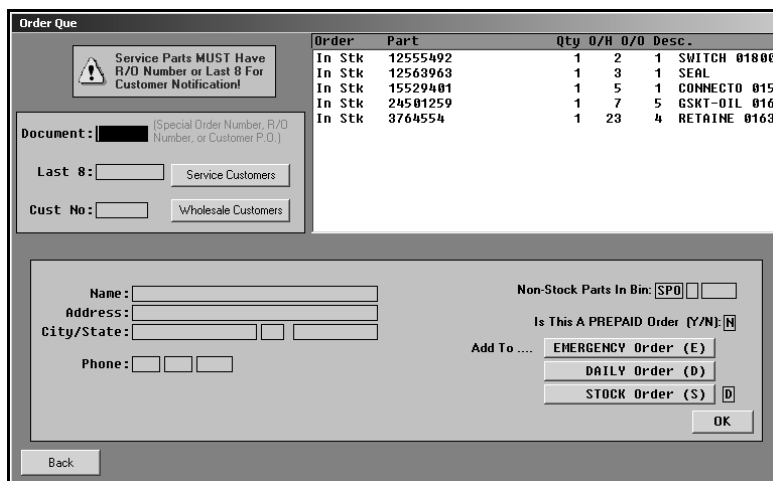# Chapter 9 Order Que

The Order Que allows you to generate a special parts order quickly. You add parts to the Order Que from the Parts Queries screen. Once you add parts to the Order Que, you can view and edit the order from the Resupply & Returns menu. When you generate a resupply list, you pull the parts in the Order Que to the resupply list and convert the list into a purchase order. At that time, the corresponding parts in the Order Que are moved to a processed Order Que list. When the parts order arrives and the purchase order is receipted into inventory, the corresponding parts in the processed Order Que are flagged "I" for "in stock." You can print customer notices for the in-stock parts from the Order Que menu. Finally, once the customer comes in to pick up the parts or brings a vehicle in for service, you pull the parts from the Order Que to a counter slip or repair order.

Adding Parts to the Order Que

You begin by creating a parts list on the Parts Queries screen. You can manually type a list or select a saved list or pre-built list. Once you create the list, you dump the list to the Order Que.

1. Click **Queries** on the Parts Inventory main menu.

2. In **Part Number**, type the part numbers for the parts you want to order, or select an existing parts list using the **Get List** or **Pre-Built Lists** button. As you add parts to the Parts Queries screen, you can verify quantities and pricing information for parts as needed.

3. When you are finished generating the parts list, click **Dump To**. The Dump To screen appears.

4. Click **Dump To Order Que**. The system advances you to the Order Que screen.

5. The window on the right side of the screen displays a list of the parts that will be added to the Order Que. The Order column indicates if each part is in stock or needs to be ordered order. Click a part to toggle the status from "In Stk" to "Order" (and vice versa).

6. Type the document number for the order. This is the special order number, repair order number, or customer purchase order number. If there is no document number related to the order, or if your dealership does not have a standard method of numbering documents, press ENTER to advance through this field, and the program will automatically generate a document number consisting of the day of the month, hour, and minute the order was created.

7. Next, you have three options depending on who ordered the parts:

   A. If the parts are for a service customer, type the last eight characters of the VIN in **Last 8**, or click **Service Customers** to search for the customer. If you typed an existing repair order number for the document number, the **Last 8** field automatically fills in with the last eight characters of the VIN entered on the repair order. For Service customers, you must enter either the repair order number as the document number or last eight characters of the VIN so the system can match the order with the appropriate repair order number when the order is pulled to the repair order.

   B. If the parts are for a wholesale customer, type the customer's account number in **Cust No**, or click **Wholesale Customers** to search for the customer.

   C. If you press ENTER to advance through both the **Last 8** and **Cust No** fields, "Stock" automatically fills in the **Customer No** field, and "(Stock Order)" automatically fills in as the customer's name. This allows the program to flag the order as a stock order. Since the order is not for a customer, the program will automatically remove the order from the Order Que when the purchase order is receipted into inventory.

8. If you selected a service or wholesale customer, the customer's name, address, and phone number automatically fill in the fields on the bottom of the screen.

