

## Chapter 8 Parts Queries

The Parts Queries screen provides quick access to parts pricing and stocking information from inventory and the master price tape. You can create nine temporary lists. The parts numbers entered on these lists will be saved for this client station until cleared. In addition, you can create pre-built lists on this screen and save them. Then, you can pull the lists to the screen as needed. You can also create customer quotes, view the order que, and pull parts kits. Then, if needed, you can dump a parts list to a counter slip, repair order, or order que. (Please refer to Chapter 9 for information about using the order que.)

Part Number	R/Q	Location	O/H	D/O	Description	D/N	List	Retail	Estimate
058133843	1	26 E X	18		AIRFILTER 133			15.00	11.96
1J0129620	1	15 D X	10		AIRFILTER 129			16.50	10.80
1J0498625	1	25 E X	5		BEARING 498			100.70	72.50

**Tip:** Click the red marker next to the R/Q field to view detailed data for the part. See page 8:14 for instructions on viewing part data.

## Creating Part Kits

Parts kits are created in the Special Inventories. You must create the parts kits in order to be able to pull them to other areas of the program. Parts kits are used to group parts that are used together for a particular service. A parts kit can contain up to 29 parts, and the parts may be from multiple inventory sources.

While the parts kits are similar to the pre-built lists you create on the Parts Queries screen, parts kits allow you to control the pricing for the kit and allow you to set a time frame for the kit usage. Parts kits are used for customer pay and internal sales. You can create multiple parts kits that are used for the same service but set different pricing for each pay type as needed. At the time of sale, you would pull the corresponding pay-type kit to the document.

## Adding a Kit

1. Click **Special Inventories** on the Parts main menu.
2. Click **Parts Kits** on the Special Inventories menu. The Enter Parts Kits screen appears.

The screenshot shows the 'Enter Parts Kits' window for 'ABC Motors'. The main section is titled 'OEM SOURCE 1'. It contains several input fields and checkboxes:

- Part Kit ID:** A text field with a blacked-out value.
- Start Date:** Three empty boxes for MM, DD, and YY.
- End Date:** Three empty boxes for MM, DD, and YY.
- Without Cores:** A checkbox.
- With Cores:** A checkbox.
- Desc:** A text field.
- Customer Class:** A dropdown menu.
- Discount Level:** A dropdown menu.
- Update Cost Automatically?:** A checkbox.
- Total Cost:** Two text fields, one under 'Without Cores' and one under 'With Cores'.
- Total Sale:** Two text fields, one under 'Without Cores' and one under 'With Cores'.
- Ovr/Sale:** A checkbox.
- Gross Profit %:** A text field.
- Update Cost for Kit:** A button.

Below the form is a table with the following columns: Lrn, Part Number, Qty, Description, Cost, List, Price, C, S, Loc. The table is currently empty.

At the bottom of the window are several buttons: Exit, Parts Kit List, Delete Kit, Print Kit, Clear, and Save.

3. Type the ID you want to assign the kit in the **Part Kit ID** field. This field holds up to six alphanumeric characters. The kit ID appears on all documents to which you assign the parts kit.
4. Use the **Description** field to type a description for the list.
5. Type the **Customer Class** and **Discount Level** for the kit. If you will not be setting a specific price for the kit, these fields allow you to control the kit pricing based on the pricing set for the selected customer class and discount level.
6. In **Update Cost Automatically**, indicate if you want the part cost automatically updated based on the current price tape information. If you type **Y** for yes, the cost automatically updates when you run the monthly inventory update. If you type **N** for no, you will have to use the **Update Cost for Kit** button to manually update the cost as needed.
7. Specify the **Start Date** and **End Date** for the kit. This is an optional entry. If you set a time frame for the kit, the system will prompt you if you try to use a kit after the set date. You will still be able to use the kit outside of the specified time frame.
8. The **Ovr/Sale** field allows you to override the total sale so you can create a kit with a pre-set sales value, regardless of the accumulated sales values of the individual parts. Type **Y** in this field, and specify the sale price in the **Total Sale** field. The sale amount you set also overrides any pricing that would have applied if you assigned a customer class and discount level.

