BodyshopConnect

Parts Management – Quick Guide

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Parts Management Dashboard

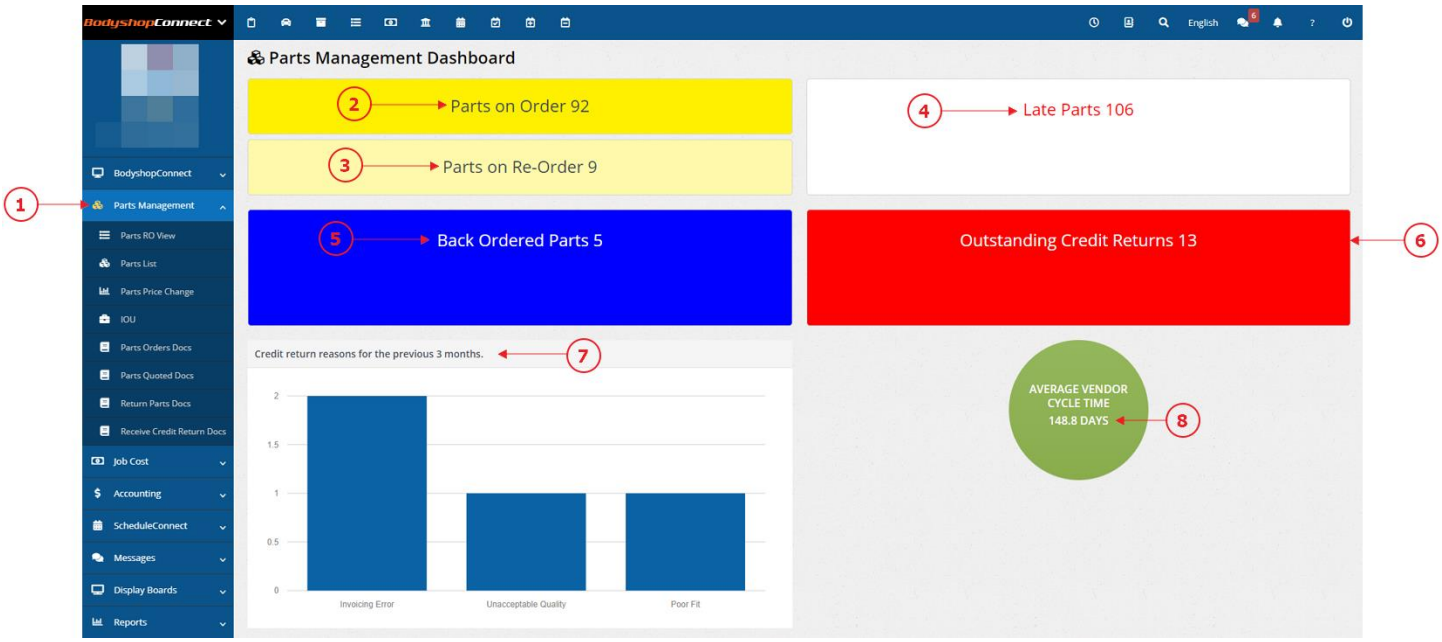
The Parts Management Dashboard was designed to give a quick view of the parts status.

When clicking on the Parts Management Section (1) on the left navigation menu, the Parts Management Dashboard will display.

- Top left yellow section (2) shows the number of parts on order.
- The pale-yellow section (3) shows the number of parts on re-order.
- Top right white section (4) shows the number of parts that are late.
- Middle left blue section (5) shows the number of parts on back order.
- Middle right red (6) shows the number of outstanding credit returns.

> Clicking on any of the above links will redirect to the parts list filtered by the corresponding parts status.

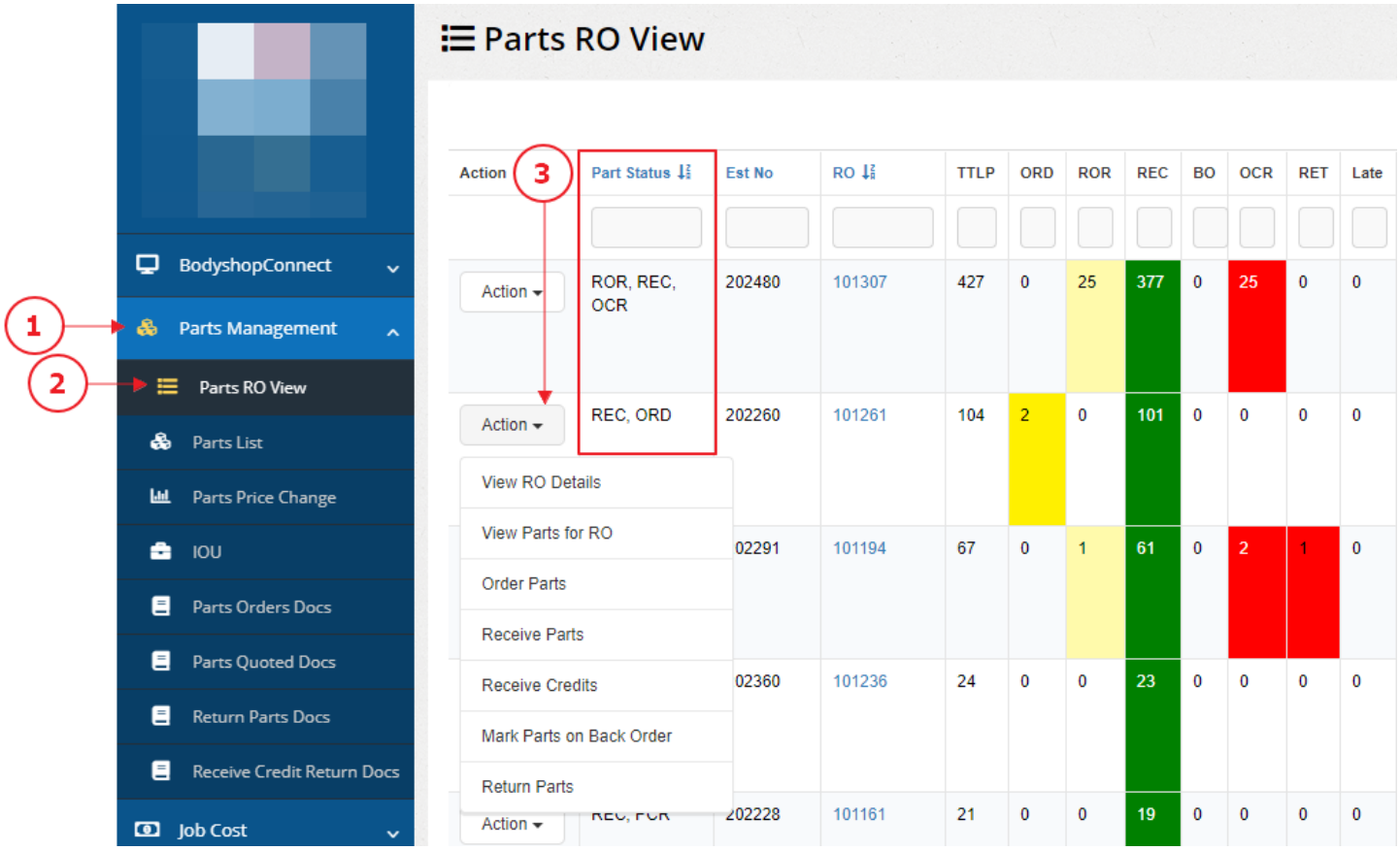
- The bottom left graph (7) indicates the top credit return reasons for the past 3 months.
- The bottom right circle graph (8) shows the average vendor cycle time for the last 3 months.



Note: The Parts Management Dashboard displaying can be turned on or off in the User Roles Settings.

Parts RO View

To view a list of all Open Repair Orders and their parts statuses, open Parts Management section (1) on the left navigation panel and click Parts RO View (2).
Column headers allow filtering and sorting.



> TTLP - Total Parts;
> ORD- Ordered;
> ROR - Re-Ordered;
> REC - Received;
> BO - Back Order;
> OCR - Returned - Waiting for Credit (Outstanding Credit Return);
> RET - Returned - Credit Received;
> Late - Ordered, Re-Ordered or Back Ordered (not yet received) - the expected due date has passed.

The *Action* drop-down (3) gives choices to:

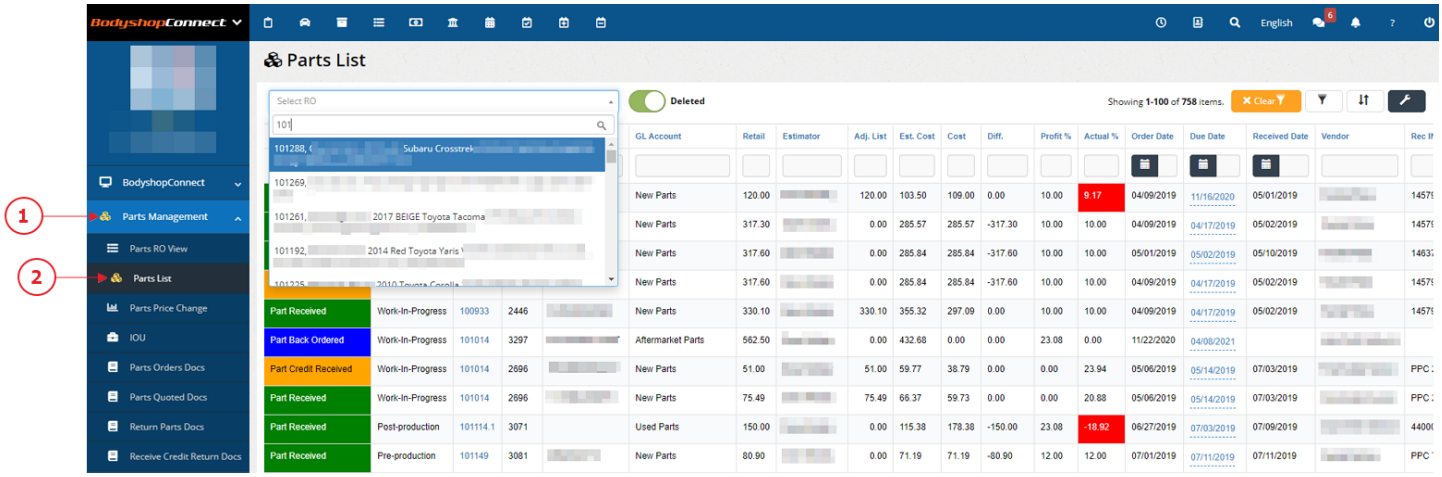
> View RO Details;
> View the Parts for the particular RO;
> Order Parts;
> Receive Parts;
> Receive Credits;
> Mark Parts on Back Order;
> Return Parts;

Parts List

If you need to view the list of all Open Repair Orders including the status of each part, open Parts Management section (1) on the left navigation panel and click Parts List (2)

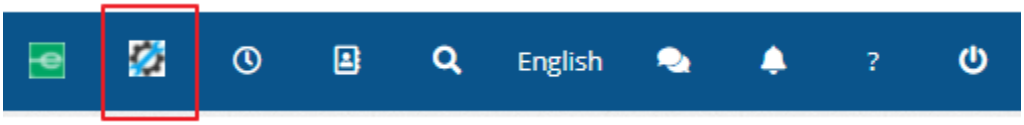
Column headers allow filtering and sorting. *RO # drop-down* on the top left redirects to the specific Repair Order's parts list view.

Once filtered by a specific RO, options are available to Order Parts, Receive Parts, Mark Back Orders, Return Parts, Receive Credit Returns, mark parts as Do not Order, Quoted, Here, Merge Lines, Update Vendors.



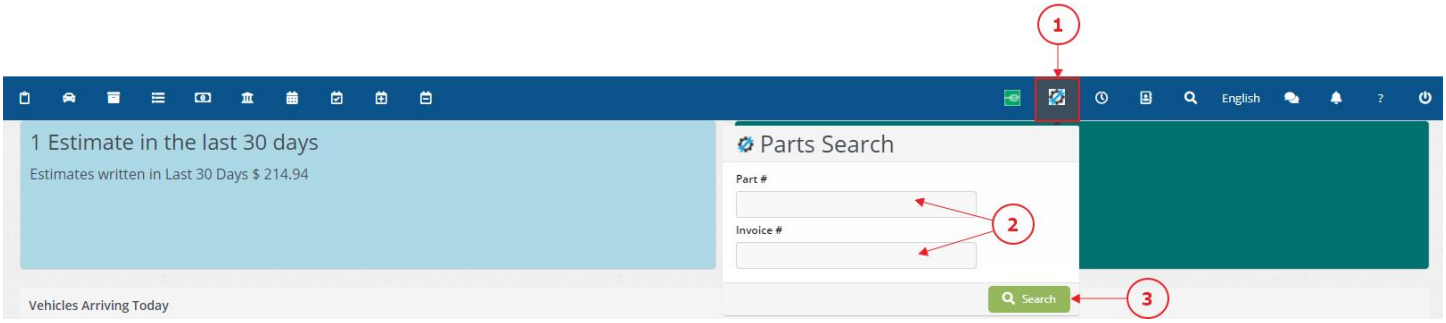
Parts Search

The Parts Search option is located in the top tool bar and allows to search by Parts Number or Invoice Number on Open and Closed ROs.



- Click on 'Parts Search' icon (1)
- Enter Part Number or Invoice Number (2)
- Press 'Search' button (3)

The list of ROs having the selected Part # or Invoice # will open in a new tab.



Deleted Parts

When viewing parts for a Repair Order, some lines may show a deleted status.

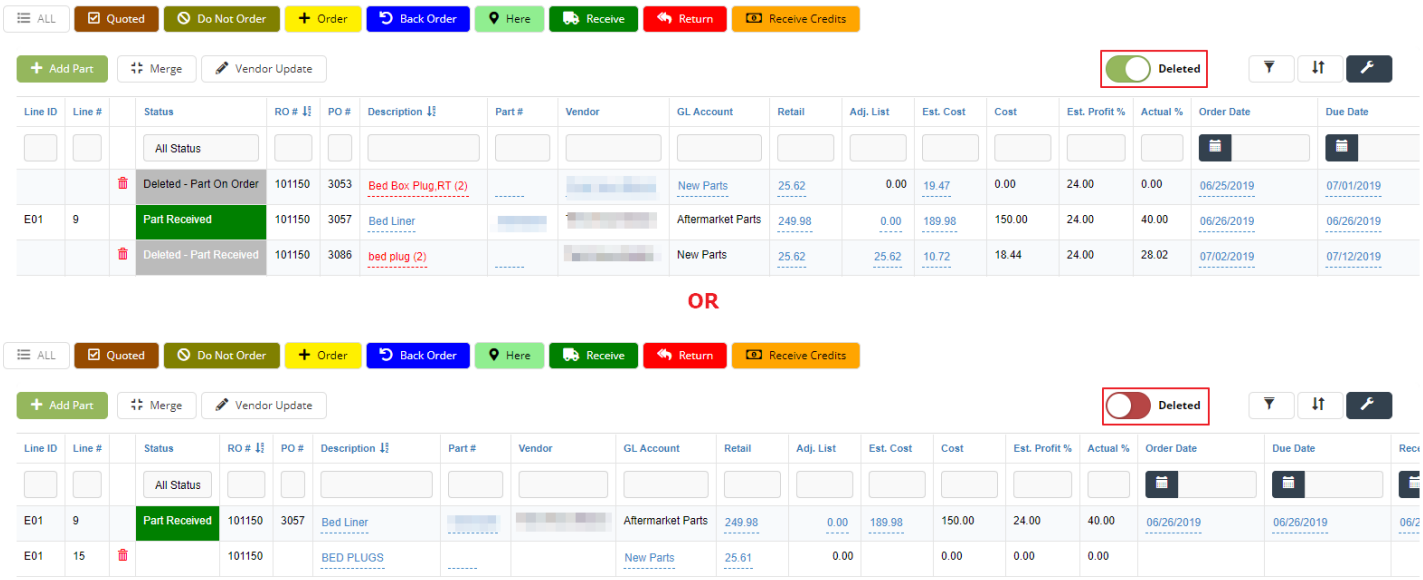
Deleted – No Previous Status
Deleted - Part On Order
Deleted - Part Re-Ordered
Deleted - Part on Back Order
Deleted - Part Received



These lines were deleted in the estimating system and therefore, as an audit trail; they show as deleted in the management system when the estimate is updated.

The deleted lines will no longer show in the line items or in the total of the Repair Order.

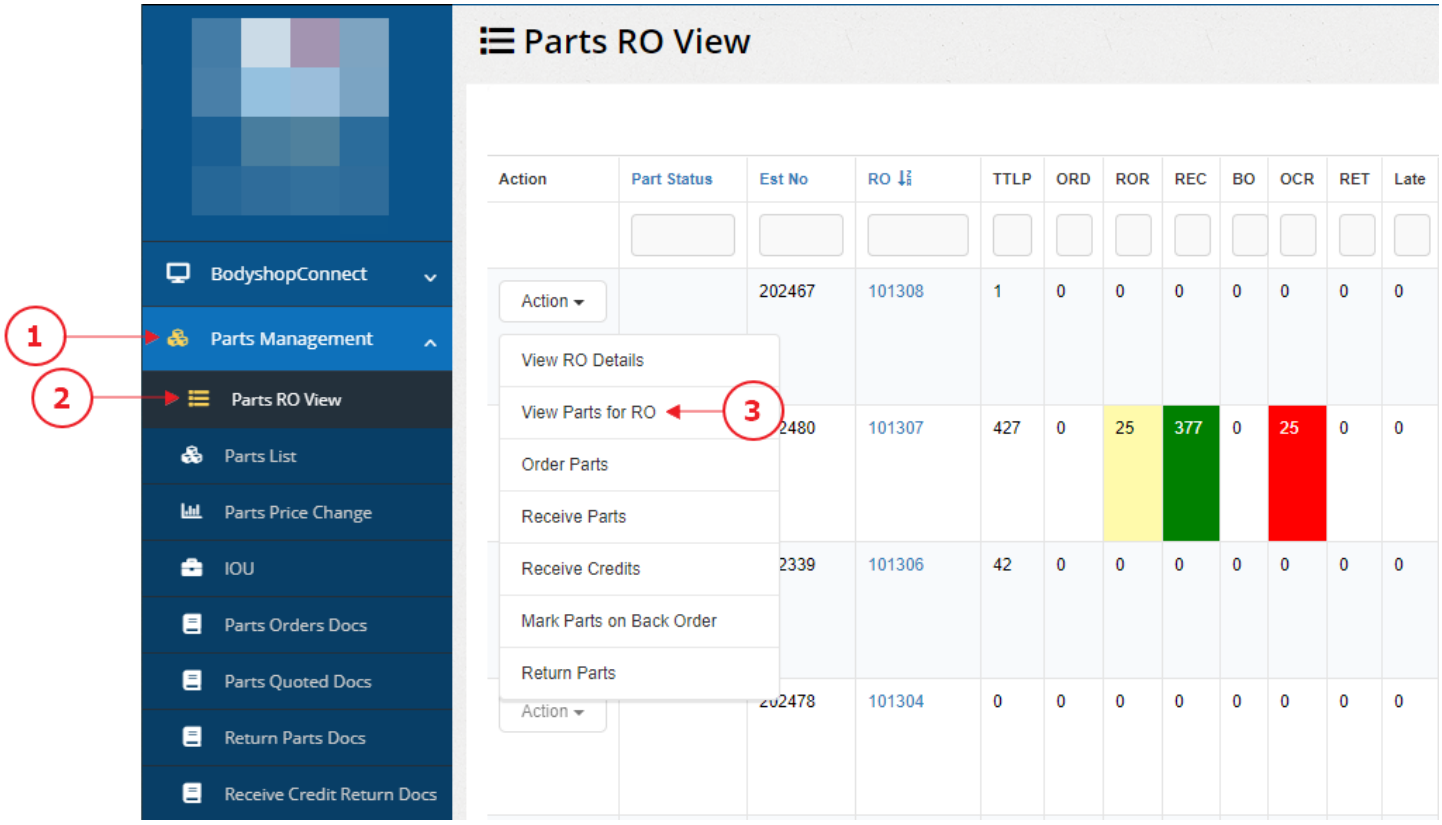
When viewing parts for a Repair Order; you can filter parts lines with the ***'Deleted'*** toggle button to make deleted parts visible or not.



OR

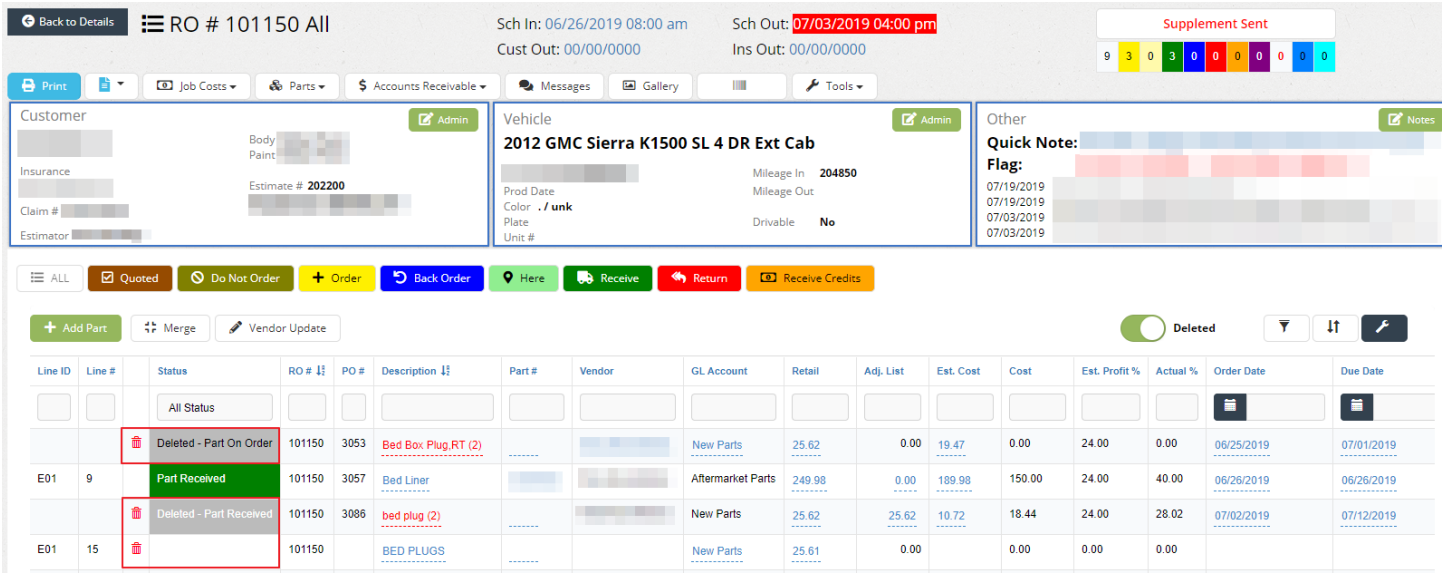
There are two ways to delete a parts line in the management system:

1. Click on Parts Management section (1) on the left navigation panel and choose Parts RO View (2), then select View Parts for RO (3) from Action drop-down list

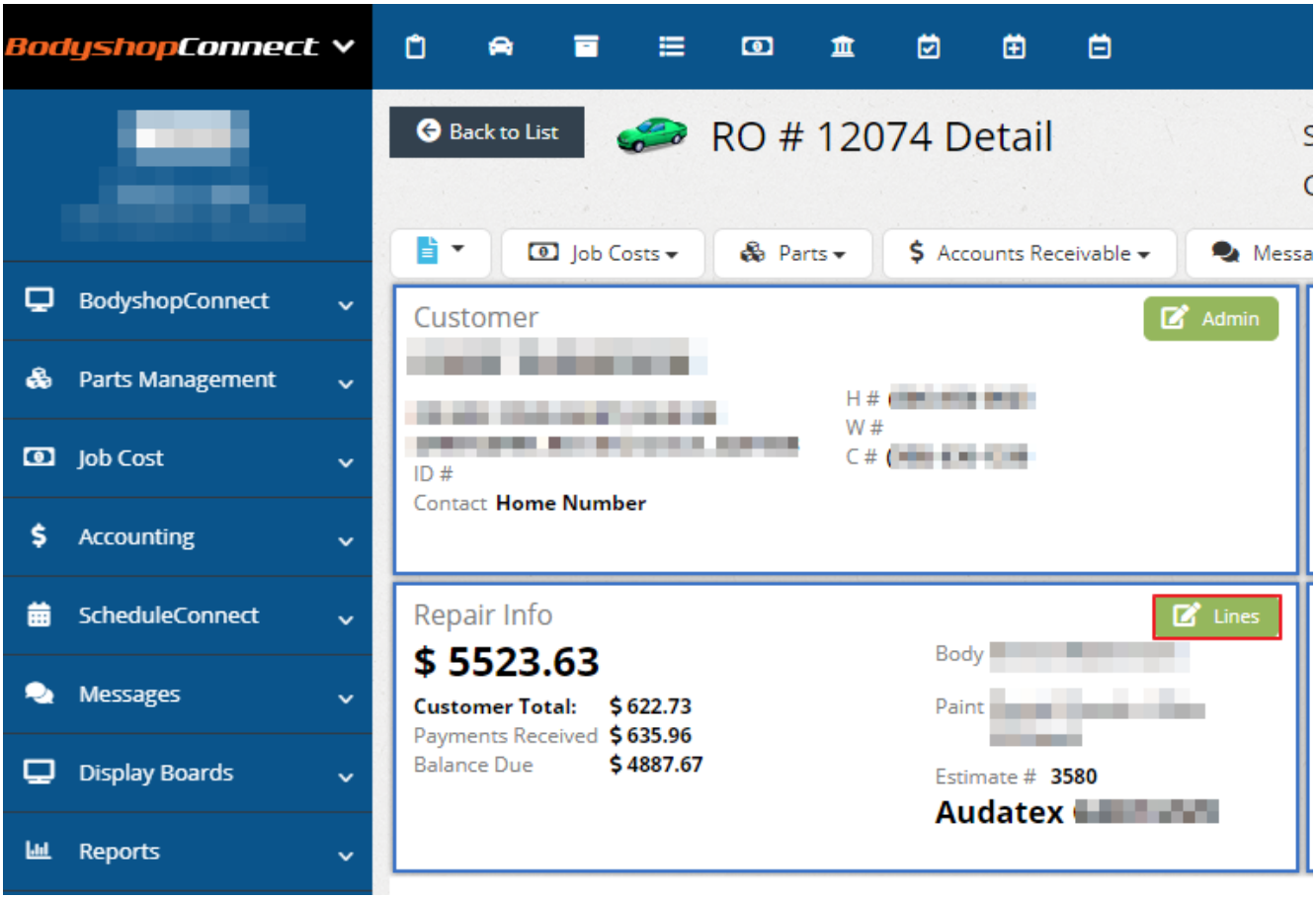


It is possible to delete *Blank Parts* as well as *Parts with Deleted status* by clicking on the Trashcan icon.

***Note**: It is NOT recommended to delete any part with 'Deleted – Part Received' status as this will affect your vendor costs.*

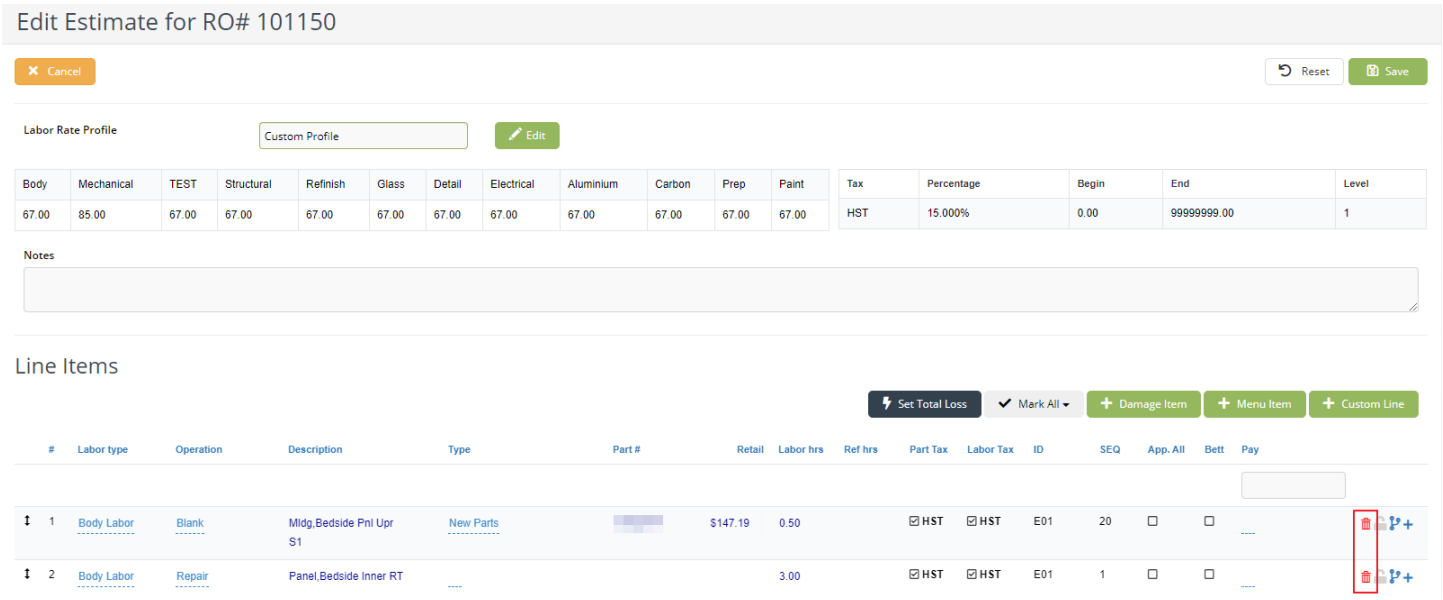


2. On Open RO view, click on the 'Lines' button in the Repair Info tab.



Note: *you can delete only "Blank" Part (not On Order, On ReOrder, Received, Back Ordered, Credit received, and Outstanding Credit Return status)*

Click on the Trashcan icon next to the part's line to be deleted.

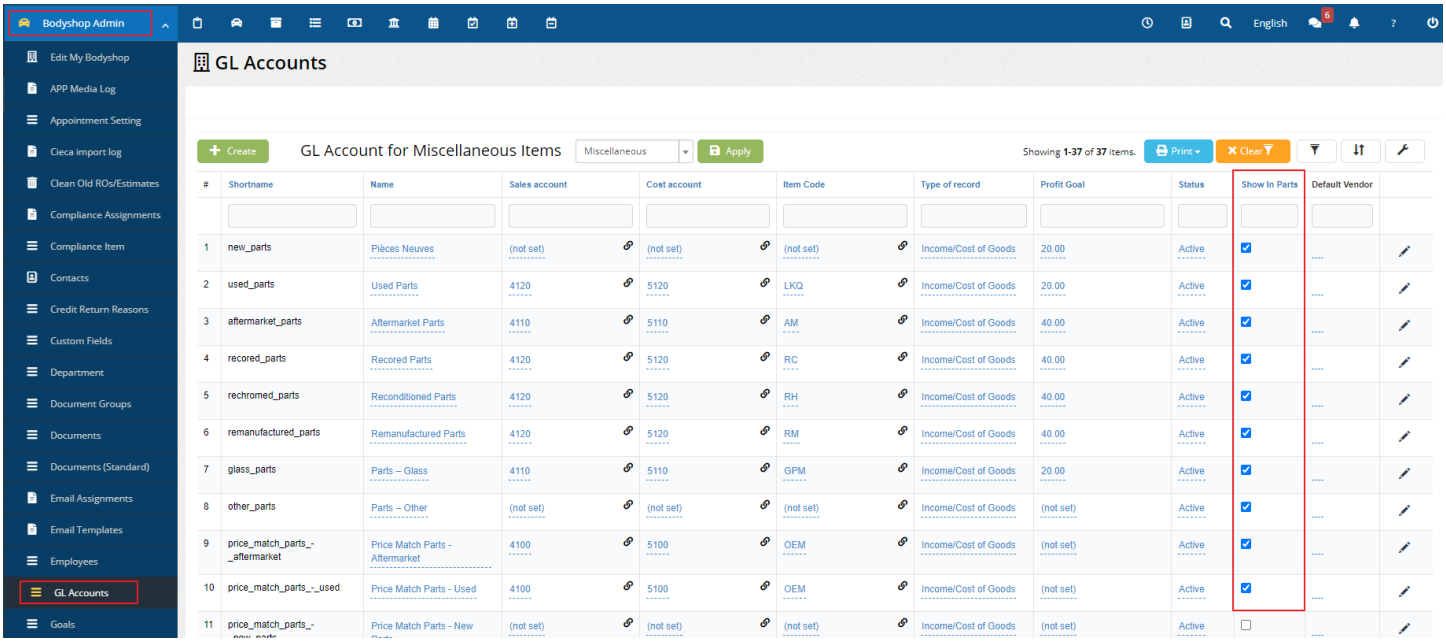


GL Accounts

A GL Account is an abbreviation for General Ledger Account, also known as Chart of Accounts. Transactions are categorized and summarized into general ledger **accounts**.

In the lines of an Estimate or in the Parts section, the GL Account may be referred to as 'Type'.

In a case you need to create a vendor cost and receive the payment for this line item, you should make this line item visible in parts section with the corresponding GL account. To do this, you should go to GL Accounts section in Bodyshop Admin and check the checkbox for the GL account needed in the "Show In Parts" column.



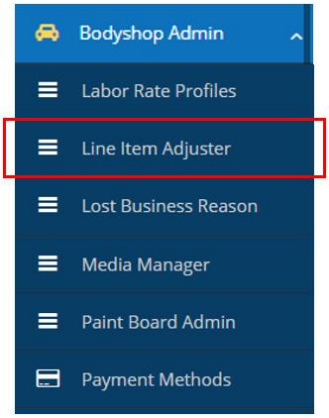
Note: *This option is available only for GL accounts with "Income/Cost of Goods" type of record.*

Line Item Adjuster

In the Estimating System, Estimates are typically written based on insurance guidelines.

When imported (or updated) in the management system certain lines may need to be changed every time based on how the vehicle will be repaired and/or what income account the line should be allocated to prior to sending to accounting.

Example: An estimate is written (based in Insurance Guidelines) in the estimating system with Flex Additive as an Aftermarket Part – when it imports, the Line Item Adjuster can change the GL Account to Paint Materials.