9. If the parts are non-stocked parts, type the Bin, Drawer, and Shelf where the parts should be stocked when they arrive. The Bin automatically defaults to SPO for non-stocked parts.

10. Indicate if this is a pre-paid order. Type **Y** for yes or **N** for no.

11. Click the button that corresponds to the type of order this is: **Emergency Order (E)**, **Daily Order (D)**, or **Stock Order (S)**. The corresponding letter will fill in the field next to the buttons. You use the order type you assign the order on this screen to specify which orders you want to pull to the current resupply list when you generate a parts order.

12. When you are finished, click **OK**.

13. When prompted, click **All Parts** to send all parts on the list to the Order Que or **Flagged Parts** to send only the parts flagged "Order" to the Order Que.

14. When prompted to print the order, you have two options:

    A. Click **Skip** to skip printing the order. The system returns you to the Dump To screen.

    B. Click to select **To Printer** to print the order or **To Screen** to view the order on your screen. Type the number of copies you want to print, and click **Print**. The system returns you to the Dump To screen.

15. Click **Back** to Close the Dump To screen.

16. If you are finished working on the Parts Queries screen, click **Exit**.

Viewing the Order Que

Use the **View Order Que** button on the bottom of the Parts Queries screen to display a list of the active and processed order ques. The top part of the screen lists the processed orders (orders pulled to a resupply list and orders stocked into inventory), and the bottom of the screen lists the active orders (orders added to the order que that still need to be added to a resupply list).

Understanding the Order Status

The **Status** column in the Processed Order Que section identifies the order status. The status changes as the order moves through the order process. There are five possible status options:

- **On Order:** The order has been placed but not receipted into stock. This status also appears as **O** when viewing the Order Que in various areas of the Parts module.

- **Stocked In:** The order has been receipted into inventory but not delivered to the customer. This status also appears as **I** when viewing the Order Que in various areas of the Parts module.

- **Sold:** The order has been pulled to a counter slip or repair order and, therefore, delivered to the customer. This status also appears as **S** when viewing the Order Que in various areas of the Parts module.

- **Partial:** The full order quantity has not been received. Once the complete order is receipted into inventory, the status will change to **Stocked In**. This status also appears as ***** when viewing the Order Que in various areas of the Parts module.

- **Pulled:** The order has been pre-paid, ordered, receipted, and delivered to the customer. Pulled Orders will clear from Order Que after the parts update to Accounting. This status also appears as **P** when viewing the Order Que in various areas of the Parts module.

Inquiring on an Ordered Part

While viewing the Order Que, you can use the **Inquire On Ordered Part** button on the bottom of the screen to search for a specific part. This is useful for quickly checking the status of a part. You have the option of searching for the part based on the part number or customer's phone number to expedite the search based on the information available for the ordered part.

1. Click **Inquire On Ordered Part**. The Inquire On Ordered Part screen appears.

2. Type the part number or customer's phone number. Do not include the area code when searching based on the customer's phone number.

3. The screen displays all of the parts in the order que for that match the criteria you specified. The screen will separate parts on order from parts that have been processed into inventory.

```
Inquire On Ordered Part
Part No.          Desc.     P.O.     Date    Name          Phone    Ord  B/O  O/H
1234567                     031708  03/24/08  JAMES M WALT 555-8585   1          0

------------------------ (Parts Listed Below Have Been Processed In) -------------------------




   Close       Part Number: 1234567            Phone Number:
```

4. Click **Close** to close the screen.

Processing Special Orders

1. Click **Resupply & Returns** on the Parts Inventory menu.

2. Click **Generate Order List** on the Resupply and Returns menu.

3. Click **View Generated List** on the Generate Order List menu.

4. Make sure the list is blank, and click **Back** to close the screen.

5. Click **Pull Order Que To List** on the Generate Order List menu.

6. The window at the top of the screen lists all of the parts in the order que. You can click the order type for each part number to change the order type so the part numbers can be added or excluded from the current order based on the order type you want to pull.

7. When you are satisfied with the list, indicate the parts you want to pull from the order que. Type **E** for emergency only, **D** for daily only, **S** for stock order only, or **A** for all parts in the que. All parts flagged with appropriate order type will be pulled to the generated list.