9. In the **Part** field, type the part number for the part you want to add to the kit. The **Description**, **Cost**, **List**, **C** (Core), **S** (source), and **Loc** (Location) fields automatically fill in with the information from the part's master inventory record.
10. In **Qty**, type the quantity of the part you want to add to the kit. For example, if you were building a list of parts used for a particular service, you could use this field to indicate the quantity of each part used during the service.
11. If you selected to use the accumulated sale for the kit rather than specifying a sale total, you can edit the price for each part as you add it to the kit. If you set an overriding sale amount, the **Price** field will be unavailable for editing.
12. Press ENTER until the part line is filed in the part window on the bottom of the screen.
13. Continue to add parts to the kit as needed.
14. The **Total Cost**, **Total Sale**, and **Gross Profit** fields automatically update as you add parts to the kit. Note that the gross profit does not include cores.
15. Click **Save** to save the kit.

### Editing an Existing Kit

1. Click **Parts Kit List**. A list of part kits appears.
2. Click the kit you want to edit. The information entered for the kit fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

### Removing a Part

1. Select the part kit as needed.
2. Click the part line.
3. Type **0** (zero) as the quantity, and press ENTER.
4. Click **OK** when prompted to verify you want to remove the part from the kit.

## Printing individual Parts Kits

1. Click **Parts Kit List**.
2. Click the parts kit you want to print. The list loads on the Enter Parts Kits screen.
3. Click **Print Kit**.
4. 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.
5. Once you select your print type, click **Print**.

## Printing all Parts Kits

When printing the complete list of parts kits, you have the option of printing a summary list or detailed list. The summary list includes the part kit ID, description, total cost, total sale, and gross profit percentage for each kit. The detailed list includes the part kit ID, description, total cost, total sale, gross profit percentage, and the part number, quantity, description, location, cost, and sale for each part in the kit. An asterisk (\*) in front of a part number indicates that the core has been set to be included with the part.

1. Click **Parts Kits List**.
2. Click **Print List** on the list screen.
3. Specify the type of list to print. Type **S** for summary or **D** for detailed.
4. 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.
5. Once you select your print type, click **Print**.

## Deleting a Kit

1. Select the part kit.
2. Click **Delete Kit**.
3. Click **OK** when prompted to verify you want to delete the record.

## Pulling Parts Kits to the Parts Queries Screen

Uses the **Parts Kits** button on the Queries screen to view available parts kits and pull parts kit to the Queries screen. You can then treat the parts kit list as you do any other list pulled to the Queries screen.

1. Click **Queries** on the Parts Inventory main menu.
2. Click **Parts Kits**. A list of parts kits displays.
3. Click **+** to view the detail for a parts kit in the list.
4. Click the parts kit you want to pull, and click **Open Kit**.
5. The parts kit fills in on the Parts Queries screen.
6. You can add additional parts to the displayed list, remove parts from the displayed list, or edit quantities as needed.

## Creating a New List on the Parts Queries Screen

You can create pre-built lists right on the Parts Queries screen. Pre-built lists allow you to create parts lists used to group parts that are used together for a particular service. These parts lists can contain up to 30 parts. You can pull the pre-built lists on the Parts Queries screen at any time to view parts pricing and stocking information for all of the parts on the list.

1. If necessary, click **Clear List** to clear the screen. The button will reflect the temporary list currently selected.
2. Click one of the **Temp List** tabs at the bottom of the screen. You can create nine temporary lists using these tabs.
3. If you will be using the data for an estimate, select the pricing level you want to use from the **Estimate-Pricing Levels** list.
4. Type the part number in the **Part Number** field. If the part is in your inventory, the remaining fields on the line fill in with the appropriate part information.

