How to Manually Issue Parts to a Work Order

Last Modified on 07/01/2024 6:43 pm EDT

1) Log into the work order in question and make sure you are in non-edit mode (if you see a red void button in your upper right corner you are in edit mode, pushing the cancel button here will take you to non-edit mode)

MANAGELY			Customers Customer Sear	ch: name - cust #		۹.		0	🗘 👔 Erick Stecke
Home Accounts Receivable Customers	Work Order 13738	4 ♀ Abc Store	e 👔 Burglar Alarm - 123					Complete X C	ancel O Void
	\$0.00	Status -	Completed ·	Contract		•	Salesperson -	Justin DeBaggis	
\$ Payments + C* RMR	\$0.00 Parts	System	Burglar Alarm - 123 × •	Requested By	Requested By		Service Level •	Comm T&M -1	
Work Orders	\$0.00	Tax • Type •	CC - 9.5550% · Service Cell ·	Email	essteckel@gmail.com		Template Billing Customer	Detault WorkOrder Customer Search: name - cust #	ו
Calendar C	QU.00	Description	arsoo	PO Number Work Order Date	Purchase Order 3/22/2024	3			
Collections		Warehouse	•	Technician	Steckel, Erick	× •			
inventory	Appointments Items & D	eposits Part 1	ts Part Kits RMR Billing 0 0 0	Notes System 0 0	Notes Documents 0	Custom Fields	Timesheets Ta 0	aska O	
GLReports	Billing Invoices 0								
🌻 Setup	Do Not Invoice on Deliver Invoice on	•			Credit Card			•	+ NewCC
	Activation Date Activation Next Invoice Date Next Invoice Date	ition Date		6	Printed Name	Printed Name		•	+ New LC
	Override Warranty				Signature		Clear		
< Collapse							@ 2024 Bold	Group Enterprise Plus BestSe	curity Version 5.3.35.25

2) Click on the parts tab, Click the Issue/Return tab and then push the + issue parts button in blue



3) Fill out the fields as shown below and then push the green Save button in the upper right corner

MANAGELY	Customers	Customer Search: name - cust #		⑦ 4 grick Steckel
Home Annumte Danaiusibile	< Parts Issue			Save X Cancel
 Accounts Payable 	Issue/Return + Issue	* Warehouse DEFAULT	X • Category	•
👗 Inventory 👻	Project Search: project # - customer name Work Order • 13738 - Cnewy Stockel	Issue Date S/22/2024 Phase	Memo	9770
Warehouses				
Issues & Returns	Parts			and the second second
T RMA	Part Code I Part Description	1	Warehouse : Quantity Remaining Quantity On Hand Issue	e Quantity
S Part Ledger ● eForms →	125 125		DEFAULT 1 -28	1 0
🖬 GL				
C Reports				
🌣 Setup				
	x x 1 x x			+ 1 - 1 of 1 items
< Collapse			© 2024 Rold Group Enterprise Plus	BestSecurity Version 5.3.35.25

4) You will receive a message that "Issue request is saved successfully"

Home Accounts Received Customers Customers Customers Prevents Proposals Cusendar Candet Cusendar Const Physike Cusendar Candet Cusendar Cus	• Stackal, Chewy - 3704 • Add Store • March Store	Type Requested By Prone Propose Next Appointment Next Appointment Tachhida	Server Call Serv	Sales Package - Sales Package - Base - Increment 1 Labor 9 Ball Arter 6 Warranty Fabra 3 Description -	Tasks Tekstory omm TEM -1 omm TEM -1 omm of Marranty o Day	Deliver/Print
b Invoices c Reprints	Source for the source	Type Requested By Phone Email 9. PONumber 10. Proposal Work Onder Date Next Appointment Technician Tax	Service Call - - - service Call - - esteckel@gmail.com / March 22, 2034 March 22, 2034 March 22, 2034 Excl. Stockel Excl. Stockel	Sales Package - Service Level C Base - Increment II Labor S Bill After 6 Warranty Labor N Warranty Parts 3 Description -	omm TGM -1 5 min. 90 000 o Warranty 0 Day	
💑 Inventory	Texas Valuation Professionals, to 2020 Water formo Prove Alter, 17 Mi024	Work Order Template Salesperson	Default WorkDrder Justin DeBaggis	Contract - Billing Customer - Bill To Address -		
 ercema Appendix Reports Certup Certup<th>positionants Remain Corporation Prints 1 Print Rat Billing Owary 15 Inseal/Reform RMA Constructs 0 Coportion Success Verticide 1 PertPosicyCon 1 Verselhouse 1 ZonetLocation 1 Prese 23 123 00/26,57</th><th>Orders Notes 0</th><th>System Parts Bystem Holdes 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0</th><th>Purchase Orders 0</th><th>Sta Work Order Hast 3 Custom Orid Layout Ouantity Remaining I 0</th><th>Plarts \$0.00 Rate \$0.00</th>	positionants Remain Corporation Prints 1 Print Rat Billing Owary 15 Inseal/Reform RMA Constructs 0 Coportion Success Verticide 1 PertPosicyCon 1 Verselhouse 1 ZonetLocation 1 Prese 23 123 00/26,57	Orders Notes 0	System Parts Bystem Holdes 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Purchase Orders 0	Sta Work Order Hast 3 Custom Orid Layout Ouantity Remaining I 0	Plarts \$0.00 Rate \$0.00

5) Repeat as necessary and when you close out the work order you will receive a message informing you that the "work order successfully closed"



If you do not issue the parts manually Managely will issue them automatically and you will receive this message upon closing the work order -

Non Issued Parts	×	
If you continue, remaining unissued parts will be issued. Do you still want to continue?		
Yes No		
RMR Billing Notes System Notes	Doci	un