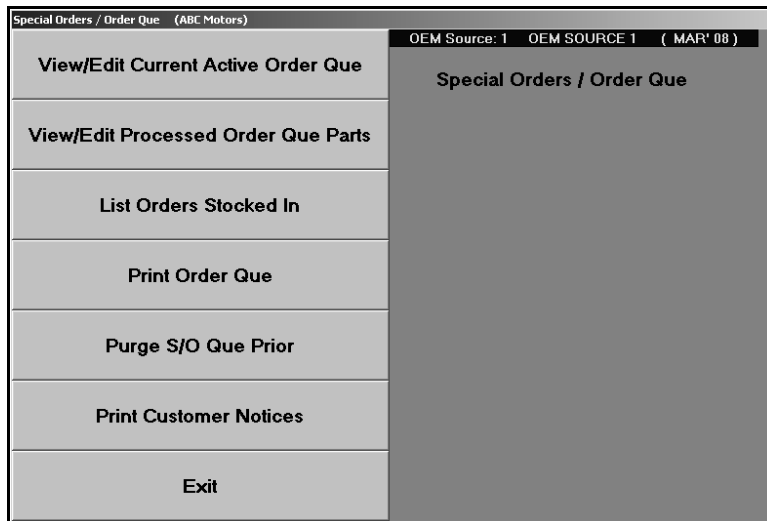8. The system returns you to the Generate Order List menu.

> **Important:** Only pull the order que to the generated list once. If you pull the order que multiple times, the parts quantities will be multiplied by the number of times you pull the order.

9. Click **View Generated List** on the Generate Order List menu.

10. Confirm this is the list of parts you want to order, and click **Back** to close the screen.

11. Click **Exit** on the Generate Order List menu.

12. Click **Enter Purchase Orders** on the Resupply and Returns menu.

13. Click **Update List Into A P.O.** on the Resupply Purchase Orders menu.

14. Type the P.O. number or order document number you want to assign the completed list of parts pulled from the Generate Order List section of software. Some manufactures may dictate certain criteria that must be used to assign these document numbers.

15. Next, indicate where these parts are being purchased from. This information is recorded to track how purchases are being made for the Trend Analysis reports in the future. Type the letter that corresponds to the option you want to select.

    - **S=Stock Order:** This selection indicates you are ordering the parts from the manufacturer or normal stocking vendor. This is the system default entry.

    - **D=Dealer:** This selection indicates you are ordering the parts from another like dealer

    - **O=Outside:** This option indicates you are ordering the parts from a non-OEM supplier.

16. Click **OK** when prompted to verify you want to update the P.O.

17. Click **Print A Purchase Order** on the Enter Purchase Orders menu.

18. The system displays a list of available purchase orders that have been entered in the system. Type the P.O. number, or click the purchase order in the list.

19. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

20. Click **Exit** until you are back at the Parts Inventory menu.

21. Click **Utilities**, and send the order to the manufacturer, if applicable.

Accessing the Order Que

The Order Que is a part of the Resupply section of the Resupply & Returns menu. The Order Que menu provides options that allow you to view and edit the current and processed special orders. In addition, you can print a list of stocked orders and print customer notices. To access the Order Que,

1. Click **Resupply & Returns** on the Parts Inventory main menu. The Resupply and Returns menu appears.

2. Under Resupply, click **Order Que–Special Order**. The Special Orders/Order Que menu appears.

Viewing the Active Order Que

The first button on the Special Orders/Order Que menu allows you to view and edit the current active orders. The current Order Que is a list of parts that have been entered into the Order Que but that have not been pulled to an order.