Part Number		R/Q	Location	O/H	O/D	Description	D/N	List	Retail	Estimate
058133843		1	26 E X	18		AIRFILTER 133			15.00	11.96

OEM Source: 1 TOYOTA ( SEP' 13 )  
 Estimate - Pricing Levels: None  
 Press ALT+F7 to log lost sale

- If a part has stock in both bins, a yellow check mark will appear beside the **Location** field for the part. Hold the mouse button down on the check mark to view the bins and on-hand quantities for the part.
- If a part is on order, a yellow check mark will appear beside the **O/O** field for that part. Click the check mark (or the **O/O** field) to view the Order Que. The list displays information about the order.
- At any time, type a **T** in the **Part Number** field, and the parts list entered will display temporary totals in that line.

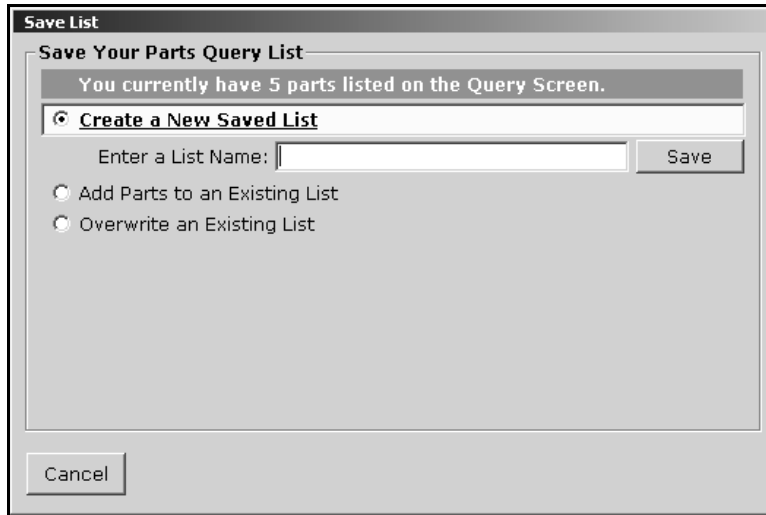
Part Number	R/O	Location	O/H	O/O	Description	D/N	List	Retail	Estimate
058133843	1	26 E X	18		AIRFILTER 133			15.00	11.96
1J0129620	1	15 D X	10		AIRFILTER 129			16.50	10.80
1J0498625	1	25 E X	5		BEARING 498			100.70	72.50
					Total			132.20	107.18

- You can click the **D/N** column header or press the HOME key to toggle the dealer net price on and off. You can also click the **List** column header to toggle the list price on and off. This feature is useful because it allows customers to view the Parts Queries screen without seeing the cost or list prices.
- The last column automatically displays the Estimate price. You can also view the Internal, Trade, and Service price by clicking the column header or by pressing F11.

Internal	Trade	Service
11.96	13.46	15.00
10.80	12.15	16.50
72.50	81.57	100.70
95.26	107.18	132.20

- Click the **Page** button to toggle the display between pages. Two pages of parts may be entered. There can be 15 parts per page. The button description identifies the page you are currently viewing.

11. Click **Save Job List**. The Save List screen appears.



**Save List**

**Save Your Parts Query List**

You currently have 5 parts listed on the Query Screen.

**Create a New Saved List**

Enter a List Name:

Add Parts to an Existing List

Overwrite an Existing List

12. The **Create a New Saved List** option should be selected.

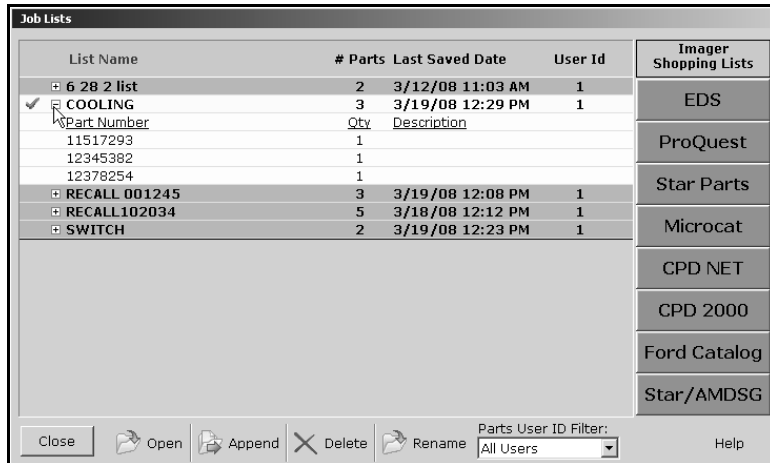
13. Type the name you want to assign the list in the **Enter a List Name** field.

