Warehouse Explorer Tree Options

The Warehouse Tree is used to view transactional history for a warehouse and perform certain functions related to the warehouse. Some of the menu options have right-click options available; each option and any available right-click options will be defined below.

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Warehouse

When highlighting the name of the Warehouse at the top of the Warehouse Tree, the Active Pane will display a list of all open Purchase Orders and Repair Orders. Any of these open orders displayed may be opened by double-clicking on the item within the Active Pane.

- Right-Click Options
    - Edit Warehouse - Selecting this option will open the Warehouse in edit mode.
    - Refresh Tree - Selecting this option will refresh all information displayed in the Active Pane.

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Parts

When highlighting the Parts tree option, the Active Pane will display a list of all parts that have been linked to the Warehouse within a Part Setup record. Within the Active Pane the current on-hand quantities and values are displayed for each part along with the unit cost of the part. This list may be re-sorted by clicking on any of the column headers. Double-clicking on any Part within the Active Pane will open the Part Explorer record for that part number.

There are options available when right-clicking on the Parts option from the Warehouse Tree and by right clicking in the Active Pane after clicking on the Parts Tree option.

- Right-Click Options (from Warehouse Tree)
    - Load Parts to Grid - This option is typically used when setting up a new Warehouse. You have the ability to copy the entire parts list from another warehouse into the currently viewed warehouse. When this option is selected, a list of all active warehouses will be listed from which to select. This option is typically used when setting up a new Technician warehouse and the new warehouse will contain all or most of the same parts as another Technician warehouse. Using this option eliminates the process of having to access each individual part and linking the new warehouse to the part. For more detailed instructions on this topic ref**er to the link.**
    - Stock Adjustment - Selecting this option will open the Stock Adjustment form for the lowest alpha-numeric part number on the parts list to perform a stock adjustment. If the you are not adjusting the stock for this part, you will need to highlight a part in the Active Pane, right-click then select the Stock Adjustment option to adjust that part.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.

- Right-Click Options (from Active Pane)
    - Open Part - While highlighting a Part and selecting this option will open the Part Explorer for the part.
    - Edit Part - While highlighting a Part and selecting this option, the Part will open in Edit Mode. User permissions are required for this option. If you do not have Part Edit permissions, this option will be dimmed-out.
    - Load Parts to Grid - - This option is typically used when setting up a new Warehouse. You have the ability to copy the entire parts list from another warehouse into the currently viewed warehouse. When this option is selected, a list of all active warehouses will be listed from which to select. This option is typically used when setting up a new Technician warehouse and the new warehouse will contain all or most of the same parts as another Technician warehouse. Using this option eliminates the process of having to access each individual part and linking the new warehouse to the part. For more detailed instructions on this topic refer to the link:
    - Stock Adjustment - Selecting this option will open the Stock Adjustment form for the lowest alpha-numeric part number on the parts list to perform a stock adjustment. If the you are not adjusting the stock for this part, you will need to highlight a part in the Active Pane, right-click then select the Stock Adjustment option to adjust that part.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.

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Negative Parts
When highlighting the Negative Parts tree option, the Active Pane will display a list of all parts where the on-hand quantity has gone negative. Negative on-hand quantities most typically occurs in Technician warehouses which can be caused by a part transfer not being completed or the incorrect part number entered on a Service Ticket. The information displayed for this menu option is provided for the purpose of tracking down how the part went negative and to determine what action needs to be taken to remove the negative on-hand situation. Negative oh-hand quantities may be handled by transferring the part from another warehouse or performing a stock adjustment. The method used for correcting negative values should be according to your company policy and procedures.
There are no Right-Click options available for the Negative Parts menu tree option, however when highlighting a part in the Active Pane there are right-click options available:

- Right-Click Options (from Active Pane)
    - Open Part - While highlighting a Part and selecting this option will open the Part Explorer for the part.
    - Edit Part - While highlighting a Part and selecting this option, the Part will open in Edit Mode. User permissions are required for this option. If you do not have Part Edit permissions, this option will be dimmed-out.
    - Load Parts to Grid - This option is typically used when setting up a new Warehouse. You have the ability to copy the entire parts list from another warehouse into the currently viewed warehouse. When this option is selected, a list of all active warehouses will be listed from which to select. This option is typically used when setting up a new Technician warehouse and the new warehouse will contain all or most of the same parts as

another Technician warehouse. Using this option eliminates the process of having to access each individual part and linking the new warehouse to the part. For more detailed instructions on this topic refer to the link:

- Copy Parts from one Warehouse to Another
- Stock Adjustment - Selecting this option will open the Stock Adjustment form for the lowest alpha-numeric part number on the parts list to perform a stock adjustment. If the you are not adjusting the stock for this part, you will need to highlight a part in the Active Pane, right-click then select the Stock Adjustment option to adjust that part.
- Refresh - Selecting this option will refresh all information displayed in the Active Pane.

