

Parts Explorer-Part Tree Details

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This article describes each option on Part Menu Tree within the Parts Explorer.

Part Number

When highlighting the Part Number at the top of the Part Tree, the Active Pane will display most of the information from the Part Detail Setup form of the Part. Right-Clicking on the Part Number will display a list of three options which are described below.

- Right-Click Options
 - Edit Part - Selecting this option will open the Part in edit mode where changes may be made to the part setup if the User has Part Edit permissions. If the User does not have Part Edit permissions, this menu option will be grayed-out.
 - Refresh Tree - Selecting this option will refresh all part information displayed.
 - Print Stock Label - Selecting this option will display the stock label in print preview mode. Three labels may be printed for the part. The barcode is used for SedonaOffice customers who have purchased the add-on Bar Coding module.

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Warehouses

When highlighting the Warehouses tree option, the Active Pane will display a list of all Warehouses for the Part along with the quantities and values of the part in each warehouse.

- Right-Click Options
 - Add Warehouse - Selecting this option will open the Part in edit mode on the Warehouse form where additional Warehouses may be added to the Part setup. Adding a new Warehouse may be made performed if the User has Part Edit permissions. If the User does not have Part Edit permissions, this menu option will be grayed-out.
 - Refresh - Selecting this option will refresh all warehouse information displayed.

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Inactive Warehouses

When highlighting the Inactive Warehouses option, the Active Pane will display all warehouses that have been marked as inactive in the Warehouse setup.

- Right-Click Options - There are no right-click options available for this item.

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Alternate Parts

When highlighting Alternate Parts option, the Active Pane will display a list of all parts entered on the Alt. Parts form within the Part setup.

- Right-Click Options
 - Add Alternate Part - Selecting this option will open the Part in edit mode on the Alt. Part form where additional Alternate Parts may be added to the Part setup. Adding Alternate Parts may be done if the User has Part Edit permissions. If the User does not have Part Edit permissions, this menu option will be grayed-out.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Bills

When highlighting the Bills option, the Active Pane will display a list of all Bills entered for the part. Double-clicking on a record in the Active Pane will open the Vendor Bill record for viewing. If the date on which the Vendor Bill was created is in an open accounting period and the Bill has not been paid, the Bill may be modified and re-saved. Security permissions are required to edit a Vendor Bill.

- Right-Click Options - There are no right-click options available for this item.

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Direct Expense PO

When highlighting the Direct Expense PO option, the Active Pane will display a list of all open and closed Purchase Orders flagged as Direct Expense. Double-clicking on a record in the Active Pane will open the Purchase Order for viewing. If the Purchase Order has not been received or manually closed, it may be modified and re-saved.

- Right-Click Options (from Part Tree)
 - New PO - Selecting this option will open the new Purchase Order form. Creating a new Purchase Order may be performed if the User has Purchase Order permissions. If the User does not have Purchase Order permissions, this menu option will be grayed-out.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Open PO - While highlighting an item in the Active Pane, this option will open the Purchase Order for viewing. If the Purchase Order is still Open, changes may be made and then re-saved. User Permissions are required for this option.
 - New PO - Selecting this option will open the new Purchase Order form. Creating a new Purchase Order may be performed if the User has Purchase Order permissions. If the User does not have Purchase Order permissions, this menu option will be grayed-out.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Purchase Credits

Highlighting this option will display a list of all Vendor Credits created for parts Returned to a Vendor for the part. Double-clicking on a record in the Active Pane will open the Vendor Credit record for viewing. If the date on which the Vendor Credit was created is in an open accounting period and the Credit has not been applied to a bill, certain information on the Vendor Credit may be modified then re-saved. Security permissions are required to edit a Vendor

Credit.

- Right-Click Options (from Part Tree)
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Open Purchase Credit - While highlighting an item in the Active Pane, selecting this option will open the Vendor Credit for viewing. If the User does not have the appropriate permissions, this menu option will be grayed-out.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Purchase Price Variances

Highlighting this option will display a list of all cost variances posted to the G/L for the part. If an A/P Bill is entered for an amount that is different than the amount at which the part was received on the Purchase Order, the variance will automatically post to the Purchase Price Variance G/L account (SedonaSetup/Inventory Setup).

Double-clicking on a record in the Active Pane will open the Bill record which generated the variance transaction.

- Right-Click Options - There are no right-click options available for this item.

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Journal

Highlighting this option will display a list of all transactions affecting the on-hand quantities and values for the part in all warehouses.

- Right-Click Options
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Price History

Highlighting this option will display a list of all Bills from all Vendors, entered for the part with a unique unit cost.

- Right-Click Options
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Receipts

Highlighting this option will display a list of all Part Receipt transactions for the part. Double-clicking on a record in the Active Pane will open the Part Receipt record for viewing. If the date on which the part was received is in an open accounting period and a bill has not been posted to A/P for the receipt, the Part Receipt may be modified and re-saved. User permissions are required to edit a Part Receipt.

- Right-Click Options (from Part Tree)
 - Add Receipt - Selecting this option will open the Part Receipt form to receive an Open Purchase Order.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

- Right-Click Options (from Active Pane)
 - Add Receipt - Selecting this option will open the Part Receipt form to receive an Open Purchase Order.
 - Open Receipt - While highlighting an item in the Active Pane, selecting this option will open the Part Receipt form for viewing. If the date on which the part was received is in an open accounting period and a bill has not been posted to A/P for the receipt, the Part Receipt may be modified and re-saved. User permissions are required to edit a Part Receipt.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Repair Orders

Highlighting this option will display a list of all open and closed Repair Orders for the part. Double-clicking on a record in the Active Pane will open the Repair Order record for viewing. If the Repair Order is in an Open status, it may be modified and re-saved.

