red arrow points to the 'Save' button.

 If you are creating a new Bin ID, be sure to check the **New Bin** checkbox.

 The **Initial Qty** and **Receipt Unit Price** fields are only available when you initially create a part location. They are not available when editing the part location. The **Initial Qty** and **Receipt Unit Price** fields perform a part adjustment of type, “Qty at a Different Price.”

The new location displays in the Stock Locations area of the Part Definition pop-in.



Part Definition

Edit Existing Part ID: P-1020

Part ID: P-1020

Suffix: 0

Keyword: ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011

Part Classification: CE

Manufacturer Name: PART-MAN-1

Manufacturer Part Number: 500123

Buttons: Lookup, Edit, New

Basic Info

Recent Purchase Orders

Recent Work Orders

Cross References

Tasks

Stock Locations: 2

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	CNSHOP004 - PARTS VENDOR
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 1

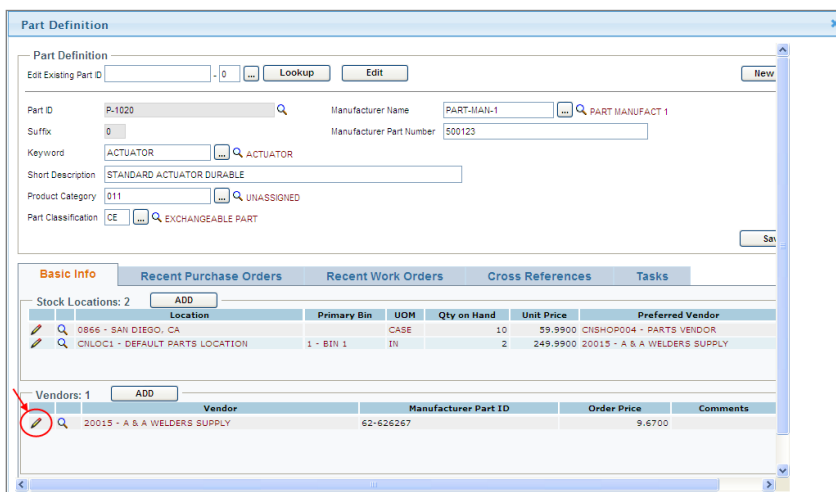
Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	

 If a Preferred Vendor ID was not provided when setting up the location information, the vendor information would not display on this page. See the next section for steps to add vendor information.

Edit Vendors

To edit a vendor:

1. Click the **Edit Pencil** icon  in the Vendors area of the Part Definition pop-in.



Part Definition

Part Definition
 Edit Existing Part ID: 0

Part ID: P-1020 Manufacturer Name: PART-MAN-1 PART MANUFACT 1
 Suffix: 0 Manufacturer Part Number: 500123
 Keyword: ACTUATOR ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011 UNASSIGNED
 Part Classification: CE EXCHANGEABLE PART

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

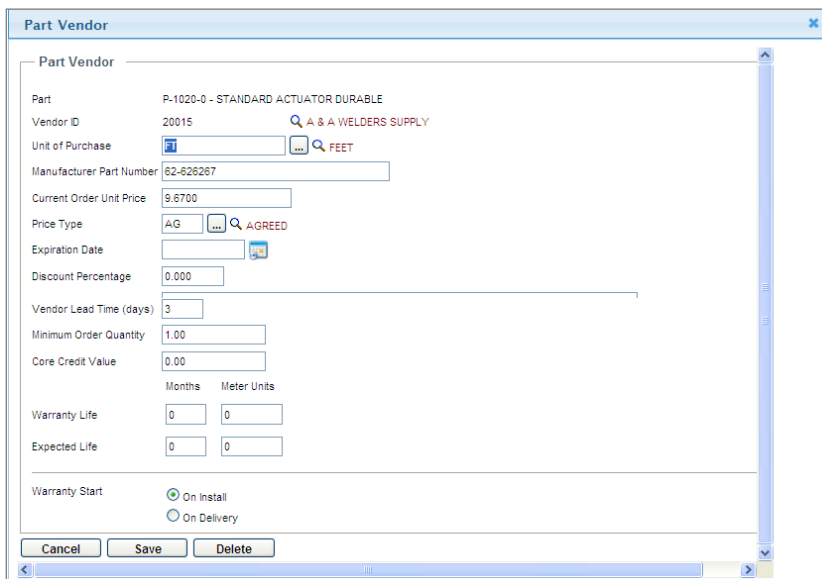
Stock Locations: 2

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA	CASE	10	59.9900	CNSHOP004 - PARTS VENDOR	
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 1

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	

The Part Vendor page displays.

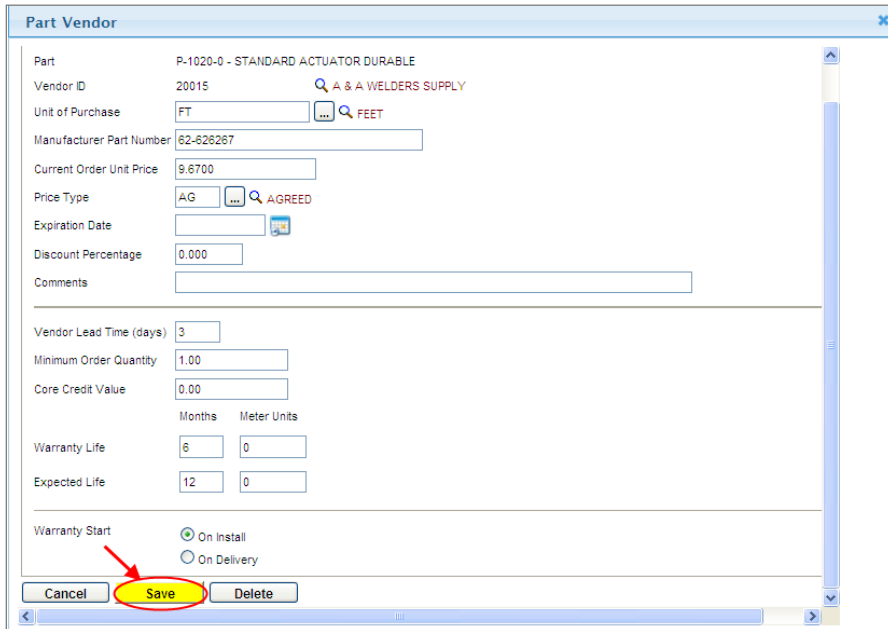


Part Vendor

Part: P-1020-0 - STANDARD ACTUATOR DURABLE
 Vendor ID: 20015 A & A WELDERS SUPPLY
 Unit of Purchase: 1 FEET
 Manufacturer Part Number: 62-626267
 Current Order Unit Price: 9.6700
 Price Type: AG AGREED
 Expiration Date:
 Discount Percentage: 0.000
 Vendor Lead Time (days): 3
 Minimum Order Quantity: 1.00
 Core Credit Value: 0.00
 Months: 0 Meter Units: 0
 Warranty Life: 0
 Expected Life: 0
 Warranty Start: ☒ On Install ☐ On Delivery

2. Complete the fields and click the **Save** button.

 You may also delete a vendor by clicking the **Delete** button.



