

Editing a Part Setup

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The setup information for a Part may be edited if the User has the appropriate security permissions granted. Refer to the User Group Security topic for more information on security permissions for the Inventory module.

□ **Important Note:**

Any information in the Part Setup may be modified, however the User making the change should first confer with management to ensure the change will not have an unwanted impact in other areas of the application. For example if the default Sales Price or Service Prices is changed, this will affect any new Jobs created where parts will be invoiced and will affect the part price that will default into Service Tickets for parts. If your company is using the Standard Costing Method and a change is made to the part Standard Cost for a warehouse where on-hand inventory exists, this will generate a transaction posting the the general ledger for the difference in part value.

If your company is not using Stock Tracking and the User has permissions to access and edit parts, when accessing a part from the Parts Lookup form, the Part is automatically opened in edit mode to make changes.

If your company is using Stock Tracking and the User has permissions to access and edit parts, the part may be opened in edit mode from the Parts Lookup form or from a Part Explorer record. Both of these methods will be described below.

Editing a Part from the Parts Search Form

The setup information for a Part may be edited if the User has the appropriate security permissions granted.

1. Navigate to the Main Application Menu and select the Parts option from the Inventory module.
2. The Inventory Parts search form will be displayed. Locate the part to be edited; highlight the part (click once on the part number within the list) then click the Edit button located at the lower right of the form.
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3. The Part will be displayed in edit mode. You may add or modify information on any of the setup forms, with one exception. If there has been any activity on the Part, the Costing Method may not be changed; the field will be dimmed-out.

If adding a new Vendor to the Vendors form or adding a Part to the Alt. Parts form or adding a new Warehouse to the Warehouses form, make certain to click the Save button at the bottom of the Part Edit form to save the additions to the Part record.

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Editing a Part from the Parts Explorer

The setup information for a Part may be edited if the User has the appropriate security permissions granted.

1. Navigate to the Main Application Menu and select the Parts option from the Inventory module.
2. The Inventory Parts search form will be displayed. Locate and open the Part Explorer record by double-click on the part within the list.

3. Once the Part Explorer is displayed, highlight the Part Number at the top of the Part Menu Tree; right-click and select the Edit Part option.

4. The Part will be displayed in edit mode. You may add or modify information on any of the setup forms, with one exception. If there has been any activity on the Part, the Costing Method may not be changed; the field will be dimmed-out.

If adding a new Vendor to the Vendors form or adding a Part to the Alt. Parts form or adding a new Warehouse to the Warehouses form, make certain to click the Save button at the bottom of the Part Edit form to save the additions to the Part record.

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