Create a Counter Release

A Counter Release is created to release stock parts to a technician. A Counter Release can be created from a Pick Ticket or done directly to release stock parts to a technician (and charged to a Work Order/Phase).

1. From the menu, under Inventory Management – Counter Release



- 2. Click Counter Release hyperlink and then click
 - a. Alternatively, you can click ⁺ from the menu.
- 3. This will bring you to the Counter Release screen.

Save Cancel						
View	1044		Last Edited by SCOTT LLOYD On 10/13/22 9:56 AM	Reference Number		
Extra Description				Warehouse	۹	
Related Documents						
				Total Cost		\$0.00
	Released By	Q				
	Released To	٩				
	Release Date	Oct 13, 2022 👘				
			Default Work Order	٩	Q	
	Line Items				Remove Load	Add
	Line Part	Description	Bin	Released Returne	ed Work Order Phase	Pick Ticket

- 4. You will need to fill in:
 - a. Warehouse
 - b. Released By
 - c. Released To
- 5. If there is an existing Pick Ticket to use:

a. Click Load

AiM Load Pick Tickets

Б	Recute Basic Search	
*		Operator
0	Transaction	= 🗸
~	Description	contains 🗸
<u>⊷</u>	web order	
	work Order	= • Q
	Phase	= • Q
	Region	= v Q
	Facility	= v Q
	Property	= v Q
	Location	= v Q

- b. You will get a query screen you can use to find the Pick Tick you need. (If you know the Pick Ticket number, put in the **Transaction** field.)
- c. Click Execute

AiM L	oad Pick Tickets								SCOTT	0	•
Don	e Cancel										
	Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Drawn Quantity		Released	l Quantity
	1008	1	W2000036	001	P1296	X1 07 P1296	2.0000	0.0000			0.0000
	1008	2	W2000036	001	P1161	X3 07 P1161	1.0000	0.0000			0.0000
	<u>1013</u>	1	W2000036	001	P3104	W2 02 P3104	2.0000	0.0000			0.0000
	<u>1019</u>	1	W2000093	001	TAW332	BB1 05 TAW332	1.0000	0.0000			0.0000
~	<u>1019</u>	2	W2000093	001	TAW516	BB1 05 TAW516	1.0000	0.0000			0.0000

- d. You will get a list of eligible Pick Tickets.
- e. Click the checkbox of all the Pick Tickets items you want to release.

|--|

Save Cancel View 1045 Extra Description Related Documents NEW LIGHT FIXTURE IN OFFICE	
View 1045 Last Edited by SCOTT LLOYD On 10/13/22 10:08 AM Reference Number Image: Comparison of the c	
Related Documents STORES STORES	
CTODEC WADELOUICE	
Total Cost	\$0.00
Released By ANTEQUER Q	
BEATRIZ ANTEQUERA Released To CALVOA Q	
ANDREW CALVO Release Date Oct 13, 2022	
Default Work Order Q Q	
Line Items Remove Load	Add
Line Part Description Bin Released Returned Work Order Phase Pick Tick	et
1 TAW332 WRENCH, ALLEN 3/32 IN BB1 05 TAW332 0.0000 W2000093 001 1019	
2 TAW516 WRENCH, ALLEN 5/16 IN BB1 05 TAW516 0.0000 W2000093 001 1019	

- g. Update any fields on this screen as needed.
- h. Click the Line Item hyperlink and enter the quantity to release.

AiM Counter Release Line	e Item					scott 🚯 🚱
Done Add	Cancel					
View	1			Last Edited by SCOTT LLOYD On 10/13/22 10:02 AM		
Account Setup	Part	TAW332 Q	Work Order	(W2000093 Q)	Transaction	1019
	Bin	881 05 TAW332 Q		NEW LIGHT FIXTURE IN OFFICE		
		WRENCH, ALLEN 3/32 IN	Phase	[001 Q]		NEW LIGHT FIXTURE IN OFFICE
	Unit Cost	\$10.1900		NEW LIGHT FIXTURE IN OFFICE		
	Inv. UOM	EA	Released Quantity	1.0000	Line	1
	Quantity on Hand	10.0000				
	Equipment			Asset		

- i. Update the other fields on this screen bin, work order, and phase as needed.
- j. Click Done
- k. To complete the Counter Release click
- 6. When there is no Pick Ticket and you just need to add drawn stock, you can manually add new line items:
 - a. If all materials will be released to the same Work Order and Phase, you can select the Work Order and Phase in the Default Work Order box. If there is only one Phase on the Work Order it will automatically populate.