14. Click **Save**.

15. Click **OK** to acknowledge the list has been saved.

## Loading a Saved List

1. Click **Load Job List**.
2. The screen displays the saved lists.
3. Click the list you want to pull. The screen displays the parts on the selected list.
4. Click **Open**.



5. The list fills in on the Parts Queries screen.

**Tip:** The buttons on the right side of the screen allow you to interface with parts catalogs.

## Logging Lost Sales

If the part is not in your inventory, the system prompts you to log the lost sale. You can click the message or press ALT+F7 to log the lost sale. You will have to enter the remaining information for the part line. Logging the lost sale on this screen is the same as logging the lost sale for counter sales and service sales. If the part is in your current inventory but you cannot meet the demand for the part, the system adds the lost sale to the part's lost sales totals for the quarter. If the part is not currently in your inventory, the system adds the part number to your inventory records and calls the part "Lost Sale." The bin for the part is LS, and the stocking status for the part is L for lost sale.



## Viewing Order Information

On the Parts Queries screen, you can click the on-hand quantity (O/H column) for a part, and the screen will display order information for the part. If orders have been received in for a part, the O/H column turns pink to alert the user. The order information is useful because it allows you to see what amount of the on-hand quantity is made up of parts that are reserved for customer orders. This will give you a more accurate assessment of your on-hand quantities as you work on this screen.

The top of the screen lists any orders that have been placed for the part. Orders appear in this section once they are pulled to a purchase order. It lists the parts number, part description, purchase order, order date, customer's name, order quantity, back order quantity, and on-hand quantity.

The bottom of the screen lists any orders that have been receipted in. Orders appear in this section once the purchase order is updated to inventory. This section lists the part number, part description, purchase order number, stock date, customer's name, order quantity, and on-hand quantity.

## Adding Parts to an Existing List

When you create a new list, you can add the parts to an existing list.

1. Add the parts to the Parts Queries screen.
2. Click **Save Job List**.
3. Click to select **Add Parts to an Existing List**.
4. The screen displays a list of all the existing parts lists. Click to select the list.
5. Click **Add Parts to Selected List**.
6. Click **Yes** to verify you want to add the parts to the list.
7. Click **Yes** again to add the parts.
8. Click **OK** to acknowledge the parts have been added.

## Overwriting an Existing List

1. Add the parts to the Parts Queries screen.
2. Click **Save Job List**.
3. Click to select **Overwrite an Existing List**.
4. Click to select the list, and click **Overwrite Selected List**.
5. Click **Yes** to verify you want to overwrite the list.
6. Click **Yes** again to overwrite the list.
7. Click **OK** to acknowledge the list has been overridden.

## Appending a Saved List to the Displayed List

You can add a saved list to the list of parts currently displayed on the screen.

1. Click **Load Job List**.
2. The screen displays the saved lists.
3. Click the list you want to pull.
4. Click **Append**. The parts on the selected list will be added to the screen.

## Renaming a List

1. Click **Load Job List**.
2. The screen displays the saved lists.
3. Click the list you want to rename.
4. Click **Rename**.
5. Type the name you want to assign the list, and click **OK**.
6. Click **Yes** to verify you want to rename the list.

## Deleting a List

1. Click **Load Job List**.
2. The screen displays the saved lists.
3. Click the list you want to delete.
4. Click **Delete**.
5. Type the name you want to assign the list, and click **OK**.
6. Click **Yes** to verify you want to delete the list.

## Dumping the List

Use the **Dump To** button to move the order to one of five places: a counter slip, a repair order, the Order Que, an outside purchase order, or a quote.

1. With the list displayed on the Parts Queries screen, click **Dump To**. The Dump To screen appears and displays the parts on the list.