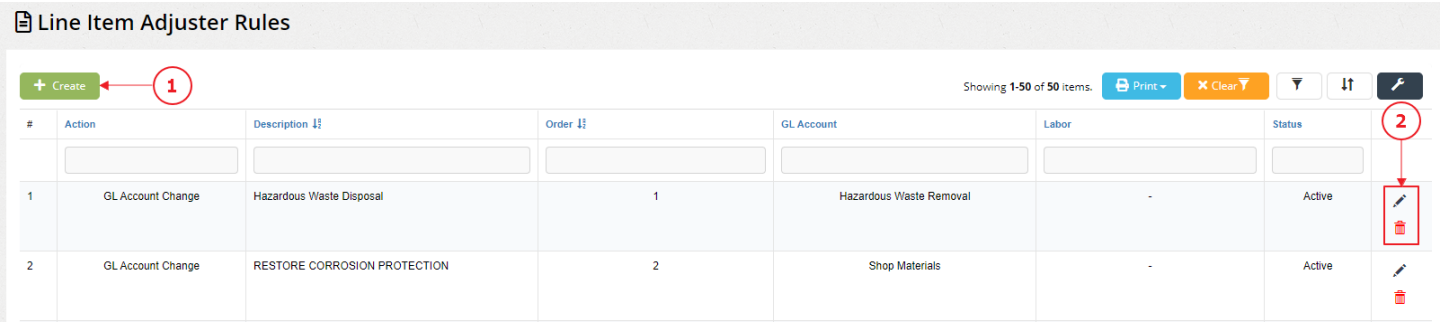
On the Left navigation panel

1. Click Bodyshop Admin section
2. Click 'Line Item Adjuster'

Add Line Item Adjuster
Click '+ Create' (1)

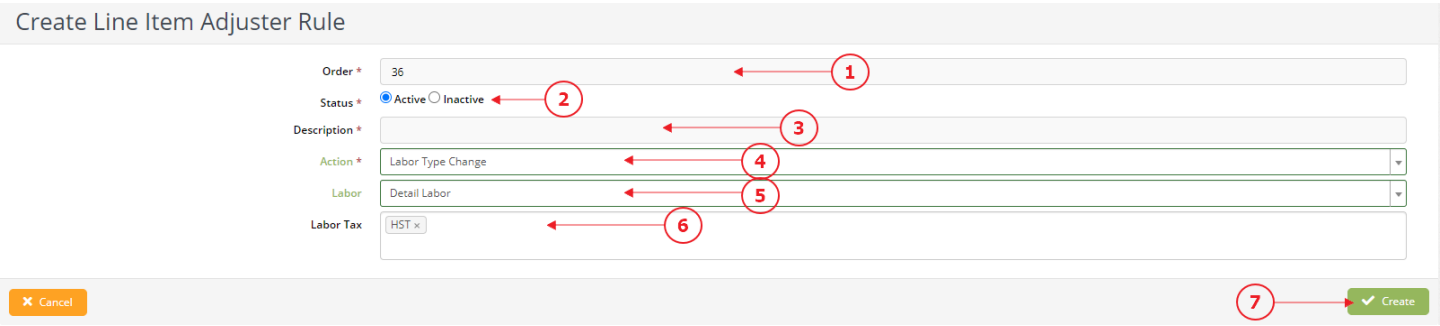
Edit Line Item Adjuster
Click the pencil (2) next to the Line Item Adjuster Rule that you would like to change

Delete Line Item Adjuster
Click the Trashcan icon (2) next to the line item adjuster that you want to remove



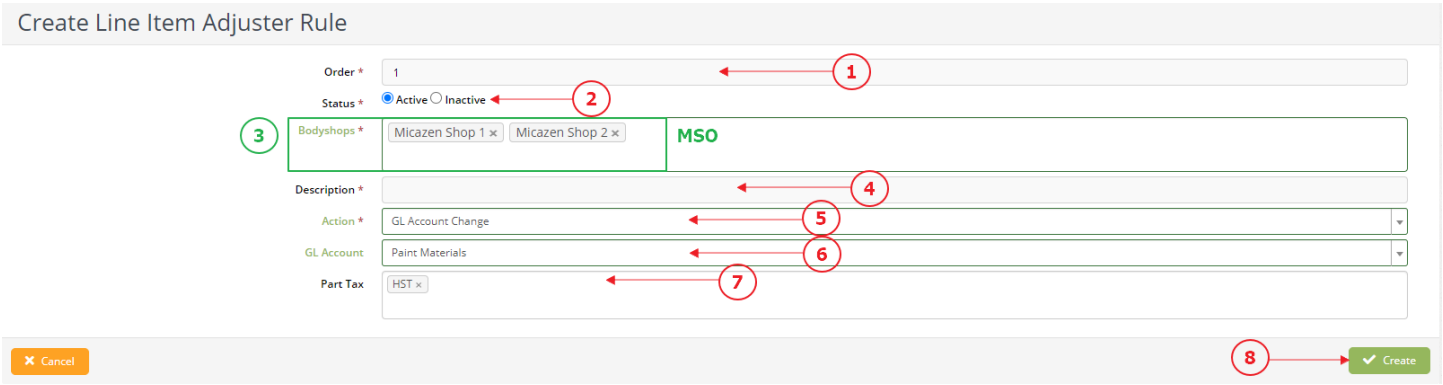
- Order (1) is a numeric value used to sort or group similar items together
- Status of Active (2) enables the rule
- Description (3) needs to match 'identically' the Line's description that is coming from the Estimating System
- Action: (4) Choices available to change Dollars to Hours, Hours to Dollars, Change the GL Account or Change Labor Type`
- Example below is Labor Type Change; therefore, the labor (5) is the labor type to be changed to for that specific line or item
- Select tax(es) to apply to the line item (6)
- Click Create or Update (7) to save and complete the form

Single Store Set Up Screen



- Order (1) is a numeric value used to sort or group similar items together
- Status of Active (2) enables the rule
- Select which Bodyshop(s) (3) the Adjuster Rule should be available in. If no shops are selected; the rule will be inactive in all locations
- Description (4) needs to match 'identically' the Line's description that is coming from the Estimating System
- Action: (5) Choices available to change Dollars to Hours, Hours to Dollars, Change the GL Account or Change Labor Type`
- Example Below is GL Account Change; therefore, the GL Account (6) is the GL Account or Type for that specific line or item
- Select tax(es) to apply to the line item (7)
- Click Create or Update (8) to save and complete the form

MSO Set Up Screen

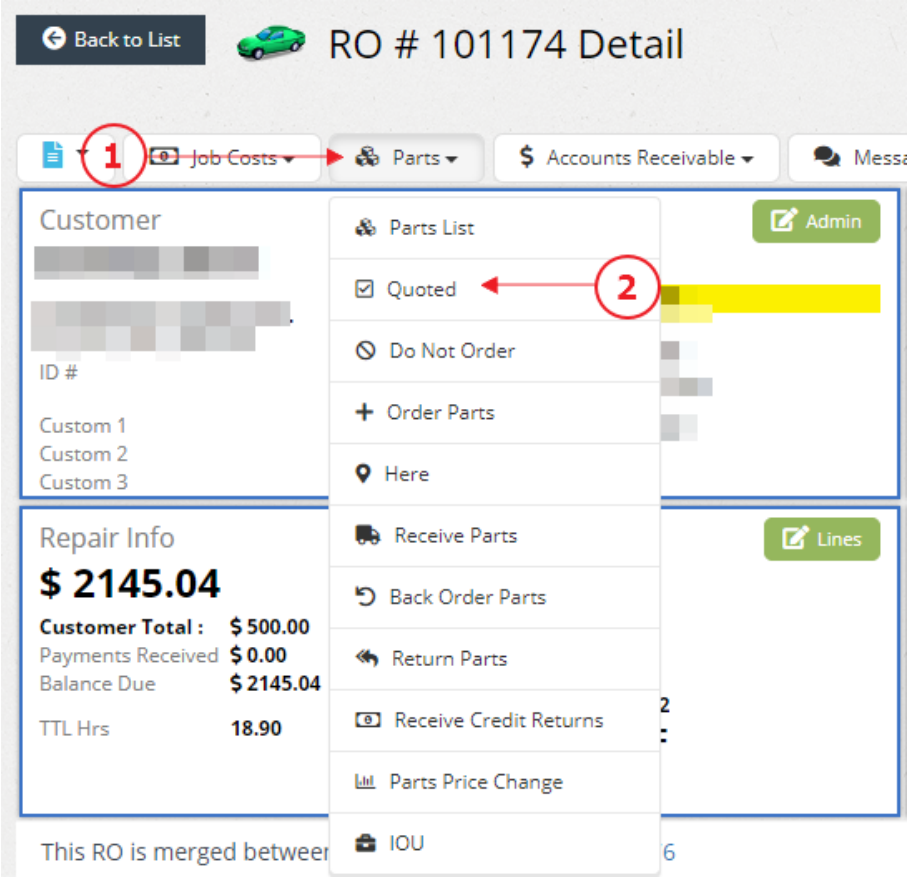


Note: *any lines that have been adjusted by the line item adjuster will show as 'beige lines' when viewing the line item details within a file.*

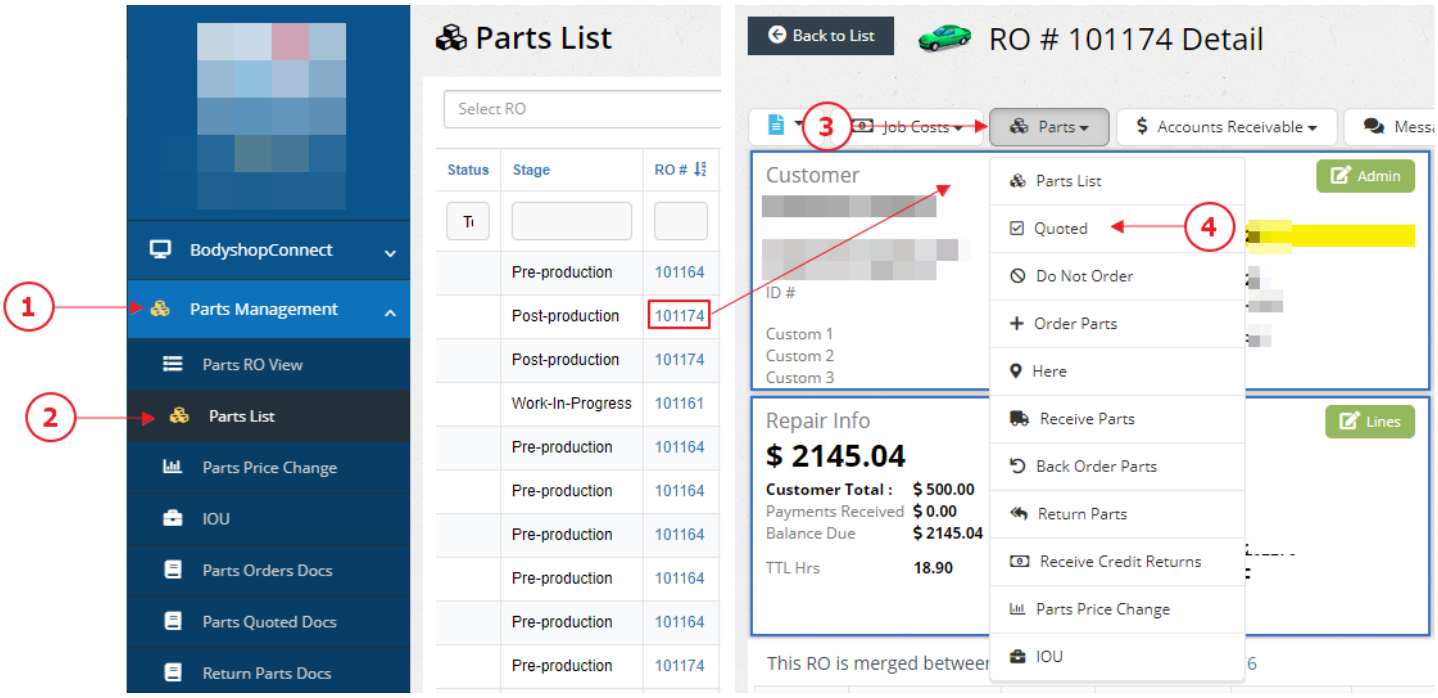
Quoted Parts

Some blank parts may be quoted. This option means that you are clarifying some details about such parts with a vendor. That may be considered as a transitional option between blank and ordered part.
There are several ways to get to the Quoted parts screen:

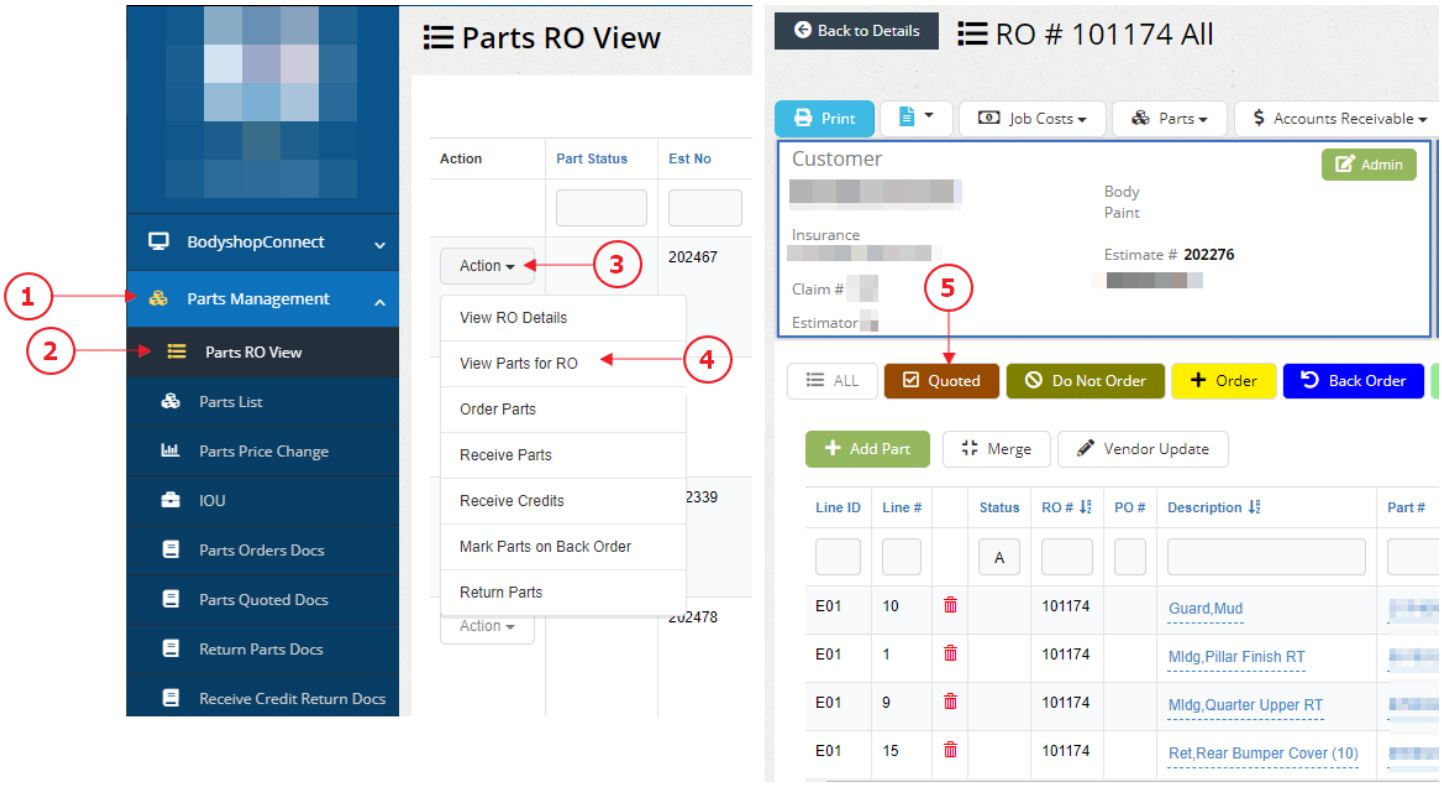
> ***Open RO View*** – 'Parts' drop-down menu (1) – 'Quoted' option (2)



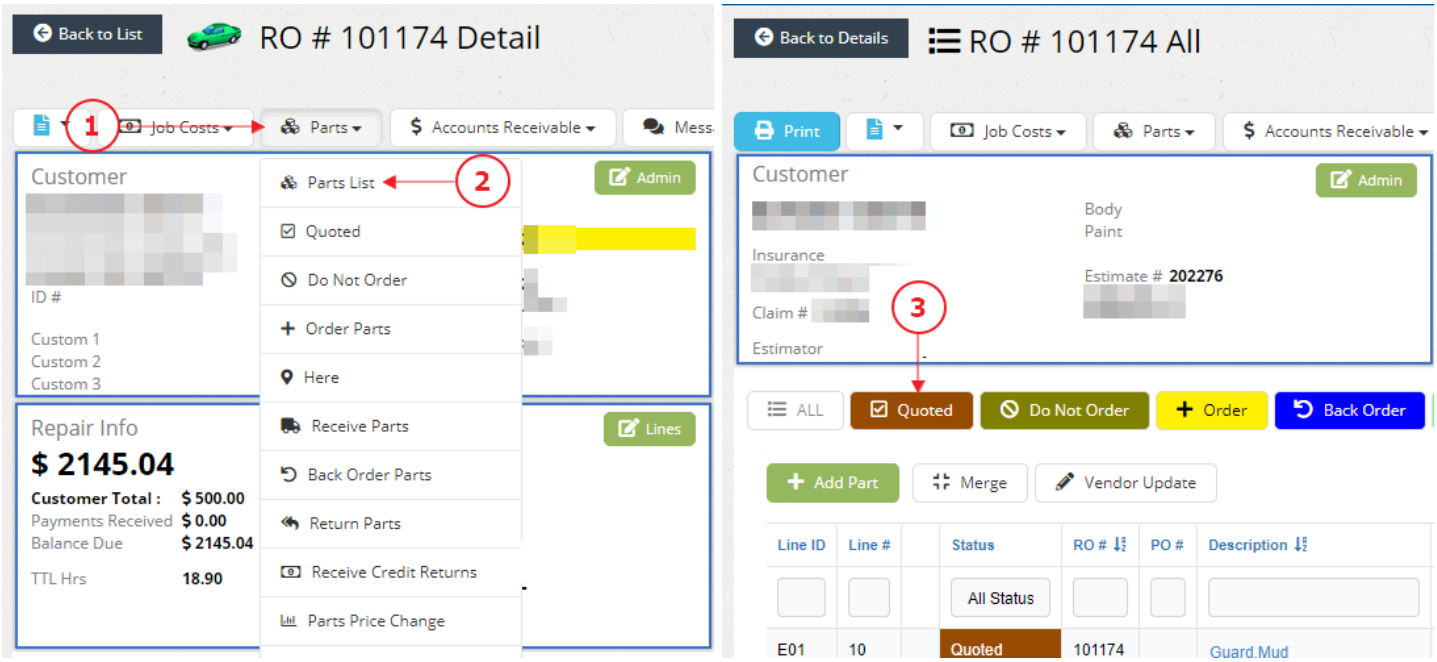
> ***Parts Management Section*** (1) - Parts List (2) – > ***Open RO View*** – 'Parts' drop-down menu (3) – 'Quoted' option (4)



> ***Parts Management Section*** (1) - Parts RO View (2) – Action drop-down menu (3) – View Parts for RO (4) – 'Quoted' button (5)

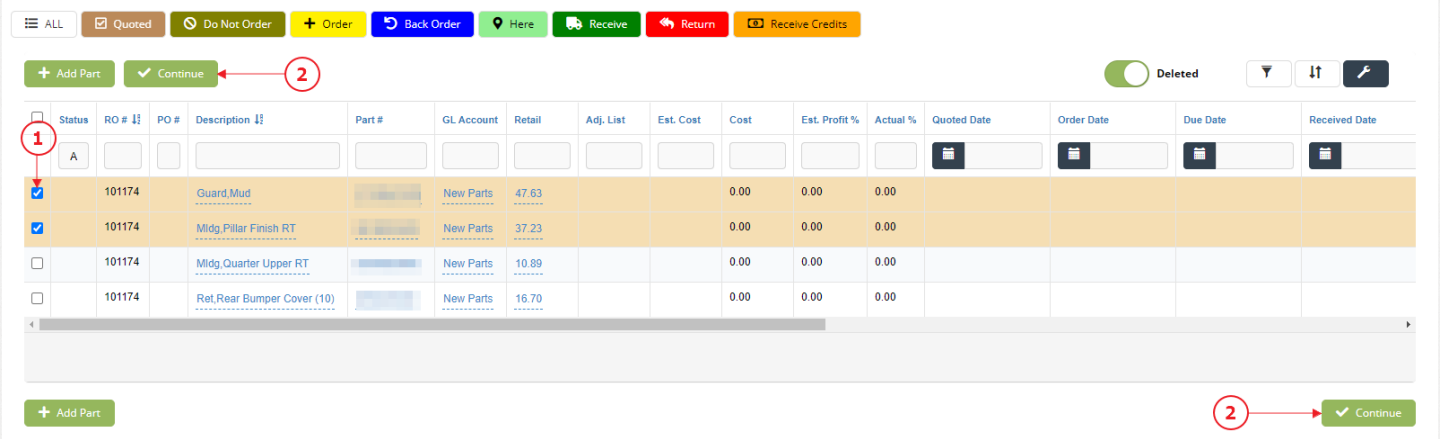


> ***Open RO View*** – Parts drop-down menu (1) - Parts List (2) – 'Quoted' button (3)



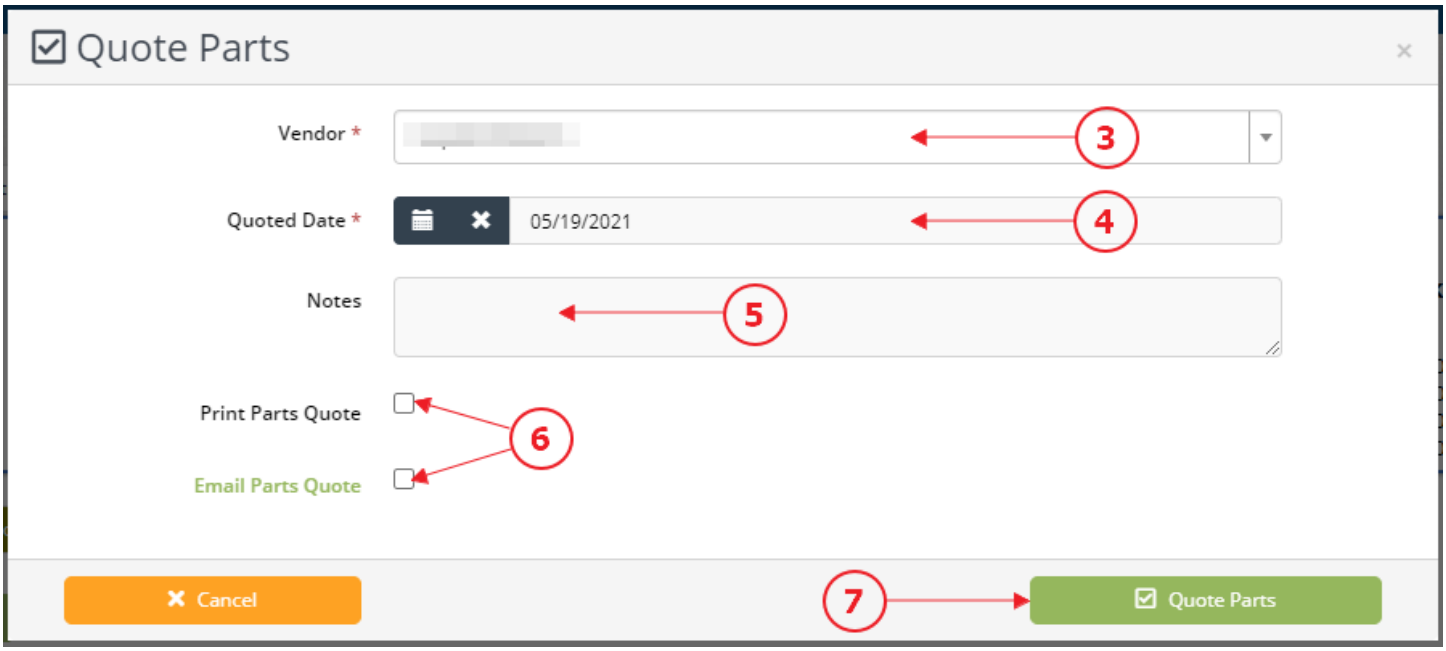
When you are on the Quoted screen, make the following steps:

- Select the parts (1) to be quoted
- Click Continue (2)



Fill the needed information in the Quote Parts pop-up:

- Check or select the vendor (3)
- Verify or edit the quoted date (4)
- Enter notes if needed (5)
- Mark the checkboxes to Print and/or Email Parts Quote document (6)
- Click 'Quote Parts' button (7)

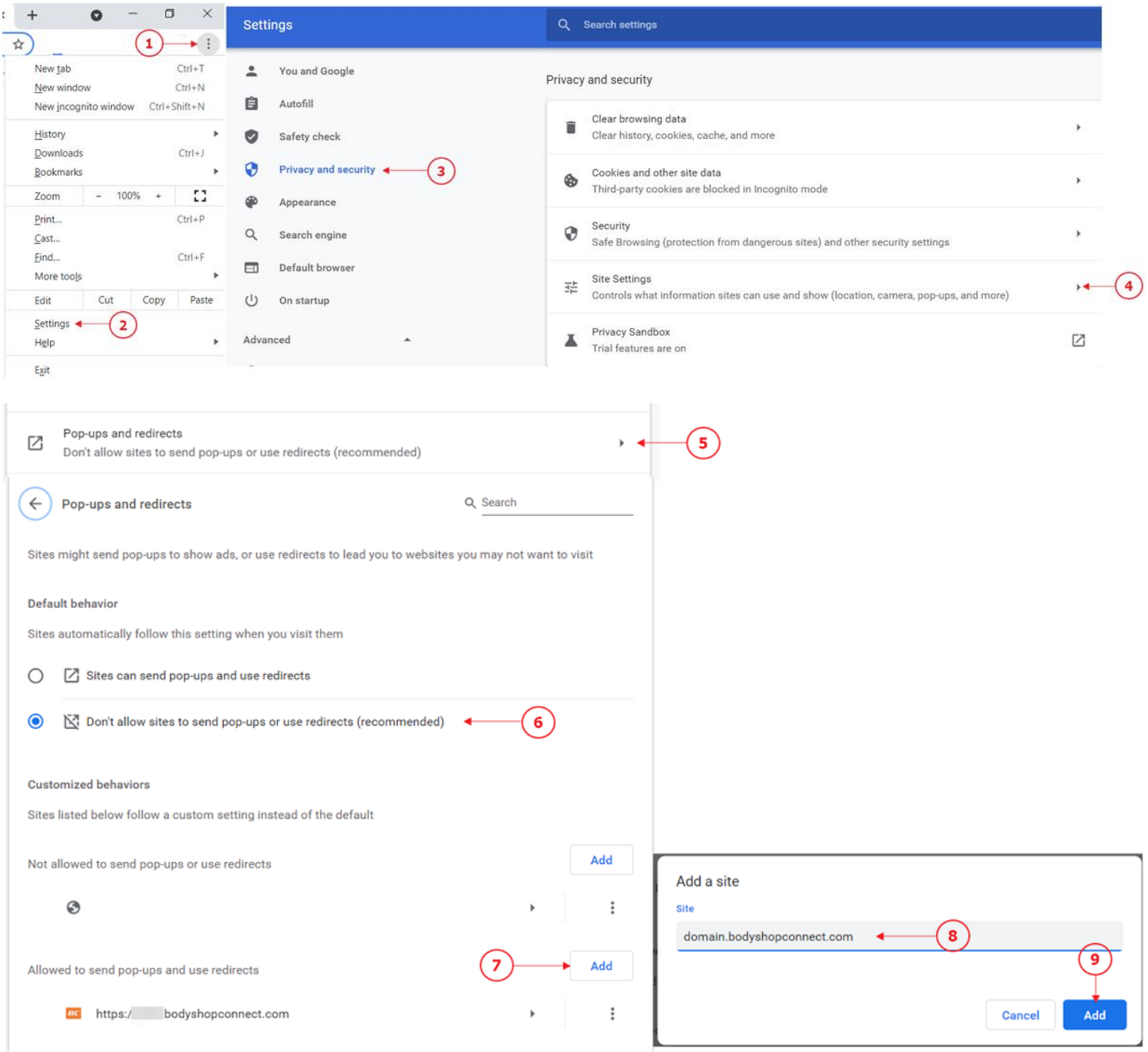


***Note**: this option is available for blank parts and parts marked as Here and Do not order.*

***Note**: pop-up blockers can block some content from the website. As a result, you may not be allowed to print from this screen. To turn the pop-up blockers off, follow these instructions*:

- Open Google Chrome browser
- Open the **Customize and control Google Chrome** (1) menu (the three dots in the upper right corner)
- Select **Settings** (2).
- Under **Privacy and security** (3), click the **Site Settings** (4) button.
- Select **Pop-ups and redirects** (5).

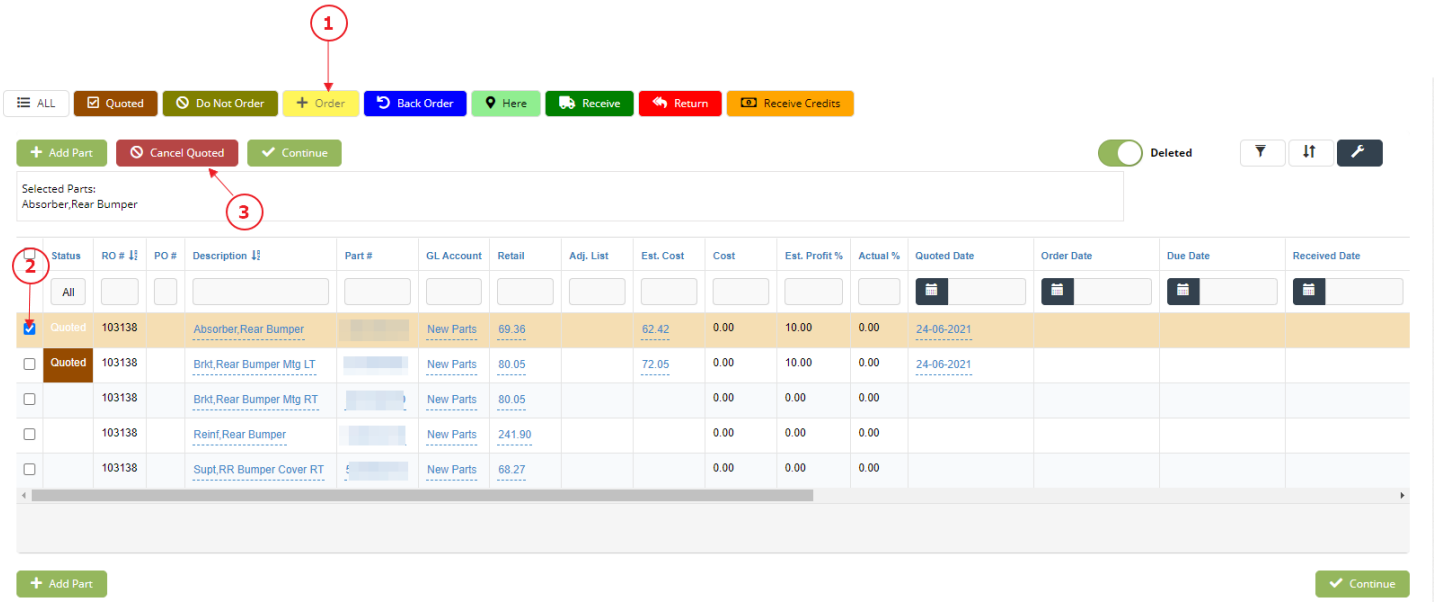
- To enable pop-ups on specific sites, enable the radio-button **Don't allow sites to send pop-ups or use redirects (recommended)** (6) and click **Add** (7) next to **Allow** and enter the URL(s) (the domain + .bodyshopconnet.com) (8) and click **Add** (9).