~	1046		Last Edited by DALLAC	E UNGER On 6/7/22 6:2	3 PM Referen	nce Number			
ra Description ated Documents					Wareh	ouse	B-S MAIN	Q	
			12				B-S MAIN		
					Total C	ost			:
	Released By	TBERGDOR Q							
	Released To	TIMOTHY BERGDORF							
	Release Date	ABIGAIL BREWSTER Jun 7, 2022							
				Default Work Order	W0001147	Q (00	1	Q	
	Line Items						Remove	Load	Ado
	Line Part	Description	Bin		Released	Returned Work O	Drder	Phase	Pick Ticket

AiM Counter Release Line	ltem					SCOTT	0	•
Done Add	Cancel							
View	3			Last Edited by SCOTT LLOYD On 10/13/22 10:12 AM				
Account Setup	Part	٩	Work Order	٩	Transaction			
	Bin	٩						
			Phase	Q				
	Unit Cost							
	Inv. UOM		Released Ouantity		Line			
	Quantity on Hand	0.0000	,					
	Equipment		Q	Asset	Q			

c. Search for the stock item using the Part field, click ${}^{ extsf{Q}}$

AiM	Inventory Part Profile		
Б	kecute Reset		
*		Operator	
Q	Part Description	= ♥ contains ♥	
₩	Class	= 🗸	
=	Commodity Item	= v	
	Туре	= •	
	UOM Green	= •	
		<u> </u>	

d. On the Inventory Part Profile screen, enter the criteria necessary to find the stock item you are looking for. Click to execute the query.

AIM Inventory Part		
Done Search	Show All Cancel	
<u>Part</u> ↓	Description	Green
<u>P1015</u>	GREASE, PREMALUBE RED P/N 10032840	No
<u>P5251</u>	NYLUBE ELEVATOR 2 SPEED ELEVATOR FAN (X12F-9	No
<u>P8156</u>	FLUID FILM 11.75 OZ SPRAY MEDECO P/N PX-KYLUBE-11	No

e. Click the Part hyperlink to add the part to the Counter Release Line Item. Clicking the hyperlink will return you to the Counter Release Line Item.

AIM Counter Release Line	ltem					SCOTT	0	•
Done Add	Cancel							
View	3			Last Edited by SCOTT LLOYD On 10/13/22 10:12 AM				
Account Setup	Part	P8156 Q	Work Order	(W2000082 Q)	Transaction			
	Bin	M4 01 P8156 Q		1135BRD - EMERGENCY LIGHT FLASHING				
		FLUID FILM 11.75 OZ SPRAY MEDECO P/N PX-	Phase	001 Q				
	Unit Cost	\$14.9500		1135BRD - EMERGENCY LIGHT FLASHING .				
	Inv. UOM	EA	Released Quantity	1.0000	Line			
	Quantity on Hand	12.0000						
	Equipment			Asset				

- f. Enter the Released Quantity.
- g. If this is the last part you want to add, click Done. To add another part, click Add

AIM Counter Release					SCOTT	0	0	•
Save Cancel								
View	1045		Last Edited by SCOTT LLOYD On 10/13/22 10:08 AM	Reference Number				
Extra Description	NEW LIGHT FIXTURE IN OF	FICE		Warehouse	STORES			
neated bocuments					STORES WAREHOUSE			
		7779		Total Cost				\$73.47
	Released By ANTE	EQUER Q						
	BEATR	RIZ ANTEQUERA						
	Released To CALV	VOA Q						
	ANDR	EW CALVO						
	Release Date Oct 1	13, 2022 🛗						
			Default Work Order	٩	Q)		
	Line Items	1			Remove	Load	A	Add
	Line Part	Description	Bin	Released Return	ned Work Order	Phase	Pick Ticke	et .
	1 TAW332	WRENCH, ALLEN 3/32 IN	BB1 05 TAW332	1.0000 0.0	000 W2000093	001	1019	
	2 TAW516	WRENCH, ALLEN 5/16 IN	BB1 05 TAW5 16	1.0000 0.0	000 W2000093	001	1019	
	□ <u>3</u> P8156	FLUID FILM 11.75 OZ SPRAY MEDECO P/N PX-KYLUBE-11	M4 01 P8156	1.0000 0.0	000 W2000082	001		

h. To complete the Counter Release click