You need to complete several processes when using the Autosoft FLEX DMS Order Que to special order parts depending on the circumstances of the order—such as whom the part is being ordered for, the type of order the part is to be placed on, whether all parts for the same Order Que document are to be ordered on the same type of order, and whether all parts on que document are to be ordered, including parts currently in stock. It may seem confusing at first, but after a review of the following instructions, the processes will be much clearer.

Creating an Order

There are generally three types of special order requests (service customers, wholesale customers, and retail customer orders), and any or all may or may not be prepaid. All special orders will be started on the Parts Queries screen. This screen should be blank when inquiring on a part or list of parts so it may be processed without the need to edit or remove unwanted parts left behind from a prior list.

1. Add the parts to the screen, or pull the parts from an imager list to the queries screen.

2. Click **Dump To** at bottom of screen.

3. The next screen will display parts on right side. Parts in stock will be flagged "In Stock" and parts not in stock are flagged "Order."

4. The left side of screen displays your "Dump To" options. In this case, you would click **Dump To Order Que**.

5. At this point you will have the ability to force order any parts flagged "In Stock" by clicking the "In Stock" flag, which will switch to the flag to "Order." Otherwise, system will assume parts will be pulled from stock and only order the parts with no on-hand quantity.

> **Tip:** If a part has a quantity of at least 1 and more are required for the order, the default is still "In Stock." Click the "In Stock" flag to change it to "Order" for the desired quantity.

6. Click **Dump To Order Que**. The next screen will appear.

7. The steps you take on this screen vary based on the type of special order.

Service Customers

1. If the special order you are generating is for a service customer and there is currently an open R/O for this customer, type the R/O number in the **Document** field.

2. This will cause the last eight digits of the VIN to fill in the **Last 8** field. Once you press ENTER to pass through this field, the customer's information will default below.

3. Important: You must press ENTER to pass through these fields. Do not use the mouse to click past or skip them.

4. You may change any of the customer's information, and it will print on special order document as edited. However, the edits will not be saved in the customer's service file.

5. Next, press ENTER to pass through the remaining fields, and enter data as needed.

6. The **Non-Stock Parts In Bin** field will default to SPO. If you change this entry, the bin will print on the special order document but will not be changed in the Master Inventory record.

7. In the **Is This A PREPAID Order** field, type **Y** for yes or **N** for no to indicate if the order is prepaid. (Prepaid orders are discussed at the end of this document.) If you flag the order a Y for prepaid, the order will be noted as such.

8. Choose type of order the parts are to be placed on: **EMERGENCY Order (E)**, **DAILY Order (D)**, or **STOCK Order (S)**. The default is D for daily. If separate parts on the special order are to be ordered on different types of orders (for example, one part is coming from a facing PDC and another from farther away), this will be dealt with when actually pulling the Order Que parts to their perspective orders.

9. Click **OK**.

10. You are prompted to specify if you want to order all part in the list or only parts flagged for order. This is another opportunity to force order parts in stock. Click **All Parts** or **Flagged Parts** as desired.

11. The parts will be loaded into the Order Que and are ready to be placed on an order.

12. Next, a print dialog box appears so you can print a copy of the special order. Click to select To Printer.

13. The **Number of Copies** field defaults to 1, but you can choose to print up to 9 copies by editing the field. This field always defaults to 1 regardless of the number of copies printed for the last order.

14. Once you specify the number of copies, click **Print**. (You can also click **Skip** if you do not want to print a copy.)

15. System will return to the Dump To screen. Prepaid orders should be processed at this time by clicking **Dump To Counter Slip** or **Dump to RO**.

16. The order information will be carried over to the selected document/screen. You are required to select each part number and press ENTER to pass through each field for the part to process the part line. Once all lines are processed, click **Generate Order**, and Click **OK** when prompted to verify you want to generate the order.

Wholesale Customer

1. If the special order you are generating is for a wholesale customer, press ENTER to pass through the **Document** field, and the system will assign a document number based on the current system date and time.

