A. Generate the resupply list.

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

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

3. Click **Scan Inventory For List** on the Generate Order List menu.

4. Enter the proper order criteria for the type of order you are generating. This varies according to the setup you have chosen under **Set Supply Parameters**. Refer to F1 help or your Parts Inventory user's manual for detailed information about resupply parameters.

5. Click **OK** when prompted to verify you want to generate the order.

6. Click **OK** on the List is Ready prompt.

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

B. View the generated list

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

2. The Generate Resupply List screen appears and displays the suggested stock order. You can click any part number to display additional data. This information may be useful to assist you with your resupply decisions.

3. Click **Exception List** on the bottom of the Generate Resupply List screen.

4. The Exception List screen appears and lists all exceptions. By default, all exceptions appear on this list. Use the options on the bottom-right side of the Exception List screen to view the different exception lists. Click in the circle to the left of the description to select which exception list you want to view.

- **Non-Stock With GT 1:** This list displays all non-stock parts (parts with any stock status other than **Y**) that have more than one sale but *do not* meet *phase-in* criteria.

- **Stocked With Zero O/H:** This list displays parts that have a **Y** stock status, have an on-hand quantity of 0, did not pull to order, and do not meet *phase-out* criteria.

- **On Order/Back Order:** This list displays all parts currently on purchase orders waiting to be received or that have been placed on back order status.

- **Testing For Phase In:** This list displays all parts with a stock status other than **Y** that have met your *phase-in* criteria.

- **Testing For Phase Out:** This list displays parts with a stock status of **Y** that have met the phase-out criteria by the *days or hits* specified under **Set Supply Parameters**.

5. Click **Print This List** to print any of the lists you want to print.

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

7. Click **Back** until you are back at the Generate Order List menu.

C. Edit the generated list

1. Click **Edit Generated List** on the Generate Order List menu.

2. The window on the right side of the screen displays the generated list.

3. Click the part you want to edit.

4. Make the adjustment, and press ENTER to record the information.

5. When you are finished making all of the adjustments, click **Exit**.

Note: You cannot add parts to the order on this screen. You can only change the suggested order quantity. Also, any changes in the original suggested order quantity you make here are not reflected when you view the list using the **View Generated List** option.

D. Add to the generated list

1. Click **Add To Generated List** on the Generate Order List menu.

2. Manually enter any additional parts you want to add to the order. Generally, these are parts reviewed from one of the exception lists you plan to order.

3. You can change the stock status of parts on this screen also. This allows phase-in parts, for example, to be changed to a **Y** stock status so they will pull to the generated list in the future.

4. When you are finished adding all the parts, click **Exit** to return to the Generate Order List menu.

Tip: Use the Order Que for special order customers.

E. Pull the order que

You use the **Order Que** option on the Generate Order List menu to pull parts customer special orders entered through the order que in AutoSoft to the generated list. If you are not currently using the order que feature, you can enter customer special orders through the **Add To Generated List** option on the Generate Order List menu. However, AutoSoft highly recommends that you use the order que for ALL customer special orders.

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

2. 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.

3. 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.

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

5. Click **Exit** on 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.

Once you complete these processes, the order list is ready to be turned into an order document or P.O. number for further processing. Refer to F1 help or your Parts Inventory user's manual for explanations and documentation on the remaining options available on this menu: Print Lists, Delete Current List, and Edit Min/Max Levels.

F. Create a purchase order

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

2. Click **Update List Into A P.O.** on the Enter Purchase Orders menu.

3. 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.

4. 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.

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

G. Print the purchase order
Printing a copy of the purchase order is optional; however, most Parts Managers require a hard copy of parts orders be retained to verify against the packing list when orders are received.

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

2. 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.

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

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

H. Add parts to the existing purchase order before submitting it to the manufacturer as needed

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

2. Click **Add To Generated List** on the Generate Order List menu.

3. Add additional part numbers as needed.

4. Click **Exit** to close the screen when you are finished.

5. If you need to add special order part numbers from the order que, click **Pull Order Que To List**, and pull the parts as needed.

6. Click **Exit** until you are back at the Resupply and Returns menu.

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

8. Click **Update List Into A P.O.** on the Enter Purchase Orders menu.

9. When prompted to enter the P.O. number you want to assign the order, type the previous P.O. number.

10. The system will display a warning that this is an active purchase order and that the new numbers will be appended and existing numbers will be amended. Click **OK** to acknowledge this message.

11. Print a fresh hard copy of the changed purchase order for your records.

I. **Submit the purchase order to the manufacturer**
Follow the steps necessary to place the order with the manufacturer. The steps vary from franchise to franchise. Refer to manufacturer-specific instructions provided for your franchise for specific information about submitting the order to your manufacturer.

J. **Receipt the order**

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

2. Click **Receipt Purchase Orders** on the Resupply and Returns menu.

3. Click **Edit Purchase Orders** on the Receipt Stock Orders menu.

4. Click the desired P.O. number displayed in the window on right hand side of screen, or type the P.O. number in the **P.O. Number** field.

5. A list of part numbers will be displayed in the window on the right side of the screen.

6. Click each part number requiring editing, and make the necessary adjustment. You must press ENTER to advance through the fields or click **Save** in order to save the edit for the part number.

7. When you are finished editing the list, click **Exit**.

8. Click **Update All Items From P.O.** on the Receipt Stock Order menu.

9. The system notifies you that only parts in the current source will be updated. Click **OK** to acknowledge the message.

10. Type the P.O. number for the order you want to update, or click the purchase order in the list of available purchase orders displayed.

11. Click **OK** when prompted to verify you want to update the purchase order.

12. The parts will be updated to Master Inventory, and back orders will be flagged accordingly. Once all parts from purchase order have been receipted, the purchase order will no longer exist.