

Take Parts Out of Holding

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

If parts for a Job were previously put into a Holding Area when receiving a Purchase Order or Issuing parts from a Warehouse, once the parts are given to an Installer to take to the Job site, you will perform a take out of holding transaction.

Follow the steps below to take parts out of Holding.

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.
5. The Part Issue form will be displayed. In the Upper right of the form under the Previous Issues section, highlight the Issue transaction record that put the parts into a holding area. Only issue transactions that display the Take Out of Holding button may be taken out of holding.

In the Installer field, select the Installer name from the drop-down list to whom the parts are being given, then click the Take out of Holding button located at the bottom of the form.

Click the Apply button when finished.