Issue Parts to a Job from the Inventory Module

Last Modified on 01/11/2023 2:37 pm EST

Follow the steps below to issue parts to a Job from the Inventory Module.

1. From the Main Application Menu navigate to Inventory and select the Issue/Returns menu option.

2. The Issue Parts form will be displayed. Fill in the form; click the Save button when finished.

- In the upper left of the form, select the Job radio button.
- In the Warehouse field, from the drop-down list, select the warehouse from which parts are being issued.
- In the Job Number field, either type in the Job Number then press the tab key on your keyboard, or click on the binoculars button to the right of the field to look up the Job Number.
- Select the appropriate Phase Code from the drop-down list.
- In the Memo field you may type in a note regarding the issue transaction. This information is viewable from the Part Journal. You may type up to 255 characters into this field.
- The Issue Date will default to today's date; this may be changed if necessary as long as the date entered is in an open accounting period.
- Select the Job Category from the drop-down list.
- 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.

Parts List - 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.