2. Next click **Wholesale Customers**. Find the customer by typing the letter the customer's account number starts with, and then click the customer to select the account when it is displayed in the search list.

3. The customer's information fills in on the screen. You may change any of the customer's information, and it will print on special order document as edited. However, the edits will not be saved in the wholesale customer's file.

4. Next, press ENTER to pass through the remaining fields, and enter data as needed.

5. The **Non-Stock Parts In Bin** field will default to SPO. If you change this entry, the bin will print on the special order document but will not be changed in the Master Inventory record.

6. In the **Is This A PREPAID Order** field, type **Y** for yes or **N** for no to indicate if the order is prepaid. (Prepaid orders are discussed at the end of this document.) If you flag the order a Y for prepaid, the order will be noted as such.

7. Choose type of order the parts are to be placed on: **EMERGENCY Order (E)**, **DAILY Order (D)**, or **STOCK Order (S)**. The default is D for daily. If separate parts on the special order are to be ordered on different types of orders (for example, one part is coming from a facing PDC and another from farther away), this will be dealt with when actually pulling the Order Que parts to their perspective orders.

8. Click **OK**.

9. You are prompted to specify if you want to order all part in the list or only parts flagged for order. This is another opportunity to force order parts in stock. Click **All Parts** or **Flagged Parts** as desired.

10. The parts will be loaded into the Order Que and are ready to be placed on an order.

11. Next, a print dialog box appears so you can print a copy of the special order. Click to select To Printer.

12. The **Number of Copies** field defaults to 1, but you can choose to print up to 9 copies by editing the field. This field always defaults to 1 regardless of the number of copies printed for the last order.

13. Once you specify the number of copies, click **Print**. (You can also click **Skip** if you do not want to print a copy.)

14. System will return to the Dump To screen. Prepaid orders should be processed at this time by clicking **Dump To Counter Slip** or **Dump to RO**.

15. The order information will be carried over to the selected document/screen. You are required to select each part number and press ENTER to pass through each field for the part to process the part line. Once all lines are processed, click **Generate Order**, and Click **OK** when prompted to verify you want to generate the order.

Retail Customer

1. If the special order you are generating is for a retail customer, press ENTER to pass through the **Document** field, and the system will assign a document number based on the current system date and time.

2. Next, click in the **Name** field. Do not press ENTER to pass through the **Last 8** or **Cust No** fields because this will cause the system to default to **(Stock Order)** as the customer name and **(S)** for the order type. Stock items are generally not ordered through the Order Que, so you would have to edit the order after you receipt the parts in to clear them from the Order Que.

3. Type the customer's information. Autosoft recommends that you complete all of the information so you can contact the customer by phone or by mail when the order arrives.

4. The **Non-Stock Parts In Bin** field will default to SPO. If you change this entry, the bin will print on the special order document but will not be changed in the Master Inventory record.

5. In the **Is This A PREPAID Order** field, type **Y** for yes or **N** for no to indicate if the order is prepaid. (Prepaid orders are discussed at the end of this document.) If you flag the order a Y for prepaid, the order will be noted as such.

6. Choose type of order the parts are to be placed on: **EMERGENCY Order (E)**, **DAILY Order (D)**, or **STOCK Order (S)**. The default is D for daily. If separate parts on the special order are to be ordered on different types of orders (for example, one part is coming from a facing PDC and another from farther away), this will be dealt with when actually pulling the Order Que parts to their perspective orders.

7. Click **OK**.

8. You are prompted to specify if you want to order all part in the list or only parts flagged for order. This is another opportunity to force order parts in stock. Click **All Parts** or **Flagged Parts** as desired.

9. The parts will be loaded into the Order Que and are ready to be placed on an order.

10. Next, a print dialog box appears so you can print a copy of the special order. Click to select To Printer.

11. The **Number of Copies** field defaults to 1, but you can choose to print up to 9 copies by editing the field. This field always defaults to 1 regardless of the number of copies printed for the last order.