Cancel Quoted Part

On occasion, you may need to cancel a quoted part. Make the following steps to do that:

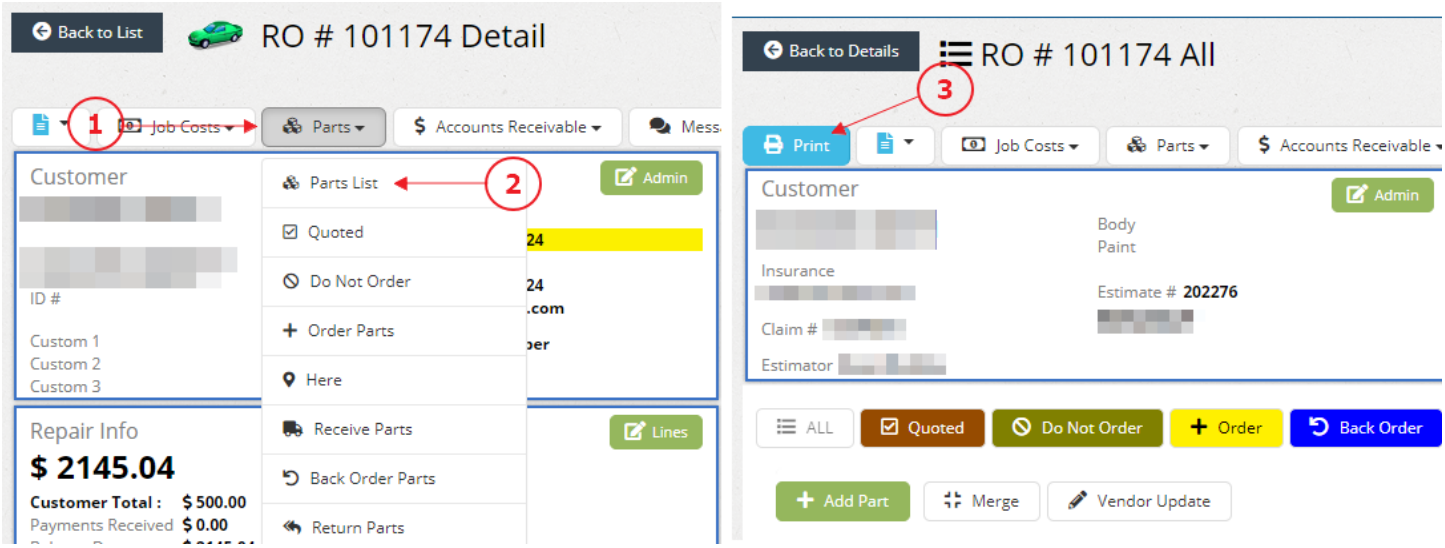
- On the RO parts list click the 'Order' button (1)
- Mark the part you need to cancel quotation for (2)
- Click the 'Cancel Quoted' button (3)



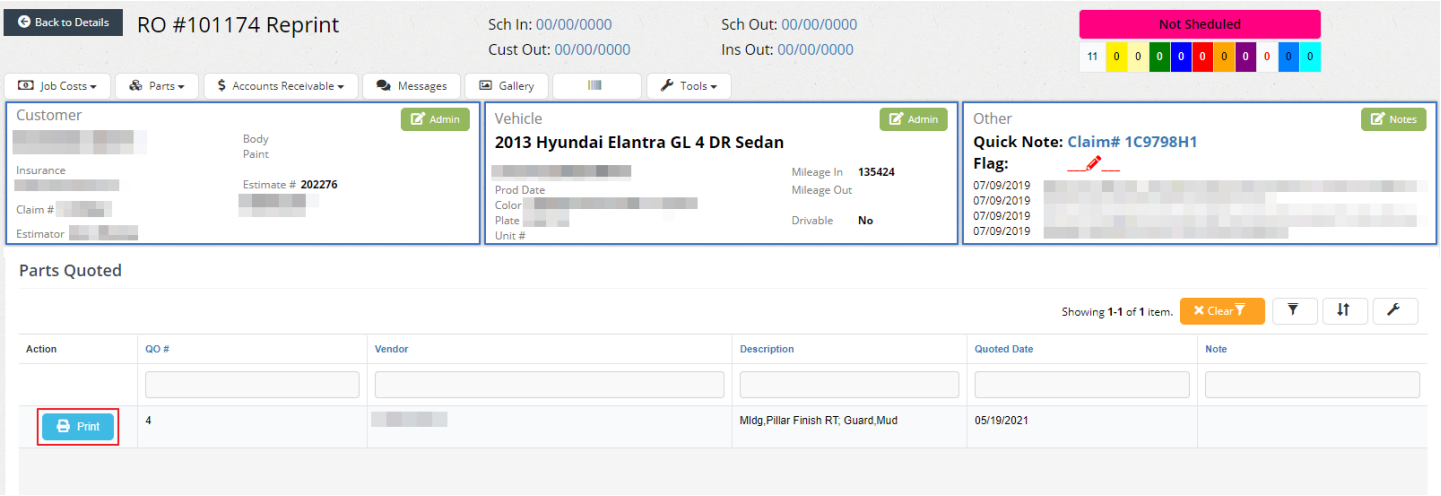
Parts Quoted Documents

Every time you quote parts, a Parts quoted document is created showing vehicle, insurance and vendor information, part(s) description, number, type and estimated cost. On occasion, **Parts Quoted documents** may need to be viewed or re-printed. There are different ways to get to the Parts Quoted Documents screen:

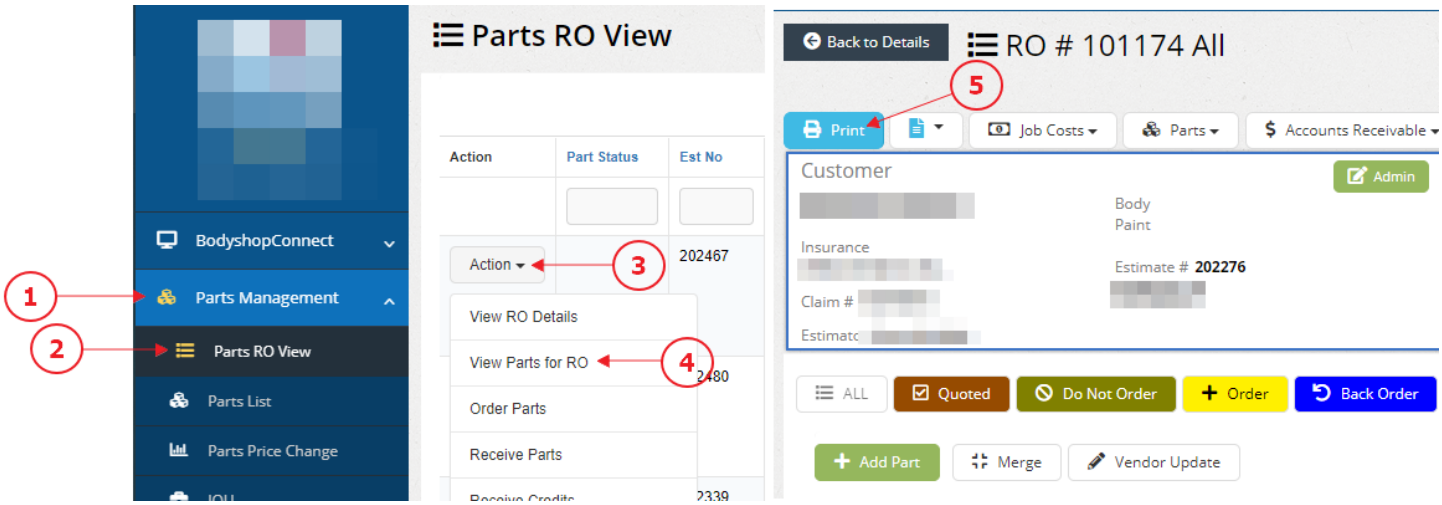
1. Open RO View - Parts drop-down list menu (1) **- Parts List** (2) **– Print button** (3)



On the next page, you will see all the parts documents for the current RO. The second section shows the Parts Quoted. You can click 'Print' to open the needed document which can be printed or sent by email.

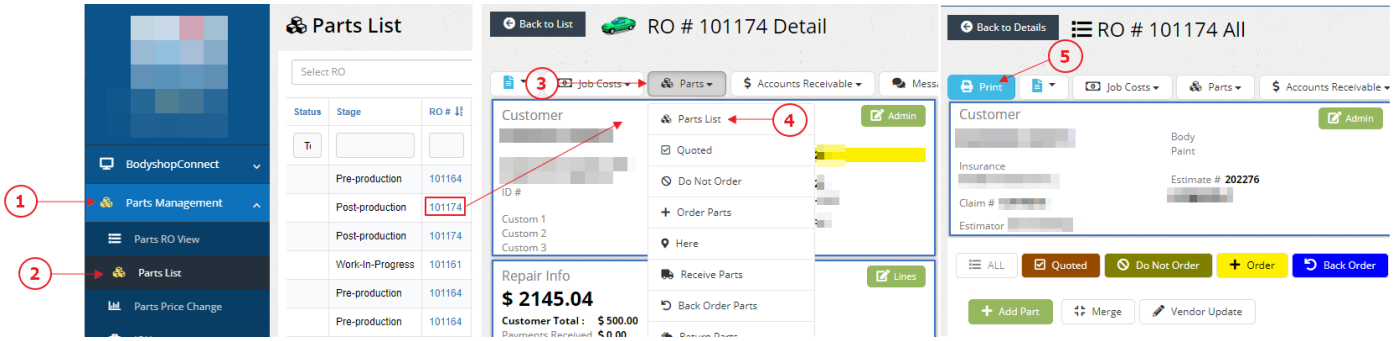


2. Parts Management Section (1) → **Parts RO View** (2) → **Find RO you want to print the document for** → **Action** (3) → **View Parts for RO** (4) → **Print button** (5)



> Click the Print button beside the invoice that you would like to print.

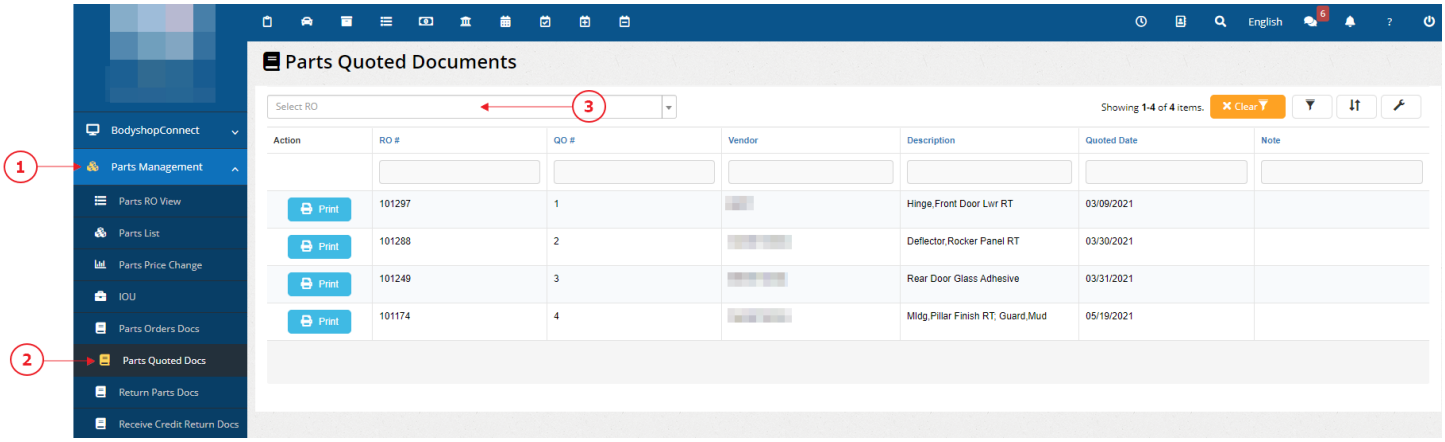
3. Parts Management Section (1) → **Parts List** (2) → **Select the RO needed** → **Open RO View** → **Parts drop-down list** (3) → **Parts List** (4) **– Print button** (5)



> Click the Print button beside the invoice that you would like to print.

4. Parts Management Section (1) → **Parts Quoted Docs** (2) → **Select the RO needed** (3) (or just click on the Print button next to the invoice needed without using the drop-down menu)

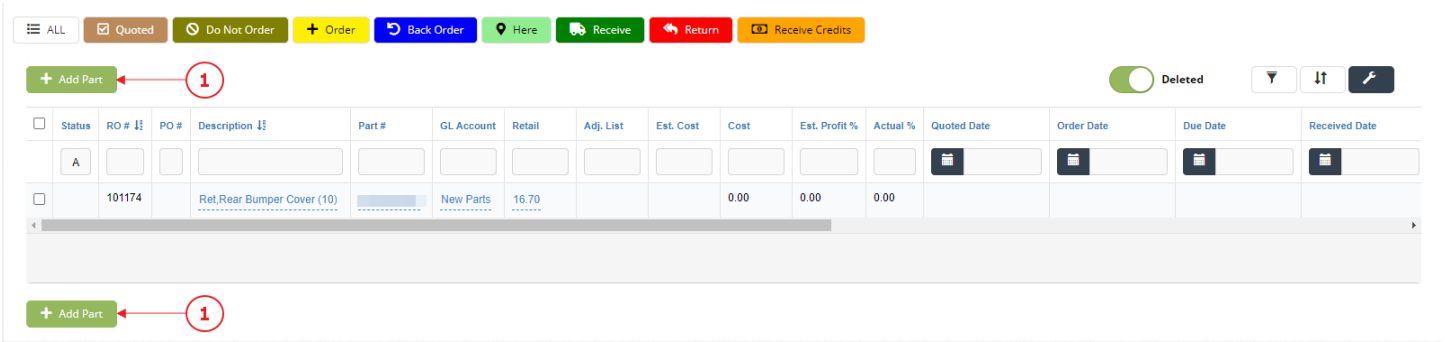
> Click the Print button beside the document that you would like to print.



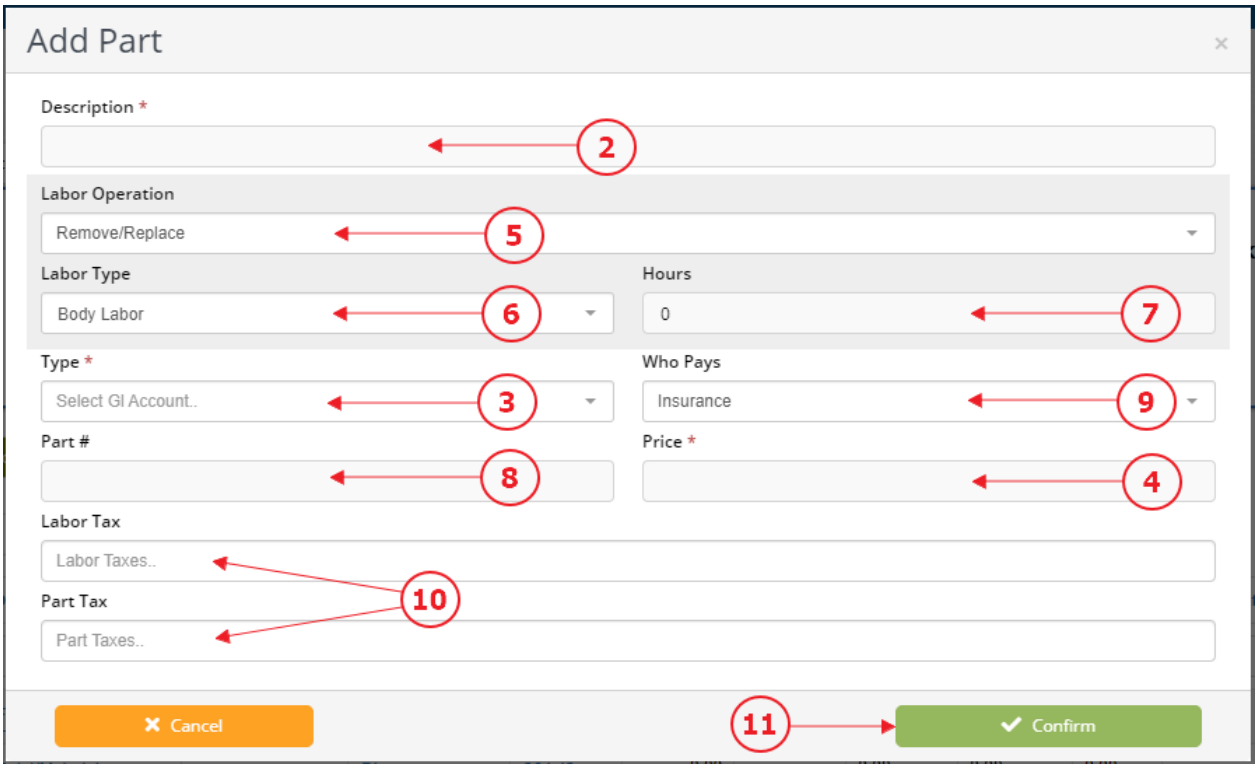
Adding Parts

1. ***Adding a part 'on the fly' when quoting***

- When quoting a part (parts to be quoted are selected), click '+ Add part' (1)



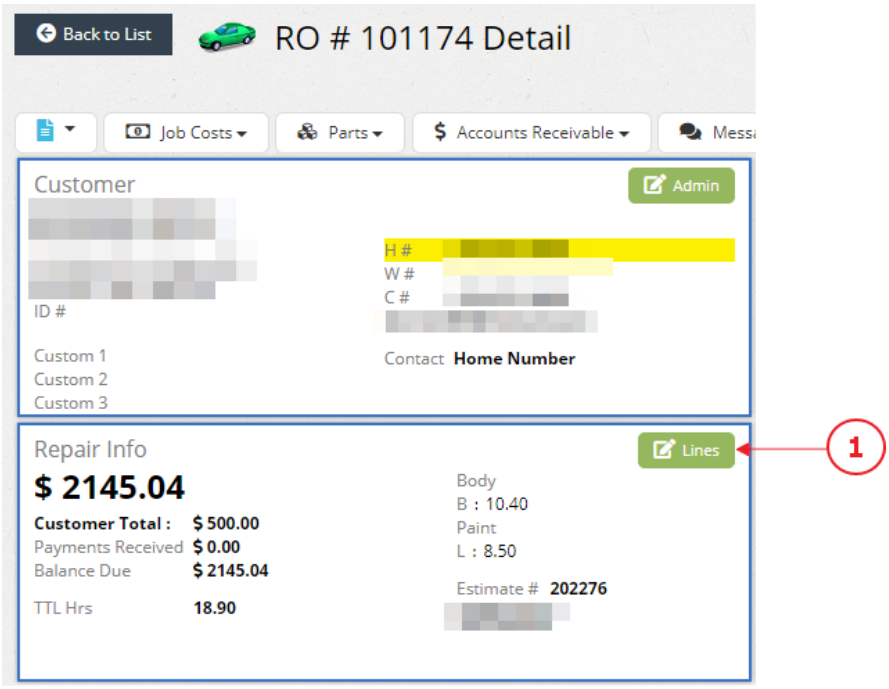
- Fill the mandatory fields: Description (2), Type (GL Account) (3), Price (4)
- Fill the other fields if needed: Labor Operation (5), Labor Type (6), Hours (7), Part # (8), Who Pays (9), select labor and part tax(es) (10)
- Click 'Confirm' (11)



- Continue the parts quoting.

2. Adding a part by a new Custom Line Item from Open RO view:

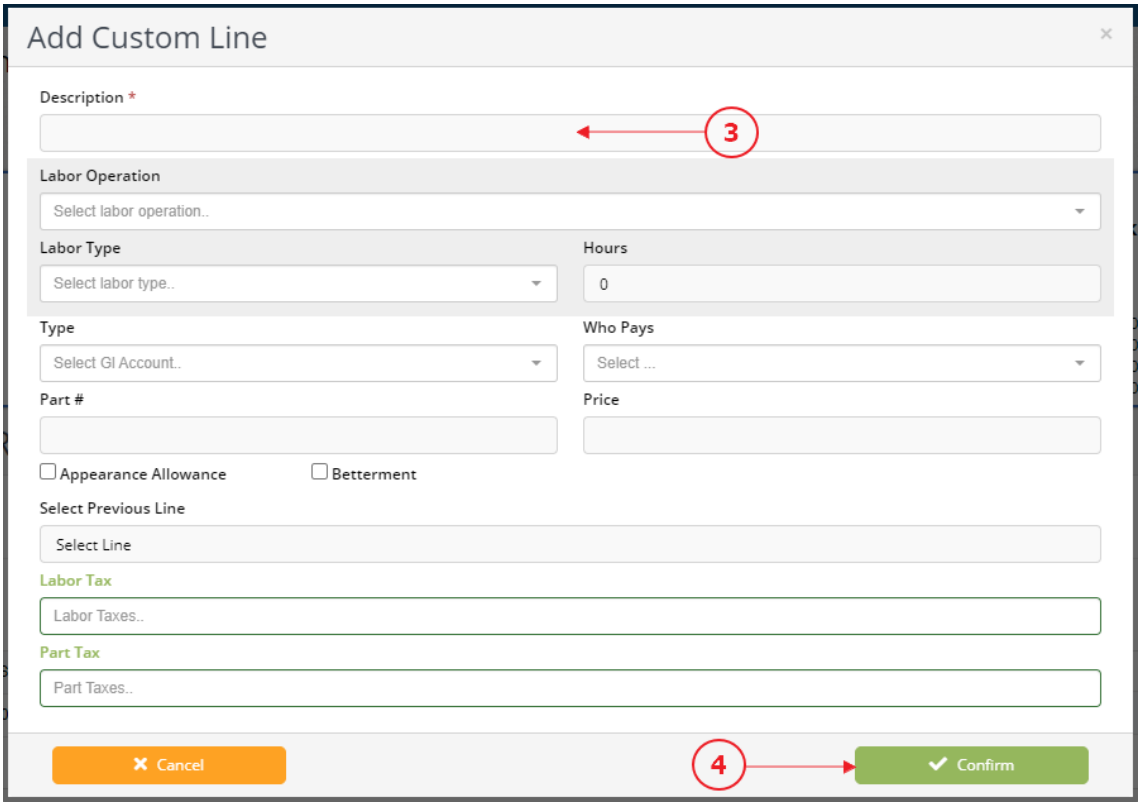
- Open the RO you need to add a part to
- On Open RO view click on Lines button (1) in Repair Info section:



- Click on '+ Custom Line' (2).

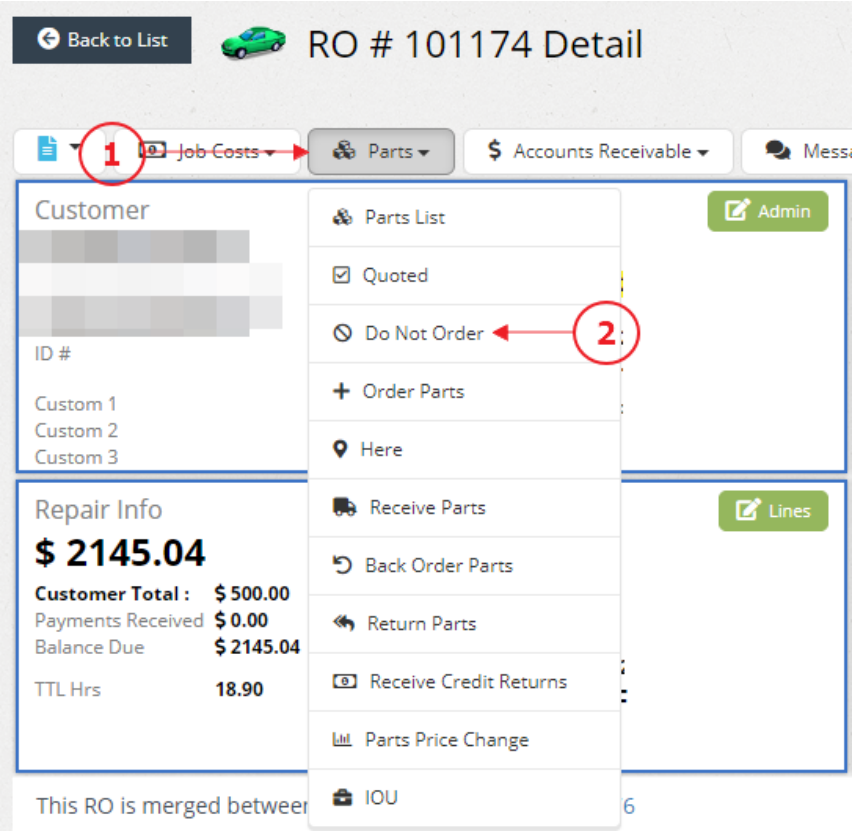


- A pop-up window to set your new line item up would appear. Enter the necessary information (do not forget to enter a description which is a mandatory field (3)) and click on Confirm button (4) to create a Custom line item.

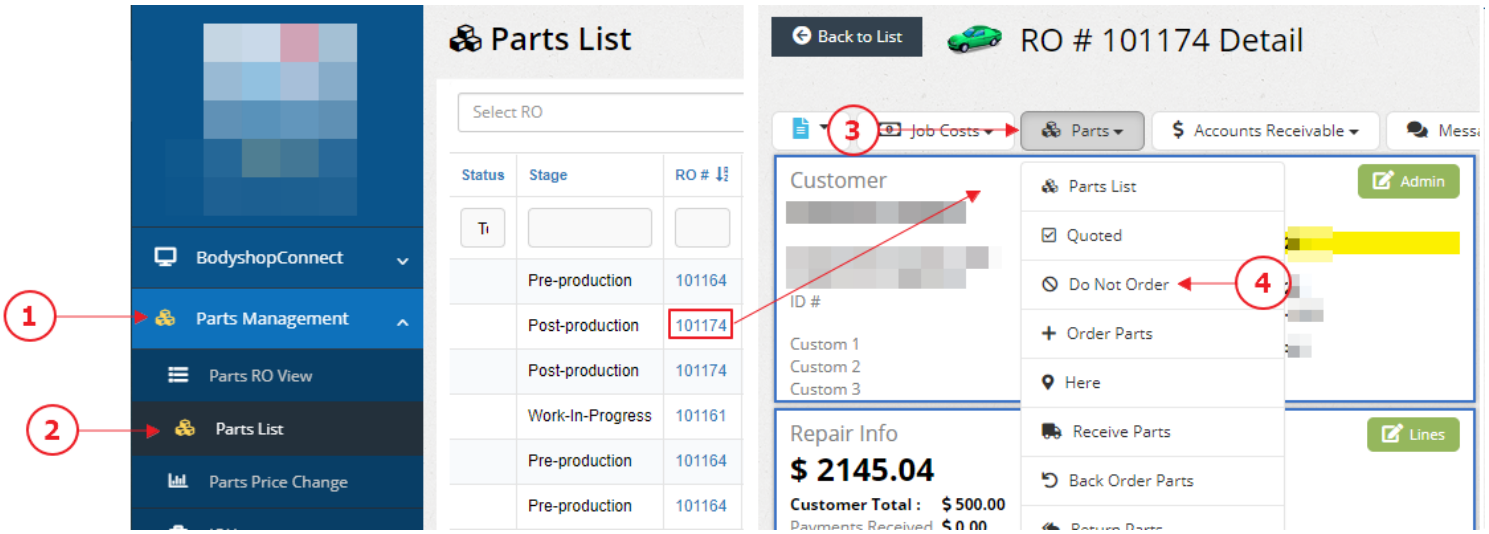


Do Not Order

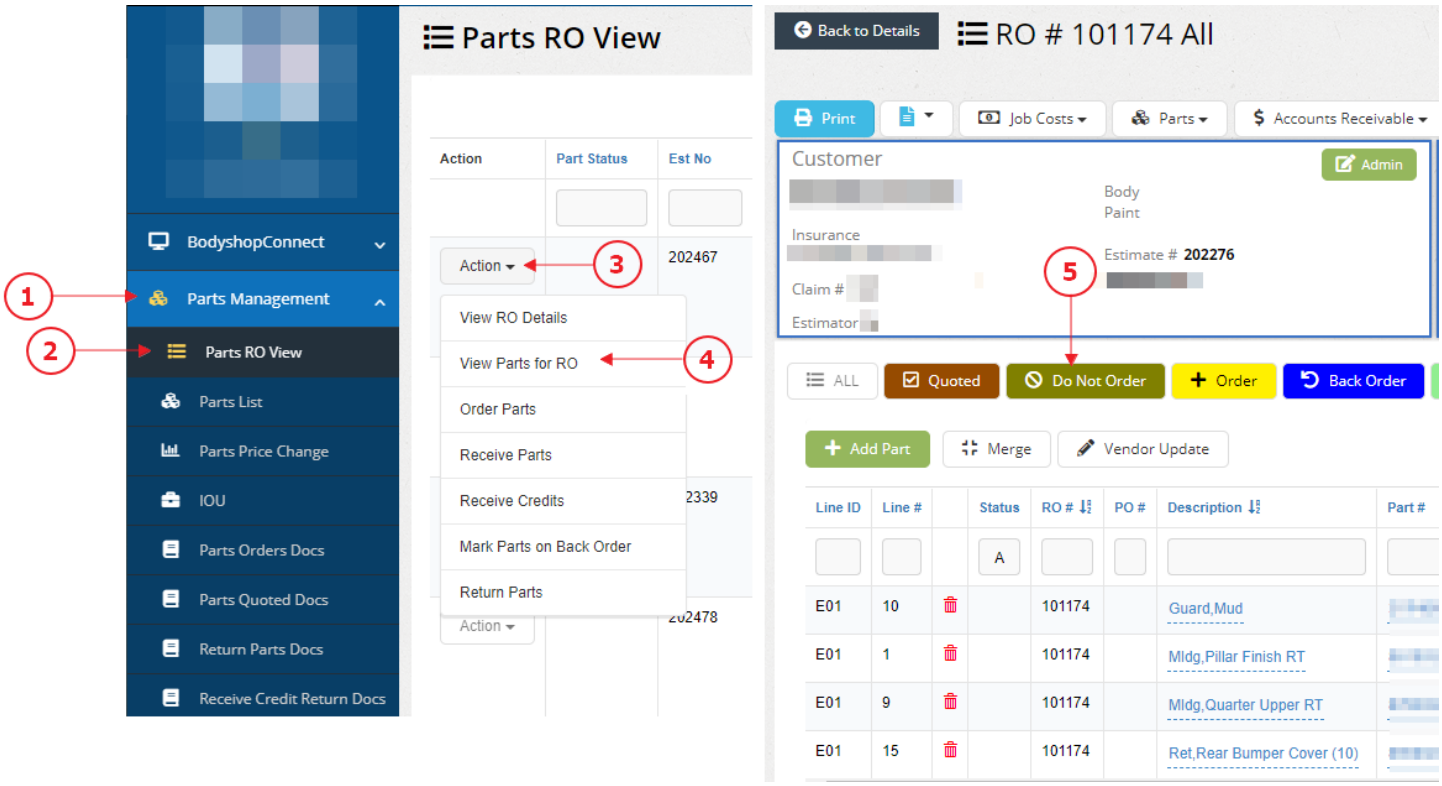
This option allows marking the parts that should never be ordered. There are several ways to get to the Do Not Order parts screen:
> ***Open RO View*** – 'Parts' drop-down menu (1) – 'Do Not Order' option (2)



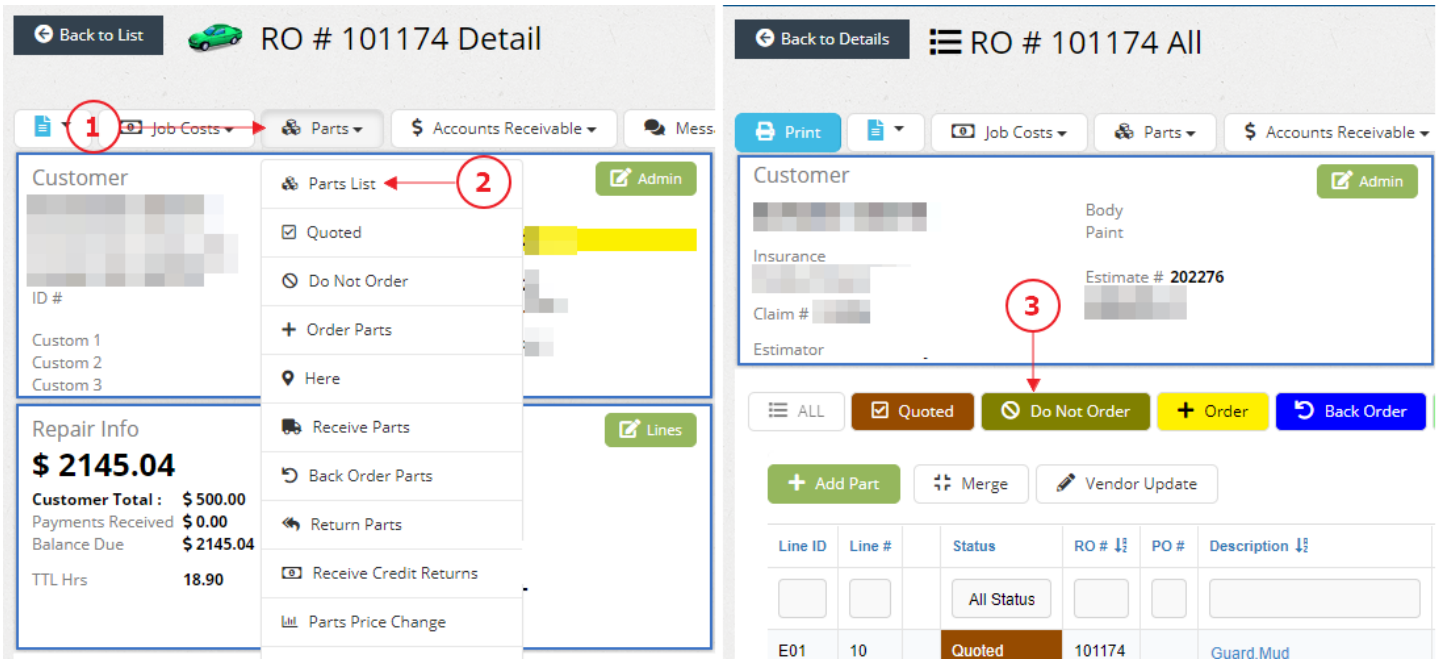
> ***Parts Management Section*** (1) - Parts List (2) – > ***Open RO View*** – 'Parts' drop-down menu (3) – 'Do Not Order' option (4)



> ***Parts Management Section*** (1) - Parts RO View (2) – Action drop-down menu (3) – View Parts for RO (4) – 'Do Not Order' button (5)

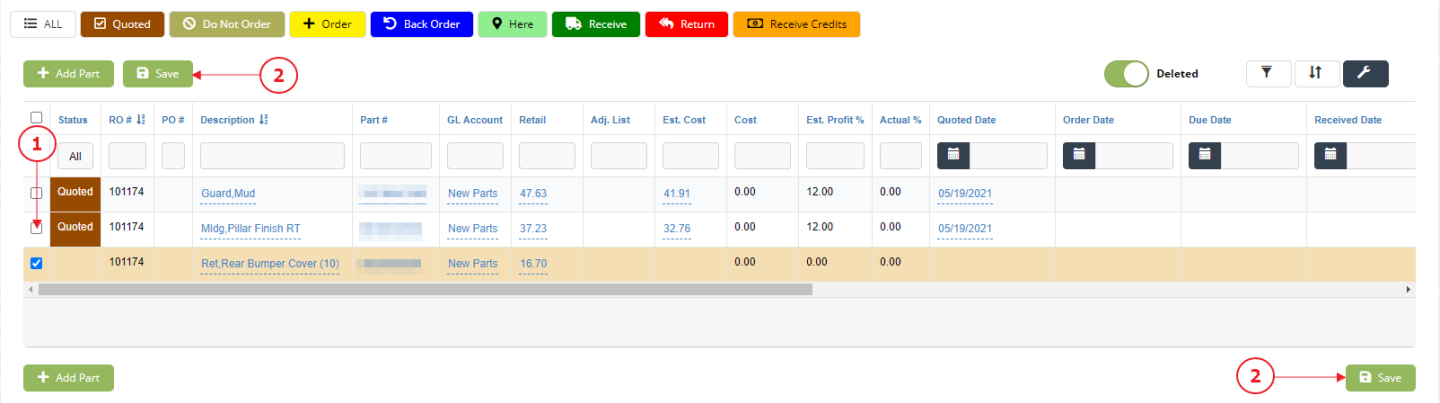


> ***Open RO View*** – Parts drop-down menu (1) - Parts List (2) – 'Do Not Order' button (3)



When you are on the Do Not Order screen, make the following steps:

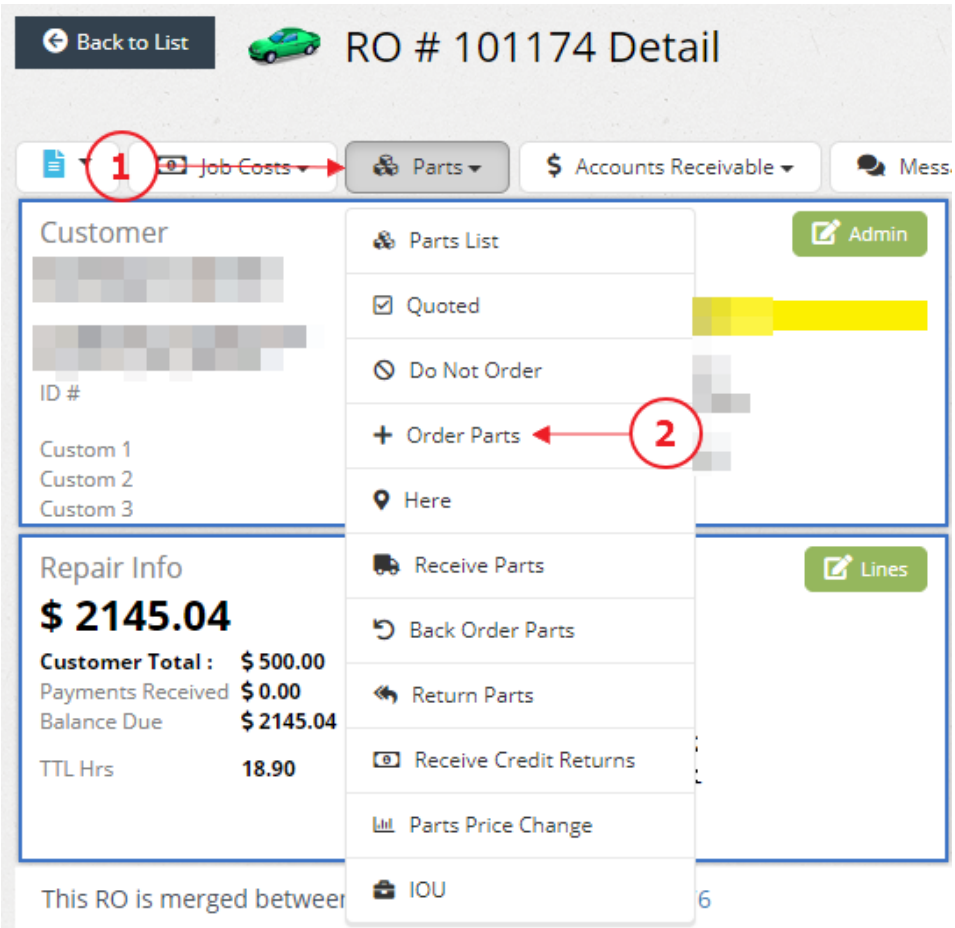
- Select the parts (1) that should not be ordered
- Click on Save (2).