Part Vendor

Part: P-1020-0 - STANDARD ACTUATOR DURABLE

Vendor ID: 20015  A & A WELDERS SUPPLY

Unit of Purchase: FT  FEET

Manufacturer Part Number: 62-626267

Current Order Unit Price: 9.6700

Price Type: AG  AGREED

Expiration Date: 

Discount Percentage: 0.000

Comments:

Vendor Lead Time (days): 3

Minimum Order Quantity: 1.00

Core Credit Value: 0.00

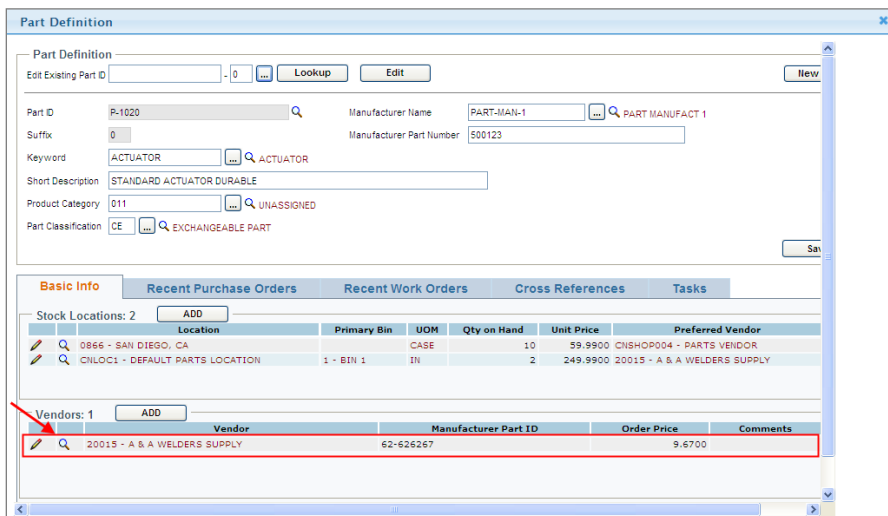
Warranty Life: Months: 6 Meter Units: 0

Expected Life: 12 0

Warranty Start: ☒ On Install ☐ On Delivery

Buttons: Cancel **Save** Delete

The updated vendor part information shows in the Vendor area of the Part Definition pop-in.



Part Definition

Part Definition: Edit Existing Part ID:  Lookup Edit New

Part ID: P-1020  Manufacturer Name: PART-MAN-1  PART MANUFACT 1

Suffix: 0  Manufacturer Part Number: 500123

Keyword: ACTUATOR  ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011  UNASSIGNED

Part Classification: CE  EXCHANGEABLE PART

Buttons: Save

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 2  ADD

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
 0866 - SAN DIEGO, CA		CASE	10	59.9900	CNSHOP004 - PARTS VENDOR
 CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 1  ADD

Vendor	Manufacturer Part ID	Order Price	Comments
 20015 - A & A WELDERS SUPPLY	62-626267	9.6700	

Add Vendor Part Information

Follow the steps below to add vendor part information.

1. To add vendors, click the Vendors **ADD** button.

The screenshot shows the 'Part Definition' window. The 'Part Definition' section at the top includes fields for Part ID (P-1020), Suffix (0), Keyword (ACTUATOR), Short Description (STANDARD ACTUATOR DURABLE), Product Category (011), and Part Classification (CE). Below this, the 'Basic Info' tab is active, showing 'Stock Locations: 2' and a table of locations. The 'Vendors: 1' section at the bottom has an 'ADD' button circled in red with an arrow pointing to it. The table below shows one vendor: 20015 - A & A WELDERS SUPPLY.

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	CINSHOP004 - PARTS VENDOR
CINLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	

The Part Vendor page displays.

The screenshot shows the 'Part Vendor' window for part P-1020-0 - STANDARD ACTUATOR DURABLE. It contains various fields for vendor information, including Vendor ID, Unit of Purchase, Manufacturer Part Number, Current Order Unit Price (0.00), Price Type, Expiration Date, Discount Percentage (0.00), Comments, Vendor Lead Time (days) (0), Minimum Order Quantity (0.00), Core Credit Value (0.00), Warranty Life (0 months, 0 meter units), Expected Life (0 months, 0 meter units), and Warranty Start (On Install selected). The 'Cancel' and 'Save' buttons are at the bottom.

2. Complete the fields and click the **Save** button.

Part Vendor

Part: P-1020-0 - STANDARD ACTUATOR DURABLE

Vendor ID:

Unit of Purchase:

Manufacturer Part Number:

Current Order Unit Price:

Price Type:

Expiration Date:

Discount Percentage:

Comments:

Vendor Lead Time (days):

Minimum Order Quantity:

Core Credit Value:

Months: Meter Units:

Warranty Life:

Expected Life:

Warranty Start: ☒ On Install ☐ On Delivery

The vendor now shows in the Vendors area of the Part Definition pop-in.

Part Vendor

Part: P-1020-0 - STANDARD ACTUATOR DURABLE

Vendor ID:

Unit of Purchase:

Manufacturer Part Number:

Current Order Unit Price:

Price Type:

Expiration Date:

Discount Percentage:

Comments:

Vendor Lead Time (days):

Minimum Order Quantity:

Core Credit Value:

Months: Meter Units:

Warranty Life:

Expected Life:

Warranty Start: ☒ On Install ☐ On Delivery

View Recent Purchase Orders

➡ On the Part Definition pop-in, select the **Recent Purchase Orders** tab to see the recent line- by-line receipts from the purchase orders for the Part ID.

📅 The purchase orders that display are only the purchase orders for the locations that the user has rights.

The screenshot shows the 'Part Definition' window with the 'Recent Purchase Orders' tab selected. The window displays fields for Part ID, Suffix, Keyword, Short Description, Product Category, and Part Classification. Below these fields is a table of recent purchase orders.

Receipt Date	PO ID	Vendor	Phone	Qty Ordered	Qty Received	Receipt Price	UOI
03/08/2010	2000-2010-0000001	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	561-281-9871	50	50	45.8500	EA
02/24/2010	1000-2010-0000008	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	561-281-9871	35	35	45.8500	EA

View Recent Work Orders

➡ On the Part Definition pop-in, select the **Recent Work Orders** tab to see the recent work orders associated with the part.

The screenshot shows the 'Part Definition' window with the 'Recent Work Orders' tab selected. The top section contains fields for Part ID (P-1020), Manufacturer Name (PART-MAN-1), Suffix (0), Keyword (ACTUATOR), Short Description (STANDARD ACTUATOR DURABLE), Product Category (011), and Part Classification (CE). The bottom section displays a table of recent work orders.