Dump To ... Order Que/Counter Slip/Repair Order							
Order	Part	Qty	O/H	O/O	Desc.	Cost	
In Stk	12555492	1	2	1	SWITCH 01800	20.15	
In Stk	12563963	1	3	1	SEAL	4.40	
In Stk	15529401	1	5	1	CONNECTO 01540	5.81	
In Stk	24501259	1	7	5	GSKT-OIL 01657	.83	
In Stk	3764554	1	23	4	RETAINR 01639	.56	

"Click" The Desired Line To Change "Order Flag"

Dump To Counter Slip

Dump To R/O

Dump To Order Que

Dump To Outside PO

Dump To Quote

Back

2. Click a part in the list to change its order status from "Order" to "In Stock" or from "In Stock" to "Order."
3. Click the button on the left side of the screen that corresponds to where you want to move the order.
  - Click **Dump To Counter Slip** to move the order to a counter slip. The system advances you to the Counter Parts Sales screen so you can complete the counter slip. (See Chapter 6 for instructions on creating counter slips.)
  - Click **Dump To R/O** to move the order to a repair order. The system advances you to the Service R/O Parts screen so you can select the repair order. (See Chapter 7 for instructions on adding parts to repair orders.)
  - Click **Dump To Order Que** to move the order to the order que. The system will advance you to the Order Que screen so you can create the order. (See Chapter 9 for instructions on using the order que.)
  - Click **Dump To Outside PO** to move the order to a purchase order. The system prompts you to indicate if you want to start a new purchase order or if you want to add the parts to an existing purchase order. Click **New** or **Existing** accordingly. If you select to add the parts to an existing purchase order, a list of purchase orders appears. Click the purchase order you want to select. The system advances you to the Parts Purchase Orders screen so you can create the purchase order. (See "Outside P/O's" under Manual Resupply in Chapter 10 for instructions on how to add parts to a purchase order.)
  - Click **Dump To Quote** to move the order to a customer quote. The system advances you to the Customer Quote screen so you can create the quote.
4. Enter the necessary information on the screen that opens to finish the order.

## Creating Customer Quotes

Click **Quotes** to open the Customer Quote screen. This screen allows you to create a customer quote. You create the quote the same way you create a counter slip. The system holds the customer quote for 30 days before it purges the quote. You can use the **Quotes** button on the Parts Queries screen to view the quote any time during the 30 days. When the customer purchases the parts, you can pull the quote to the counter slip from the Counter Parts Sales screen or to a repair order from the Service R/O Parts screen. (See Chapter 6 for instructions on pulling quotes to counter slips and Chapter 7 for instructions on pulling quotes to repair orders.)

## Printing the Parts Query

Use the **Print List** button to print the current list. When prompted to define the list you want to print, click the option in the print list you want to select. There are eight print options:

- **Print Estimate:** This prints an estimate. When prompted, you must type the customer's name that will print on the estimate, and press ENTER. The estimate lists the location, quantity, part number, description, retail price, and estimate pricing.
- **Print Pick List:** This prints the part number, quantity, location, on-hand quantity, and description for each part on the list.
- **Print Retail Quote:** In addition to the part detail, the printout lists the retail price and extended price for each part and the extended total for the quote, including tax.
- **Print List Quote:** In addition to the part detail, the printout lists the list price and extended price for each part and the extended total for the quote, including tax.
- **Print Trade Quote:** In addition to the part detail, the printout lists the trade price, extended price, and retail price for each part and the extended total for the quote, including tax.
- **Print Service Quote:** In addition to the part detail, the printout lists the shop price and extended price for each part and the extended total for the quote, including tax.
- **Print Internal Pricing:** In addition to the part detail, the printout lists the internal price and extended price for each part and the extended total for the quote.
- **Print Special Discount Pricing:** The system prompts you to specify the discount percentage you want to use for the quote. In addition to the part detail, the printout lists the discount price, extended price, and retail price for each part and the extended total for the quote, including tax.
- **Print Parts Cost:** In addition to the part detail, the printout lists the cost and extended price for each part and the extended total for the quote, including tax.