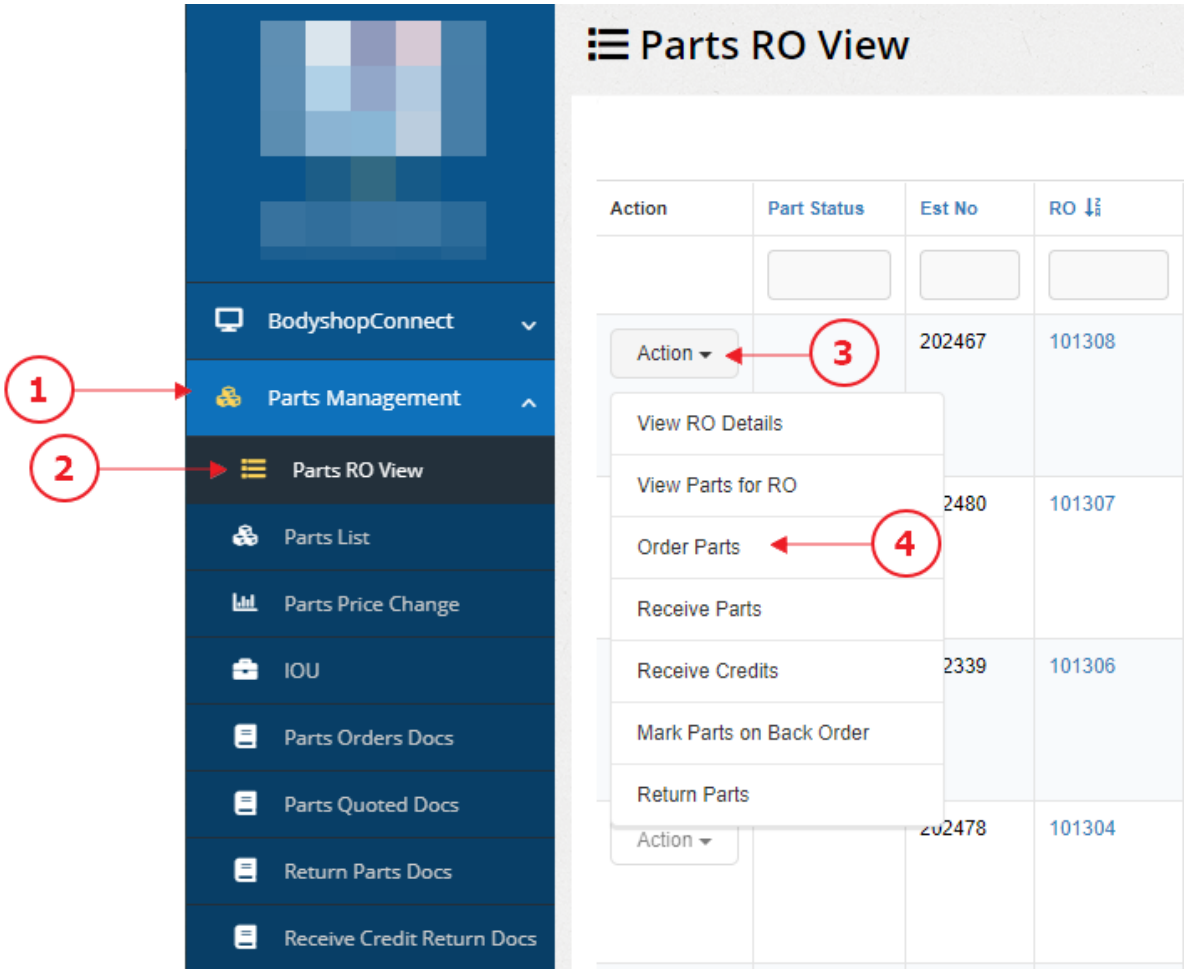
***Note**: this option is available for blank, quoted parts and parts marked as Here.*

Order Parts

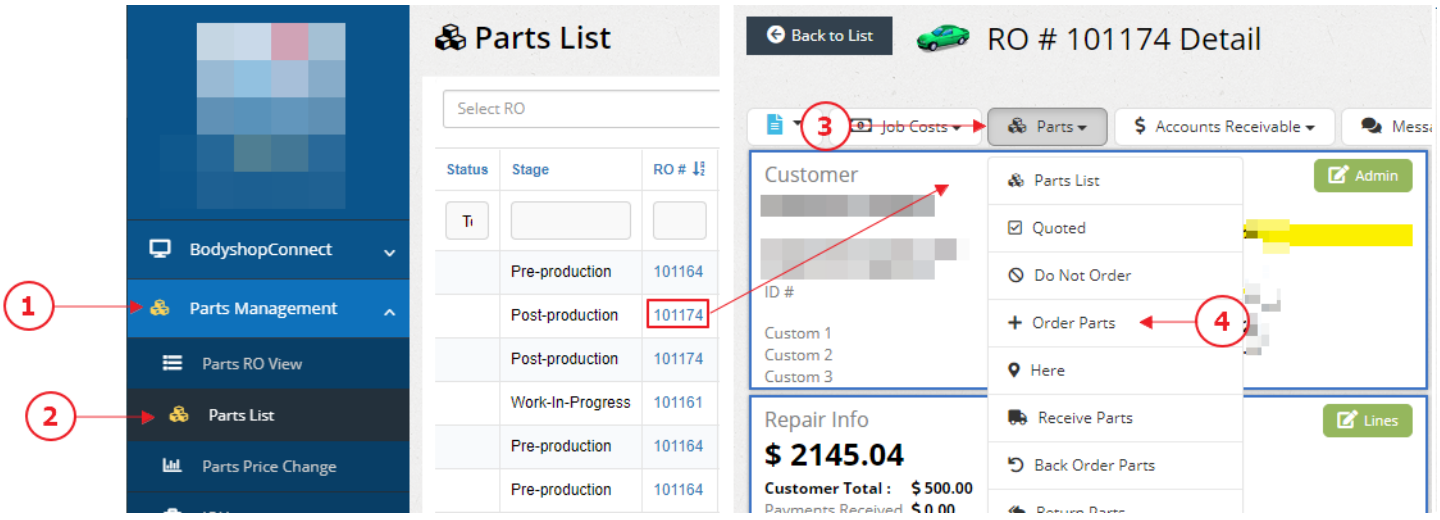
The 'Order Parts' Screen can be accessed in several ways:
> ***Open RO View*** - Parts drop-down menu (1) – Order Parts option (2)



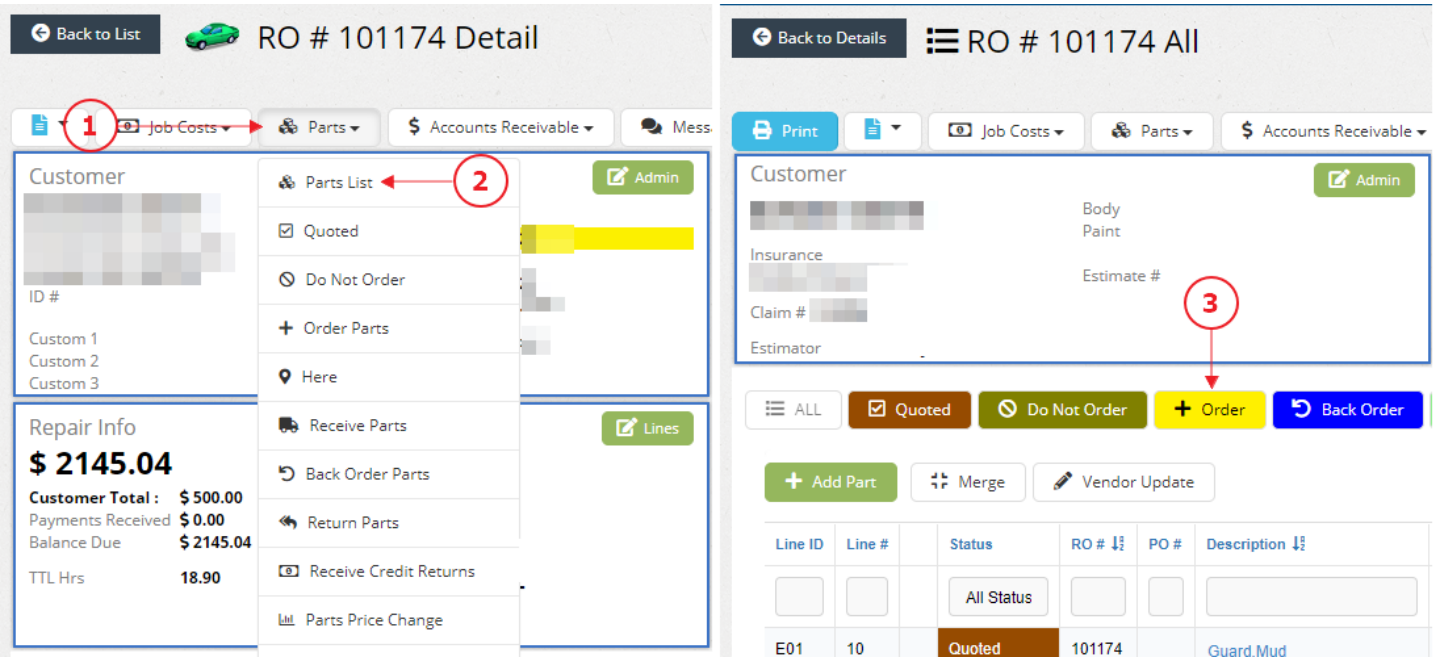
> ***Parts Management Section*** (1) - Parts RO View (2) - Action drop-down menu (3) – Order Parts (4)



> ***Parts Management Section*** (1) - Parts List (2) - ***Open RO View*** - Parts drop-down menu (3) – Order Parts option (4)

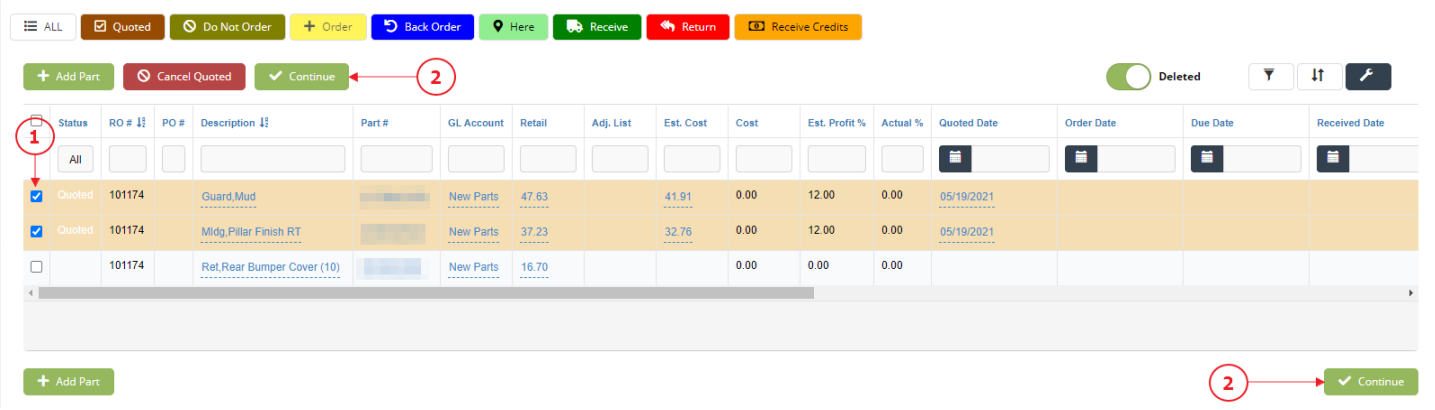


> ***Open RO View*** – Parts drop-down menu (1) - Parts List (2) – Order button (3)

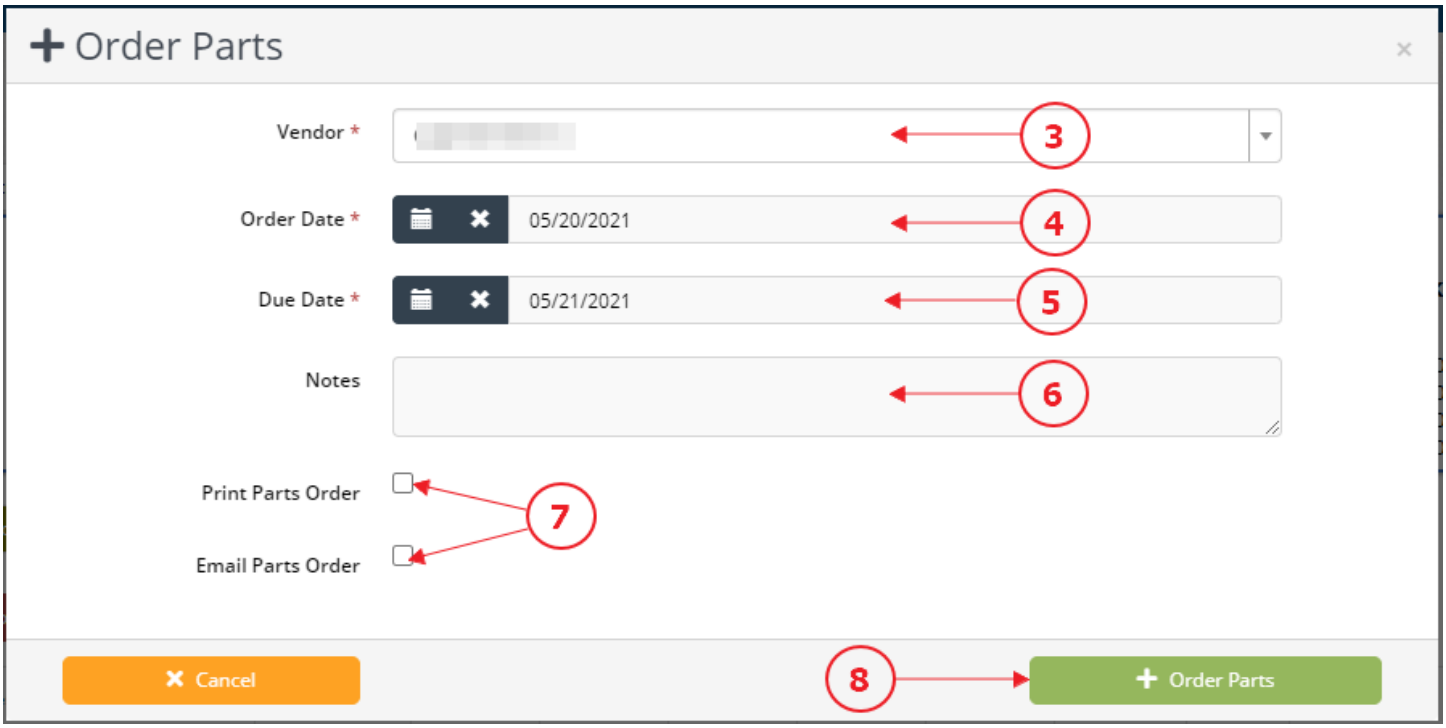


Then follow the next steps on *'Order Parts' screen* to Order Parts:

- Select or tag all parts to be ordered from one vendor (1).
- Click 'Continue' button (2).



- Fill in the needed information:
  - Verify or select Vendor (3)
  - Verify or select Order Date (4)
  - Verify or select expected Due Date (5)
  - Enter Notes if needed (6)
  - Select to print or email parts order (7)
- Click 'Order Parts' (8)

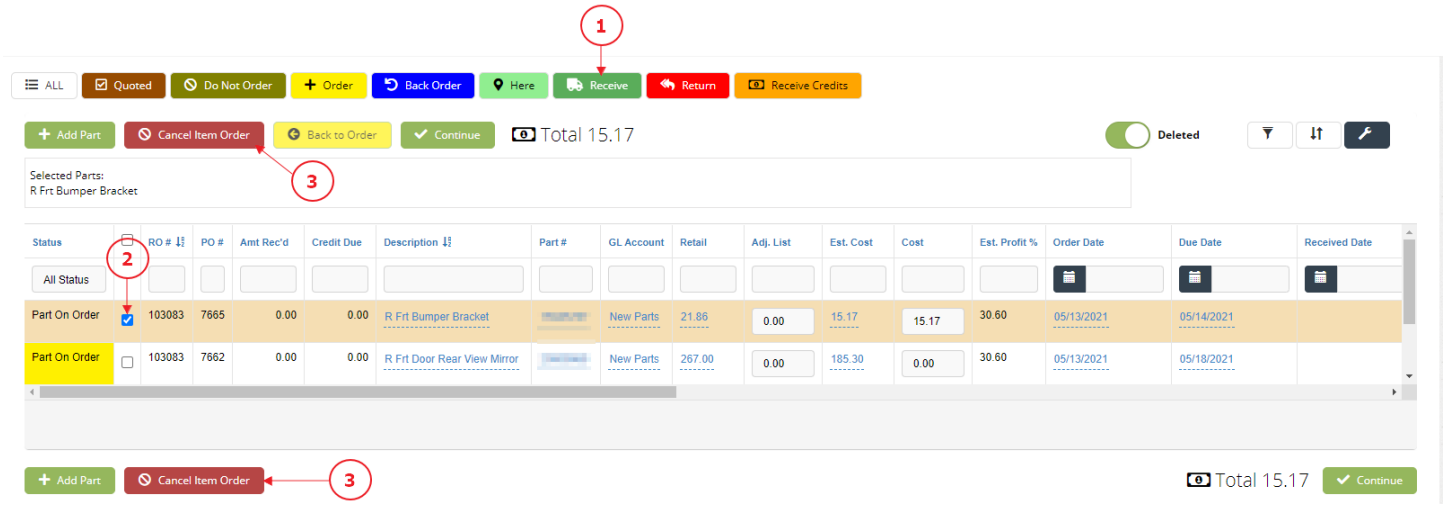


Note: this option is available for blank, quoted parts and parts that are Here and Do not order.

Cancel Part order

On occasion, you may need to cancel a part order. Make the following steps to do that:

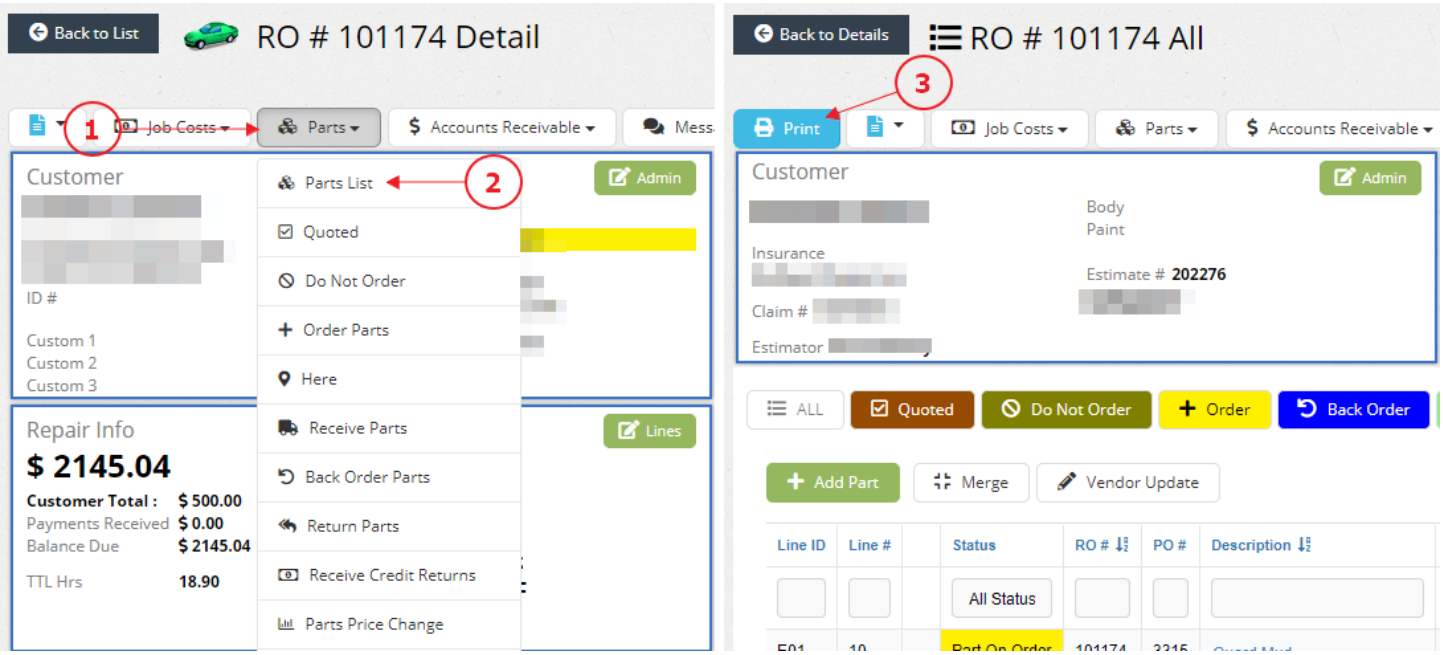
- On the RO parts list click the 'Receive' button (1)
- Mark the part you need to cancel order for (2)
- Click the 'Cancel Item Order' button (3)



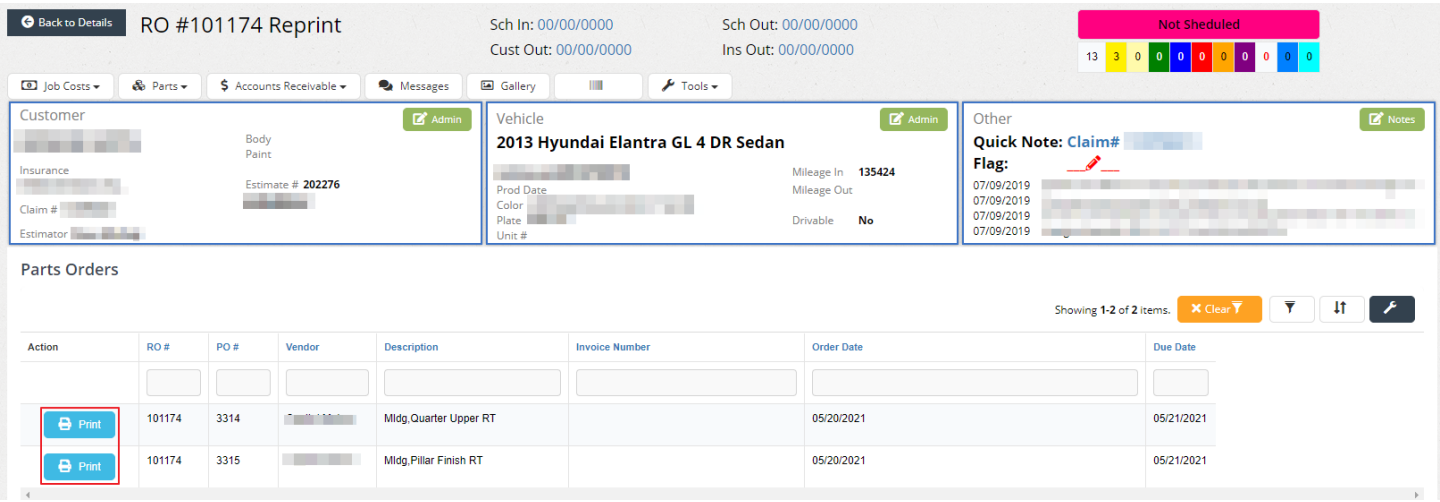
Parts Orders Documents

Every time you order parts, a Parts order invoice is created showing vehicle and vendor information, part(s) description, number, type, estimated cost and due date. On occasion, **Parts Order Invoices** may need to be viewed or printed:

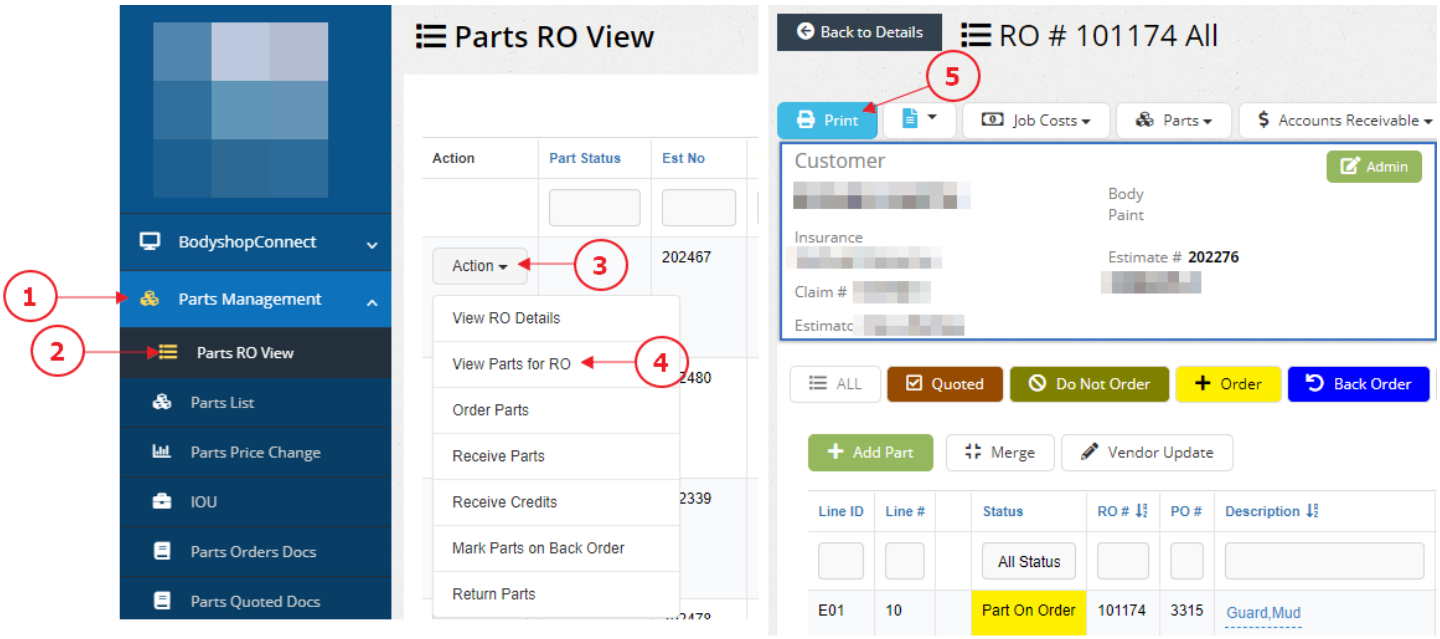
1. Open RO View - Parts drop-down list menu (1) **- Parts List** (2) **– Print button** (3)



On the next page, you will see all the parts documents for the current RO. The first section shows the Parts Orders. You can click 'Print' to open an invoice needed which can be printed or sent by email.

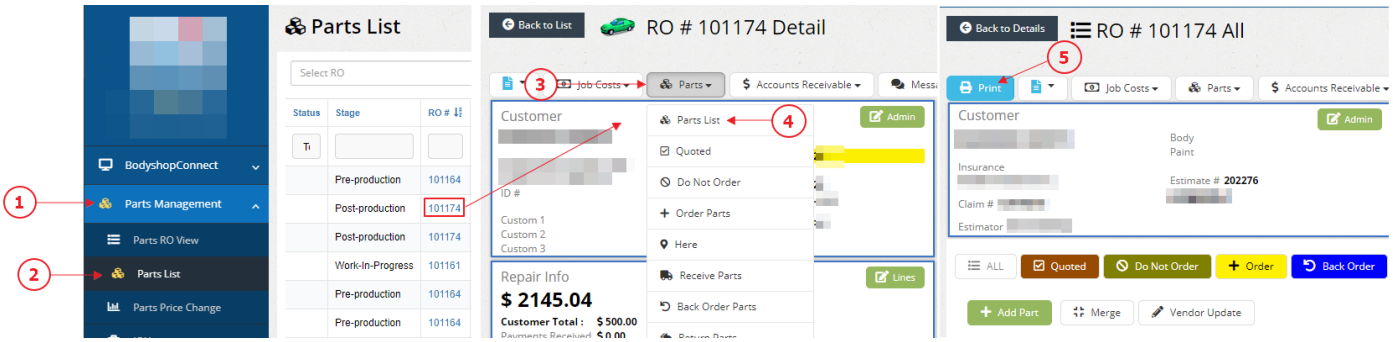


2. Parts Management Section (1) **→ Parts RO View** (2) **→ Find RO you want to print the invoice for → Action** (3) **→ View Parts for RO** (4) **→ Print button** (5)



> Click the Print button beside the invoice that you would like to print.

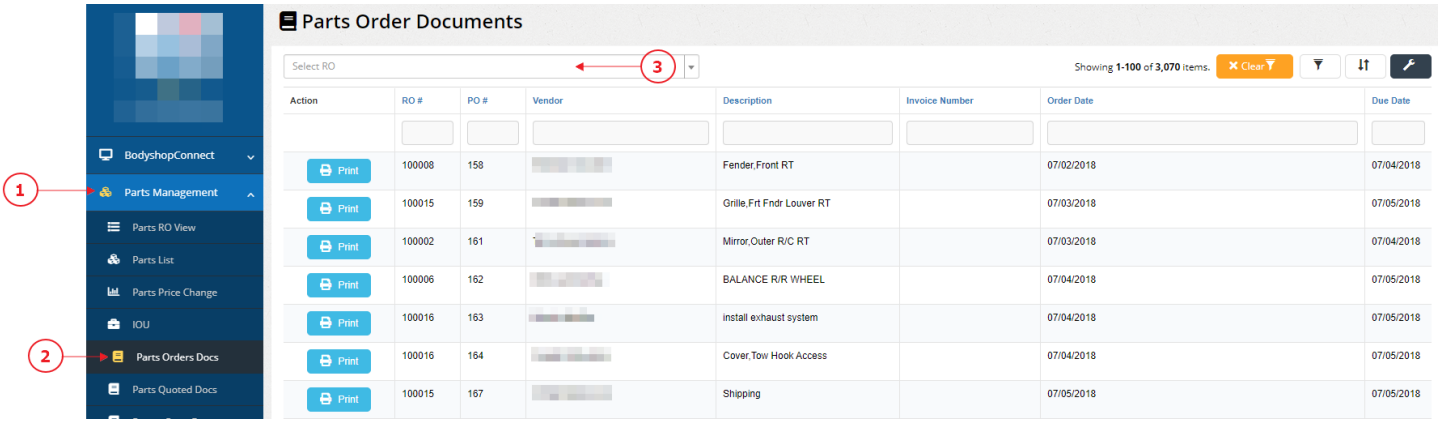
3. Parts Management Section (1) → **Parts List** (2) → **Select an RO needed → Open RO View → Parts drop-down list** (3) → **Parts List** (4) **– Print button** (5)



> Click the Print button beside the invoice that you would like to print.