12. Once you specify the number of copies, click **Print**. (You can also click **Skip** if you do not want to print a copy.)

13. System will return to the Dump To screen. Prepaid orders should be processed at this time by clicking **Dump To Counter Slip** or **Dump to RO**.

14. The order information will be carried over to the selected document/screen. You are required to select each part number and press ENTER to pass through each field for the part to process the part line. Once all lines are processed, click **Generate Order**, and Click **OK** when prompted to verify you want to generate the order.

This completes the process of initializing the special order request into the system and preparing them to be placed onto an order document.

Viewing the Order Status

If you choose to review the status of a special order or Order Que document, you can do so from the Parts Queries screen.

1. Click **View Order Que** at bottom of the Parts Queries screen.

2. The View Order Que screen appears.

   The top blue section of the screen displays the processed Order Que. It lists the parts in the Order Que that have been placed on an order document. It also identifies the order status as **(O)** for on-order or **(I)** for parts receipted.

   The bottom pink section of the screen displays the active Order Que. It lists the parts in the Order Que that have not been placed on an order document.

   If parts have been prepaid, **(PRE-PAID)** will display in the processed Order Que (blue section) and **(PP)** will display in the active Order Que (pink section).

Inquiring on an Ordered Part

If a customer calls to inquire on the status of a special order, you can search for the order.

1. Click **View Order Que** at bottom of the Parts Queries screen.

2. Click Inquire On Ordered Part.

3. Use the **Part Number** field to search for the order based on the part number or the **Phone Number** field to search for the order based on the customer's phone number. Generally, using the phone number is the easiest search method. Type the search criteria you want to use, and press ENTER.

4. The orders matching your search criteria are displayed on the screen.

5. Click **Exit** to close the screen.

Ordering Parts

When time has come to actually order the parts simply follow instructions below.

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. At this point, you can change the order type for any given parts if they require emergency ordering or you wish to add them to a stock order for special benefits such as obsolescence accrual or additional discounts. To change the order type, click the order type flag displayed for the part line (first column), and the order type will change for that part number only.

7. Type the letter that corresponds with the parts you want to pull. Type **E** for emergency, **D** for daily, **S** for stock, **A** for all, or **N** for none.

Important:	Make sure you only pull the Order Que once. If you pull the Order Que multiple times, the parts will duplicate each time they are pulled prior to assigning a P/O or order document number.

8. The system returns you to the Generate Order list menu. Click **View Generated List**.

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

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

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

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

13. 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.

14. Next, indicate where these parts are being purchased. 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.

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

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

17. 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.

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

Printing the Processed Order Que

When parts are received and receipted, print the processed Order Que so you can contact customers accordingly.

1. Click **Order Que—Special Order Parts** on the Resupply and Returns menu.

2. Click **View/Edit Processed Order Que Parts**.

3. Click in the **P.O.** field at bottom of screen, and type the P.O. number for the P.O. you just receipted. The screen will display only the parts on that P.O.

4. Click **Print List**. This will print a list of parts receipted. Back orders will show as still On Order.

Pulling Received Parts from the Order Que

The final step in this process is to pull parts from the Order Que when the customer receives them.

1. When customer arrives to receive parts, go to the Counter Parts Sales screen for Retail, Wholesale and Prepaid orders and the Line Parts screen under Service Parts Sales for service customer sales.

2. Click, **Order Que** at the bottom of the screen.

3. Type the Order Que document number from the original printout of the special order document, or sort by the options listed.

4. When the Order Que document is displayed on the screen, click **Pull To Invoice**. The order information will display on the screen.

5. Press ENTER to pass through each part line to process the line. This will flag the Order Que document with (S) for sold and clear the record from the Order Que file when the end of day update is completed and the information is sent to Accounting.

6. If this is a prepaid order, click **Print**, and a pick-up ticket will print for customer to sign. This will flag the Order Que document with (P) for picked up and clear the record from the Order Que file when the end of day update is completed and the information is sent to Accounting.