

How to Change Service Tickets to use Warehouse or Technician for Parts

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The example below will show how to change between using a warehouse or technician for the parts.

Overview

The following steps can only be done with a user that has the permissions to change the field. If the field shown is grayed out, then that user does not have the permission necessary to do these steps. Please either ask your supervisor to give you those permissions, or have a user that does change between options.

Steps:

1. Example Service Ticket#: 9865 shows using Warehouse in the Equipment and Parts tab

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2. To change to the technician, so the warehouse the technician is assigned to will be used; close the service ticket – Click on Service Options Tab in Service

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3. In the Parts Warehouse Option – it is showing Warehouse as being selected. To change to Technician – Click on Technician

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4. This will automatically change the option for all service tickets. So once a technician is dispatched, that technician will show in the Parts and Equipment.

5. To see the change, reopen the Service Ticket, in our example: 9865 and Click on Parts and Equipment and now the Technicians Name is displaying instead of the Warehouse.

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