Issue Date	Equipment ID	Work Order ID	Issue Location	Qty Issued
09/19/2011	C-1003	2000-2010-79	1000 - FULL SERVICE SHOP	
03/30/2010	C-1003	1000-2010-28	1000 - FULL SERVICE SHOP	
03/30/2010	C-1003	1000-2010-28	1000 - FULL SERVICE SHOP	
03/17/2010	C-1004	2000-2010-12	1000 - FULL SERVICE SHOP	
03/17/2010	C-1004	2000-2010-12	1000 - FULL SERVICE SHOP	
02/26/2010	R-1001	1000-2010-103	1000 - FULL SERVICE SHOP	

📅 The list is filtered by the part location and issue location for location security. The work orders that display are only the work orders for the locations that the user has rights.

View Cross References

➡ On the Part Definition pop-in, select the **Cross References** tab to see the cross references for the part.

The screenshot shows the 'Part Definition' window with the 'Cross References' tab selected. The top section contains the same fields as the previous screenshot. The bottom section displays a table of cross references.

Action	Cross reference part	Cross reference vendor
	62-626267 - 0	
	354123 - 0	JH-BT MOTORS
	5462 - 0	

Manage Part Tasks

To associate a task with a part:

1. To associate tasks with a part, click the **Tasks** tab on the Part Definition pop-in and then click the **Manage Tasks** button.

The Choose a Task pop-in displays with tabs based on data conditions.

2. There are many ways to select a task from the Choose a Task pop-in:

To search for a task:

- i. Type a search string in the field and click the **Search** button to begin a task search.

- ii. Select the desired task from the resulting list and click **Save** to associate the task to the part.

Choose a Task

Repair Tasks PM Services Inspections Task Search

Tasks Found: 2140

Task Type	Task ID	Description
PM SERVICE	A	PM SERVICE A
REPAIR GROUP	A-	AIR SYSTEM
REPAIR TASK	A-A	ALCOHOL INJECTION SYSTEM - AIR
REPAIR TASK	A-A1	AIR COMPRESSOR MOTOR
REPAIR TASK	A-A11	BRUSHES- AIR COMPRESSOR MOTOR
REPAIR TASK	A-A12A	START RESISTOR
REPAIR TASK	A-A1Z	AIR CMPRS MTR-MAJ COMP CHG OUT

Pending Tasks: 1

Task ID	Description
A-A	ALCOHOL INJECTION SYSTEM - AIR

Cancel Save

If you know the Task ID:

- i. Type the ID in the Jump to field.

Choose a Task

Repair Tasks PM Services Inspections Task Search

Jump to: A-V

Task ID	Description
00	TEST GROUP, REALLY LONG DESCRIPTION FOR TESTING PURPOSES !!!
01	TEST
03	03 GROUP
10	ENGINE REPAIR GROUP
13	BRAKES
17	TIRES
20	TEST REPAIR GROUP
99	KRISH
A-	AIR SYSTEM
AA	REPAIR GROUP
AS	AS

Task ID	Description
A-H	HARDWARE- AIR SYSTEM
A-L	AIR LINES & FITTINGS - AIR SUPPLY
A-N	CINSTON- AIR SYSTEM
A-P	PIPING- AIR SUPPLY SYSTEM
A-R	MAIN RESERVOIR ASSEMBLY
A-S	AIR STARTER - AIR SYSTEM
A-T	TANK - AIR SYSTEM
A-V	VALVES - AIR BRAKE SYSTEM
A-W	WIRING- AIR SUPPLY SYSTEM
A-X	WIRING- AIR SUPPLY SYSTEM
A-Y	AIR SUPPLY INSPECTION
A-Z	MISCELLANEOUS AIR SYSTEM

Task ID	Description
A-V	VALVES - AIR BRAKE SYSTEM
A-V1	AIR SAFETY VALVE - BRAKE
A-V10	QUICK RELEASE VALVE - BRAKE
A-V10A	AIR PRESSURE SWITCH
A-V11	PRESSURE STAT SWITCH
A-V12	EMERGENCY AIR DUMP VALVE
A-V13	AIR VALVE - OIL SEPARATOR
A-V1A	QUICK RELEASE VALVE
A-V1B	AIR CONTROL VALVE- AIR SUPPLY
A-V2	AIR SUPPLY VALVE - BRAKE
A-V2A	DOUBLE CHECK VALVE
A-V2B	TREADLE VALVE- AIR SUPPLY SYS

Pending Tasks: 2

Task ID	Description
A-A	ALCOHOL INJECTION SYSTEM - AIR
A-V	VALVES - AIR BRAKE SYSTEM

Cancel Save

- ii. Select the desired task from the resulting list and click **Save** to associate the task to the part.

If it is a PM Service or Inspection:

- i. Select the PM Service or Inspection and click **Save** to associate the service or inspection with the part.
3. Once you have found the task, select the desired task from the list and click the **Save** button.

Choose a Task

Repair Tasks PM Services Inspections Task Search

Jump to: A-V

Task ID	Description	Task ID	Description	Task ID	Description
00	TEST GROUP- REALLY LONG DESCRIPTION FOR TESTING PURPOSES !!!	A-H	HARDWARE - AIR SYSTEM	A-V	VALVES - AIR BRAKE SYSTEM
01	TEST	A-L	AIR LINES & FITTINGS - AIR SUPPLY	A-V1	AIR SAFETY VALVE - BRAKE
03	03 GROUP	A-N	CINSTEON- AIR SYSTEM	A-V10	QUICK RELEASE VALVE - BRAKE
10	ENGINE REPAIR GROUP	A-P	PIPING- AIR SUPPLY SYSTEM	A-V10A	AIR PRESSURE SWITCH
13	BRAKES	A-R	MAIN RESERVOIR ASSEMBLY	A-V11	PRESSURE STAT SWITCH
17	TIRES	A-S	AIR STARTER - AIR SYSTEM	A-V12	EMERGENCY AIR DUMP VALVE
20	TEST REPAIR GROUP	A-T	TANK - AIR SYSTEM	A-V13	AIR VALVE - OIL SEPARATOR
99	KRISH	A-V	VALVES - AIR BRAKE SYSTEM	A-V1A	QUICK RELEASE VALVE
AA	AIR SYSTEM	A-W	WIRING- AIR SUPPLY SYSTEM	A-V1B	AIR CONTROL VALVE- AIR SUPPLY
AS	REPAIR GROUP	A-X	WIRING- AIR SUPPLY SYSTEM	A-V2	AIR SUPPLY VALVE - BRAKE
AS	AS	A-Y	AIR SUPPLY INSPECTION	A-V2A	DOUBLE CHECK VALVE
		A-Z	MISCELLANEOUS AIR SYSTEM	A-V2B	TREADLE VALVE- AIR SUPPLY SYS

Pending Tasks: 1

Task ID	Description
A-V13	AIR VALVE - OIL SEPARATOR

Cancel Save

The task shows in the Tasks list.

