Moving Returns Back to a Work Order Directly

From a work order, edit any material line. There is now a new blue Returned Items source button below the part description and manufacturer boxes.

Press this button to open a search window for a list of your 'Items To Be Returned.' This is the same list of returns as seen from 'Purchases' in your main ribbon.

This window has various tools to help you narrow down your search results. It will also pull over any information entered into your material line's part number, description, manufacturer, and quantity box.

Home General Service Package Utility		Demo - Darren - Protractor.Net Shop Manager				_ 5 X		
Serve & Delete Post Print. Service Post Post Post Post Post Post Post Post	Aut Aut Aut Aut Aut	thorization Disclaimer Deposit Financing Work	Appointment Time Reassign To Promised Time Protecharge * Parchase Order Note					
Prioritization × WO - 1432 - Hartman, Scott × Purchases ×						v		
Service					👗 🥥	»		
					Tasks	* 📥		
 Disc Brake Rotors, Front 					- Collapse All			
Remove and Replace components as required to access and install materials, and/or perform needed service, adjustments as required. Additional fluids may be required to complete this service. Retest and verify repair as required. Perform final road test where 😰 Review Service Packages								
applicable.					🛤 Batch Add Material			
Labor			0 Hour \$158.50 / Hour	\$0.00	Warranty			
DISC Brake Rotor			2 Unit \$0.00 / Unit	\$0.00 C2S	➤ Delete Service Package Line			
			Returned Item Search			×		
Total Parts	General							
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General Source Other Charges Tags Format	Close New Search	w						
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Part Number	Manufacturer							
Manufacturer		-						
🖉 Lookup Required 💽 🛞 📁 🐊	1							
Definition Disc Brake Rotor 🖘 🗙	1					- 11		
Unit Cost \$ 0.00	Date V Type Source	Supplier Part umber	Description Manufacturer	Quanti Unit Cost	Core Total FET	4		
MSRP \$ 0.00	12/30/23 Part Purchase	O'Reilly Auto Parts 580000RGS	BRAKE ROTOR O'REILLY/BRAKEBEST/S ELECT	2 Unit 92.990	00 0.0000 \$185.98 \$0.00			
Core Status Returned *						- 61		
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	4							
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Work Order Deferred Work Inspections History Analysis	Labor Hour Purchases				NEIRSE - 2003 Toyota Corolla LE	-		
					R. 0 Dessee Millions	(B) and 1 100 100		

Important things to know:

- 1. The quantity field will be locked from editing after hitting 'draw' on a material from returns.
- 2. If you wish to change the quantity, edit the material line, then click the 'source' tab. From here, press 'Clear Source' next to the green In Stock display.

Prioritization × WO - 1432 - Hartman, Scott ×	Purchases ×		
Service			
Disc Brake Rotors, Front Remove and Replace components as required to a applicable.	ccess and install materials, and/or perform needed service, adjustments as required. Additional fluids may be required to complete this service	. Retest and verify repair as required. Perform	i final road test where
Labor	0 Hour	\$158.50 / Hour	\$0.00
Disc Brake Rotor	2 Unit	\$0.00 / Unit	\$0.00 C25
	Material Line	× Sub	\$0.00
Total Parts Total Labor Total Before Taxes & Miscellaneous Charges	General Source Other Charges Tags Format Source Returned Item In Stock [Clear] S80000RGS BRAKE ROTOR Undo OK Cancel	Total	\$0.00 \$0.00 \$0.00 \$0.00

- 3. If you wish to change to a different quantity, you must enter the desired quantity into the material line quantity box before sourcing a return. You can do this by returning to the 'General' tab after clearing the source as well.
- 4. Once you source a material from returns and press OK and save the work order, the quantity from returns will be reduced by the number you added to the work order. Nothing will be committed until the work order is saved. At this point, the ledger will also create an entry moving the material from 'Returned Items' to 'Parts Received for Work In Progress' (using default system ledger mapping).
- 5. Performing any of the following actions will reverse the ledger entry and revert the material quantity in 'Items to be Returned' back to its original quantity:
 - a. Deleting the work order
 - b. Deleting the material line and pressing save
 - c. Moving the service package to deferred work with the returned item still sourced, then posting the work order to an invoice