Parts Explorer-Warehouse Level

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

When expanding the tree of a single Warehouse, several options are displayed; each option will be covered below.

Open Purchase Orders
Highlighting this option will display a list of all open Purchase Orders in the Active Pane. 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
  - 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.

Closed Purchase Orders
Highlighting this option will display a list of all closed Purchase Orders in the Active Pane. Double-clicking on a record in the Active Pane will open the Purchase Order for viewing; closed Purchase Orders may not be modified.

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

Journal
Highlighting this option will display a list of all transactions affecting the on-hand quantities and values within the warehouse.

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

Purchase Credits
Highlighting this option will display a list of all Vendor Credits created for parts Returned to a Vendor for the selected warehouse. 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, the Vendor Credit may be modified and re-saved. Security permissions are required to edit a Vendor Credit.

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

Purchase Price Variances
Highlighting this option will display a list of all cost variances posted to the G/L for the part within the selected warehouse. 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 account.
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 menu option.

Receipts
Highlighting this option will display a list of all Part Receipt transactions for the warehouse. If the amount displayed in the Total Receipt column is greater than the amount in the Part Amt column, this indicates there was more than one part on the Part Receipt record. 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
  - 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.

Repair Order
Highlighting this option will display a list of all open and closed Repair Orders for the warehouse. 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
  - 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.

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

- Right-Click Options
  - 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.

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

- Right-Click Options
    - Add Invoice - Selecting this option will open the new Invoice form to create a Miscellaneous Invoice. User permissions are required to create a Invoice.
    - Refresh - Selecting this option will refresh the information displayed in the Active Pane.

Transfers - Open
Highlighting this option will display a list of all Open Transfer Requests for the selected warehouse.

- Right-Click Options

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.

Transfers - Closed
Highlighting this option will display a list of all Open Transfer Requests for the selected warehouse.

- Right-Click Options

If there are any Closed 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 Closed 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. This form is displayed in view-only mode; no changes may be made to closed transfers.
- Refresh - Selecting this option will refresh the information displayed in the Active Pane.

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 item.

Committed

Highlighting this option will display a list of all Jobs where the part is listed on the Job Materials List, is flagged as a stock item and the part has not yet been issued to the Job. Once the parts are issued to the Job, they will no longer be displayed in the Committed list.

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