1. Click **View/Edit Current Active Order Que**. A list of the parts in the current Order Que is displayed. The screen displays the part number, quantity, source number, order type, document number, order date, customer's name, and customer's phone number. A (PP) next to a customers name indicates the order was prepaid.

```
Current Order Que   (ABC Motors)
Part                   Qty  S/T   Doc.     Date      Customer
12555492                1   1 D   191307   03/19/08  STEVE SMITH        555-1234
12563963                1   1 D   191307   03/19/08  STEVE SMITH        555-1234
15529401                1   1 D   191307   03/19/08  STEVE SMITH        555-1234
24501259                1   1 D   191307   03/19/08  STEVE SMITH        555-1234
3764554                 1   1 D   191307   03/19/08  STEVE SMITH        555-1234
10280480                1   1 D   191308   03/19/08  MARK DAVIS         555-9898 (PP)
10305686                1   1 D   191309   03/19/08  DELLIA CHRISTOPHE  555-6565
12555492                1   1 D   191310   03/19/08  STACIE TENNYSON    555-3232



            Back                     Edit                    Print Ticket            Sort By Doc
```

2. The program automatically sorts the list by part number. Click **Sort By Doc** in the bottom right-hand corner of the screen to sort the list by document number. The button description changes to **Sort By PN**. Click the button to sort the list by part number again.

3. Click **Back** to return to the Special Orders/Order Que menu.

Printing a Ticket

You can print an order (ticket) as needed using the **Print Ticket** button. The button is unavailable until you click a part in the list. The printout includes all parts included on the original order.

1. Click to select the order/ticket in the list. If there are multiple parts on an order, click any part from the order. Remember, the printout includes all parts included on the original order.

2. Click **Print Ticket**.

3. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

4. Once you select your print type, click **Print**.

Editing the Active Order Que

You can edit the active Order Que in three ways. You can edit the order quantity, delete a part from the Order Que, or delete an entire order/document. This allows you to adjust an order before pulling it to a resupply list.

Editing the Order Quantity

1. Click **View/Edit Current Active Order Que**.

2. Click **Edit** on the Current Order Que screen. The Edit Order Que screen appears.

3. In **Part**, type the part number for the part you want to edit, or click the part in the list on the right side of the screen. The order information fills in on the left side of the screen.

4. Edit the quantity as needed.

5. Click **Save**.

6. Click **Back** to return to the Current Order Que screen.

Deleting a Part from the Order Que

1. Click **View/Edit Current Active Order Que**.

2. Click **Edit** on the Current Order Que screen. The Edit Order Que screen appears.

3. In **Part**, type the part number for the part you want to edit, or click the part in the list on the right side of the screen. The order information fills in on the left side of the screen.

4. Click **Delete**.

5. Click **OK** when prompted to verify you want to delete the part.

Deleting an Entire Order/Document from the Order Que

1. Click **View/Edit Current Active Order Que**.

2. Click **Edit** on the Current Order Que screen. The Edit Order Que screen appears.

3. Leave the **Part Number** field blank.

4. Type the document number.

5. Click **Delete**.

6. Click **OK** when prompted to verify you want to delete the document.

Viewing the Processed Order Que

The second button on the Special Orders/Order Que menu allows you to view and edit the processed orders. The processed Order Que is a list of parts that have been pulled to an order using the **Pull Order Que To List** button on the Generate Order List menu (the first menu option on the Resupply and Returns menu) and parts that have been stocked using the Receipt Stock Orders menu (the third menu option on the Resupply and Returns menu).

1. Click **View/Edit Processed Order Que Parts**. The system displays all the processed parts orders. The screen displays the part number, quantity, source number, order type, document number, order date, customer's name, customer's phone number, and order status. (See Chapter 10 for instructions on using the Resupply feature.)

2. Type the document number or purchase order number for the order you want to view, or click the document in the list. A list of the parts for the selected order is displayed. View the information as needed.

3. If necessary, click **Print List** to print a list of the parts or **Print Labels** to print labels for the parts on the list. (Labels require a Zebra LP2844 thermal laser printer. The printer requires 1x4 labels available for purchase through Zebra.).

4. Click **Part List** to display the complete list of processed orders again.

5. Click **Exit** to return to the Special Orders/Order Que menu.

Understanding the Order Status

The **Stat** column identifies the order status. The status changes as the order moves through the order process. There are five possible status options:

- **O:** The order has been placed but not receipted into stock.

- **I:** The order has been receipted into inventory but not delivered to the customer.

- **S:** The order has been pulled to a counter slip or repair order and, therefore, delivered to the customer.

- ***:** The full order quantity has not been received. Once the complete order is receipted into inventory, the status will change to **S**.

- **P:** The order has been pre-paid, ordered, receipted, and delivered to the customer. Pulled Orders will clear from Order Que after the parts update to Accounting.