## Viewing Parts Based on Base Number

Use the **Search Base** button to display a list of parts in your inventory that have the same base/group number.

1. Click **Search Base**.
2. Type the base number, and press ENTER. The screen displays the list of parts.

Search Base							
Part No.	O/H	Location	Ord B/O	Desc.	Cost	Trade	Retail
10179286	9	600		BELT	15.43	21.60	30.86
10189265	7	600		BELT	15.43	21.60	30.86
10230725	9	600		BELT	20.67	28.94	41.34
12551136	5	600		BELT-FAN	17.00	23.80	34.00
12564763	10	600		BELT	18.70	26.18	37.40
12569347	0	600 0		BELT	25.04	31.30	37.50
12569504	0			BELT	20.89	29.25	41.78
12569591	12	600		BELT	18.17	25.44	36.34
12570499	0			BELT-W/P	5.62	7.87	11.24
12576447	5	600		BELT	10.25	14.35	20.50
12576450	11	600 0		BELT	25.31	35.43	50.62
12576451	4	600		BELT	25.04	35.06	50.08
12576452	5	600		BELT	25.30	35.42	50.60
12576453	5	600		BELT	25.05	35.07	50.10
12576747	0			BELT	25.30	35.42	50.60
12576753	5	600 0		BELT	25.31	35.43	50.62
12576761	4	600		BELT	25.04	35.06	50.08
24504180	6	600		BELT	18.15	25.41	36.30
24505054	4	600		BELT	14.99	20.99	29.98
24505380	1	600		BELT	18.70	26.18	37.40
88984192	1	600 0		BELT	16.69	23.37	33.38
88986805	2	600 0		BELT	18.07	25.30	36.14
88986806	1	600		BELT	14.61	20.45	29.22
88986807	1	600 0		BELT	18.07	25.30	36.14
88986808	1	600		BELT	17.28	24.19	34.56
88986809	1	600 0		BELT	14.98	20.97	29.96
88986810	1	600		BELT	16.88	23.63	33.76
88986811	2	600		BELT	16.75	23.45	33.50

Exit      Base Number : 01066      "Click" Line To Query      Print List

3. Click **Print List** to print the parts list. When prompted to verify your printer is ready, select your print criteria.
4. Click a part in the list to pull the part to the Parts Queries screen, or click **Exit** to return to the Parts Queries screen.

## Viewing Part Data

Use the **QwikLook** button to display the QwikLook screen for the part entered on the current line. This screen provides detailed information for a single part. Pricing information, stocking status, and sales information is pulled from the Master Inventory file. The information is intended for viewing only. You may edit the on-hand quantity and bin for a part on this screen if your parameters have been set to allow these edits. However, no other information can be edited on this screen. If you need to edit part information, or if your parameters have been set to restrict on-hand quantity and bin edits from this screen, you must use the Master Inventory screen to edit the part information.

1. Click **QwikLook**. The information for the part selected on the Parts Queries screen is automatically displayed on the screen.

You can search for parts by entering a partial part number and clicking **Search**. The system displays the information for the first part that matches the partial number. Click on the arrow buttons on each side of the **Search** button to scroll through the parts list. You can also press F2 to view the previous part record and F4 to view the next part record.

2. Click **History** to view the sales history or receipt history for the current part. Click **Back** to close the history.
3. Click **Setting** to view the pricing parameters being used to calculate the pricing information.
4. The **Corrections** button is available based on the **Allow 'On Hand' Quantity Corrections From Quote/Query** field on the More Operating Defaults screen in the Parts System Setup. If this field contains an **N**, the button is unavailable on the QwikLook screen, and you will have to use the Master Inventory screen to edit the quantity and/or bin.

If this field contains a **Y**, the **Corrections** button is available on the QwikLook screen. It allows you to edit the Bin and quantity. Click **Corrections**, and edit the Bin and quantity as needed on the screen that appears. Click **Save** to save the changes.

5. Click **Close** to return to the Parts Query screen.

**Tip:** You can press F7 to log a lost sale for the part number displayed on the QwikLook screen.