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Enter an Inventory Part

Module: Inventory

Screen: Inventory Part Profile

1. Click New

2. Enter Part Number
3. Enter Description
4. Select Class, Commodity, Item
5. Select UOM
6. Select UOM Fractional Yes/No
7. Click Save
Enter a New Bin Location

Module: Inventory

Screen: Warehouse Bin Definition

1. Click New

2. Enter Bin Number
3. Enter Description
4. Select Warehouse

If a part number exists in the bin, follow steps 5-9:

5. Select Part
6. Enter Minimum Quantity
7. Enter Maximum Quantity
8. Enter Reorder Level
9. Enter Reorder Quantity
10. Click Save

Quantity Requirements:
- Minimum Quantity must be less than Maximum Quantity
- Reorder Level + Reorder Quantity must be less than or equal to Maximum Quantity
Add an Inventory Part to a Bin

Module: Inventory

Screen: Warehouse Bin Definition

1. Click Edit

2. Select Part
3. Enter Minimum Quantity
4. Enter Maximum Quantity
5. Enter Reorder Level
6. Enter Reorder Quantity
7. Click Save

Quantity Requirements:

- Minimum Quantity must be less than Maximum Quantity
- Reorder Level + Reorder Quantity must be less than or equal to Maximum Quantity
Enter a Counter Release without a Pick Ticket

Module: Inventory

Screen: Counter Release

1. Click New

2. Enter Description
3. Select Warehouse, if not defaulted
4. Select Released By
5. Select Released To
6. If all items are going to the same work order, enter Default Work Order
7. Click Add
8. Select Part
9. Select Bin, if not defaulted by part selection
10. Enter Work Order and Phase, if not defaulted from step 6
11. Enter Released Quantity
12. To add another item, click Add and repeat steps 8-11
13. Click Done to return to the counter release

14. Click Save
Enter a Counter Return

Module: Inventory

Screen: Counter Return

1. Click New

2. Enter search criteria for counter release (transaction number, part, work order, etc.)

3. Click Execute

4. Select counter release transaction number
5. Select Returned By
6. Select Returned To
7. If all items are to be returned, click Return All and proceed to step 11
8. Click the line item to return

9. Enter Return Quantity
10. Click Done to return to the return
11. Repeat steps 7-9 for additional lines
12. Click Save
Enter a Purchase Request for Stock Items

Module: Work Management
Screen: Purchase Request

1. Click New
2. Enter Description (optional)
3. Enter Work Order and Phase
4. Enter Date Needed
5. Select Requested By (optional)
6. Select Deliver To (optional)
7. Click Add
8. Select “Add Stock Part by Warehouse”
9. Click Next
10. Select Warehouse
11. Select Part
12. Enter Quantity
13. To add another item, click Add and repeat steps 8-12
14. Click Done to return to the Purchase Request

15. Change the status to APPROVED REQ
16. Click Save
Alternate method to enter a Purchase Request for Stock Items

Module: Work Management

Screen: Phase

1. Click Purchase Request

2. Work Order and Phase will default

3. Proceed with above process, omitting step 3
Enter a Pick Ticket

Module: Inventory

Screen: Pick Ticket

1. Click New

2. Select Warehouse

3. Click Load Purchase Request
4. Select Purchase Request items (note: only lines on the same work order/phase can be loaded on one pick ticket)
5. Click Done

6. Click the line item to review and make edits, if needed
7. Change the status to FINALIZED
8. Click Save
Enter a Counter Release with a Pick Ticket

Module: Inventory

Screen: Counter Release

1. Click New

2. Enter Description (optional)
3. Select Warehouse, if not defaulted
4. Select Released By
5. Select Released To
6. Click Load

7. Enter search criteria
8. Click Execute
9. Check boxes next to each pick ticket line to load
10. Click Next

11. If the release quantity is different from the pick ticket quantity, click the line item

12. Update the Released Quantity
13. Click Done
14. Click Save