Printing a Ticket

You can print an order (ticket) as needed using the **Print Ticket** button. The button is unavailable until you click a part in the list. The printout includes all parts included on the original order.

1. Click to select the order/ticket in the list. If there are multiple parts on an order, click any part from the order. Remember, the printout includes all parts included on the original order.

2. Click **Print Ticket**.

3. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

4. Once you select your print type, click **Print**.

Editing the Processed Order Que

You can edit the processed Order Que in four ways. You can edit the order status of a single part, edit the order status of a complete order/document, delete a part from the Order Que, or delete an entire order/document. This allows you to make any necessary adjustments before printing stock lists or customer notices and before pulling orders to repair orders or counter slips.

Editing the Order Status for a Single Part

1. Click **View/Edit Processed Order Que Parts**. The system displays all of the processed parts orders.

2. Click **Edit** on the Processed Order Que Parts screen. The Edit Order Que screen appears.

3. Type the document number and part number, or click a part in the list.

4. Edit the order status. You have four options:

   - **O** for ordered,

   - **I** for in,

   - **S** for sold, or

   - **P** for picked up.

5. Click **Save Changes**.

6. Click **Back** to return to the processed Order Que List.

7. Click **Exit** to return to the Special Orders/Order Que menu.

Editing the Order Status for a Document

1. Click **View/Edit Processed Order Que Parts**. The system displays all of the processed parts orders.

2. Click **Edit** on the Processed Order Que Parts screen. The Edit Order Que screen appears.

3. Type the document number.

4. Leave the **Part** field blank.

5. Edit the order status.

6. Click **Save** Changes.

Deleting a Single Part from the Order Que

1. Click **View/Edit Processed Order Que Parts**. The system displays all of the processed parts orders.

2. Click **Edit** on the Processed Order Que Parts screen. The Edit Order Que screen appears.

3. Type the document number and part number, or click a part in the list.

4. Click **Delete**.

5. Click **DELETE** when prompted to verify you want to delete the part.

Deleting the Entire Order/Document from the Order Que

1. Click **View/Edit Processed Order Que Parts**. The system displays all of the processed parts orders.

2. Click **Edit** on the Processed Order Que Parts screen. The Edit Order Que screen appears.

3. Type the document number.

4. Leave the **Part** field blank.

5. Click **Delete**.

6. Click **DELETE** when prompted to verify you want to delete the document.
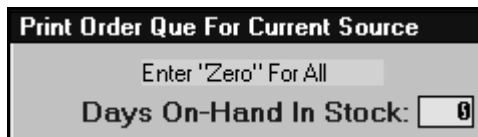
Printing a List of Stocked-in Orders

You use the third menu option to print a list of Order Que parts stocked into inventory. Again, these are the parts on purchase orders that have been receipted into the inventory. For each part stocked in, the printout lists the document number, part number, order quantity, on-hand quantity, and customer who ordered the part.

1. Click **List Order Stocked In**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

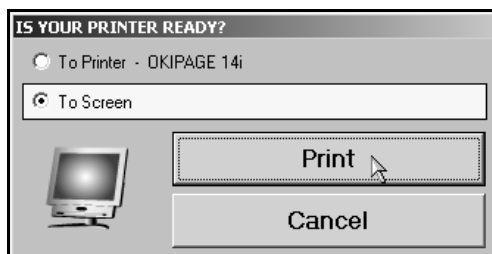3. Once you select your print type, click **Print**.

Printing the Order Que

You can print a list of parts in the processed Order Que. When you print the processed Order Que list, you have the option of specifying the number of days you want to use to filter the list. This allows you to view parts that have been in the Order Que longer than the specified number of days. If you want to print a list of all the processed orders in the Order Que, use 0 (zero) as the number of days. For each part in the Order Que, the printout lists the part number, control number, order quantity, on-hand quantity, customer who ordered the part, the customer's phone number, the order date, the stocked-in date, and the date customer notices were printed for the order.

1. Click **Print Order Que**.

2. Type the **Days On-Hand In Stock** value you want to use. This lists all parts older than the number of days specified. Use 0 (zero) to print a list of all parts in the Order Que.