Part Definition

Part Definition

Edit Existing Part ID: R-1020

Part ID: R-1020

Suffix: 0

Keyword: ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011

Part Classification: CE EXCHANGEABLE PART

Manufacturer Name: PART-MAN-1

Manufacturer Part Number: 500123

Stocking Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Manage Tasks

Task ID	Description
A-A	ALCOHOL INJECTION SYSTEM - AIR
A-V	VALVES - AIR BRAKE SYSTEM

- Click **Save** to save the part and its associated task.

Part Definition

Part Definition

Edit Existing Part ID: R-1020

Part ID: R-1020

Suffix: 0

Keyword: ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011

Part Classification: CE EXCHANGEABLE PART

Manufacturer Name: PART-MAN-1

Manufacturer Part Number: 500123

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Save

Successful Update displays on the Part Definition pop-in.

Part Definition

Part Definition

Edit Existing Part ID: R-1020

Part ID: R-1020

Suffix: 0

Keyword: ACTUATOR

Short Description: STANDARD ACTUATOR DURABLE

Product Category: 011

Part Classification: CE EXCHANGEABLE PART

Manufacturer Name: PART-MAN-1

Manufacturer Part Number: 500123

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Successful update.

Save

To disassociate a task from a part:

1. On the **Tasks** tab, click **Manage Tasks**.

The screenshot shows the 'Part Definition' window with the 'Tasks' tab selected. The 'Manage Tasks' button is highlighted with a red circle and an arrow. The window displays fields for Part ID (P-1020), Manufacturer Name (PART-MAN-1), and Manufacturer Part Number (500123). The 'Tasks' tab shows a list of tasks with columns 'Task ID' and 'Description'. The tasks listed are:

Task ID	Description
A-A	ALCOHOL INJECTION SYSTEM - AIR
A-V	VALVES - AIR BRAKE SYSTEM

2. Click the red X in the Pending Tasks section.

The screenshot shows the 'Choose a Task' window with the 'Repair Tasks' tab selected. The 'Pending Tasks' section shows a list of tasks with columns 'Task ID' and 'Description'. The tasks listed are:

Task ID	Description
00	TEST GROUP, REALLY LONG DESCRIPTION FOR TESTING PURPOSES !!!
01	TEST
03	03 GROUP
10	ENGINE REPAIR GROUP
13	BRAKES
17	TIRES
20	TEST REPAIR GROUP
99	KRISH
A-	AIR SYSTEM
AA	REPAIR GROUP
AS	AS

The 'Pending Tasks' section shows a list of tasks with columns 'Task ID' and 'Description'. The tasks listed are:

Task ID	Description
A-A	ALCOHOL INJECTION SYSTEM - AIR
A-V	VALVES - AIR BRAKE SYSTEM

The red X button is highlighted with a red circle and an arrow.

The task is removed from the pending tasks list.

The screenshot shows the 'Choose a Task' window with the 'Repair Tasks' tab selected. The 'Pending Tasks' section shows a list of tasks with columns 'Task ID' and 'Description'. The tasks listed are:

Task ID	Description
00	TEST GROUP, REALLY LONG DESCRIPTION FOR TESTING PURPOSES !!!
01	TEST
03	03 GROUP
10	ENGINE REPAIR GROUP
13	BRAKES
17	TIRES
20	TEST REPAIR GROUP
99	KRISH
A-	AIR SYSTEM
AA	REPAIR GROUP
AS	AS

The 'Pending Tasks' section shows a list of tasks with columns 'Task ID' and 'Description'. The tasks listed are:

Task ID	Description
A-V	VALVES - AIR BRAKE SYSTEM

3. Click **Save** to save the deletion.

Successful Update displays on the **Part Definition** pop-in and the task is no longer associated with the part.

Part Definition

Edit Existing Part ID: [0] [Lookup] [Edit] [New]

Part ID: P-1020 Manufacturer Name: PART-MAN-1 PART MANUFACT 1
 Suffix: 0 Manufacturer Part Number: 500123
 Keyword: ACTUATOR ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011 UNASSIGNED
 Part Classification: CE EXCHANGEABLE PART

Successful update.

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Manage Tasks

Task ID	Description
A-V	VALVES - AIR BRAKE SYSTEM

- Click the **Save** button to save all the changes you made to the part.

Part Definition

Edit Existing Part ID: [0] [Lookup] [Edit] [New Pa]

Part ID: P-1020 Manufacturer Name: PART-MAN-1 PART MANUFACT 1
 Suffix: 0 Manufacturer Part Number: 500123
 Keyword: ACTUATOR ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011 UNASSIGNED
 Part Classification: CE EXCHANGEABLE PART

Successful update.

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Manage Tasks

Task ID	Description
A-V	VALVES - AIR BRAKE SYSTEM

You are returned to the **Part Definition** pop-in where another **Successful Update** message displays.

Part Definition

Edit Existing Part ID: [0] [Lookup] [Edit] [New]

Part ID: P-1020 Manufacturer Name: PART-MAN-1 PART MANUFACT 1
 Suffix: 0 Manufacturer Part Number: 500123
 Keyword: ACTUATOR ACTUATOR
 Short Description: STANDARD ACTUATOR DURABLE
 Product Category: 011 UNASSIGNED
 Part Classification: CE EXCHANGEABLE PART

Successful update.

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 2 [ADD]

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
0866 - SAN DIEGO, CA		CASE	10	59.9900	CHSHOP004 - PARTS VENDOR
CNLOC1 - DEFAULT PARTS LOCATION	1 - BIN 1	IN	2	249.9900	20015 - A & A WELDERS SUPPLY

Vendors: 2 [ADD]

Vendor	Manufacturer Part ID	Order Price	Comments
20015 - A & A WELDERS SUPPLY	62-626267	9.6700	
VENDOR1 - VENDOR1 NAME	5462	2.0700	

Change Requests for New Parts/Vendors when Responding to Part Requests

Settings control the **Request New Part** and **Request New Vendor** buttons on the Part Definition Pop-in. With proper control rights, Storekeepers can create change requests for new parts and vendors using these buttons.

The screenshot shows the 'Part Definition' window. At the top, there are buttons for 'New Part' and 'Request New Part', with the latter circled in red. Below this, there are input fields for Part ID (1000), Manufacturer Name (GARRETT), Manufacturer Part Number (GARRETT1000), Keyword (HOSE-SILICON(RU)), Short Description (HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON), Product Category (B 999), and Part Classification (13). A 'Save' button is at the bottom right of the form. Below the form, there are tabs for 'Basic Info', 'Recent Purchase Orders', 'Recent Work Orders', 'Cross References', and 'Tasks'. Under 'Basic Info', there is a 'Stock Locations' section with a table showing two locations: 'ABA - 2 ASSET CENTRAL ADMINISTRATION' and 'ACA - ASSET CENTRAL ADMINISTRATION'. Below that is a 'Vendors' section with a table showing three vendors: '1-666 - DEFAULT VENDOR', '1-762 - MAGNECRAFT & STRUTHERS-DUNN', and '100-5661 - SYNAPSE ENERGY ECONOMICS, INC.'. A 'Request New Vendor' button is circled in red in the vendors section. At the bottom of the window are 'Cancel' and 'Apply' buttons.



