Adding Parts to a Ticket

Last Modified on 01/11/2023 3:38 pm EST

If Inventory Parts were used on a Ticket, it is important to make certain the inventory is being relieved from the correct warehouse.

When adding a Part to a Ticket, the default warehouse will be the Warehouse linked to the Technician scheduled to the Ticket. If the parts are being pulled from a different location, you need to make certain to change the warehouse.

When adding parts to a Ticket, if a Technician Appointment has not yet been created, you must select the warehouse for the part. Once you know which warehouse was used, this may be changed later.

If more than one of your company's Technicians is scheduled to the Ticket, when adding parts to the Ticket, you need to make certain the correct warehouse is selected for the part.

Note: The first column on the Part line labeled Stock, will automatically be checked. This indicates the part will be removed from the Warehouse selected on the part line. If your company is using WIP (work in process), once the Part line is saved to the ticket, the part will be removed from the warehouse inventory. If not using WIP, the part will be removed from inventory when the ticket is invoiced or closed, depending on your company settings.

Un-checking the Stock checkbox would only be done if you need to order the Part. When creating a Purchase Order from the Ticket, the software checks to see if any parts on the Service Ticket Parts list have the Stock checkbox de-selected; if so, you are able to create a PO for the part(s).

To add parts to a Ticket, click on the Equipment and Parts button from the ribbon. This form is divided into two tiers. The upper tier labeled Customer Equipment Detail, displays any parts that are a part of the installed equipment list for the System. The lower tier labeled Service Ticket Parts, is where parts used on the ticket are added.

Click the New button located at the lower right of the form. A line will open in the lower tier. The Warehouse will default, but may be changed depending on the location of where inventory is to be relieved.

In the Part field either type in the exact part number or click the ☐ lookup button to the right of the field to search for the part. Once a part number has been entered or selected from the lookup, the sales price will automatically fill in. The part price may be overridden if necessary. Enter the quantity to be used on the ticket. Click the Save button when finished with the part line. If additional parts need to be added, click the New button again and repeat the process as the first part line.

When finished, click the Save button at the lower right of the form.