

How to Copy Parts from One Warehouse to Another

05/16/2024 6:37 pm EDT

Overview

The Warehouse Explorer is used to view the most current information related to a Warehouse. Transaction history for various functions is viewable and many inventory type transactions may be performed directly from the Warehouse Explorer. This form is divided into three panes of information; the Warehouse Tree, Warehouse Setup Information, and the Active Pane.

□

Definitions of each pane which comprise the Warehouse Explorer.

1. Warehouse Tree

The Warehouse Tree is used to view transactional history for a warehouse and perform certain functions related to the warehouse.

2. Warehouse Setup Information

The Warehouse Setup Information pane displays the information contained within the setup of the Warehouse. The information displayed will only change if a User makes any changes to the Warehouse setup.

3. Active Pane

When the Warehouse Explorer is first opened, all open Purchase Orders and Repair Orders will be displayed in this pane. When clicking an option on the Warehouse Tree, the Active Pane will display the information available for the selected option. When certain Warehouse Tree Options are selected, you are able to drill down into the information displayed in the Active Pane such as Purchase Orders, Repair Orders, Transfers.

Copy the Parts List

This option is typically used when setting up a new Technician or Installer Warehouse. You have the ability to copy the entire parts list from another warehouse into the currently viewed warehouse. When this option is selected, a list of all active warehouses will be listed from which to select. Using this option eliminates the process of having to access each individual part and linking the new warehouse to the part.

Steps:

1. Open the newly created Warehouse Explorer.
2. From the Warehouse Tree, click on the Parts option, right-click and select the *Load Parts to Grid* option.
3. A grid form will be displayed containing no Parts. At the bottom of the form is a drop-down field labeled "*Load Parts From*". Click on the drop-down list and select the Warehouse from which to copy the list of parts for this new Warehouse.

□

4. The Part grid will fill in with all the parts linked to the warehouse selected (in step 3). If there are certain parts in the list that you do not want to be linked to the new warehouse, highlight the part row in the grid area then press the delete key on your keyboard. If there are several parts that you want to remove from the list, highlight the first part row then hold down the CTRL key on your keyboard while highlighting additional part rows; press the delete key on your keyboard once all rows for deletion have been selected.

- ***You have one opportunity to remove un-wanted parts from the grid; if you do not delete any parts before saving you will not be able to remove the parts later.***

□ □

5. When finished with the Parts Grid, click the Save button located at the lower right of the form.

6. A confirmation message will be displayed asking if you are ready to save the parts in the grid; click on the Yes button to proceed.

□

7. The Warehouse Explorer of the new warehouse will be displayed with the Parts added in the Active Pane.