For the **Request New Part** and **Request New Vendor** buttons to show, the **User** must have rights set as follows: **View** and **Request change** rights checked for the Parts Primary and Vendor Primary screens and the **User Group** must also have **View** and **Insert** rights checked for the Change Request screen. These rights are set on the Screen Rights Template screen, Screen Rights tab (Setup > System Management > Access Rights > Right Templates > Screen Rights > Screen Rights Template).

The following steps illustrate the recommended workflow to request new parts and/or vendors when responding to part requests.

To create a new request:

1. From the Request Management page, click the **Request ID** button to open the Part Request Detail page.



You can also check the desired boxes, select **Issue/Order for Checked Items**, and click **Process**, but clicking the **Request ID** is the preferred method.

Request Management

Current Location: MAIN - MAIN LOCATION Refresh Off

Pending Parts Requests: 3 Pending Commercial Requests: 1 Notify Requests: 0 Ordered Requests: 0

☐	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Descr...	Manufacturer	Comments	Qty P
☐	1		Y	475808	LAEMPO-EMPLOYEE #0 (DEFAULT EMP)	1000-0-HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2	GARRETT (GARRETT1000)		
☐			Y	475652	GE-GARY FROST	1000-0-HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2	GARRETT (GARRETT1000)		
☐			Y	475494	SJW-BERENA	1000-0-HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2	GARRETT (GARRETT1000)		

Click the Request ID (preferred method)

NOTE: You can also check the box(es), select Issue/Order for Checked Items, and click Process but clicking the Request ID is the preferred method.

Current Filter No filter defined. Define Filter Clear Filter

Back for Checked Items: Set Notify Flag Process Print Pick Report

- On the resulting Part Request Detail page, select the **Action**, update fields as desired, and click the **Edit**  icon next to the **Part ID** to open the Part Wizard.

Part Request Detail

Request ID: 475808 Date and Time Requested: 08/08/2014 11:40
 Location ID: MAIN Requested By: EMPLOYEE #0 (DEFAULT EMP)
 Issue Together: ☐

Line Items: 1

Work Order: MAIN-2014-45 (OPEN) Equipment: EQ-004: EQ-004 2010 EQMFR-001 MODEL-004 GREY FLEET EQUIPMENT EQ-004 Edit

Delay Status: Hat No: Parking Stall:

Line Type: PART
 Action: **ORDER** (PENDING) ☐ NFI Part ID: 1000 - 0 Lookup 
 Service Request ID:
 Manuf Part No: GARRETT1000 Manufacturer: GARRETT
 Part description: HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON
 WAC: Task ID: 001-101 ELECTRICAL - CLAMPS / TERMINALS / TIES
 Priority ID: 1 EMERGENCY/IMMEDIATE
 Quantity: 2.00 EA Qty Ordered: 11.00 Unit Price: 0.0000 Est. Unit Cost: 0.00
 Qty Committed: 2.00 WOs: 1.00
 Qty on Hand: 5.00 Qty Avail: Y Total: 12.00 Date Required:
 Comment: Bin:
 Action Comment:
 Purchase Order ID: Vendor ID: 1000-1322 Vendor Contract ID:
 Account ID: ACCOUNT-03 ALL ACCESS ACCOUNT ☐ Parts are ready

- In the resulting Part Definition pop-in, click either **Request New Part** or **Request New Vendor** button.

Part Definition

Part Definition

Edit Existing Part ID: [0] [Lookup] [Edit] [New Part] **Request New Part**

Part ID: 1000 Manufacturer Name: GARRETT
 Suffix: 0 Manufacturer Part Number: GARRETT1000
 Keyword: HOSE-SILICON(RU) HOSE,SILICON(RUBBER)
 Short Description: HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON
 Product Category: B 999 BUS-NOT ASSIGNED
 Part Classification: 13 WARRANTABLE

[Save]

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Stock Locations: 18 [ADD]

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
ABA - 2 ASSET CENTRAL ADMINISTRATION		EA	0	0.0000	
ACA - ASSET CENTRAL ADMINISTRATION		EA	96	0.0000	

Vendors: 24 [ADD] **Request New Vendor**

Vendor	Manufacturer Part ID	Order Price	Comments
1-666 - DEFAULT VENDOR		0.0000	
1-762 - MAGNECRAFT & STRUTHERS-DUNN		0.0000	
100-5661 - SYNAPSE ENERGY ECONOMICS, INC.		0.0000	

[Cancel] [Apply]

- The Vendors-Primary Information or Parts Primary information screen opens in Change Request mode (indicated by **Change Request** highlighted in the menu at the top of the screen). Enter the desired information and click **Save** to launch the Change Requests screen.

Parts - Primary Information ADMIN MODE **CHANGE REQUEST** HELP

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel

Part ID: [] Part suffix: [] New part/location/inventory: []

Basic Info

The Change Requests screen displays with pre-populated data.

- Review and update the information and click **Save** to generate the change request.

Change Requests ADMIN MODE **CHANGE REQUEST** HELP

Search Reload Sort Select Filter Select Sort New Copy Delete Edit **Save** Cancel

Change request ID: 57

Basic Info

Proposed Changes

Changed Values

Notes

Status: PENDING [View changes] [Apply changes]

Description: []

To complete the change request:

1. Close the following screens: Change Requests screen, Parts Primary Information or Vendors-Information screen, and the Part Wizard.
2. Enter an **Action Comment** for the Part Request Line Item.
3. Click **Save Changes**.

Although this workflow is not required, it is recommended. Entering an **Action Comment** allows other viewers of the request to know that a change request has been made for that part request.

The screenshot shows the 'Part Request Detail' form. At the top, it displays the Request ID (475808), Location ID (MAIN), and Date and Time Requested (08/08/2014 11:40). Below this, there are fields for 'Line Items: 1'. The first line item is for a part with Part ID 1000, Part description 'HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON', and Manufacturer 'GARRETT'. The form includes various fields for quantity, price, and comments. The 'Save Changes' button at the bottom is highlighted with a red circle and an arrow.



If a user has the Rights Templates set for Change Requests on the Parts Primary and Vendor Primary screens, and the wrong Part/Vendor are entered on the Part Request Detail page, the system will return an error indicating the Part ID-Part suffix or Vendor ID cannot be referenced. The error message also includes the link, "Request New Part ID." If the user does not have the correct rights, the link does not display.

- Click the link to create a new request for Part (or Vendor).

The Parts – Primary Information screen (or Vendor Primary Information screen) displays in Change Request Mode (INSERT MODE) for the new request.

- Enter the new part (or vendor) information and click **Save**.