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Purchase Orders

When highlighting the Purchase Orders tree option, the Active Pane will display a list of all open and closed Purchase Orders; this is the Purchase Order history list. This list may be re-sorted by clicking on any of the column headers. Double-clicking on any Purchase Order within the Active Pane will open the Purchase Order for viewing. Right-click options are available from the Warehouse Tree and the Active Pane; these will be described below.

- Right-Click Options (from Warehouse Tree)
    - New PO - Selecting this option will open a blank Purchase Order form.
    - Receive PO - Selecting this option will open the Part Receipt form for the lowest open Purchase Order Number in the list; if this is not the desired Purchase Order, you will need to highlight the correct Purchase Order in the Active Pane, right-click then select the Receive PO option.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
    - Open PO - While highlighting a Purchase Order and selecting this option will open the Purchase Order form.
    - New PO - Selecting this option will open a blank Purchase Order form.
    - Receive PO - Selecting this option will open the Part Receipt form for the Purchase Order highlighted in the Active Pane.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.

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Purchase Price Variances

When highlighting the Purchase Price Variances tree option, the Active Pane will display a list of all variances that have been recorded to the general ledger due to a bill being entered for an amount that differed from the receipt cost. Employees responsible for maintaining the standard costs on inventory parts should regularly review this list to determine whether it is time to change part standard costs. Double-clicking on an item within the Active Pane will display the transaction (A/P Bill or Part Receipt etc.) that created the variance.

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

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Repair Orders

When highlighting the Repair Orders tree option, the Active Pane will display a list of all open and closed Repair Orders; this is the Repair Order history list. This list may be re-sorted by clicking on any of the column headers. Double-clicking on any Repair Order within the Active Pane will open the Repair Order record for viewing.

- Right-Click Options (from Warehouse Tree)
    - Add Repair Order - Selecting this option will open a blank Repair Order form to create a new Repair Order.
    - Receive Repair Order - Selecting this option will open the Part Receipt form for the lowest open Repair Order Number in the list; if this is not the desired Repair Order to be received, you will need to highlight the correct Repair Order in the Active Pane, right-click then select the Receive Repair Order option.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.
- Right-Click Options (from Active Pane)
    - Add Repair Order - Selecting this option will open a blank Repair Order form to create a new Repair Order.
    - Open Repair Order - Selecting this option will open the Repair Order highlighted in the Active Pane.
    - Receive Repair Order - This option is only available if the highlighted Repair Order has not been closed. If the Repair Order is Open, the Part Receipt form will open to enter the receipt information.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.
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Transfers - Open

When highlighting the Transfers-Open tree option, the Active Pane will display a list of all Open Transfer Requests. This list may be re-sorted by clicking on any of the column headers. Double-clicking on any Transfer Request within the Active Pane will open the that record for viewing. Right-click options are only available from within the Active Pane.

- Right-Click Options (from Active Pane)
    - Add Transfer - Selecting this option will open the Transfer Request form where you may setup a new Transfer Request.
    - Open Transfer - Selecting this option will open the Transfer Request record highlighted in the Active Pane.
    - Refresh - Selecting this option will refresh all information displayed in the Active Pane.
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Transfers - Closed

When highlighting the Transfers-Closed tree option, the Active Pane will display a list of all Closed Transfer Requests. This list may be re-sorted by clicking on any of the column headers. Double-clicking on any Transfer Request within the Active Pane will open the that record for viewing. Right-click options are only available from within the Active Pane. Note: Transfer Requests were introduced to SedonaOffice with version 5.6.219 in June of 2014. All transfer transactions created prior to updating to this version of the software will appear in the Closed Transfer list. When opening one of these older transactions, it may appear it was created/received using a Transfer Request. In order to migrate over to Transfer Requests (at the database level), when upgrading to 5.6.219, a script processed which created "fictitious" Transfer Request records for all prior part transfers.

- Right-Click Options (from Active Pane)

- Add Transfer - Selecting this option will open the Transfer Request form where you may setup a new Transfer Request.

- Open Transfer - Selecting this option will open the Transfer Request record highlighted in the Active Pane.

- Refresh - Selecting this option will refresh all information displayed in the Active Pane.

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Journal

When highlighting the Journal tree option, the Active Pane will display a list of all transactions affecting the on-hand quantities and values within the warehouse. This list may be re-sorted by clicking on any of the column headers within the Active Pane.

The only Right-Click option available for the this menu option is the Refresh option which is available when right-clicking from the Warehouse Tree or within the Active Pane.

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