Issue Parts from a Job Record

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Follow the steps below to issue parts to a Job from a Job record.

1. From the Main Application Menu navigate to Job Management and select the Job Queue menu option.

2. The Open Job List will be displayed. Highlight the Job within the list then click the Open button located at the lower right of the form or double-click on the Job line.

3. Click the Tools button on the Job Toolbar.

4. From the Tools Toolbar, click the Issue Parts button.

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5. The Part Issue form will be displayed.

- Select the Warehouse from which the parts are being issued.
- Select the Phase Code for the issue from the drop-down list.
- The Issue Date will default to today's date; make certain to enter the actual date on which the parts were removed from the warehouse.
- In the Memo field, you may type in a note regarding the issue transaction; you may type up to 255 characters into this field.
- In Holding - If the parts are being held in the stockroom or another location until the date of the installation, you may select this option then in the next field type in the location of where the parts are being held. Once the parts are handed off to an Installer, you will open the Job record and take the parts out of holding and select the name of the Installer taking the parts. This is done from the Job Issues form. The In Holding and Holding Location fields are optional.
- Holding Location - If the In Holding option is selected, type in the location of where the parts are being stored; you may type up to 255 characters into this field.

The lower grid area will fill in with all parts listed on the Job Materials List that have not yet been issued to the Job where the Stock flag is checked on the Job Materials list. If all parts are being issued at this time, click the Apply button located at the lower right of the form.
If not all parts are being issued at this time, change the quantity to the correct quantity being issued. If any of the parts are not being issued, change the quantity to zero or highlight the entire part line and press delete on your keyboard to remove the part from the issue transaction.

When finished making the quantity changes, click the Apply button located at the lower right of the form.

The next time parts are issued, only the parts remaining to be issued will display on the Issue List.

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