The Change Requests screen displays to enter additional information.

- When you are done entering information, click **Save** to complete the request.

Working with Serialized Parts

When working with serialized parts, you can generate new parts, and move or scrap parts. To do this, you need to be in the Part Definition pop-in.

To open the Part Definition pop-in:

1. On the main Storekeeper Portal page, click **New/Edit Part**.
2. The Part Definition displays.

Generate Serialized Parts

1. Make the Serial Number tab display. You can do this one of two ways:
 - Enter a serial part ID into the Edit Existing Part ID field and click **Edit**.
 - Create a new part ID (with a product classification which is a serialized part) and click **Save**.

This displays the Serial Numbers tab.

2. In the Serial Numbers tab, enter the information in the Generate Serial Numbers section. This includes the **Serial Number Format** field, starting number and how many parts you are generating. You cannot use a serial number that already exists when generating.

 **Note:** You may need to check the parts numbers if you do not know the next number in the serialized list for generation, or the serial number format. To check this, click the magnifying glass next to Part ID, search for the part ID, and you can check part information.

 The **Serial Number Format** field is an editable field that tells the system how to number the parts. Be sure to enter your serial number format according to the number already in the system for that part, or, if this is a new serial format, you can enter the format as follows:

- Prefix[SEQ:5]Suffix

Prefix and Suffix can be anything you need. If you generate parts with sequence quantity of 5, and the starting number is 100, the following serialized numbers would be generated.

- Prefix00100Suffix
- Prefix00101Suffix
- Prefix00102Suffix
- Prefix00103Suffix
- Prefix00104Suffix

3. Click **Generate**.

 **Note:** After clicking **Generate**, there may be a wait while the system processes the data, especially when generating a large number of items.

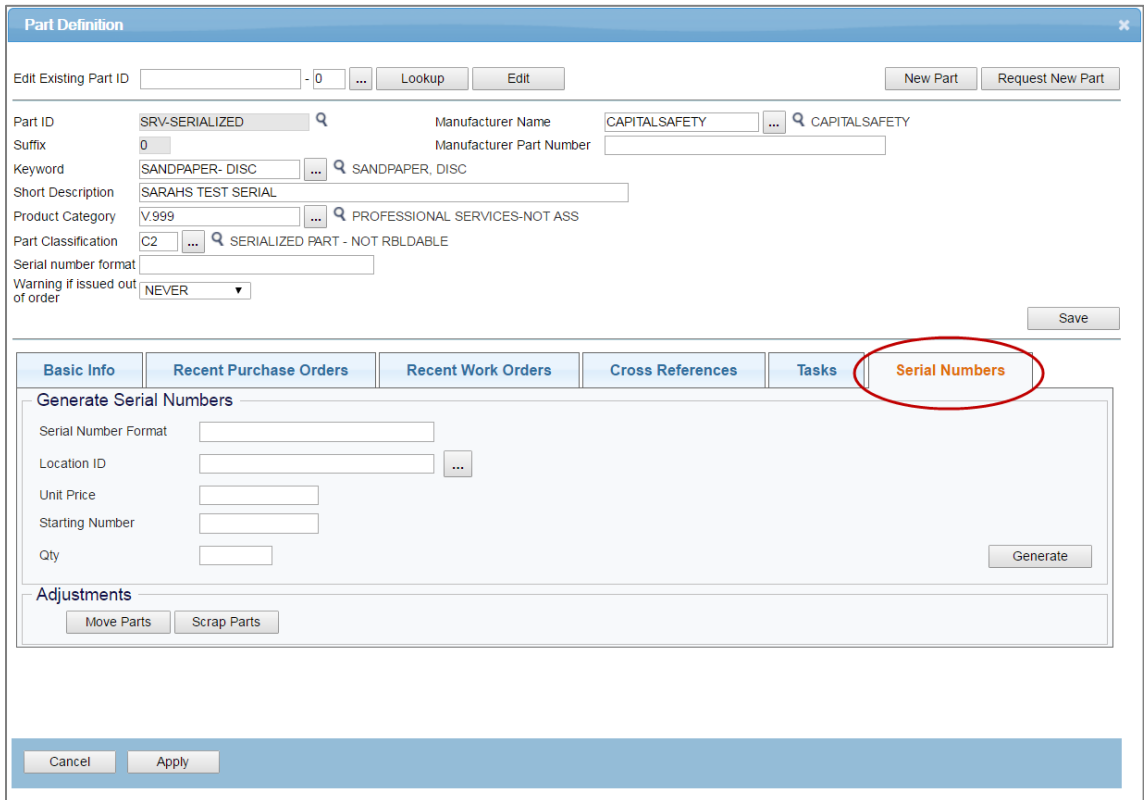
Move Serialized Parts

Use this button to move serialized parts to a different location.

To move parts:

- From the Part Definition pop-in, open the serialized part you need to move. You can do this one of two ways.
 - Enter the part ID into the **Edit Existing Part ID** field and click **Edit**.
 - Click the  button to open the Select Edit Existing Part ID pop-in. Find the part, and select it. When you select the part, you will be taken back to the Part Definition page. Click **Edit**.

When a serialized part is selected and you click Edit, the Serial Numbers tab then displays.



Part Definition

Edit Existing Part ID - 0 

Part ID  Manufacturer Name  CAPITALSAFETY

Suffix Manufacturer Part Number

Keyword  SANDPAPER, DISC

Short Description

Product Category  PROFESSIONAL SERVICES-NOT ASS

Part Classification  SERIALIZED PART - NOT RBLDABLE

Serial number format

Warning if issued out of order

Basic Info **Recent Purchase Orders** **Recent Work Orders** **Cross References** **Tasks** **Serial Numbers**

Generate Serial Numbers

Serial Number Format

Location ID 

Unit Price

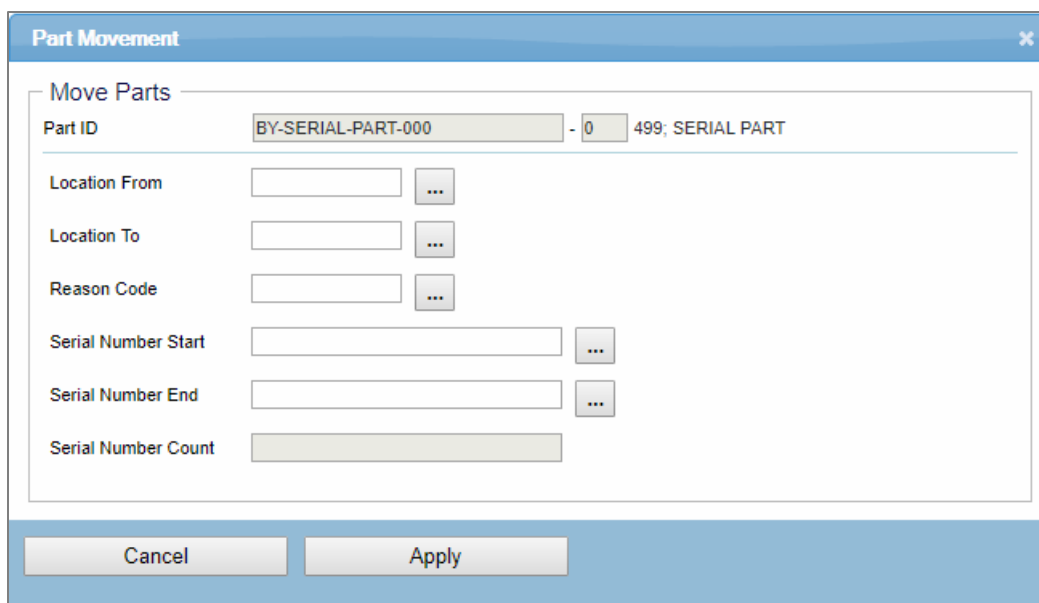
Starting Number

Qty

Adjustments

- In the Adjustments section, click **Move Parts**.

