

How to Add Parts from Tech Trucks (Warehouses) into Jobs

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There are times where techs may have to use other parts on a job that was not assigned prior to the tech going on site. This can cause some confusion on what parts need to be either added to the job or keep the inventory balanced. Below are the steps to take to lessen manual entry and fix physical counts being off with techs trucks/warehouses.

Overview

There prerequisites that need to be done prior to using the steps below.

1. Make sure the Installer/Tech has their Truck assigned to them in SedonaSetup – Installer/Technician on the Service Tab assign the warehouse that is their truck.

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2. If the warehouse assigned is the Main Warehouse, then jobs will only pull out of the Main Warehouse.

3. This Warehouse needs to be set whether the tech is just an Installer or not.

4. Make sure the Tech has the permissions to add parts in Sedona-X.

Steps:

1. When the tech is logged into the job via Sedona-X – Click on the ... more to move into the area where the option to select materials is available

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2. Click on Materials – Then in the Materials screen – click on + to add a part

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3. In the Search Parts – Enter the part that is needed - Click the circle to add that part -- also notice the Warehouse where the parts is pulling from. This example shows the Techs Warehouse and not the main warehouse

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4. Once added can select the part to change the quantity needed by clicking on the Edit pencil to open the part to change the quantity

5. Once changed you can see how many of the part is being used by opening the part

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6. The tech can write a note if needed saying what was added

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7. Open the job in SedonaOffice – Click on Materials – here is where the new parts have been added to the job.

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8. Click on Tools – Parts Reconcile – this is where the parts were also added, however they will show out of balance

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9. In the Tools - Click on Issue/Returns in the Job

10. To balance the Parts Reconcile, will need to add the issue of the parts by Clicking on New button

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11. Fill in the Techs Warehouse – Phase Code – Issue Date (make sure date is the date used from tech truck) – Memo (if needed)

12. The Part filled in automatically after tabbing out of the Memo Field

13. Click on Apply to add the Issue of the parts used from the Techs Truck

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14. After clicking on Apply the new issued parts will show in the Previous Issues Box

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15. Open the Part Reconcile and should show the part is now also balanced

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16. The Tech Warehouse will also now show correct in the parts journal showing where 5 strikes were used on this job and no manual adjustment was needed other than adding the issue to the job from that truck

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