4. Parts Management Section (1) → **Parts Orders Docs** (2) → **Select an RO needed** (3) (or just click on Print button next to the needed document without using the drop-down list)

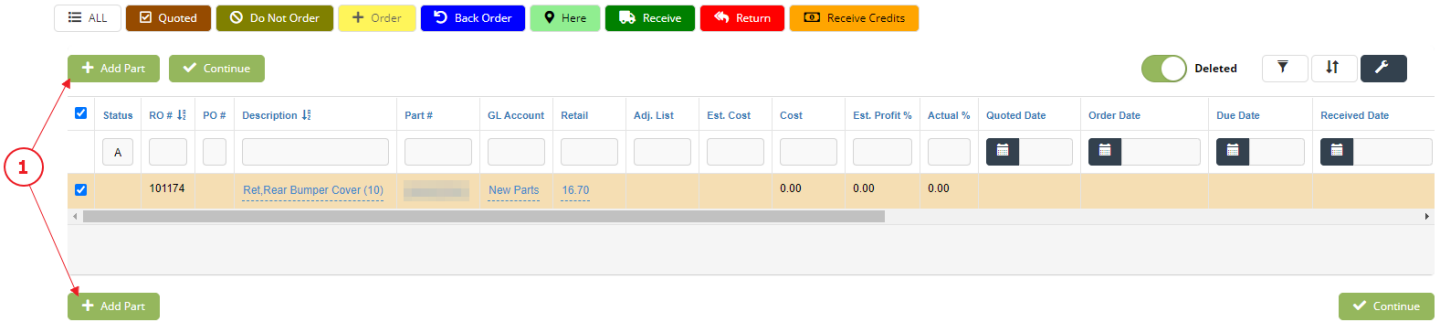
> Click the Print button beside the invoice that you would like to print.



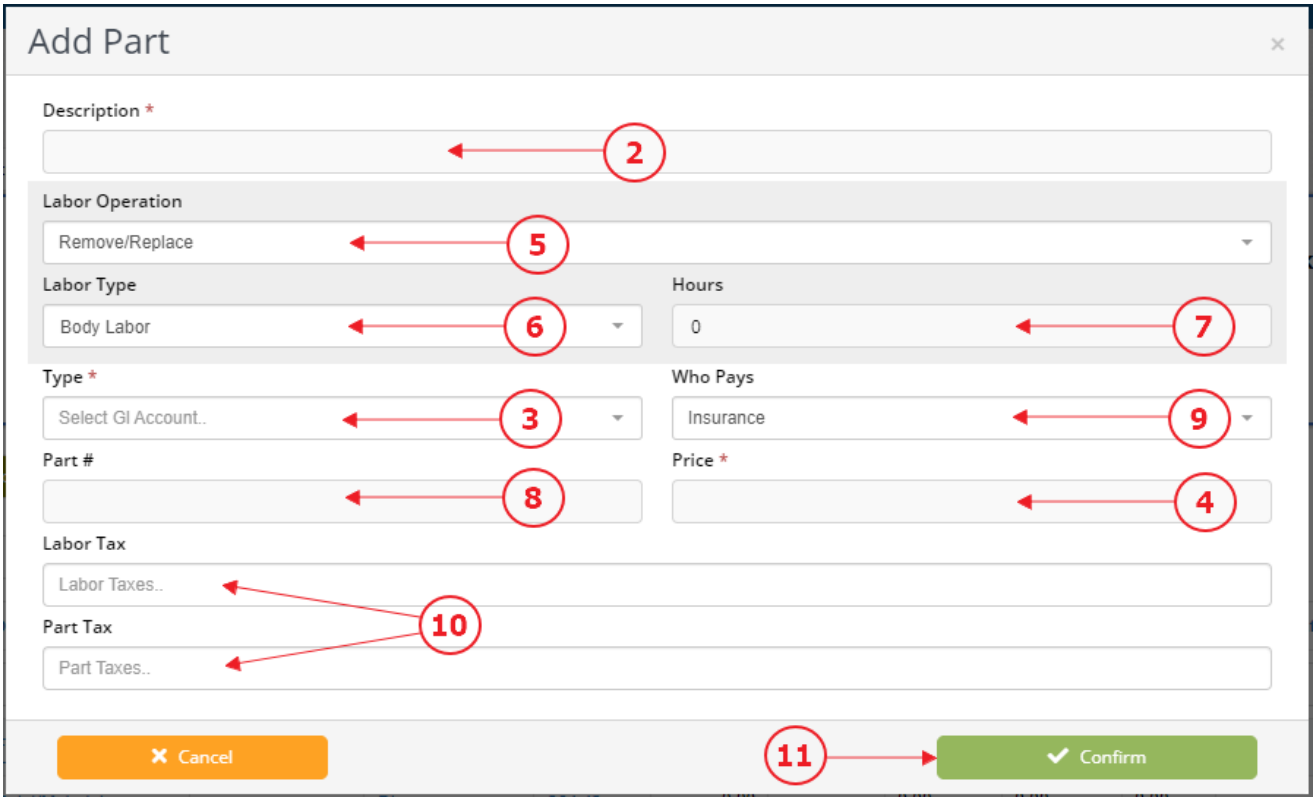
Adding Parts

1. Adding a part 'on the fly' when ordering

- When ordering a part (parts to be ordered are selected), click '+ Add part' (1)



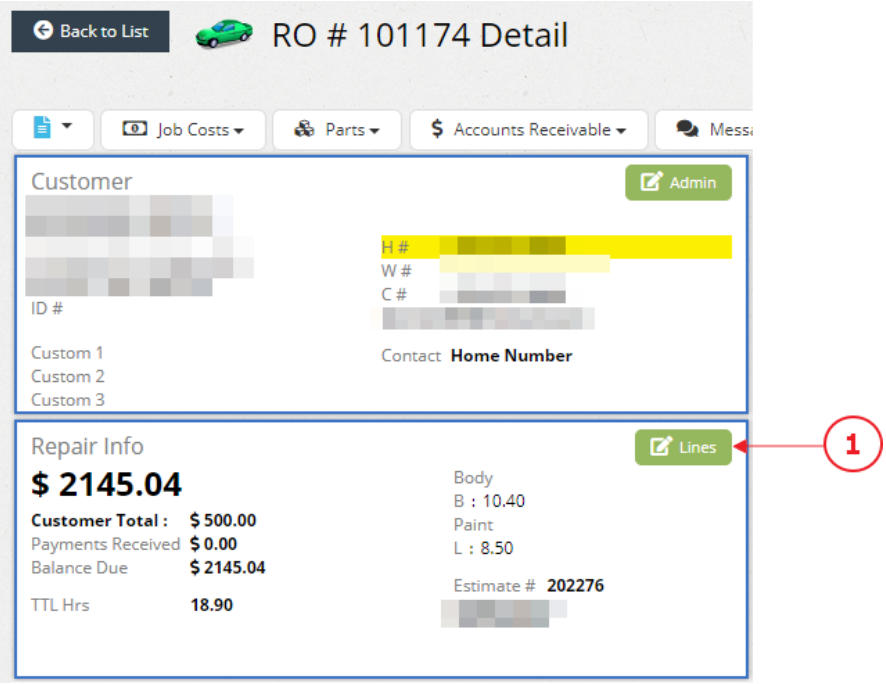
- Fill the mandatory fields: Description (2), Type (GL Account) (3), Price (4)
- Fill the other fields if needed: Labor Operation (5), Labor Type (6), Hours (7), Part # (8), Who Pays (9), select labor and part tax(es) (10)
- Click 'Confirm' (11)



- Continue the parts ordering.

2. Adding a part by a new Custom Line Item from Open RO view:

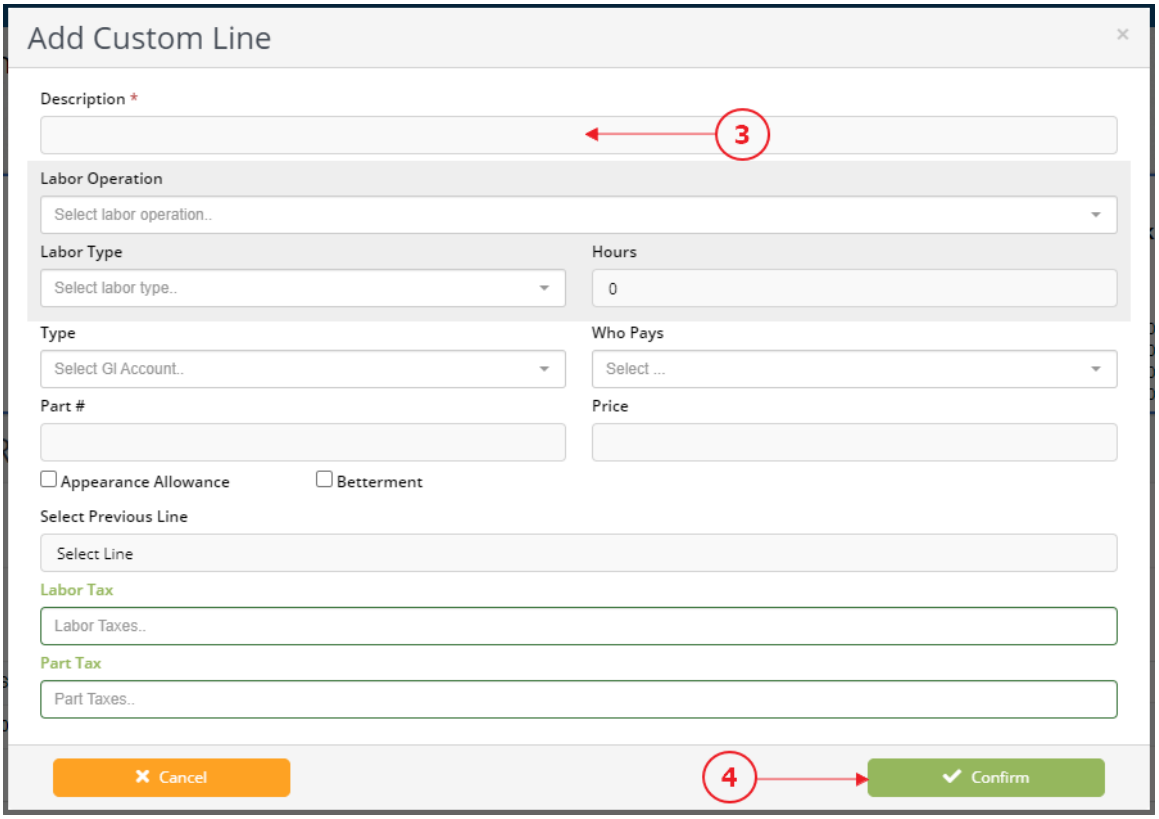
- Open the RO you need to add a part to
- On Open RO view click on Lines button (1) in Repair Info section:



- Click on '+ Custom Line' (2).

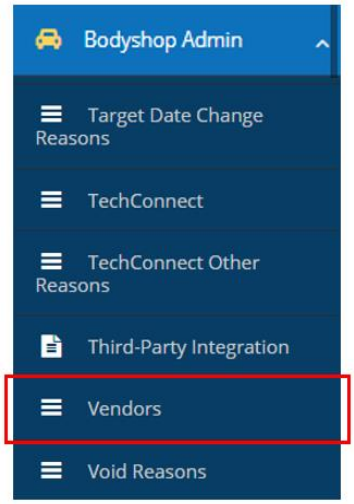


- A pop-up window to set your new line item up would appear. Enter the necessary information (do not forget to enter a description which is a mandatory field (3)) and click on Confirm button (4) to create a Custom line item.



Parts Vendors

Vendors are used for posting Vendor Costs against a Repair Order. A Vendor could include towing companies, rental companies, parts suppliers or sublet vendors. If there is a cost from a supplier that will be posted inside the management system; they will need to be created in this section.



On the Left navigation panel
1. Click Bodyshop Admin section
2. Click 'Vendors'

Add A Vendor
Click '+ Create' (1)

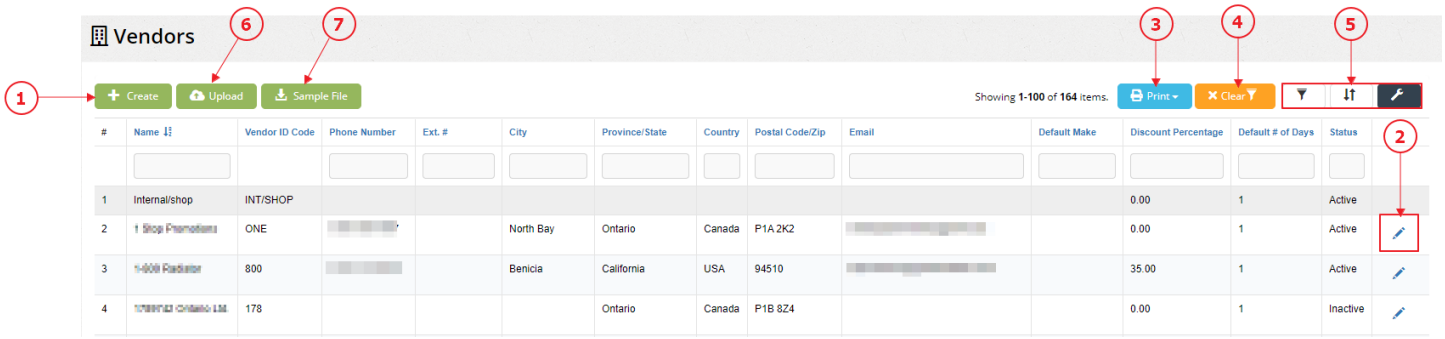
Edit A Vendor
Click the Pencil next to the Vendor that you would like to edit (2)

Delete A Vendor
We do not really delete Vendors, but you can hide a record from all the lists in the system:

- Click the pencil (2) next to the vendor you would like to hide
- Change its status to Inactive
- Click on Update to save the changes

- Vendor List can be printed (3)
- Clear filter (4) to clear search
- Options are available to personalize grid configurations and to save/edit default grid sort/filter (5)
- Upload (6) a list of Vendors using the Excel™ format
- If uploading; make sure to download the Sample File (7) first.

Note: If the format or data fields are incorrect; the data will not upload



- Enter the Vendor 'Code'. (1) This could be a short form for the Vendor or may need to match the code used in your accounting system. *(See accounting Guide for your specific accounting system).* Make sure it makes sense as this code will be displayed in different areas of your system.
- Vendor 'Name'. (2) This is the actual name of the Vendor and may need to match identically the actual to name used in your accounting system. *(See accounting Guide for your specific accounting system).*

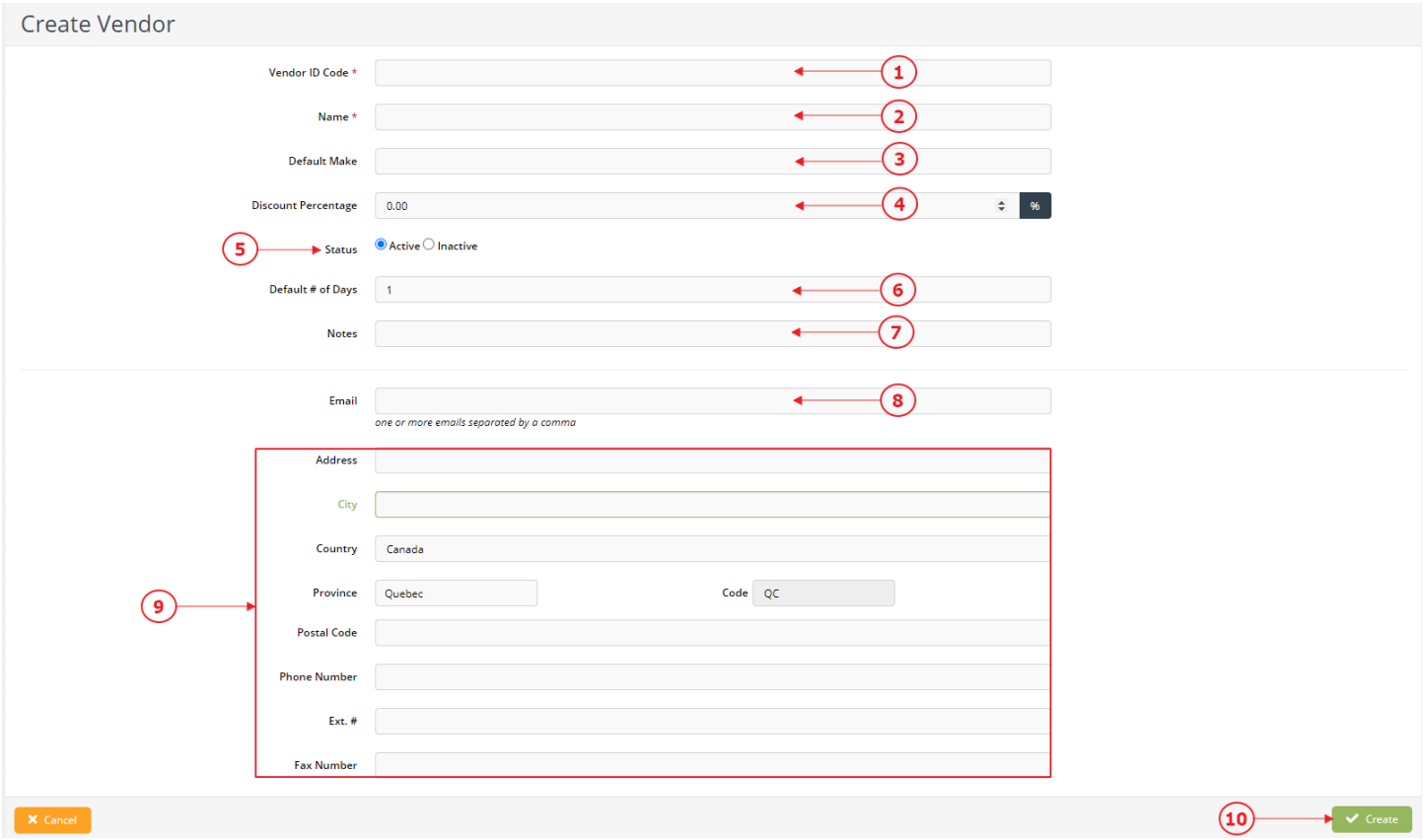
Note: If accounting Interface is going to be used; review Specific Accounting System Guides PRIOR to setting up Vendors

- *Business Works – Code needs to match*

- *QuickBooks – Name needs to match*
- *Simply Accounting – Name and Code need to match*

- Default Make (3) (example: Toyota, Honda, etc.) should be entered for the preferred 'new parts' vendor for that make of vehicle. *NOTE: you can add several values divided by a semicolon here and this vendor will be brought up as a default one for several makes.*
- Discount Percentage (4) should be entered to make the receiving parts process faster by displaying the "suggested cost" based on percentage after ordering parts.
- Select status of Active or Inactive (5) to show or not show the vendor in different drop-down lists in the system.
- Default Number of Days (6) will calculate the expected date or 'due date' for those parts based on the default number of days (example: If default # of days = 3 / When ordering parts on a Monday; the suggested due date would be Thursday)
- Notes field (7) can be used for any kind of notes related to this vendor. *Note: if you use Acomba X as an accounting system, you can use this field to select terms of payment applicable to this vendor (work with Acomba X accounting system only!).*
- The "contact" email address (8) for the Vendor. It will be used when ordering parts by email. If more than one contact; enter multiple email addresses separated by a semicolon **(**";").
  Note: If Parts Order is usually sent by email; turn on the rule for 'Default Parts Order to be sent by email' for this option to be pre-selected when ordering parts.
- Complete Address (9) of the Vendor including Phone numbers for quick reference within the system.
- Click Create or Update (10) to save and complete the form.

Single Store Set Up Screen



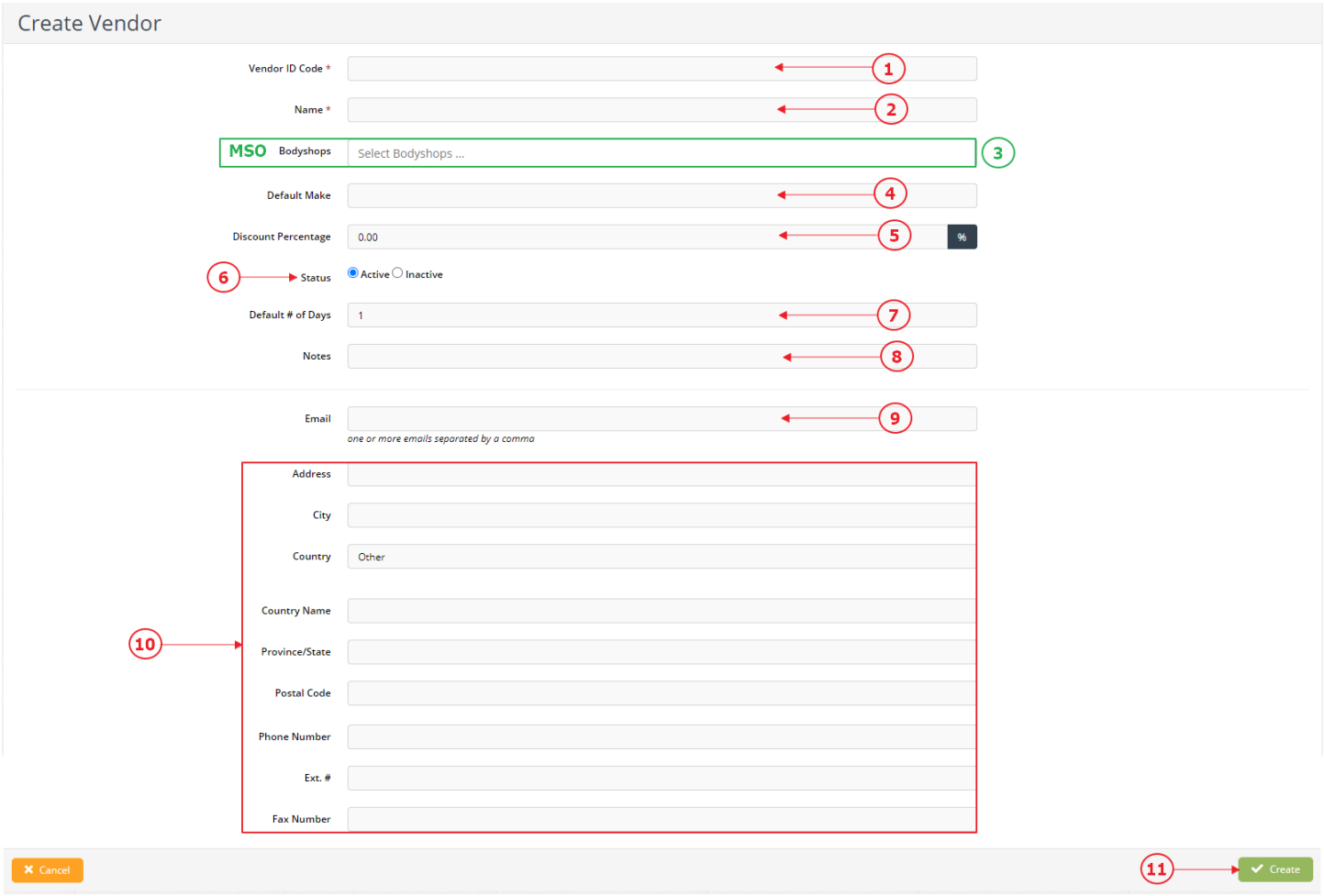
- Enter the Vendor 'Code'. (1) This could be a short form for the Vendor or may need to match the code used in your accounting system. *(See accounting Guide for your specific accounting system).* Make sure it makes sense as this code will be displayed in different areas of your system.
- Vendor 'Name'. (2) This is the actual name of the Vendor and may need to match identically to the actual name used in your accounting system. *(See accounting Guide for your specific accounting system).*

Note: If accounting Interface is going to be used; review specific Accounting System Guides PRIOR to setting up Vendors

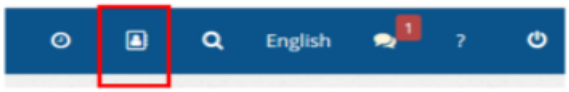
  - *Business Works – Code needs to match*
  - *QuickBooks – Name needs to match*
  - *Simply Accounting – Name and Code needs to match*

- Select Bodyshop(s) (3) the Vendor should be available in.
- Default Make (4) (example: Toyota, Honda, etc.) should be entered for the preferred 'new parts' vendor for that make of vehicle. *NOTE: you can add several values divided by a semicolon here and this vendor will be brought up as a default one for several makes.*
- Discount Percentage (5) should be entered to make the receiving parts process faster by displaying the "suggested cost" based on percentage after ordering the parts.
- Select status of Active or Inactive (6) to show or not show in the vendor in different drop-down lists of the system.
- Default Number of Days (7) will calculate the expected date or 'due date' for those parts based on the default number of days (example: If default # of days = 3 / When ordering parts on a Monday; the suggested due date would be Thursday).
- Notes field (8) can be used for any kind of notes related to this vendor. *Note: if you use Acomba X as an accounting system, you can use this field to select terms of payment applicable to this vendor (work with Acomba X accounting system only!).*
- The "contact" email address (9) for the Vendor. It will be used when ordering parts by email. If more than one contact, enter multiple email addresses separated by a semicolon **(**";").
  Note: If Parts Order is usually sent by email; turn on the rule for 'Default Parts Order to be sent by email' for this option to be pre-selected when ordering parts.
- Complete Address (10) of the Vendor including Phone numbers for quick reference within the system.
- Click Create or Update (11) to save and complete the form.

MSO Set Up Screen

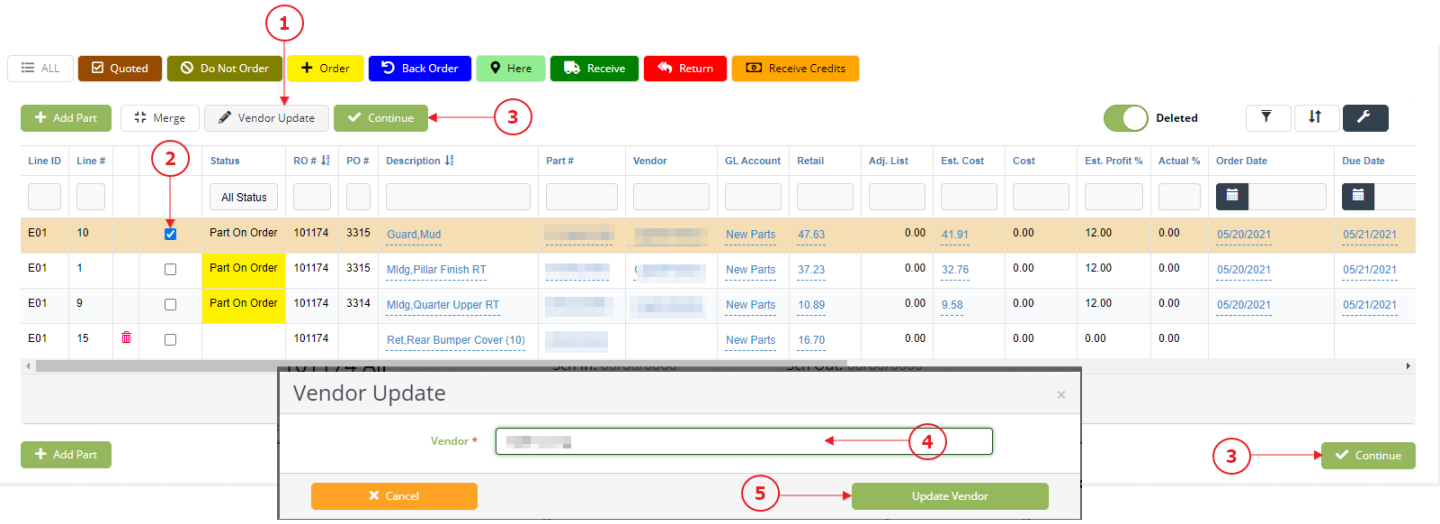


Note: When using the navigation bar to search a contact – the search may also look for (or search results for) Rentals, Vendors, and Insurance Companies (if the user has been given access in their Role to view Rentals, Vendors and / Or Insurance Companies).



In case an incorrect vendor was selected while ordering a part, the user has the option to change the Vendor when the part is still marked 'on order', 'on reorder' or 'back ordered'.

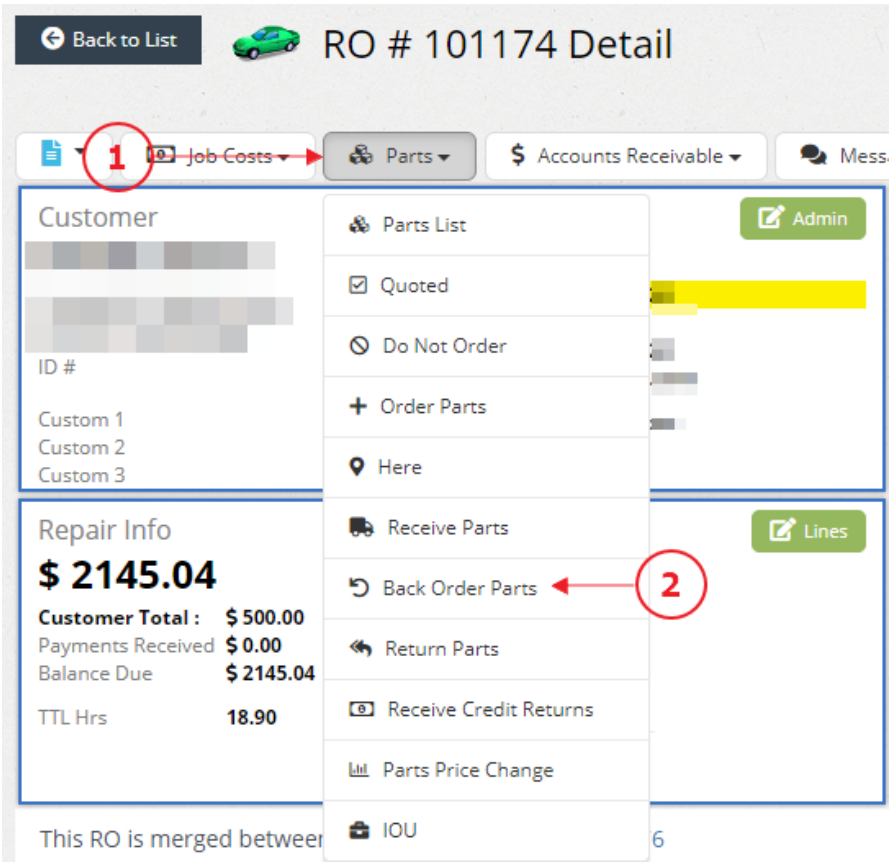
- On the RO All Parts view click the Vendor Update button (1)
- Mark the checkbox next to the part vendor needs to be updated for (2)
- Click the Continue button (3)
- Select a new vendor from the drop-down list (4)
- Click the Update Vendor button (5)



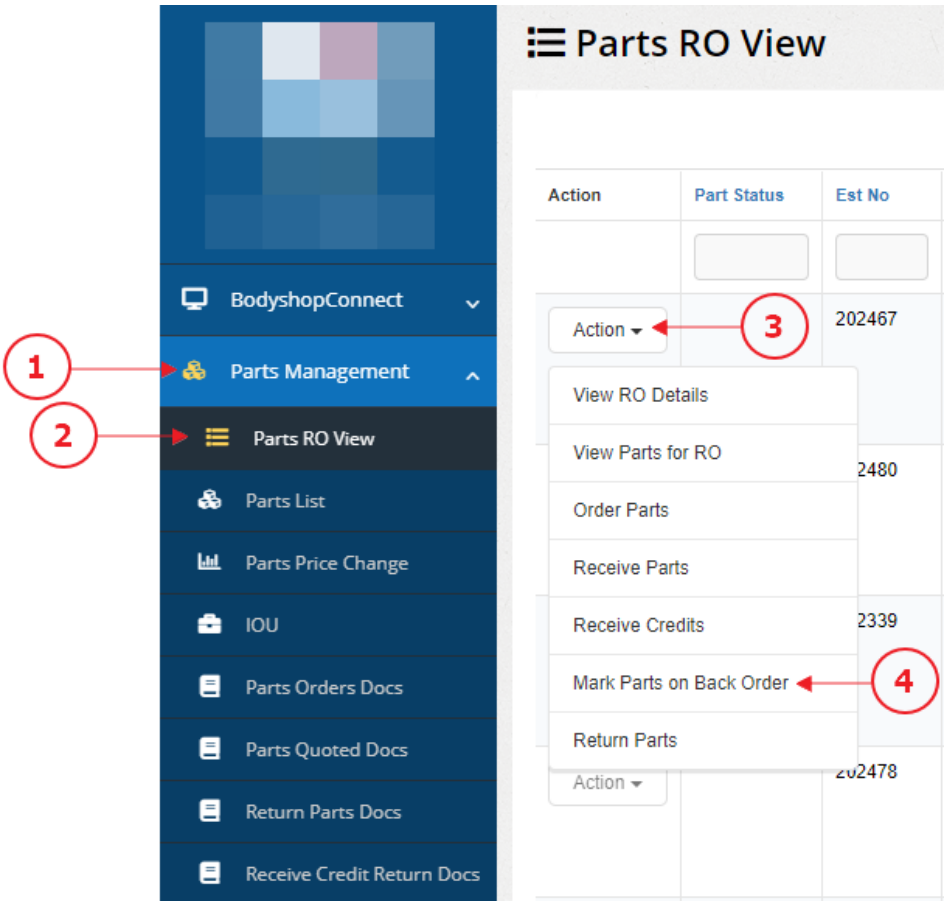
Back Order Parts

There are several ways to start parts back order:

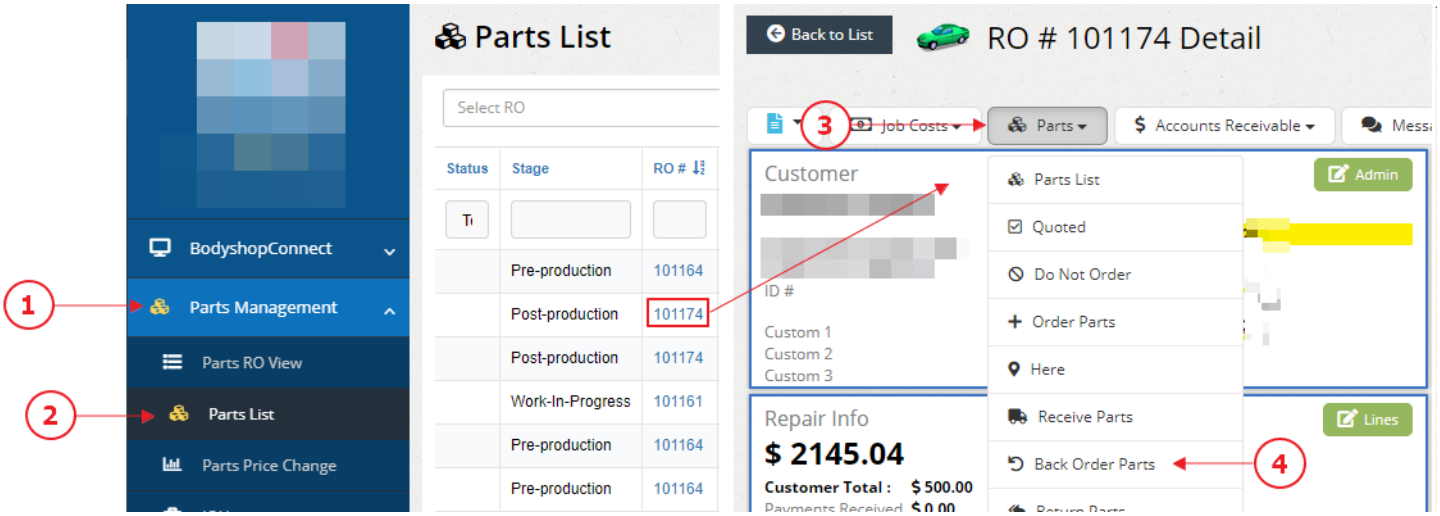
> ***Open RO View*** - Parts drop-down menu (1) – Back Order Parts option (2)