    Print Order Que For Current Source

    Enter "Zero" For All
    Days On-Hand In Stock: 0

3. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

4. Once you select your print type, click **Print**.

    IS YOUR PRINTER READY?
    ○ To Printer - OKIPAGE 14i
    ● To Screen

    Print

    Cancel

Printing Customer Notices

Once an order is receipted into stock, you can print customer notices for the parts orders. The program makes note of the date when you print the customer notice and displays the date on the printed Order Que list. You can only print one customer notice at a time, so you must repeat the following instructions for each customer that needs to receive a notice.

Important: Customer notices require pre-printed postcards ordered from Autosoft International's Forms Division.

1. Click **Print Customer Notices**.

2. The screen displays a list of customers whose orders have been receipted into stock. Click the customers you want to select. You can click **Select all** to select all customer in the list.

   Click a customer again to deselect the customer, or click **Clear all** to clear all the selected customers in the list.

3. Click **Print Selected Notices**.

4. Click **Yes** when prompted to verify you want to print the selected card.

Pulling Parts to Counter Slips and Repair Orders

Once the parts are in stock, you can pull them to a repair order or counter slip. The process is quick and easy. Since all of the part information fills in from the Order Que, you do not have to retype any information. You can only view the Order Que and pull parts from the Order Que before adding parts to a counter slip or selecting a repair order.

1. Advance to the Counter Parts Sales screen or Service Parts R/O screen.

2. Click **Lists**. (If you select a repair order on the Service R/O screen or advance the cursor to the **Part Number** field on the Counter Parts Sales screen, the **Order Que** button becomes the **Emergency Stock** button, and you cannot access the Order Que.)

3. A list of parts in the processed Order Que is displayed. The screen lists the part number, quantity, inventory source for the part, document number, order date, customer's name, and order status.

4. The list is sorted by document number. Click the column headers to sort the list by part number, customer name, etc.

5. Click the order or one of the parts on an order. The window on the bottom of the screen displays the detail for the order.

6. Click **Pull To Invoice** to pull the part to the counter slip or repair order.

7. Click **OK** when prompted to verify you want to pull the order.

8. If you pulled the order to a counter slip, the Counter Parts Sales screen displays the parts. If you pulled the order to a repair order, select the repair order, and the screen displays the parts.

9. Add any additional parts as needed.

10. Generate the order, or save the repair order.

When an order is pulled to a counter slip or repair order, the part in the processed Order Que is flagged "S" for "sold." The part remains on the list until the End of Day Update. The same is true for parts flagged "P" for "picked up" and parts receipted in for stock only.

```
Processed Order Que Parts   (ABC Motors)
Part                Qty  S/T   Doc.    Date     Customer                    Stat.
12555492             1   1 D  191307  03/19/08  STEVE SMITH      555-1234   (s)   031908
12563963             1   1 D  191307  03/19/08  STEVE SMITH      555-1234   (s)   031908
15529401             1   1 D  191307  03/19/08  STEVE SMITH      555-1234   (s)   031908
24501259             1   1 D  191307  03/19/08  STEVE SMITH      555-1234   (s)   031908
3764554              1   1 D  191307  03/19/08  STEVE SMITH      555-1234   (s)   031908
10280480             1   1 D  191308  03/19/08  MARK DAVIS       555-9898   (I)   031908
10305686             1   1 D  191309  03/19/08  DELLIA CHRISTOPHE 555-6565  (I)   031908
12555492             1   1 D  191310  03/19/08  STACIE TENNYSON  555-3232   (I)   031908
```

Managing the Processed Order Que List

Customer orders remain in the processed Order Que until they are pulled to a counter slip or repair order, flagged "S" for "sold," or flagged "P" for "picked up." Orders flagged "O" for "ordered" and "I" for "in stock" remain in the processed Order Que until the status is changed or the order is pulled. Therefore, it may be necessary to remove orders from the Order Que once they become older than a certain number of days. If you do not remove these orders, they will remain in the processed Order Que indefinitely.

1. Advance to the Special Orders/Order Que menu.

2. Click **Purge S/O Que Prior**.

3. Type the date you want to use as the cutoff date. All orders dated before this date will be deleted. Type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to purge the orders.