This opens the Part Movement pop-in.



The image shows a 'Part Movement' dialog box with a blue header bar containing the title and a close button. The main area is titled 'Move Parts' and contains several input fields: 'Part ID' (with a dropdown menu showing 'BY-SERIAL-PART-000' and a value of '0' followed by '499; SERIAL PART'), 'Location From' (with a dropdown menu), 'Location To' (with a dropdown menu), 'Reason Code' (with a dropdown menu), 'Serial Number Start' (with a dropdown menu), 'Serial Number End' (with a dropdown menu), and 'Serial Number Count' (a text input field). At the bottom of the dialog are two buttons: 'Cancel' and 'Apply'.

3. Enter the information for the locations involved in moving the parts including **Location From** and **Location To**, the reason for moving the parts, and the beginning and ending serial part numbers if you are moving multiple serialized parts. The **Serial Number Count** field is display only, and will show the number of serialized parts you are moving.

 If you leave the **Location To** field empty, and click **Apply** to move the parts, the parts will be scrapped instead of moved. There is a confirmation when this happens to ensure you do want to scrap these parts if you forgot to fill in the field.

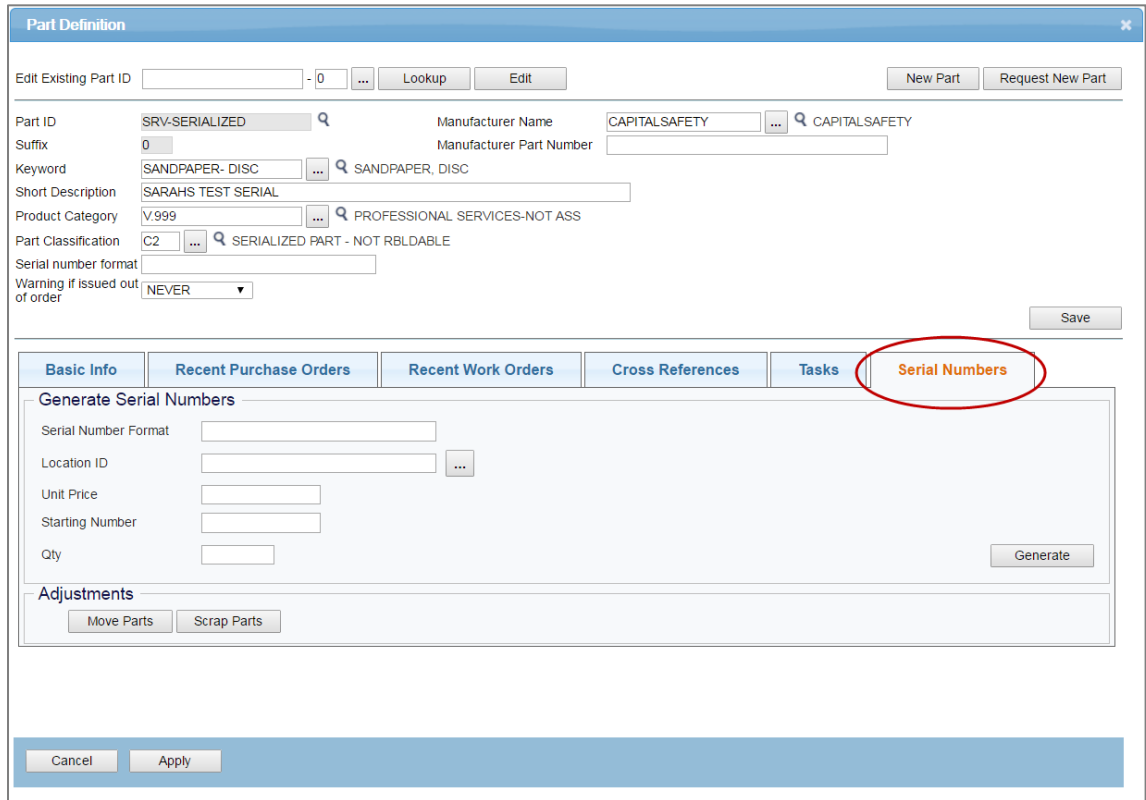
4. Click **Apply** to move these parts, or click **Cancel**, to leave this pop-in and make no changes.

 Note: After clicking **Apply**, there may be a wait while the system processes the data, especially when moving a large number of items.

Scrap Serialized Parts

1. On the Part Definition pop-in, open the serialized part you need to move. You can do this one of two ways.
 - Enter the part ID into the **Edit Existing Part ID** field and click **Edit**.
 - Click the  button to open the Select Edit Existing Part ID pop-in. Find the part, and select it. When you select the part, you will be taken back to the Part Definition page. Click **Edit**.

When a serialized part is selected and you click Edit, the Serial Numbers tab then displays.

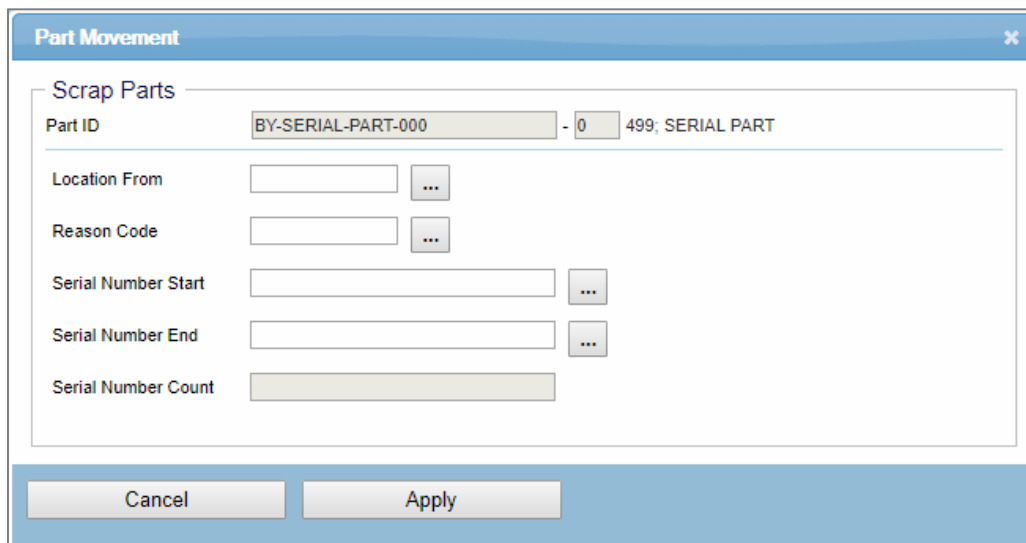


The screenshot shows the 'Part Definition' window. The 'Serial Numbers' tab is highlighted with a red circle. The window contains the following fields and sections:

- Edit Existing Part ID:** A text field with '- 0' and buttons for 'Lookup' and 'Edit'.
- Buttons:** 'New Part' and 'Request New Part'.
- Part ID:** 'SRV-SERIALIZED' with a search icon.
- Suffix:** '0'.
- Keyword:** 'SANDPAPER- DISC' with a search icon.
- Short Description:** 'SARAH'S TEST SERIAL'.
- Product Category:** 'V.999' with a search icon.
- Part Classification:** 'C2' with a search icon.
- Serial number format:** A text field.
- Warning if issued out of order:** 'NEVER' with a dropdown arrow.
- Buttons:** 'Save'.
- Tabs:** 'Basic Info', 'Recent Purchase Orders', 'Recent Work Orders', 'Cross References', 'Tasks', and 'Serial Numbers' (highlighted).
- Generate Serial Numbers Section:**
 - Serial Number Format: Text field.
 - Location ID: Text field with a search icon.
 - Unit Price: Text field.
 - Starting Number: Text field.
 - Qty: Text field.
 - Generate** button.
- Adjustments Section:**
 - Move Parts** button.
 - Scrap Parts** button.
- Footer:** 'Cancel' and 'Apply' buttons.

- In the Adjustments section, click **Scrap Parts**.

This opens the Part Movement pop-in.

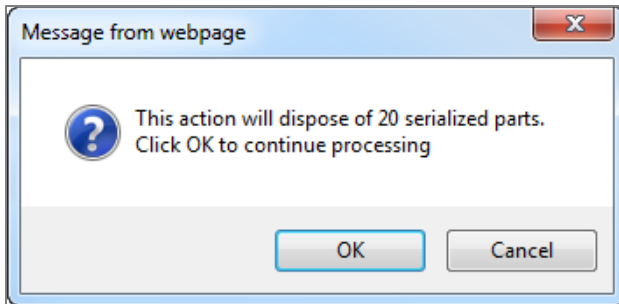


The screenshot shows the 'Part Movement' window. The 'Scrap Parts' section is active. The window contains the following fields and buttons:

- Part ID:** 'BY-SERIAL-PART-000' - '0' 499; SERIAL PART
- Location From:** Text field with a search icon.
- Reason Code:** Text field with a search icon.
- Serial Number Start:** Text field with a search icon.
- Serial Number End:** Text field with a search icon.
- Serial Number Count:** Text field.
- Buttons:** 'Cancel' and 'Apply'.

3. Enter the information for the **Location From**, the reason for scrapping the parts, and the beginning and ending serial part numbers if you are moving multiple serialized parts. The **Serial Number Count** field is display only, and will show the number of serialized parts you are moving.
4. Click **Apply** to scrap the parts, or click **Cancel** to leave this pop-in and make no changes.

A confirmation message displays.



5. Click **OK**.

 **Note:** After clicking **OK**, there may be a wait while the system processes the data, especially when moving a large number of items.

*Scrapped parts will do one of two things depending on whether the option for **Enable part status tracking** is turned on or off. This setting is found on the **Part Status Tracking** tab of the **Parts – Setup – Options** screen:*

- If tracking is enabled: The system inserts a stocking ticket for the removal of the item and changes the item's suffix number to have the scrapped suffix number. The system also sets the scrapped items to have quantity of 0, a receipt unit price of 0, and status is set as **SCRAPPED**.
- If tracking is disabled: The status of the items will be set to **AWAITING DISPOSITION** and removed from the location in the system. Items with this status will stay in the system until you delete them. You may keep them for records, or delete them after a certain amount of time to help clear up space in the database.

15. Picking Card Detail Pop-in

The Picking Card Detail pop-in displays detailed information about the picking card and any movement on the card. Information includes an image for the card (if you have set an image), the card ID, transfer ID, part ID, part description, quantity, status, date and time inserted, and the quantity on hand.

Picking Card Detail

Card ID: 210
Transfer ID: 523
Part ID: PART001 - 1
Part Desc: MOTOR-WIPER
Quantity: 3
Status: BEING PICKED
DateTime Insert: 06/17/2017 01:40 PM
Qty on Hand: 322.38

NO IMAGE AVAILABLE

Movement

Movement Add Movement Bin Assignment

Quantity	From Bin	To Bin	Employee ID	Employee Name	Stocking Ticket ID
1	BIN	BIN	EMP4	EMPLOYEE4	

Close Save

Movement Tab

Add Movement

To move a part:

1. Click **Add Movement**.

A new line displays.

Quantity	From Bin	To Bin	Employee ID	Employee Name	Stocking Ticket ID
1	RGBIN	RGBIN	RGEMP4	RG,EMPLOYEE4	
1	BIN	G-BIN	RH	RICK H	

2. Enter the quantity of parts you want to move.
3. Enter the **From Bin** ID or click the chooser button to select an ID from the list.
4. Enter the **To Bin** ID or click the chooser button to select an ID from the list.
5. After entering all information, click **Save**.

A confirmation message displays.

Bin Assignment

Clicking **Bin Assignment** opens the Bin Assignment pop-in and allows you to assign a bin to a part location.

Bin Assignment

Actions

Create New Bin

Assign Bin to Part Location

Part ID: PART001 ... MOTOR- WIPER

Part Suffix: 1

Part Location: LOC1 ... LOCATION1

Bin ID: ...

Remove Old Primary Bin ☒

Cancel Save

Actions

Create New Bin: Create a new bin with the Bin Creation dialogue.

1. Enter the new bin's Bin ID, Bin Location ID, Bin Description, and Bin Type. The bin type can either be set as a stock area or a staging area.
2. When you are done, click **Save**, or click **Cancel** to return to the Bin Assignment pop-in without changes.

Assign Bin to Part Location

Use this section to assign a bin to a part location. Enter the name of the part ID, part location, or bin ID if you know it, or use the chooser buttons next to these fields to find the proper information. Also enter the part suffix, and check the **Remove Old Primary Bin** checkbox if you would like to remove the bin that was set previously for the part location.

When you are done assigning a bin, click **Save**, or click **Cancel** to close this window and return to the Picking Card Detail pop-in.