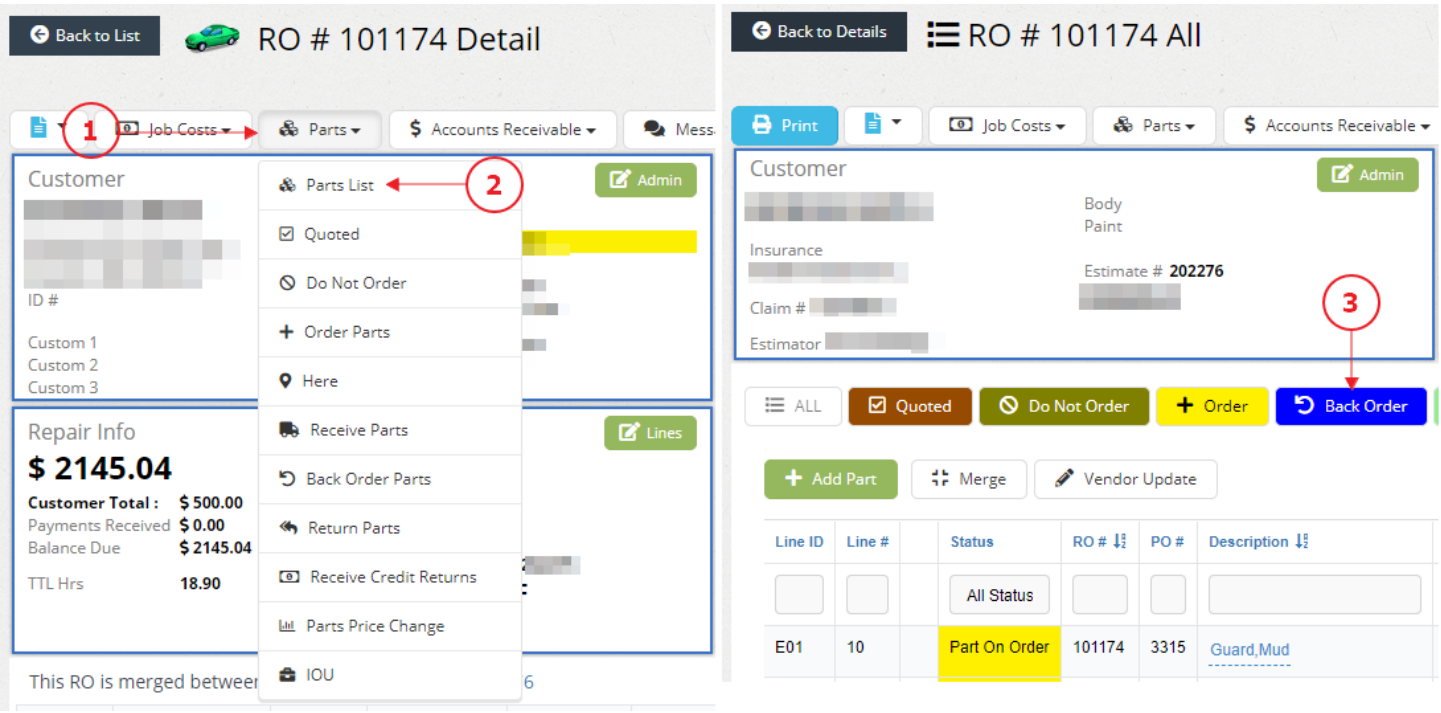
> ***Parts Management Section*** (1) - Parts RO View (2) - Action drop-down menu (3) – Mark Parts on Back Order (4)



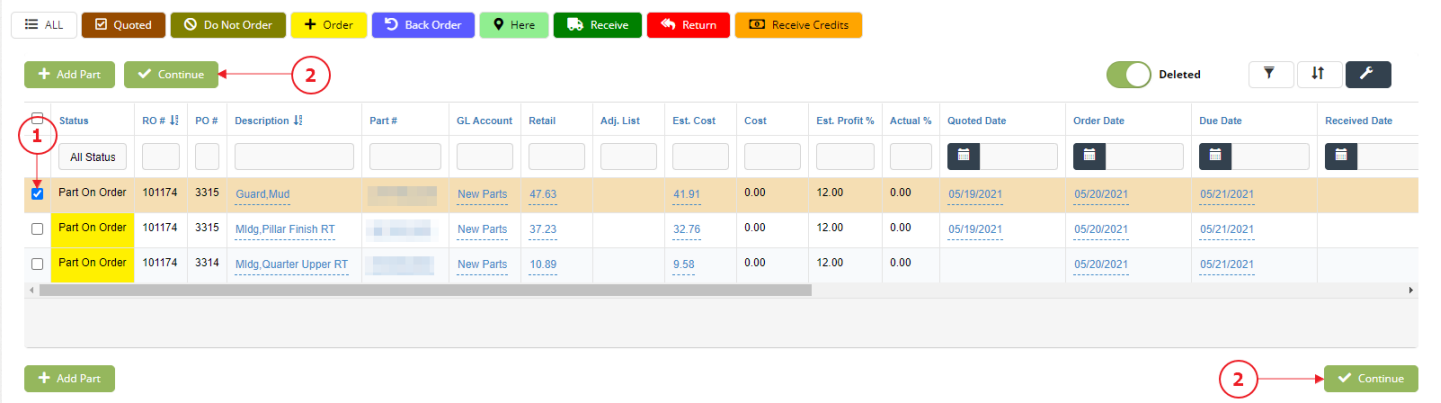
> ***Parts Management Section*** (1) - Parts List (2) - ***Open RO View*** - Parts drop-down menu (3) – Back Order Parts option (4)



> ***Open RO View*** – Parts (1) - Parts List (2) – Back Order button (3)



- Tag or select the part(s) you would like to mark as back ordered (1)
- Click Continue (2)



- Enter the new Due Date or leave it blank (3)
- Click on BackOrder Parts button (4)

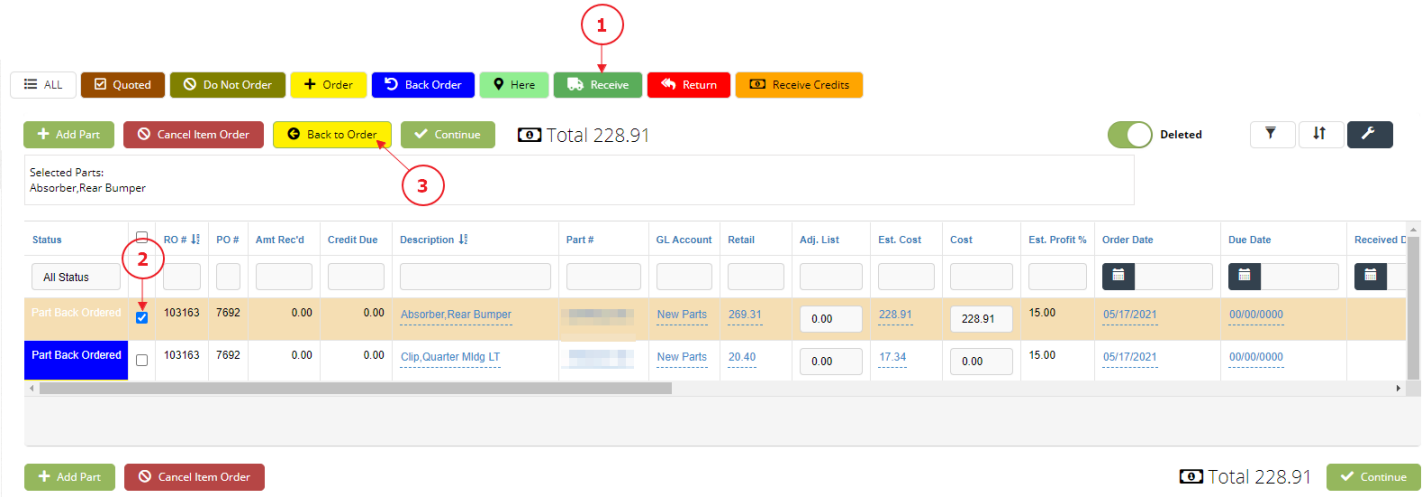


***Note**: this option is available for ordered, back ordered, and marked as Here parts.*

Back to Order

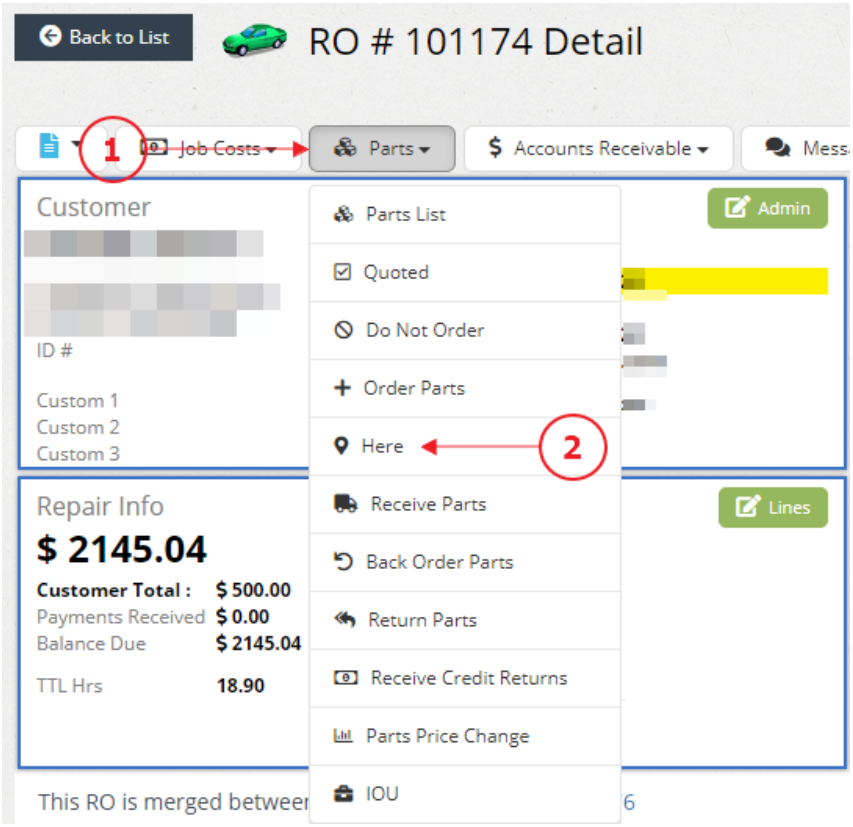
Back Ordered parts may be returned to the ‘On Order’ status.

- On the RO parts list click the ‘Receive’ button (1)
- Mark the part you need to return to the ‘On Order’ status (2)
- Click the ‘Back to Order’ button (3)

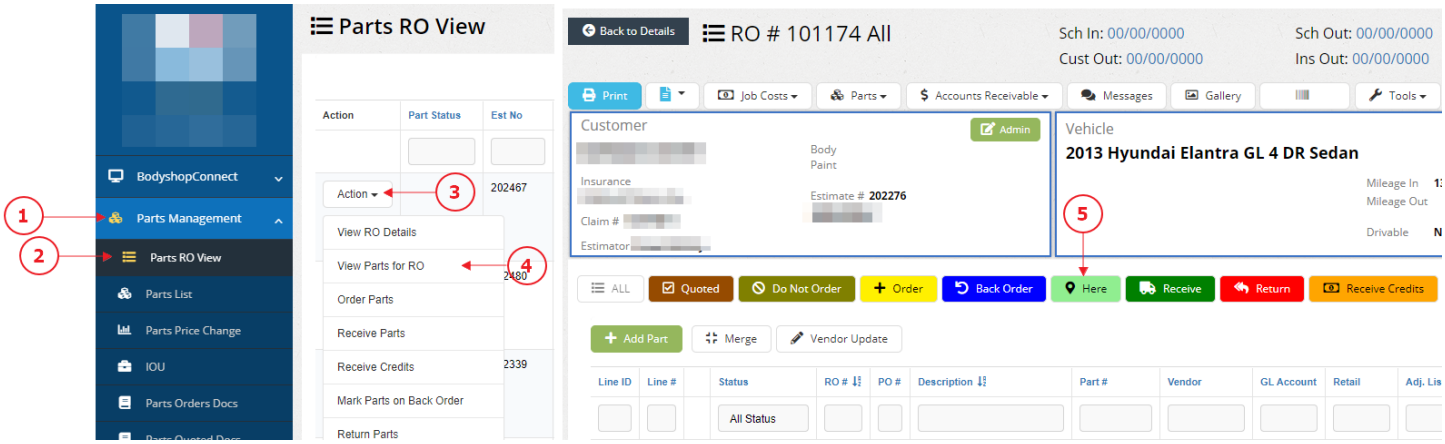


Parts Here

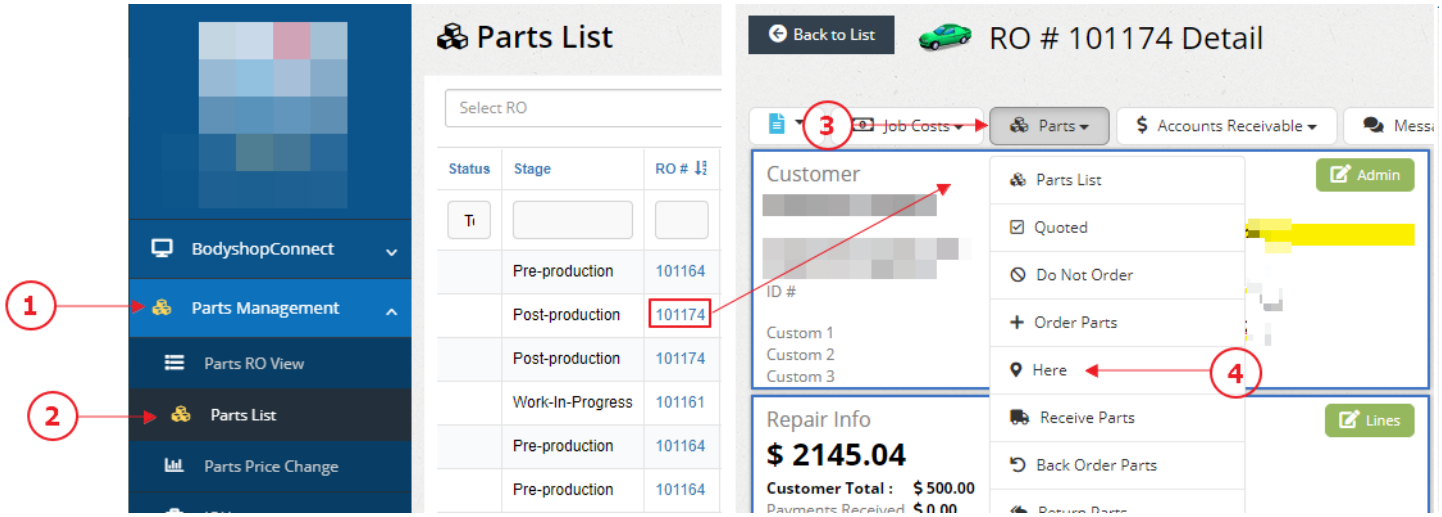
The Here status was designed to quickly mark the parts arrived without entering the invoice information (because it may be time consuming). So, the parts may be marked as Here and a part management may enter the invoice information later.
Make the following steps to get to the Here parts screen:
> ***Open RO View*** – ‘Parts’ drop-down menu (1) – ‘Here’ option (2)



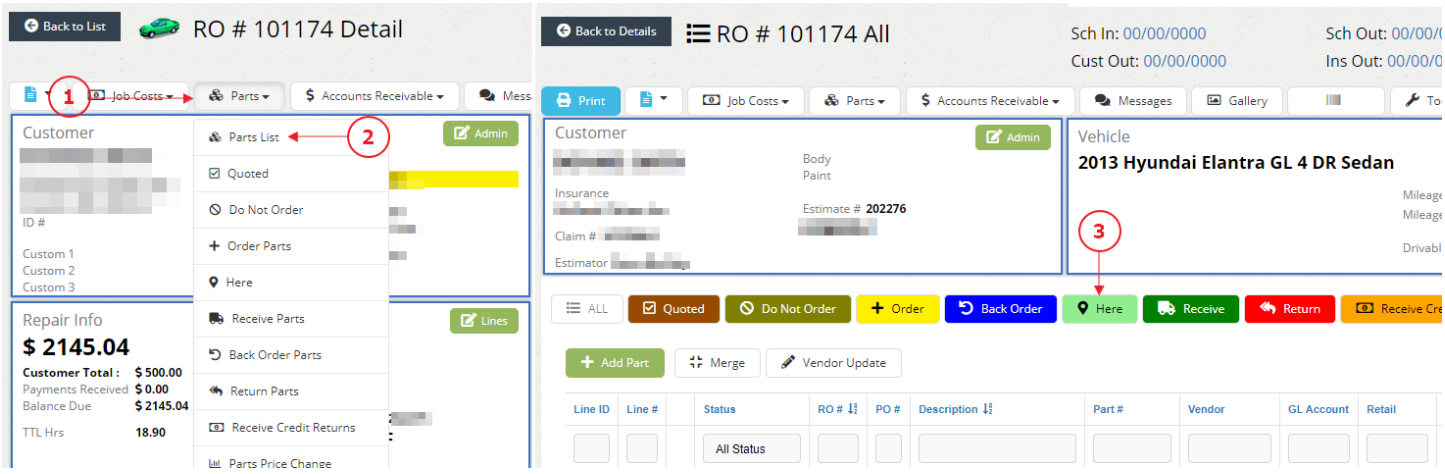
> ***Parts Management section*** (1) – Parts RO View (2) – Action drop-down menu (3) – View Parts for RO (4) – Here button (5)



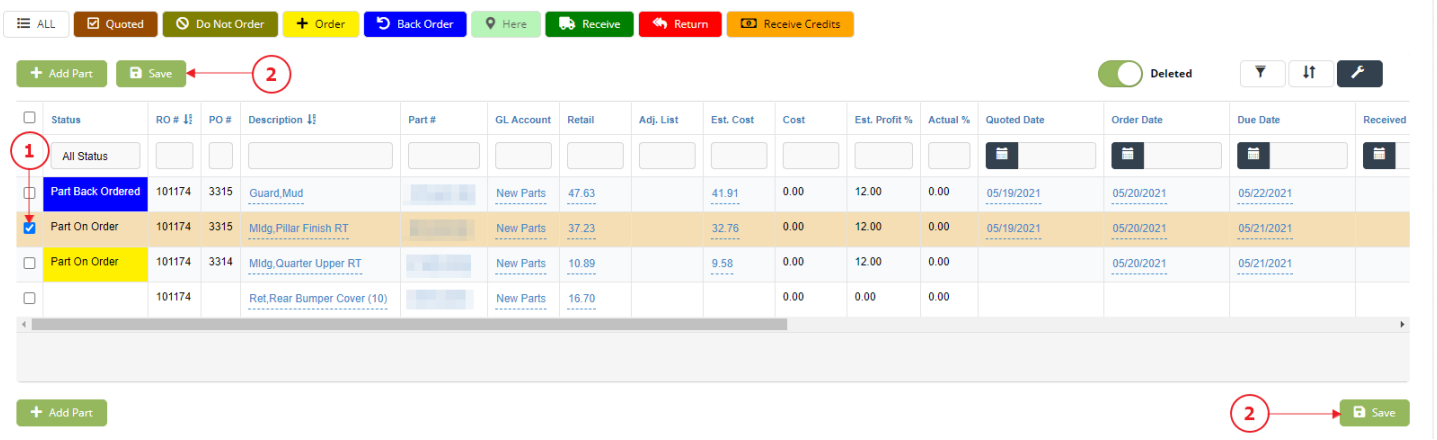
> ***Parts Management Section*** (1) - Parts List (2) - ***Open RO View*** - Parts drop-down menu (3) – Here option (4)



> ***Open RO View*** – Parts (1) - Parts List (2) – Here button (3)



- Select the parts arrived (1)
- Click on Save (2).

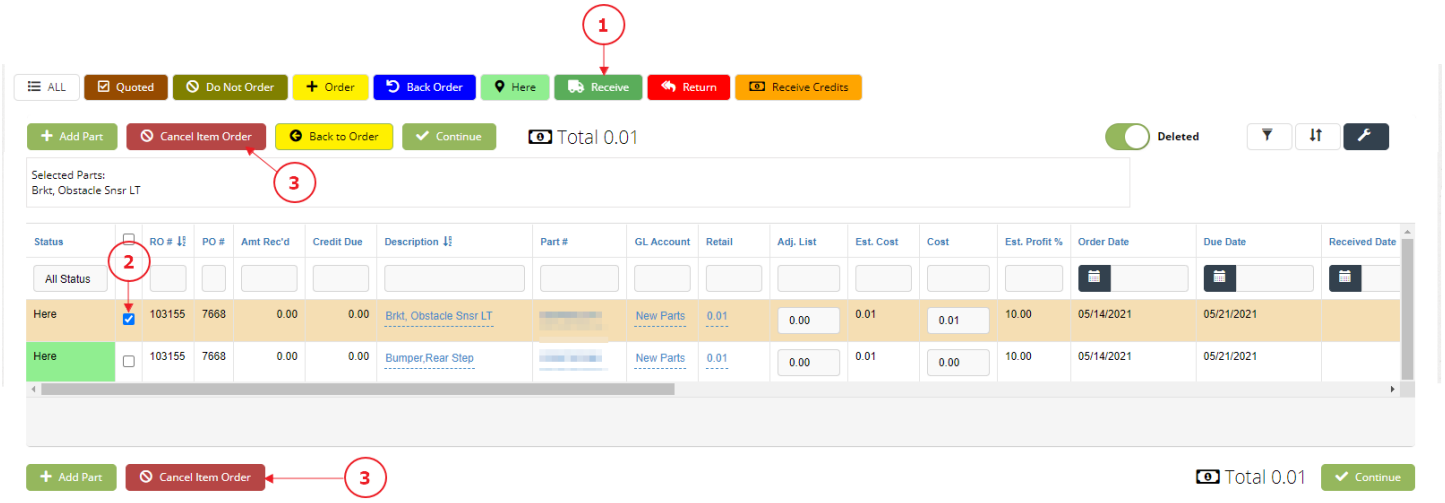


***Note**: this option is available for blank, quoted, ordered, back ordered parts and parts marked as Do not order.*

Cancel Here status

On occasion, you may need to cancel a part Here status. Make the following steps to do that:

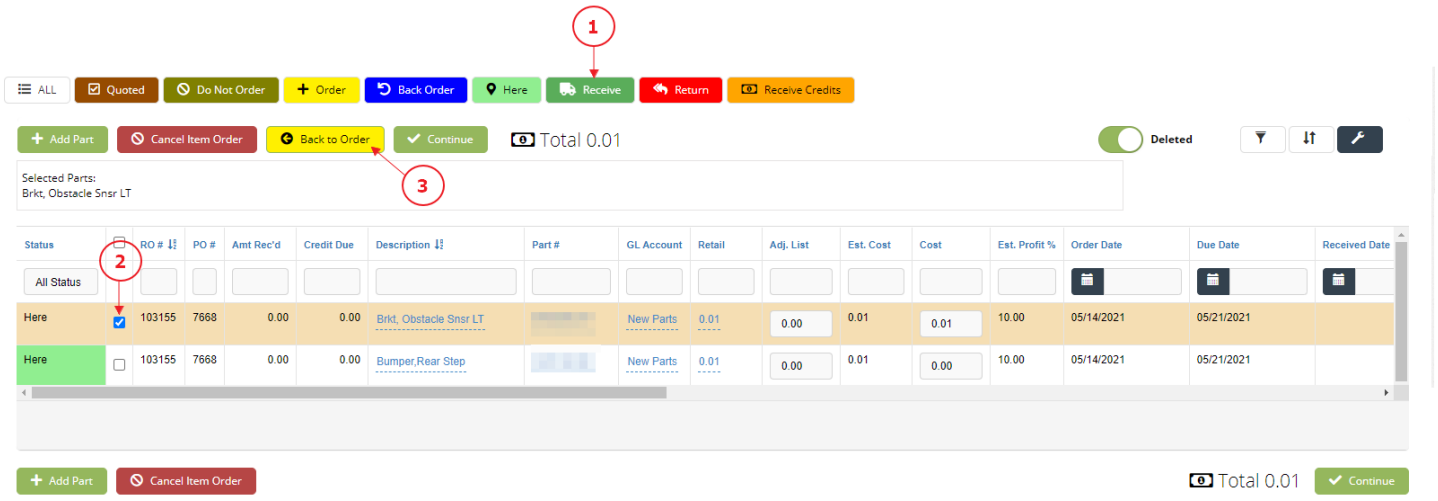
- On the RO parts list click the 'Receive' button (1)
- Mark the part you need to cancel Here status for and make it blank (2)
- Click the 'Cancel Item Order' button (3)



Back to Order

Here Parts may be returned to the 'On Order' status.

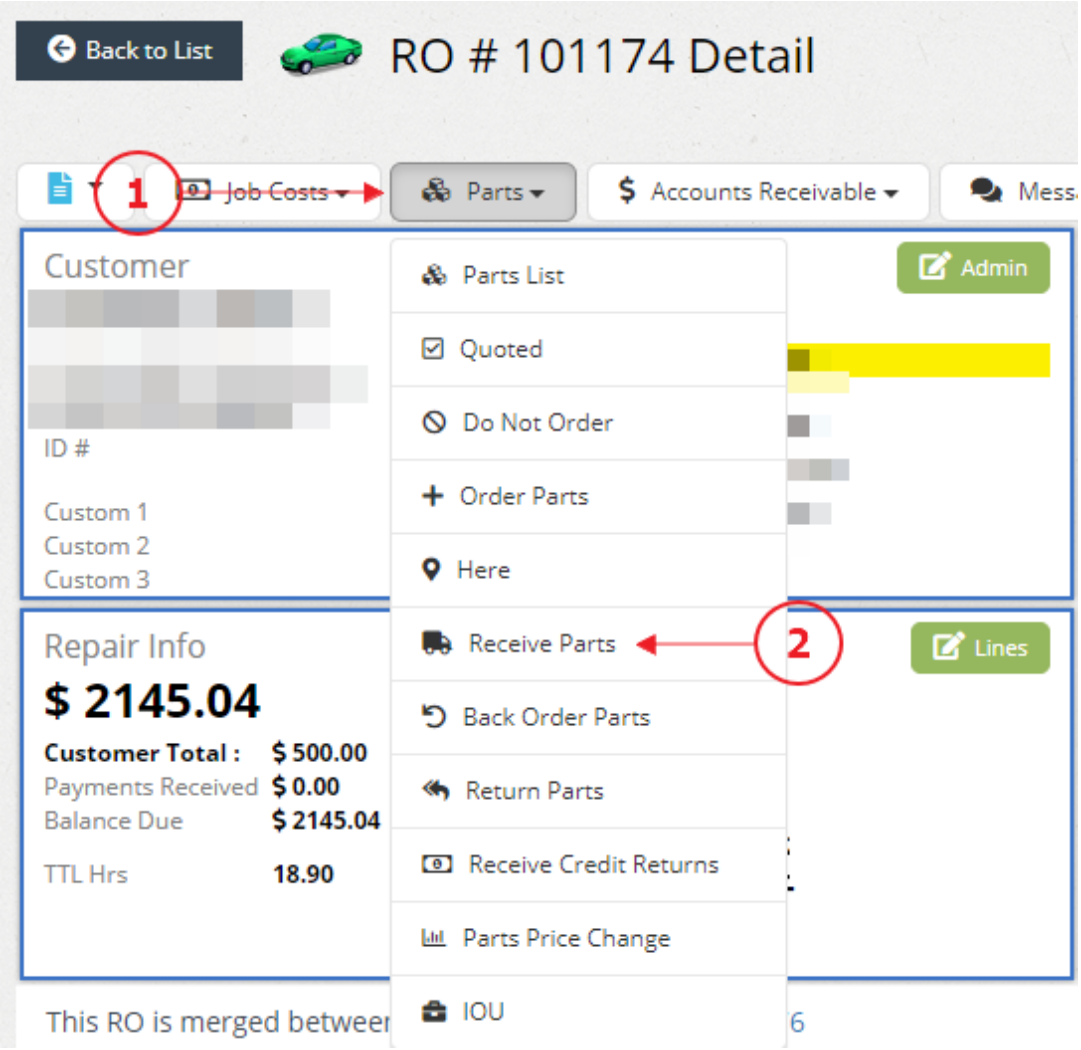
- On the RO parts list click the 'Receive' button (1)
- Mark the part you need to return to the 'On Order' status (2)
- Click the 'Back to Order' button (3)



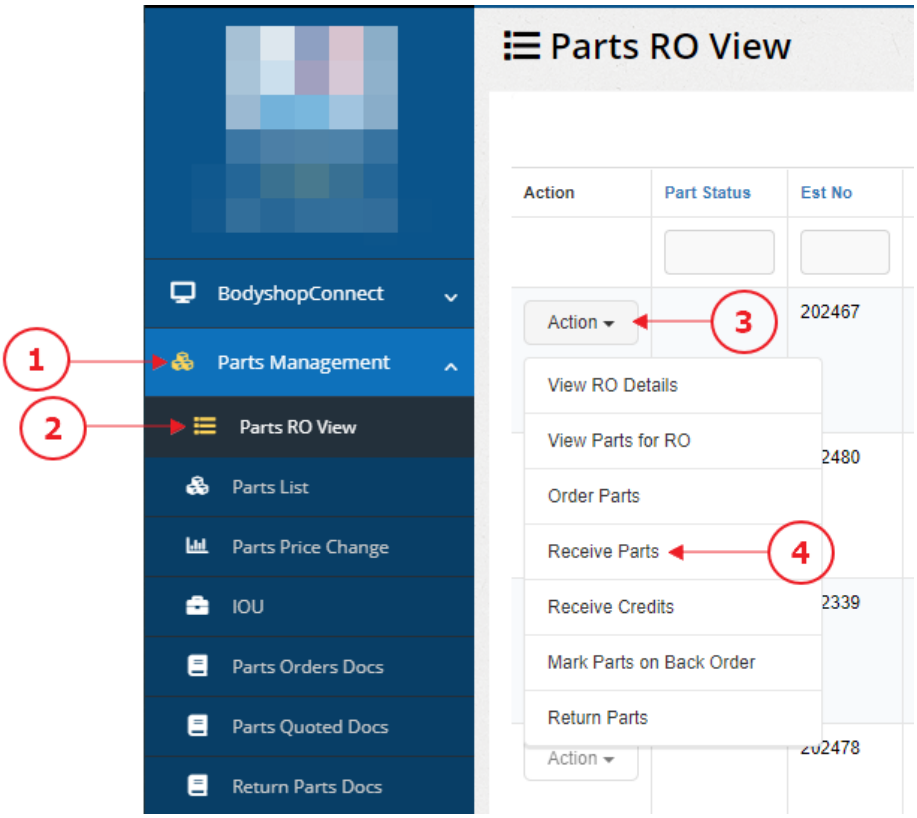
***NOTE**: Only Here parts that have previously been ordered may be returned to On Order status.*

Receive Parts

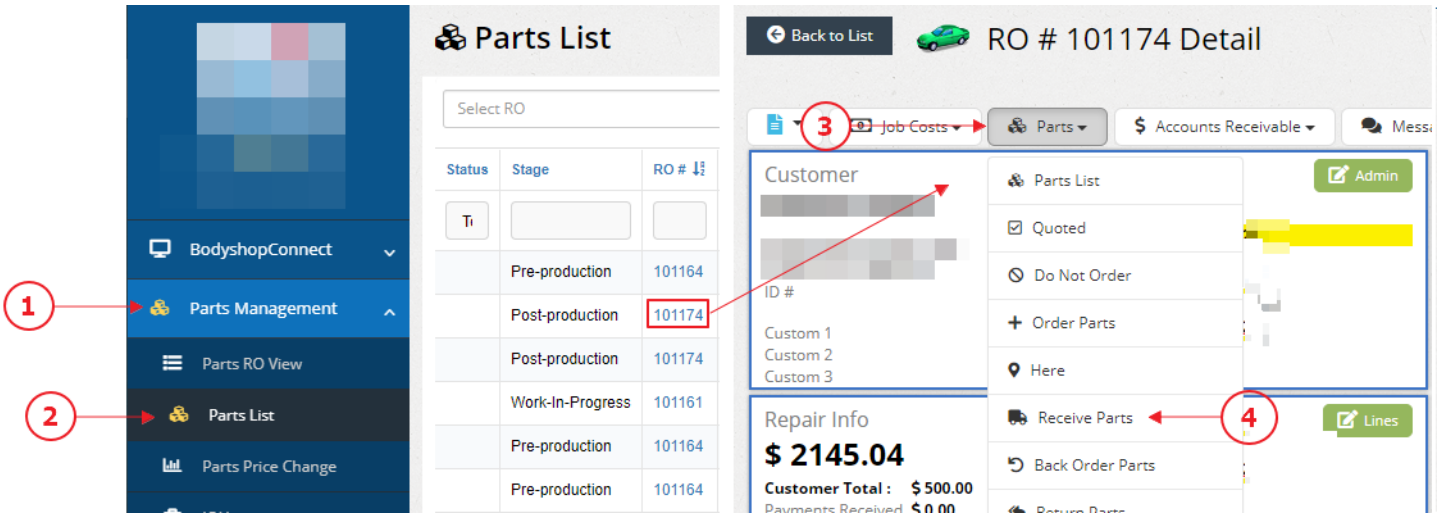
There are several ways to start parts receiving.
> ***Open RO View*** - Parts drop-down menu (1) – Receive Parts option (2)



