

# How to Manually Issue Parts to a Work Order

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)

The screenshot shows the MANAGELY Work Order 13738 interface. The top navigation bar includes 'Home', 'Accounts Receivable', 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'Collections', 'Accounts Payable', 'Inventory', 'eForms', 'GL', 'Reports', and 'Setup'. The left sidebar lists these categories. The main content area displays the work order details for 'Stackel, Chevy - 3704' and 'Burglar Alarm - 123'. The status is 'Completed'. The 'Billing' tab is selected, showing fields for 'Do Not Invoice', 'Delivery Invoice', 'Activation Date', 'Next Invoice Date', 'Override Warranty', 'Credit Card', 'eCheck', 'Printed Name', and 'Signature'. The 'Parts' tab is visible in the bottom navigation bar.

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

The screenshot shows the MANAGELY Work Order 13738 interface in edit mode. The top navigation bar includes 'Home', 'Accounts Receivable', 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'Collections', 'Accounts Payable', 'Inventory', 'eForms', 'GL', 'Reports', and 'Setup'. The left sidebar lists these categories. The main content area displays the work order details for 'Stackel, Chevy - 3704' and 'Burglar Alarm - 123'. The status is 'In Progress'. The 'Parts' tab is selected, showing a map of the location and a list of parts. The 'Issue/Return' tab is selected, showing a table with columns for 'Issue/Return', 'Issue/Return #', 'Date', 'Warehouse', 'User', 'Memo', and 'Phase'. A blue '+ Issue Parts' button is visible in the top right corner of the 'Issue/Return' section.

- 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: Last of

**Parts Issue** Save Cancel

Issue/Return: Issue Warehouse: DEFAULT Category:   
 Project: Search project# - customer name Issue Date: 3/22/2024 Memo:   
 Work Order: 13738 - Chevy Steekl Phase:

| Part Code | Part Description | Warehouse | Quantity Remaining | Quantity On Hand | Issue Quantity |
|-----------|------------------|-----------|--------------------|------------------|----------------|
| 125       | 125              | DEFAULT   | 1                  | -28              | 1              |

1 - 1 of 1 items

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

**MANAGELY** Issue request is saved successfully

**Work Order 13738** Edit Tasks History Review Print

In Progress Steekl, Chevy - 3704 ABC Store Burglar Alarm - 123

Service Fee \$0.00 Labor \$0.00 Parts \$0.00 Total \$0.00

Map: Spring Creek Pkwy, Spring Creek, TX 75226

Details:

- Type: Service Call
- Requested By: -
- Phone: -
- Email: esteckel@gmail.com
- PO Number: -
- Proposal: -
- Work Order Date: March 22, 2024
- Next Appointment: Mar 22, 2024, 2:08:42 PM
- Technician: Erick Steekl
- Tax: OC - 75550%
- Work Order Template: Default WorkOrder
- Salesperson: Justin DelBaggis
- Sales Package: -
- Service Level: Comm TSM - 1
- Base: -
- Increment: 15 min
- Labor: \$90.00
- Bill After: 60 min
- Warranty Labor: No Warranty
- Warranty Parts: 30 Day
- Description: -
- Contract: -
- Billing Customer: -
- Bill To Address: -

Appointments: 0 Items & Deposits: 0 Parts: 1 Part Kits: 0 RMR: 0 Billing: 0 Change Orders: 0 Notes: 0 System Parts: 0 System Notes: 0 Zones: 0 Purchase Orders: 0 Site Work Order History: 3

Order Parts Export to Excel

| Part Code | Part Description | Warehouse | Zone/Location | Phase | Vendor | Quantity Required | Quantity Available | Quantity Issued | Quantity Remaining | Rate   |
|-----------|------------------|-----------|---------------|-------|--------|-------------------|--------------------|-----------------|--------------------|--------|
| 125       | 125              | DEFAULT   |               |       |        | 1                 | -29                | 1               | 0                  | \$0.00 |

Custom Grid Layout Parts \$0.00

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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”

**MANAGELY** Work Order successfully closed and invoice generated.

**Work Order 13738** Edit Tasks History Invoice Review Print

Completed Steekl, Chevy - 3704 ABC Store Burglar Alarm - 123

Service Fee \$0.00 Labor \$0.00 Parts \$0.00 Total \$0.00

Map: Spring Creek Pkwy, Spring Creek, TX 75226

Details:

- Type: Service Call
- Requested By: -
- Phone: -
- Email: esteckel@gmail.com
- PO Number: -
- Proposal: -
- Work Order Date: March 22, 2024
- Next Appointment: -
- Technician: Erick Steekl
- Tax: OC - 75550%
- Work Order Template: Default WorkOrder
- Salesperson: Justin DelBaggis
- Sales Package: -
- Service Level: Comm TSM - 1
- Base: -
- Increment: 15 min
- Labor: \$90.00
- Bill After: 60 min
- Warranty Labor: No Warranty
- Warranty Parts: 30 Day
- Description: -
- Contract: -
- Billing Customer: -
- Bill To Address: -

Appointments: 0 Items & Deposits: 0 Parts: 1 Part Kits: 0 RMR: 0 Billing: 0 Change Orders: 0 Notes: 0 System Parts: 1 System Notes: 0 Zones: 0 Purchase Orders: 0 Site Work Order History: 3

Billing Invoices 1

Do Not Invoice: ☐ OFF

Deliver Invoice: ☐ OFF

Activation Date:

Next Invoice Date:

Override Warranty: ☐ OFF

Credit Card:

eCheck:

Printed Name:

Signature:

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

