View and Move Customer Inventory to a New Work order

- Click on the Customer icon. The Customer Screen will appear displaying all customers.

- From the Customer Screen, double click on the Customer to open the Customer Detail Screen.
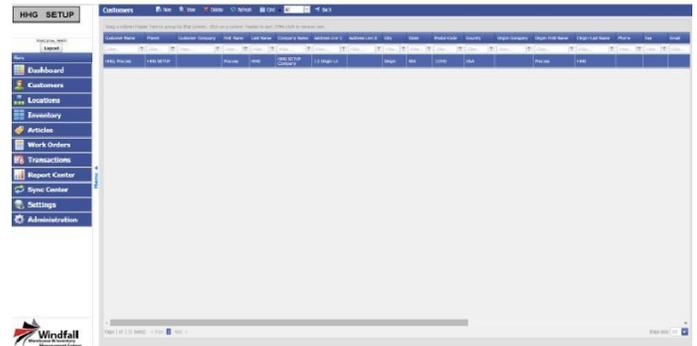
- Click on the Inventory Tab for this specific customer.
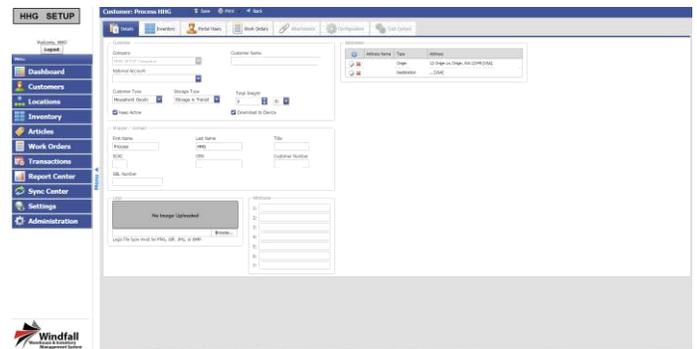
- From the selected Customer Inventory Tab, select the pieces to move. Then, click on the Move Button and select Move to New Work Order.
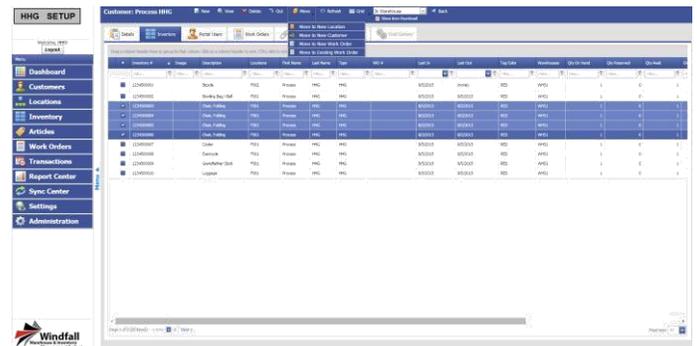
- From the Add Inventory to Work Order Box, you can select/change a warehouse and the carrier.

- Once you have chosen the warehouse and carrier select the Save Button

- In the Add Inventory to Work Order Box it will tell you if the line items were added to the Work Order, and the Work Order Number, or it will say if they were not added to a Work order
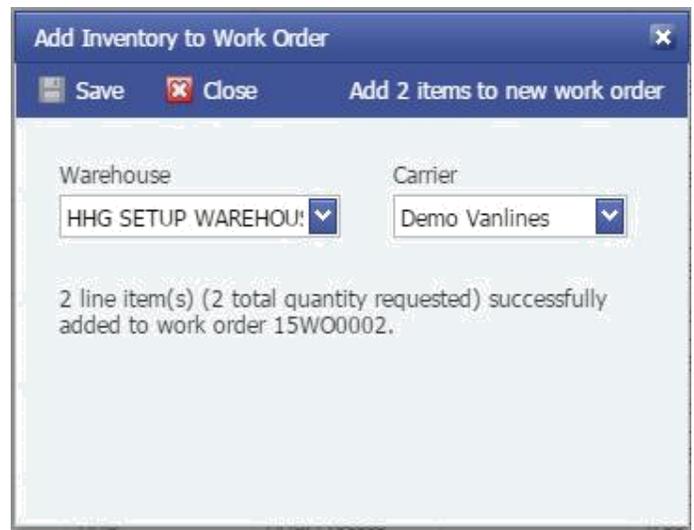
View and Move Customer Inventory to an Existing Work order

- From the selected Customer Inventory Tab select the pieces to move. Then click on the Move Button and select Move to Existing Work Order.
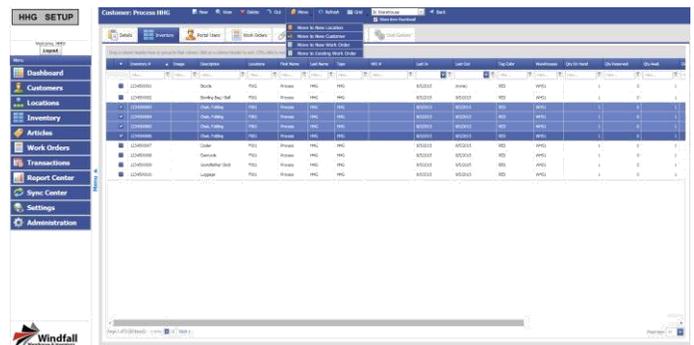
- From the Add Inventory to Work Order Box you will select the Work Order that you want the selected piece(s) to go on.

- In the Add Inventory to Work Order Box it will tell you if the line item(s) were added to the Work Order, or it will say if they were not added to a Work Order