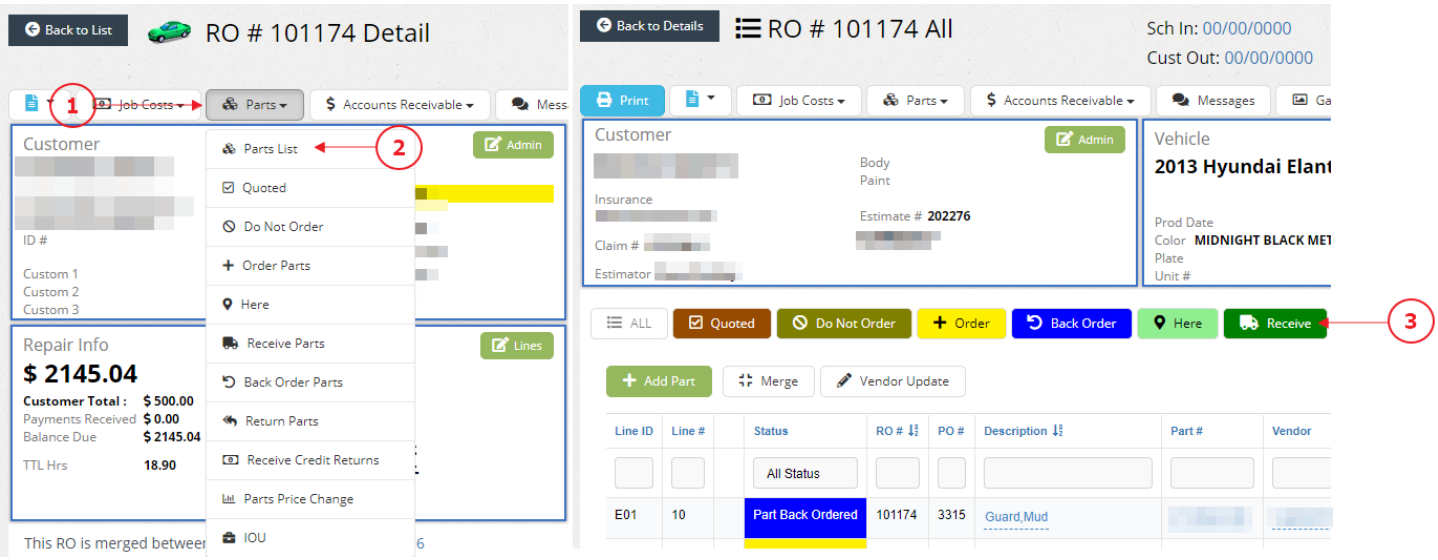
> ***Parts Management Section*** (1) - Parts RO View (2) - Action drop-down menu (3) – Receive Parts (4)



> ***Parts Management Section*** (1) - Parts List (2) - ***Open RO View*** - Parts drop-down menu (3) – Receive Parts option (4)

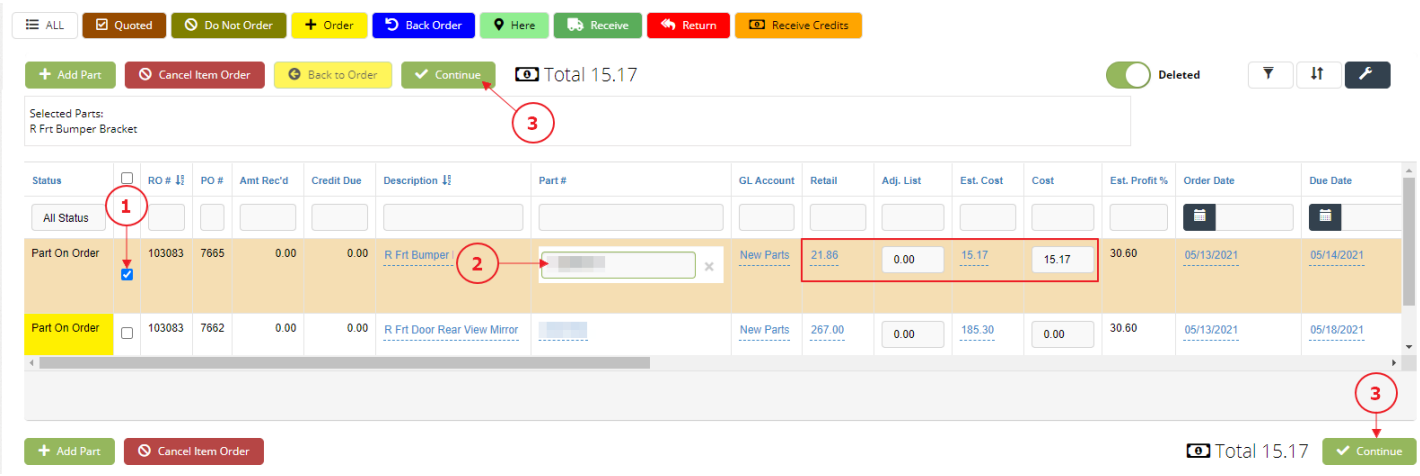


> ***Open RO View*** – Parts (1) - Parts List (2) – Receive button (3)

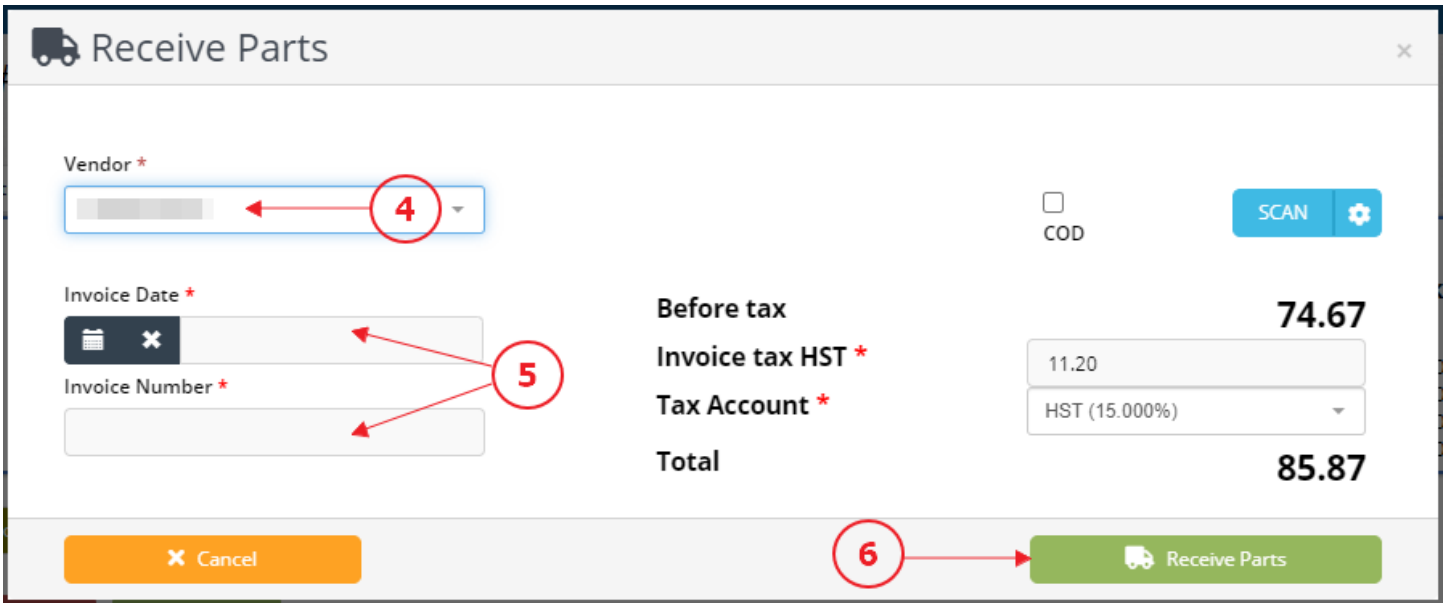


After that, the steps are the same wherever you started:

- Select or tag all parts to be received (1)
- Verify or change: Part#, List (enter in Adj list) or cost (enter actual cost) (2)
- Click 'Continue' button (3)



- Verify the vendor (4)*
- Enter Invoice information (5)
- Click on 'Receive Parts' button (6)



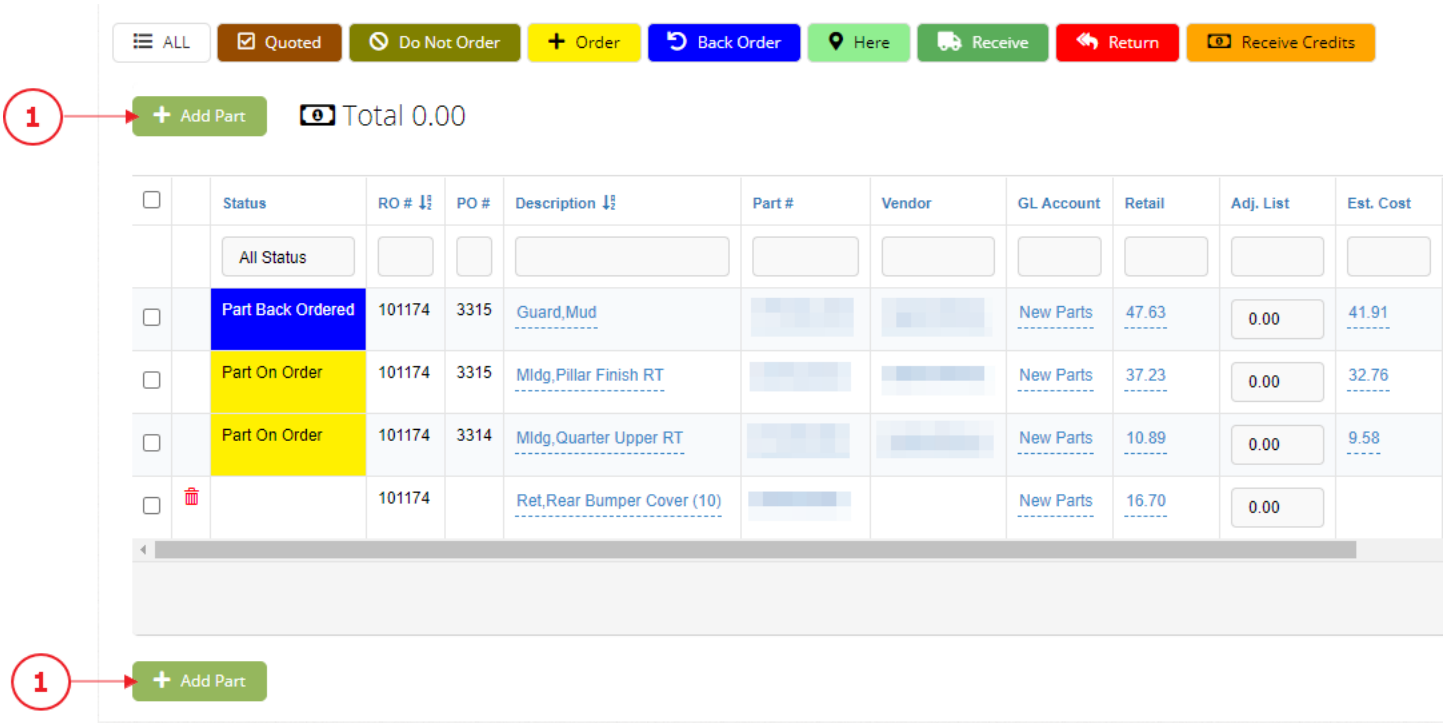
* The vendor a part was ordered from may be changed, selected from the drop-down menu. In this case, you may need or not to mark the checkbox 'Confirm vendor change' depending on the rule '[Disable "Confirm Vendor Change" option when receiving parts]' (if it is set to Active or Inactive).

***Note**: this option is available for blank, quoted, ordered parts, back ordered parts and parts that are Here and Do not order.*

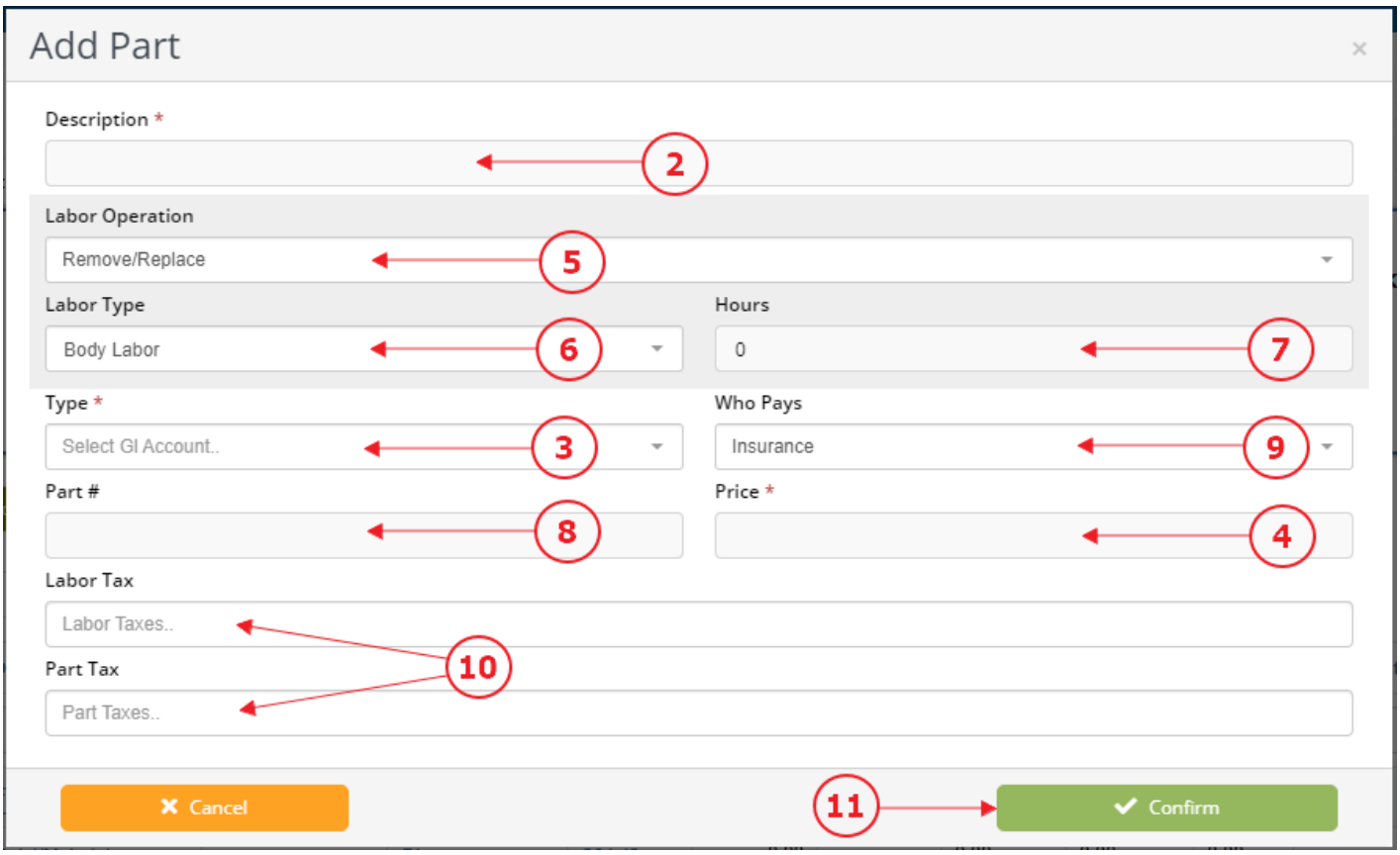
Adding Parts

1. Adding a part 'on the fly' when receiving

- Click 'Add Part' (1)



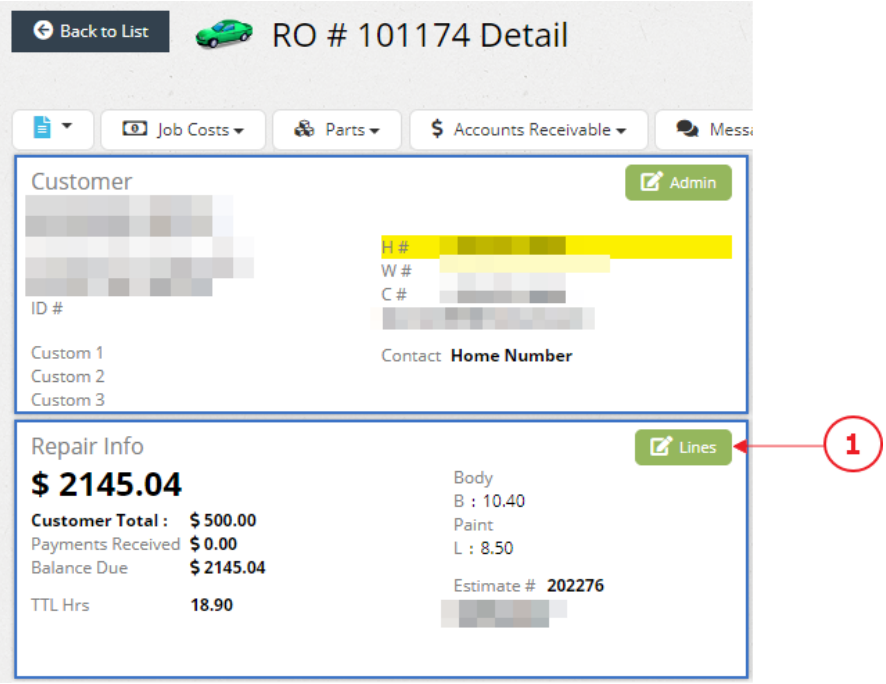
- Fill the mandatory fields: Description (2), Type (GL Account) (3), Price (4)
- Fill the other fields if needed: Labor Operation (5), Labor Type (6), Hours (7), Part # (8), Who Pays (9), select labor and part tax(es) (10)
- Click 'Confirm' (11)



After that, you may continue parts receiving as described here.

2. Adding a part by a new Custom Line Item from Open RO view:

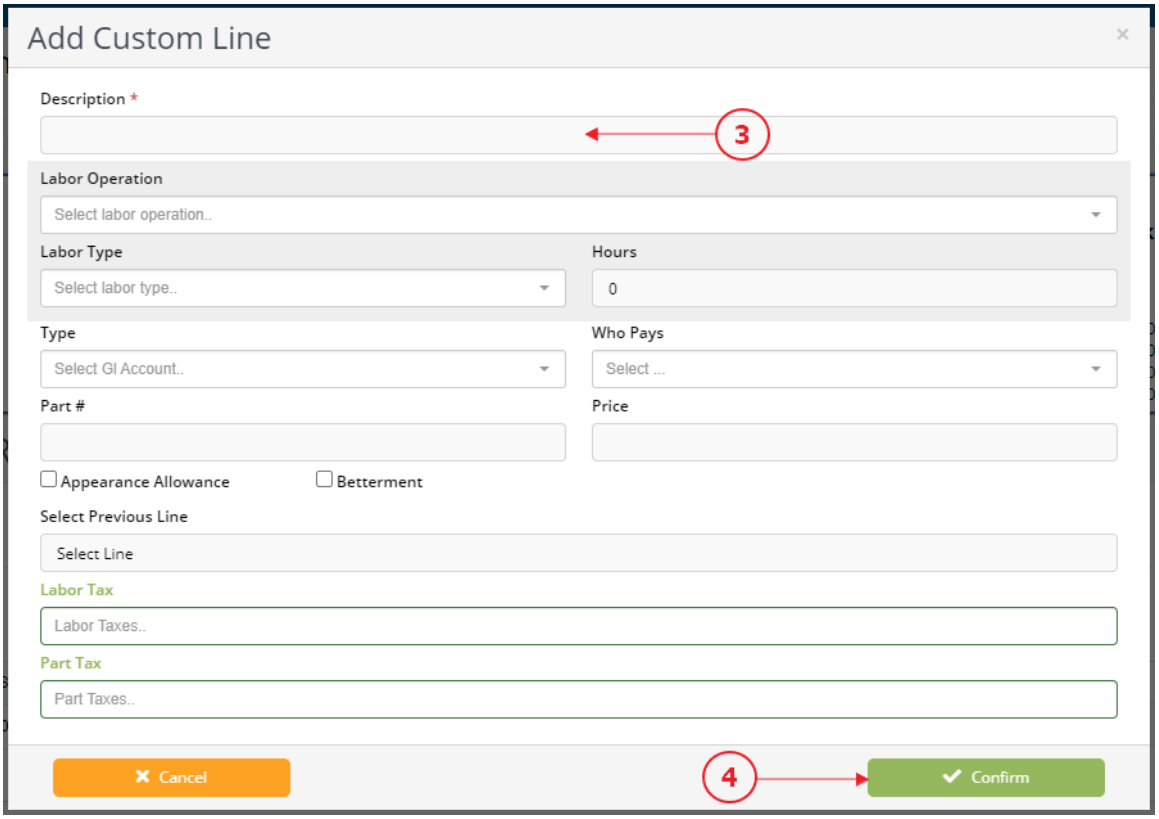
- Open the RO you need to add a part to
- On Open RO view click on Lines button (1) in Repair Info section:



- Click on '+ Custom Line' (2).



- A pop-up window to set your new line item up would appear. Enter the necessary information (do not forget to enter a description which is a mandatory field (3)) and click on Confirm button (4) to create a Custom line item.

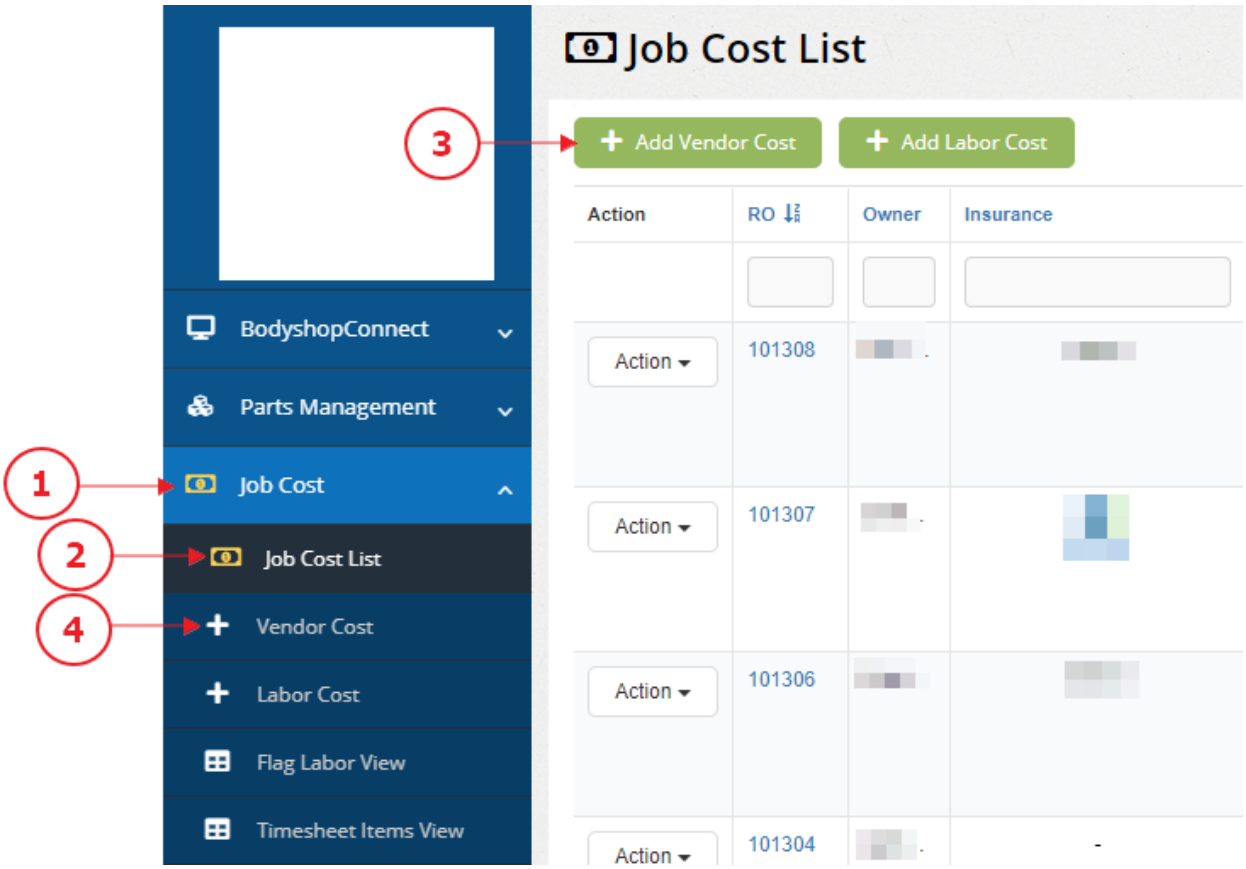


Vendor Costs

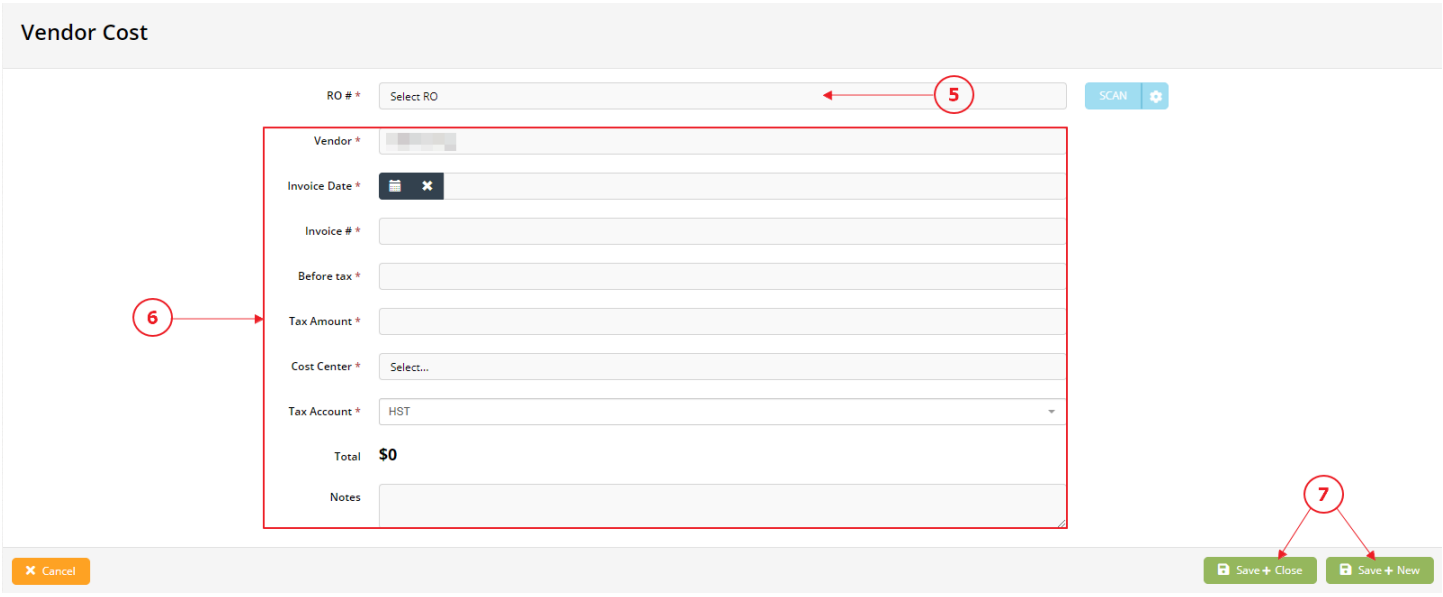
Normally, when you receive part(s), the vendor cost gets created automatically. But it is also possible to created it manually.

There are several ways to add a vendor invoice:

1 - In the left navigation menu select the Job Cost section (1) → Job Cost List (2) → + Add Vendor Cost (3) OR select '+ Vendor Cost' (4) under the Job Cost section (1).



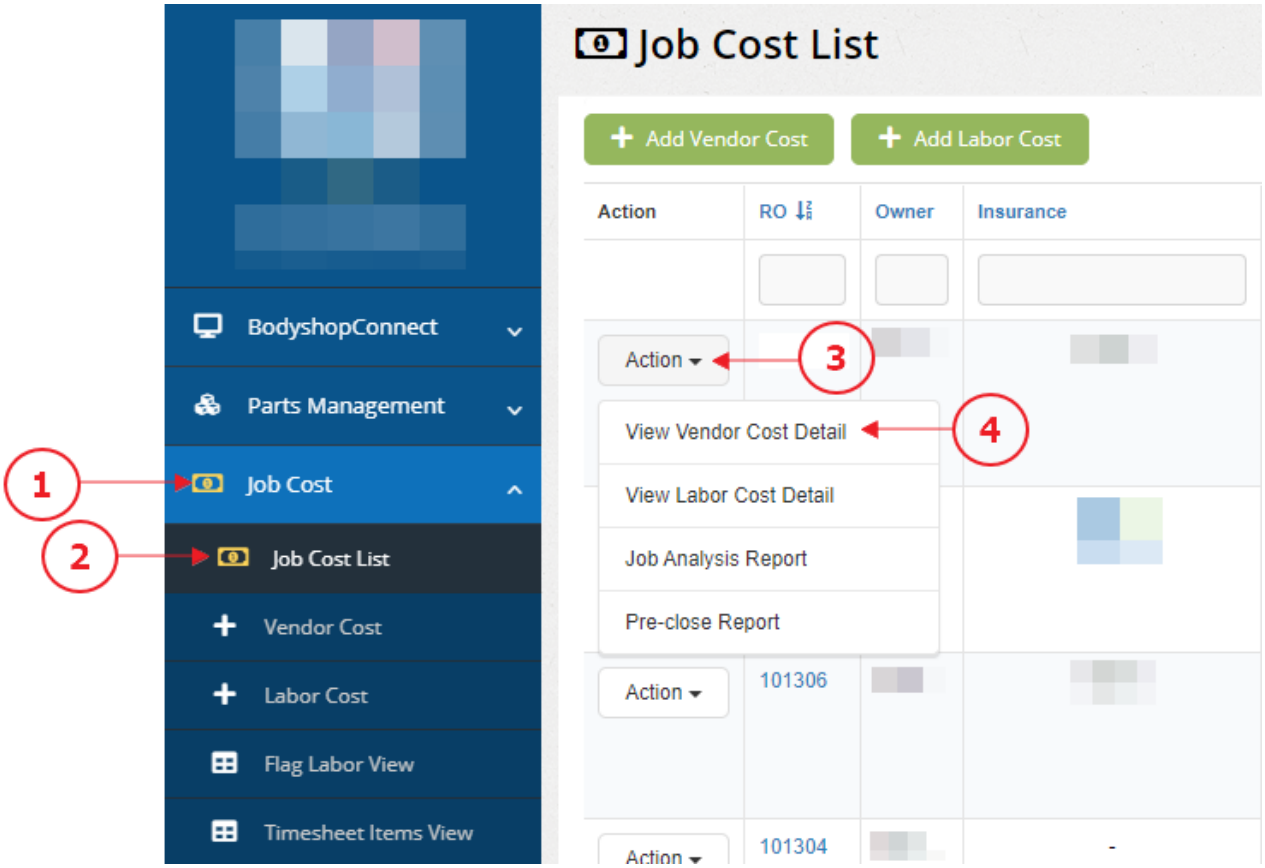
> Select the RO that you would like to post the Vendor Cost to (5)
> Enter the Information (6)
> Click 'Save + Close' or 'Save + New' (7).