- Right-Click Options (from Part Tree)
 - Add Repair Order - Selecting this option will open the new Repair Order form.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Add Repair Order - Selecting this option will open the new Repair Order form.
 - Open Repair Order - While highlighting an item in the Active Pane, selecting this option will open the Repair Order form. If the Repair Order has not yet been received, changes may be made and then re-saved. User permissions are required to edit a Repair Order.
 - Receive Repair Order - While highlighting an item in the Active Pane, selecting this option will open the Part Receipt form to receive the Open Repair Order.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Returns

Highlighting this option will display a list of all Return to Vendor records created for the part. Double-clicking on a record in the Active Pane will open the Part Return record for viewing. If a Vendor Credit has not been entered for the Part Return and the date of the return is in an open accounting period, it may be modified and re-saved.

- Right-Click Options - There are no right-click options available for this menu option.

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Sales Credits

Highlighting this option will display a list of all Customer Credit Memos generated for the part. Double-clicking on a record in the Active Pane will open the Credit Memo record for viewing.

- Right-Click Options (from Part Tree)
 - Add AR Credit - Selecting this option will open the new Credit Memo form. User permissions are required

to create a Customer Credit Memo.

- Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Add AR Credit - Selecting this option will open the new Credit Memo form. User permissions are required to create a Customer Credit Memo.
 - Open AR Credit - While highlighting an item in the Active Pane, selecting this option will open the Customer Credit Memo form for viewing. If the date on which the Credit Memo was created is in an open accounting period, and the Credit Memo has not been applied to any Invoices, the Credit Memo may be modified and re-saved. User permissions are required to edit a Customer Credit Memo.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Sales Invoices

Highlighting this option will display a list of all Customer Invoices on which the part was sold. Double-clicking on a record in the Active Pane will open the Invoice record for viewing.

- Right-Click Options (from Part Tree)
 - Add Invoice - Selecting this option will open the new Invoice form to create a Miscellaneous Invoice. User permissions are required to create a Customer Invoice.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Add Invoice - Selecting this option will open the new Invoice form. User permissions are required to create a customer Invoice.
 - Open Invoice - While highlighting an item in the Active Pane, selecting this option will open the Invoice form for viewing. If the date on which the Invoice was created is in an open accounting period, and no payments have been applied to the Invoice, the Invoice may be edited and re-saved; the only exception would be Job Invoices. User permissions are required to edit a Customer Invoice.
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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Service

Highlighting this option will display a list of all Service Tickets on which the part was used. Double-clicking on a record in the Active Pane will open the Service Ticket for viewing. If the Resolution code is displayed as N/A, this indicates your company is using WIP for service tickets and the ticket has not yet been invoiced or closed.

- Right-Click Options - There are no right-click options available for this menu option.

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Transfer

Highlighting this option will display a list of all Transfer transactions performed for the part.

- Right-Click Options (from Part Tree)
 - Add Transfer - Selecting this option will open the Part Transfer form which is used for single part transfers. This is different than the Transfer Requests found on the Inventory main application menu. User permissions are required to transfer a part from one warehouse to another. For detailed instructions on performing single part transfers, refer to the following topic link: [Part Transfers](#).
 - Refresh - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)

If there are any Open Transfer Requests listed in the Active Pane, then highlight a row in the Active Pane to view the Right-Click options. If there are no Open Transfer Requests listed, the Right-Click options are not available.

- Add Transfer - Selecting this option will open the Part Transfer form which is used for single part transfers. This is different than the Transfer Requests found on the Inventory main application menu. User permissions are required to transfer a part from one warehouse to another. For detailed instructions on performing single part transfers, refer to the following topic link: [Part Transfers](#).
- Open Transfer - Selecting this option will open the Transfer Request form. Some information on the Transfer Request may be modified and re-saved if necessary.
- Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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In Holding

Highlighting this option will display a list of all Part Issues to Jobs that have been placed in a Holding location.

- Right-Click Options - There are no right-click options available for this menu option.

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Vendors

When highlighting the Vendors option, the Active Pane will display a list of all Vendors entered on the Vendors form within the Part setup; these are the Vendors from which the part may be ordered on a Purchase Order.

- Right-Click Options (from Part Tree)
 - Add Supplier - Selecting this option will open the Part in edit mode on the Vendors form where additional Part Suppliers may be added to the Part setup. Adding Vendors may be done if the User has Part Edit permissions. If the User does not have Part Edit permissions, this menu option will be grayed-out.
 - Refresh Part - Selecting this option will refresh the information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
 - Add Supplier - Selecting this option will open the Part in edit mode on the Vendors form where additional Part Suppliers may be added to the Part setup. Adding Vendors may be done if the User has Part Edit permissions. If the User does not have Part Edit permissions, this menu option will be grayed-out.

- Open Supplier - While highlighting a Vendor listed in the Active Pane, selecting this option will open the Vendor record in edit mode. Permissions are required to edit a Vendor.
- Refresh Part - Selecting this option will refresh the information displayed in the Active Pane.

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Documents

When highlighting Documents from the menu tree, the Active Pane will display a list of all documents attached to the Part record. Double-clicking on a Document listed in the Active Pane will open the document for viewing. Your company must subscribe to the add-on module SedonaDocs to be able to attach documents. The SedonaDocs Scanner Interface option must be purchased to be able to scan and attach documents.

- Right-Click Options
 - Add Existing Document - Selecting this option will open the Document Add form where the User will title and locate the document to be attached to the part. For more details on attaching documents, refer to the Client Management module topic [SedonaDocs](#).
 - Scan New Document - Selecting this option will open the SedonaDocs Scanner Interface. For more details on scanning and attaching documents, refer to the Client Management module topic [SedonaDocs](#).

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