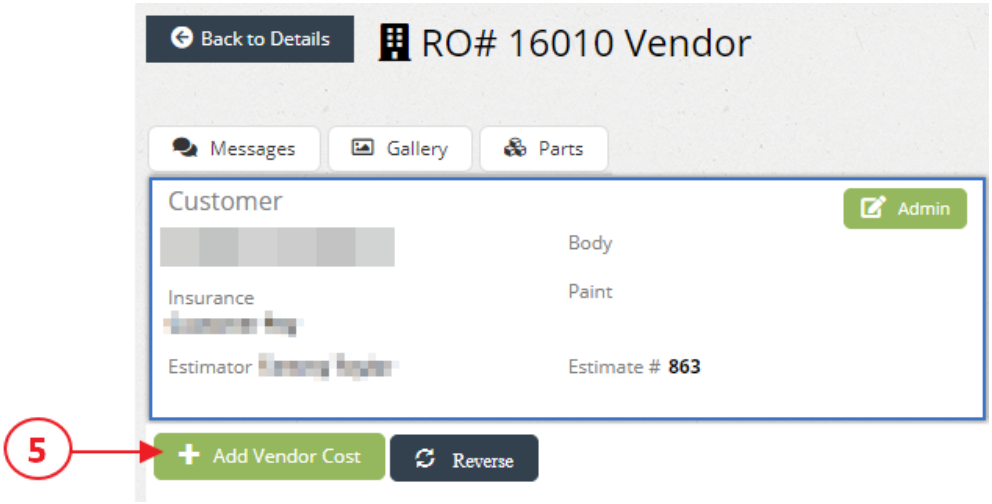
***Note**: The Tax amount will be calculated automatically depending on tax account selected.*

2 - On the left navigation menu select the Job Cost section (1) then select Job Cost List (2)

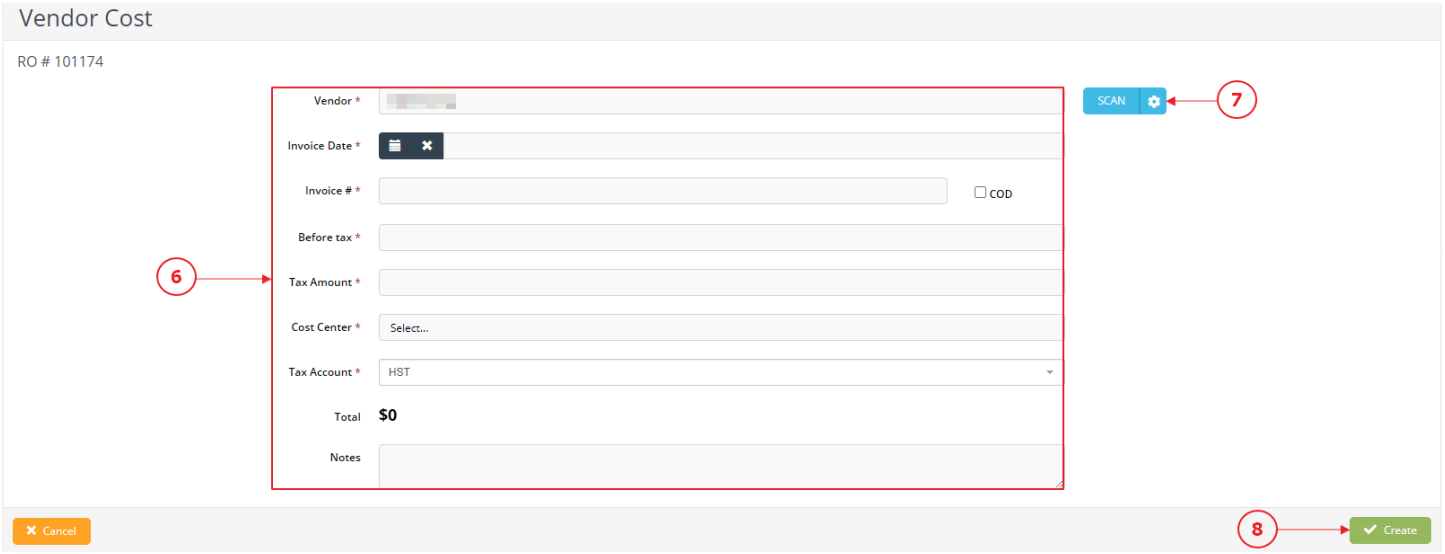
> Select the RO that you want to Post the Vendor Cost to
> Select 'View Vendor Cost Detail' (4) from the 'Action' drop-down menu (3)



> Click '+ Add Vendor Cost' (5)

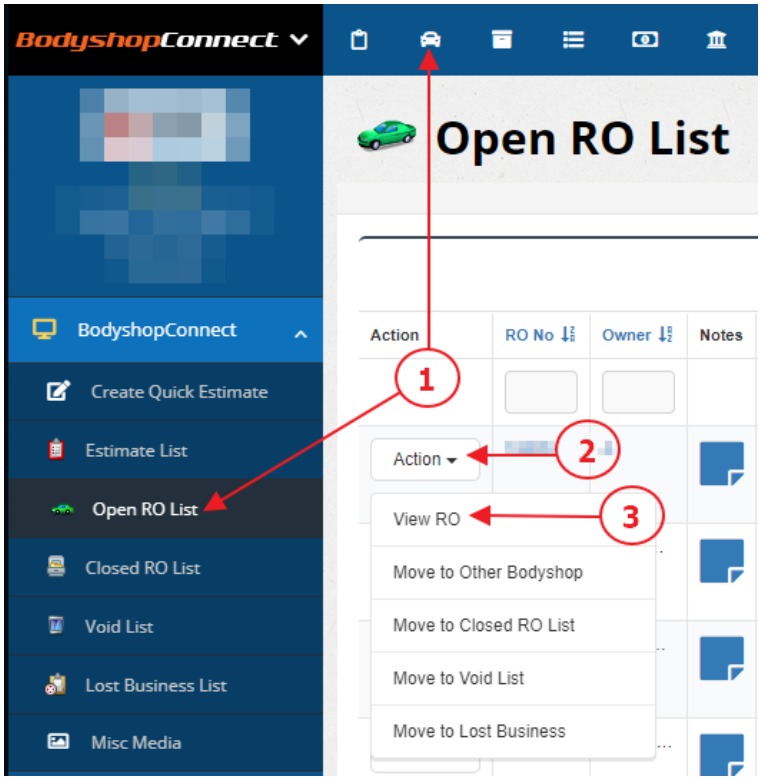


> Enter the Information (6)
> Use the Scan button to scan a vendor invoice (7)
> Click 'Create' (8).

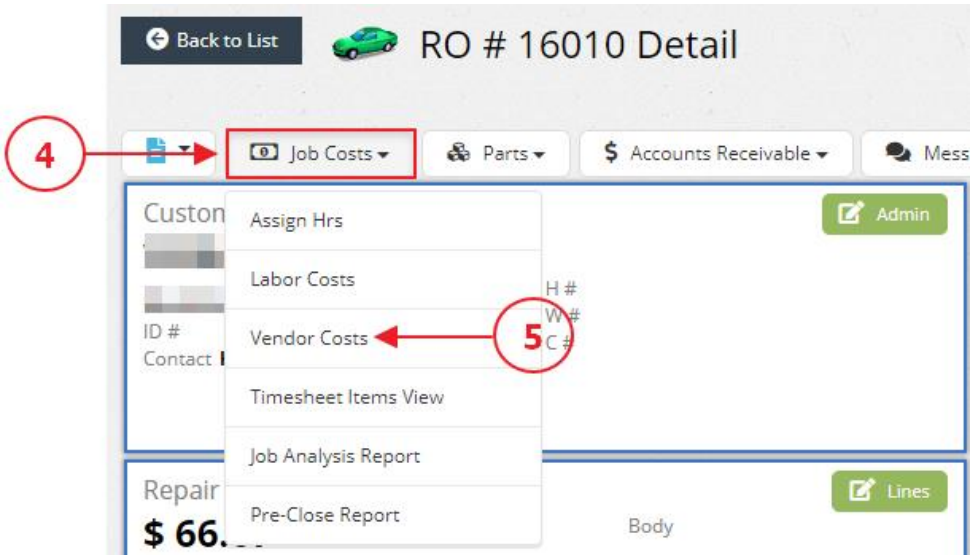


3 - On the left navigation menu select Open RO List under the BodyshopConnect section OR click on Open RO icon on the top navigation panel (1)

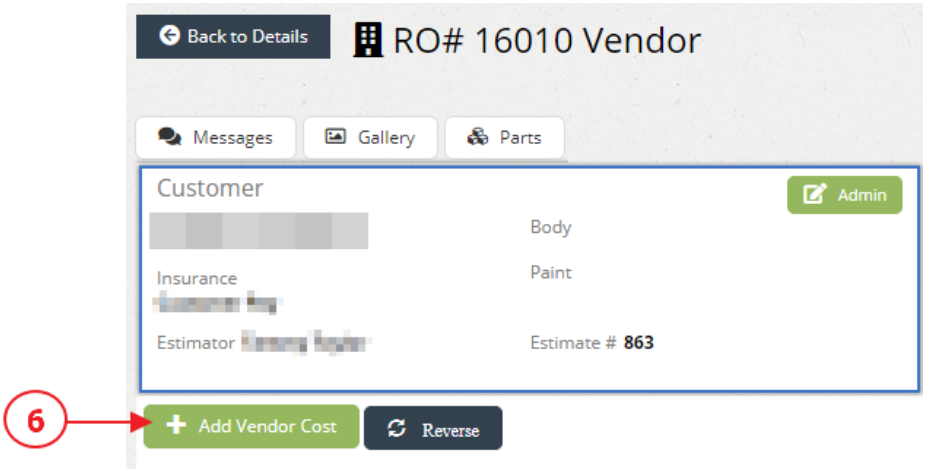
> Select the RO that you would like to post the Vendor Cost to
> Select 'View RO' (3) from the 'Action' drop-down (2)



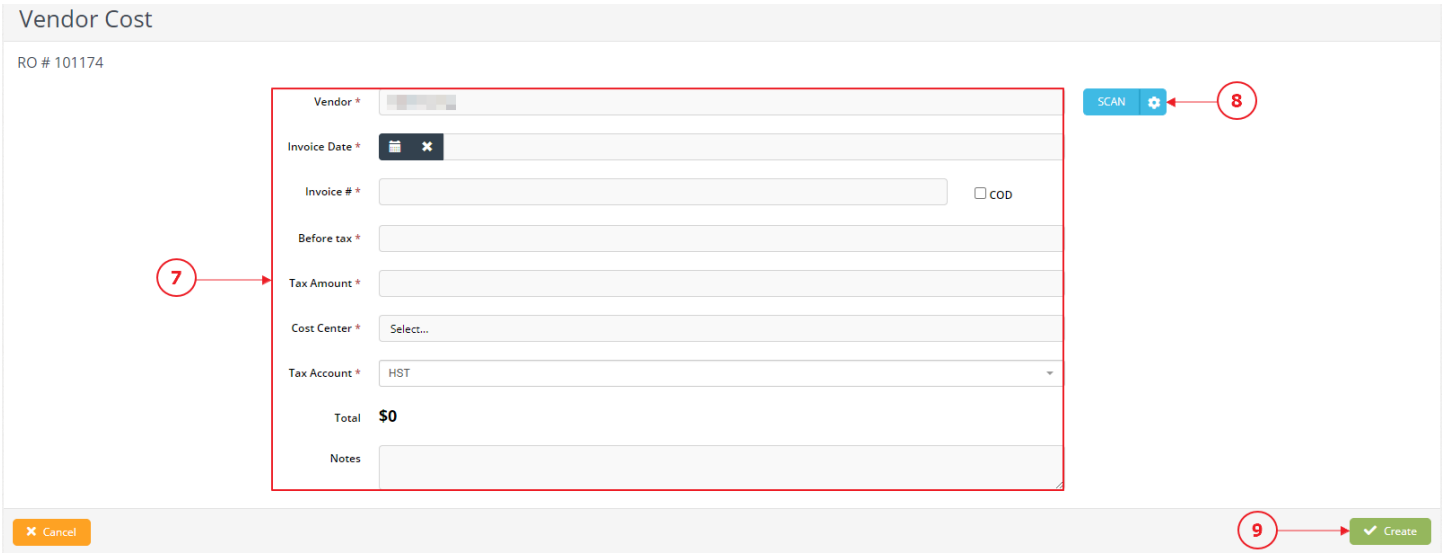
> Select 'Vendor Costs' (5) from the 'Job Costs' drop-down (4)



> Click '+ Add Vendor Cost' (6) at the top left of the screen



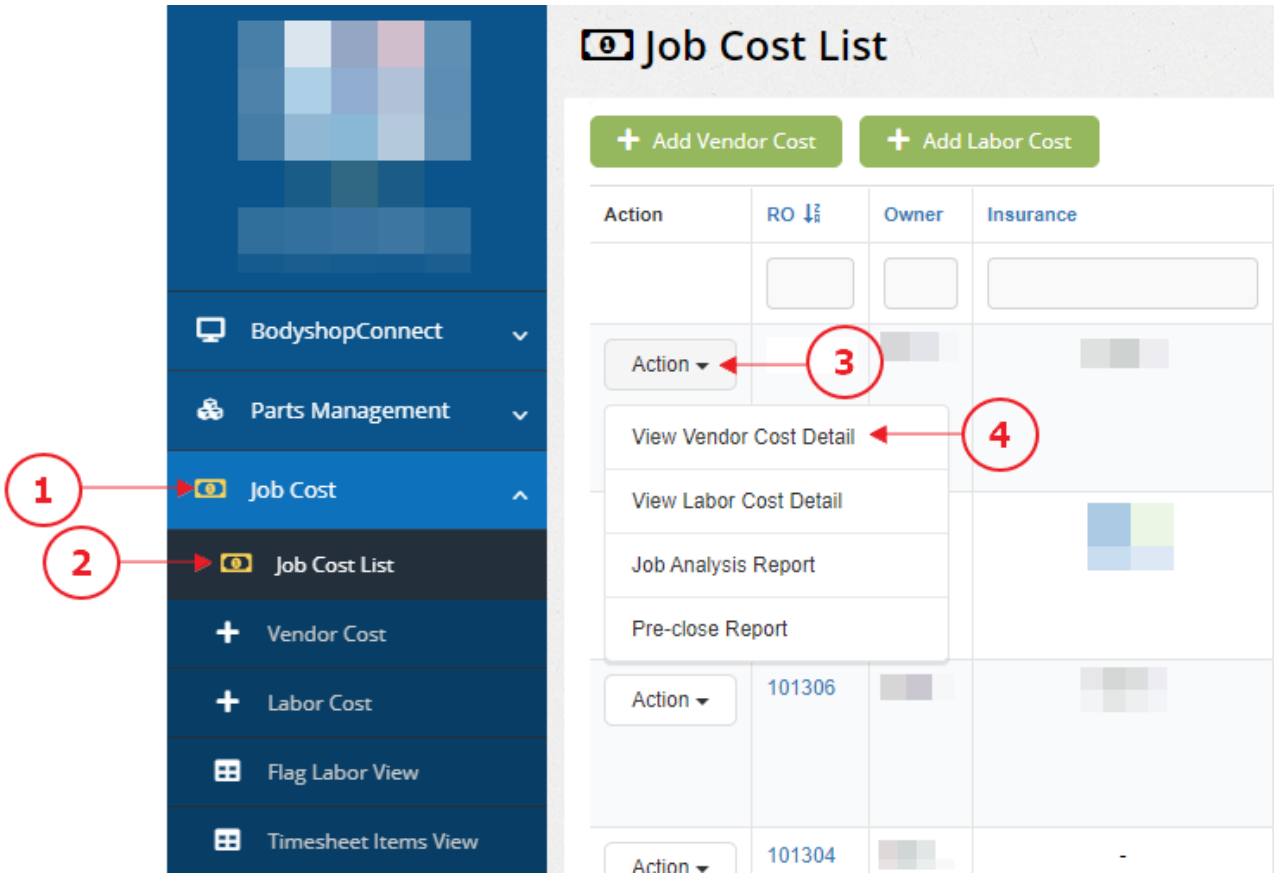
> Enter the Information (7)
> Use the Scan button to scan a vendor invoice (8)
> Click 'Create' (9).



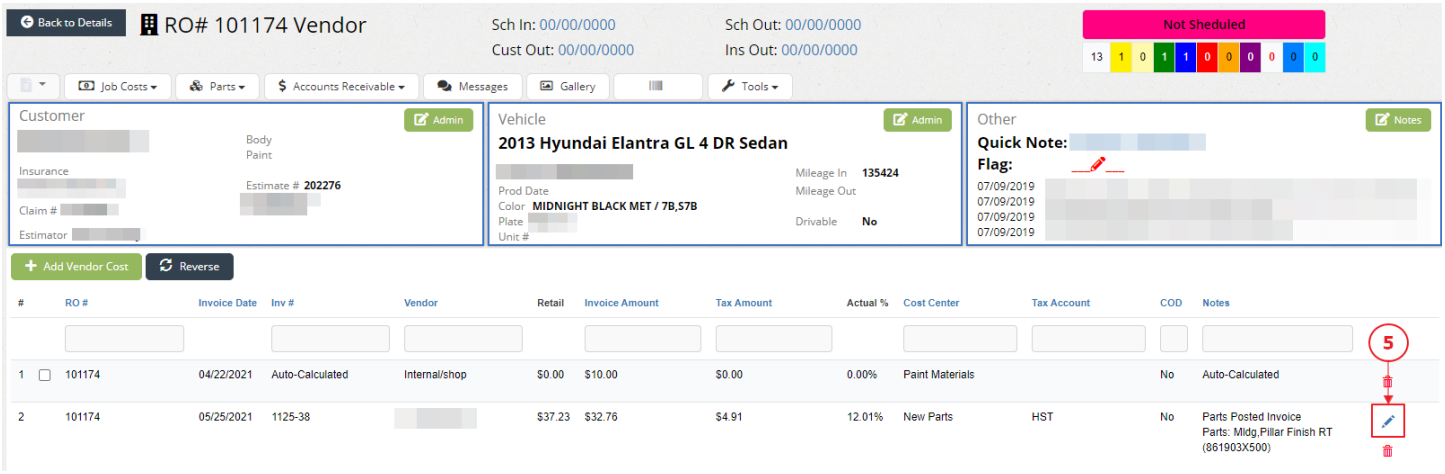
On occasion, when receiving part(s) or manually posting a vendor cost, an incorrect vendor or wrong invoice number has been entered. To correct it, you will need to edit the vendor cost.

<u>There are several ways to edit a vendor cost:</u>

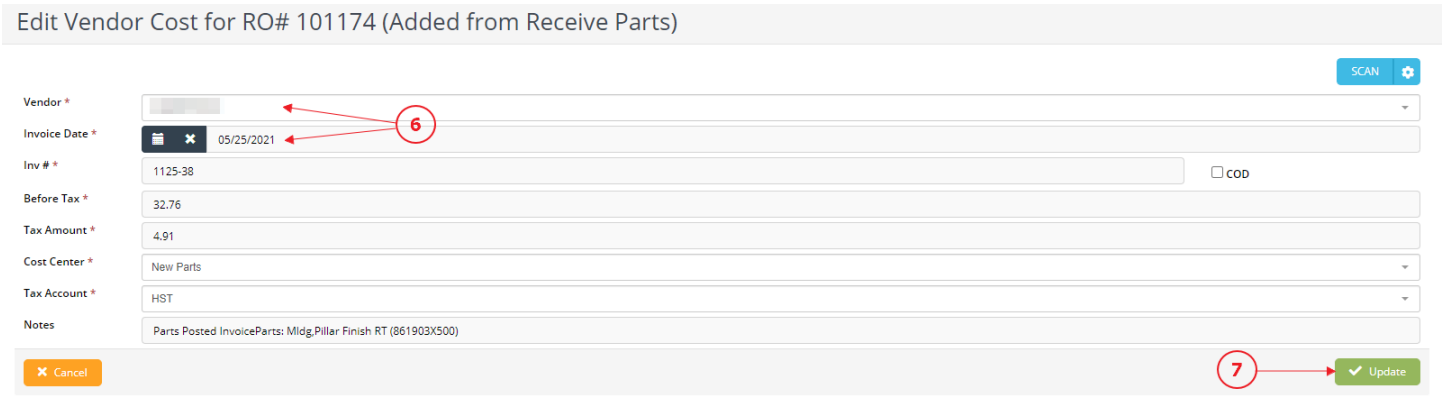
1 – On the left navigation menu select the Job Cost section (1) then select Job Cost List (2)
> Select the RO that you want to Edit the Vendor Cost for
> Select "View Vendor Cost Detail" (4) from the "Action" drop-down (3)



> Click the pencil next to the invoice that you would like to edit (5)

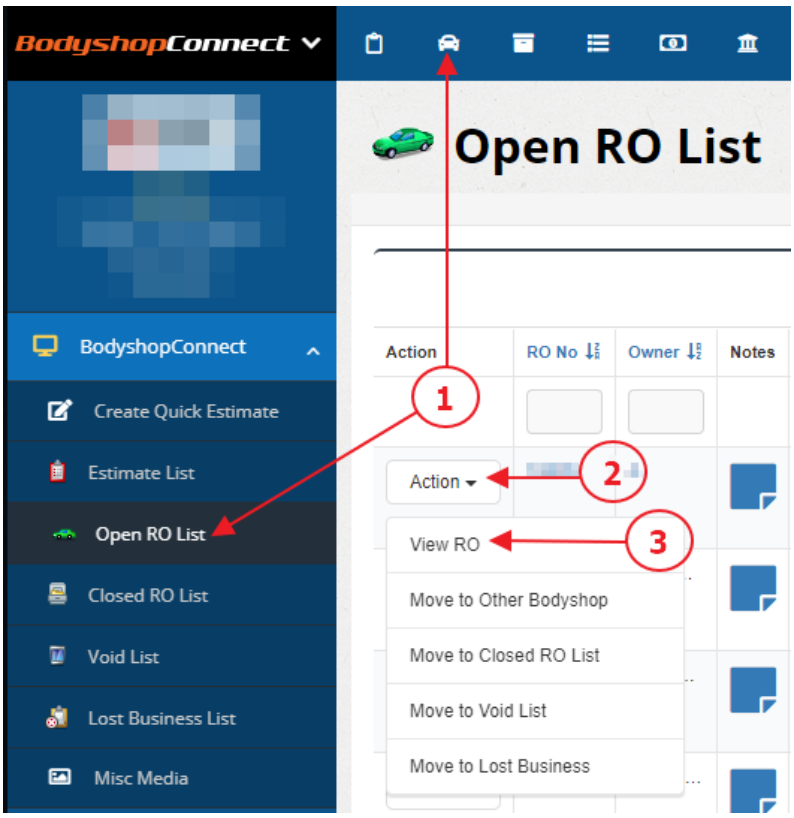


> Select the new vendor from the vendor drop-down list or enter the correct invoice number (or make other changes needed) (6)
> Click Update (7)

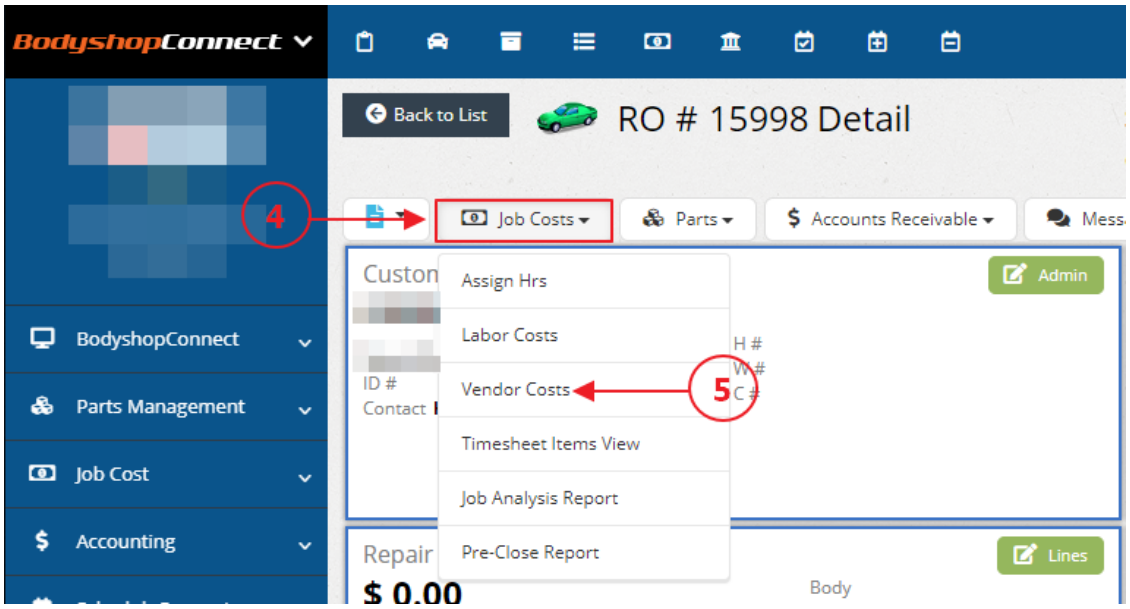


2 – On the left navigation menu select Open RO List under the BodyshopConnect section OR Click on Open RO icon on the top navigation bar (1)

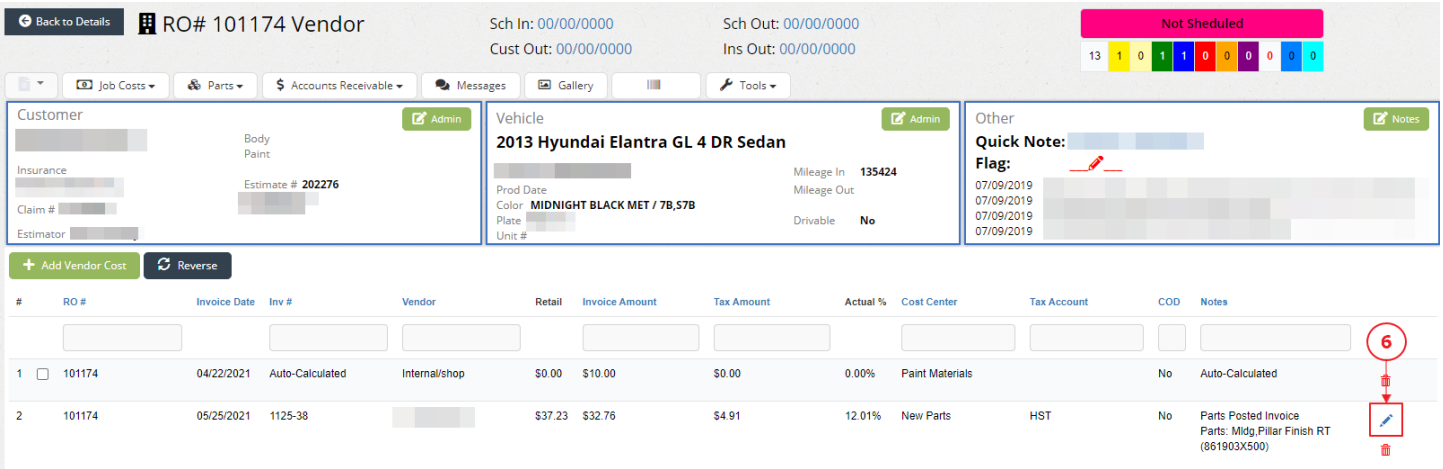
> Select the RO that you would like to edit the Vendor Cost for
> Select "View RO" (3) from the "Action" drop-down (2)



> Select 'Vendor Costs' (5) from the 'Job Costs' drop-down (4)

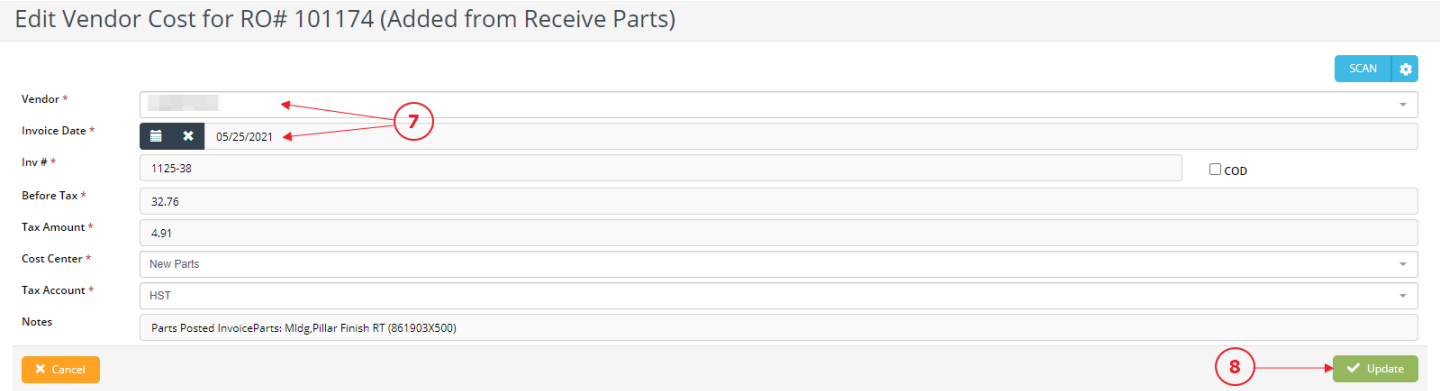


> Click the pencil to the right of the line for the invoice that you would like to edit (6)



> Select the new vendor from the vendor drop-down list or enter the correct invoice number (or make other changes needed) (7)

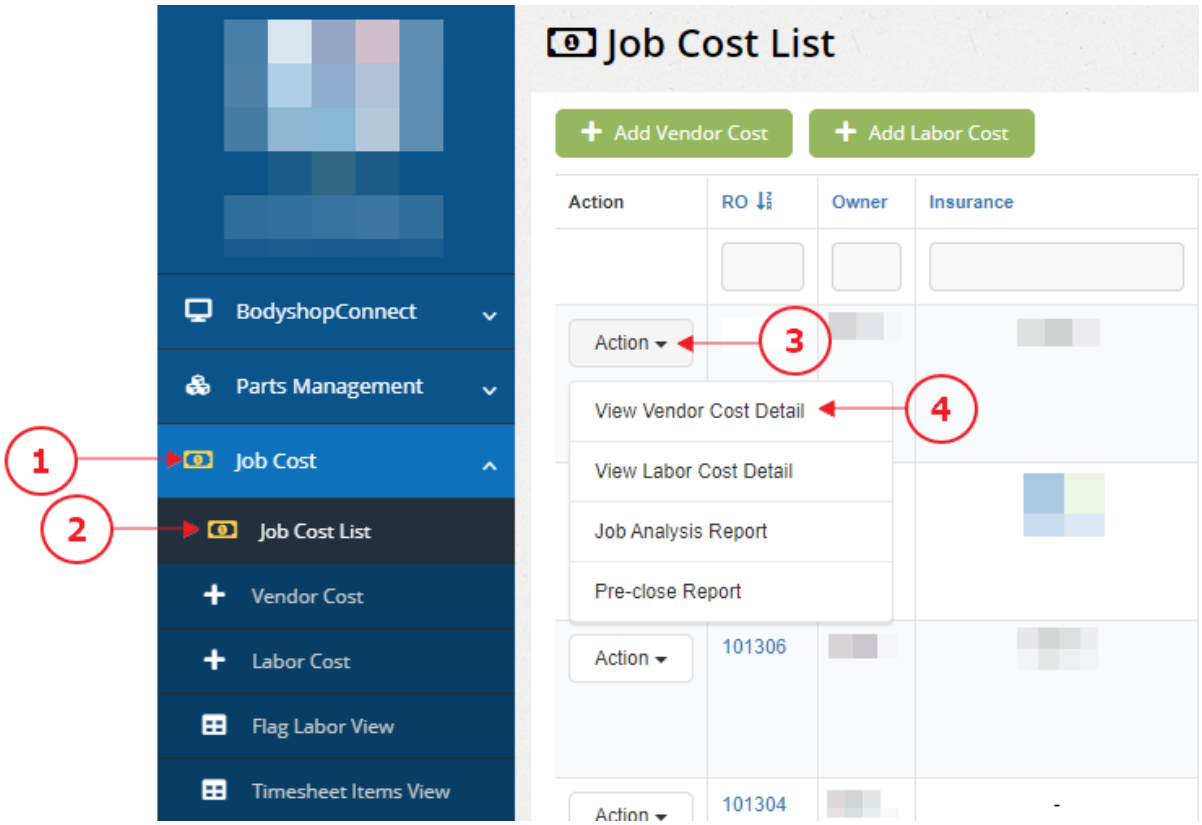
> Click Update (8)



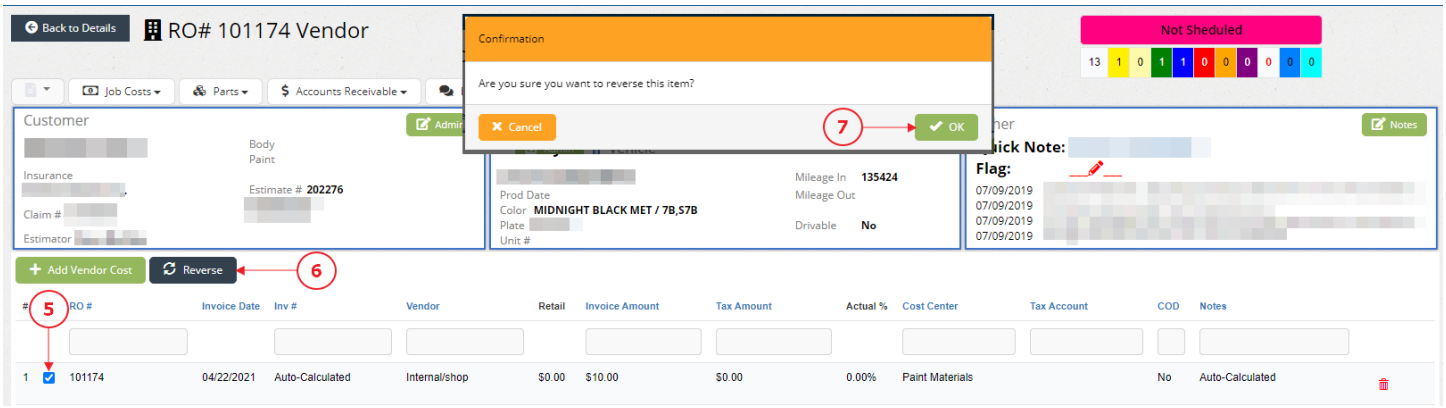
There are several ways to reverse a vendor cost:

1 – On the left navigation menu select the Job Cost section (1) then select Job Cost List (2):

> Open the RO that you want to reverse a vendor cost for
> Select 'View Vendor Cost Detail' (4) from the 'Action' drop-down (3)

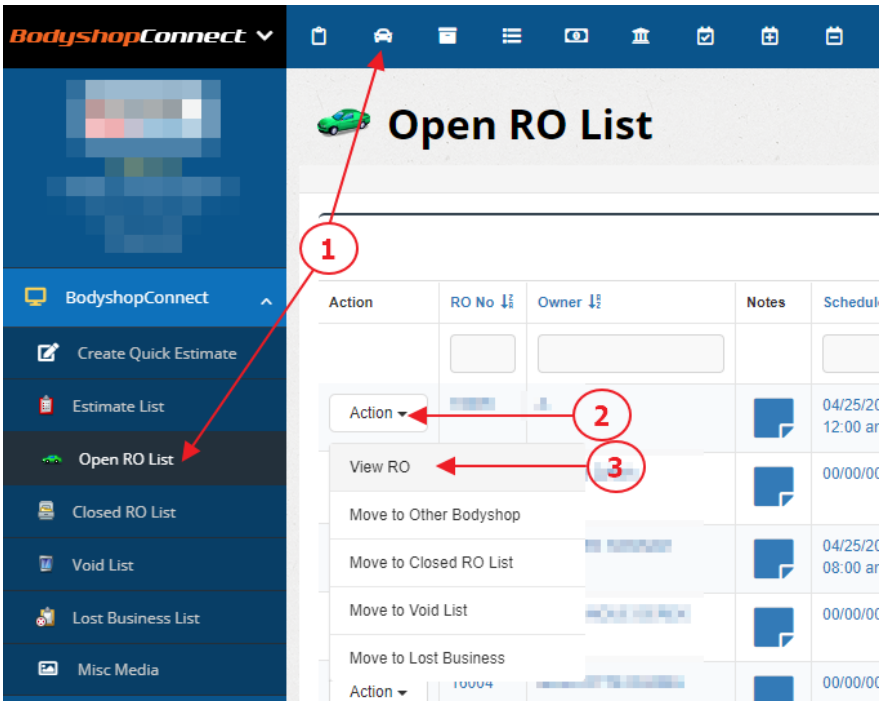


> Select or tag the Invoice that you would like to reverse (5) and click the Reverse button (6).
> Click 'OK' (7) to confirm that you would like to reverse the item.

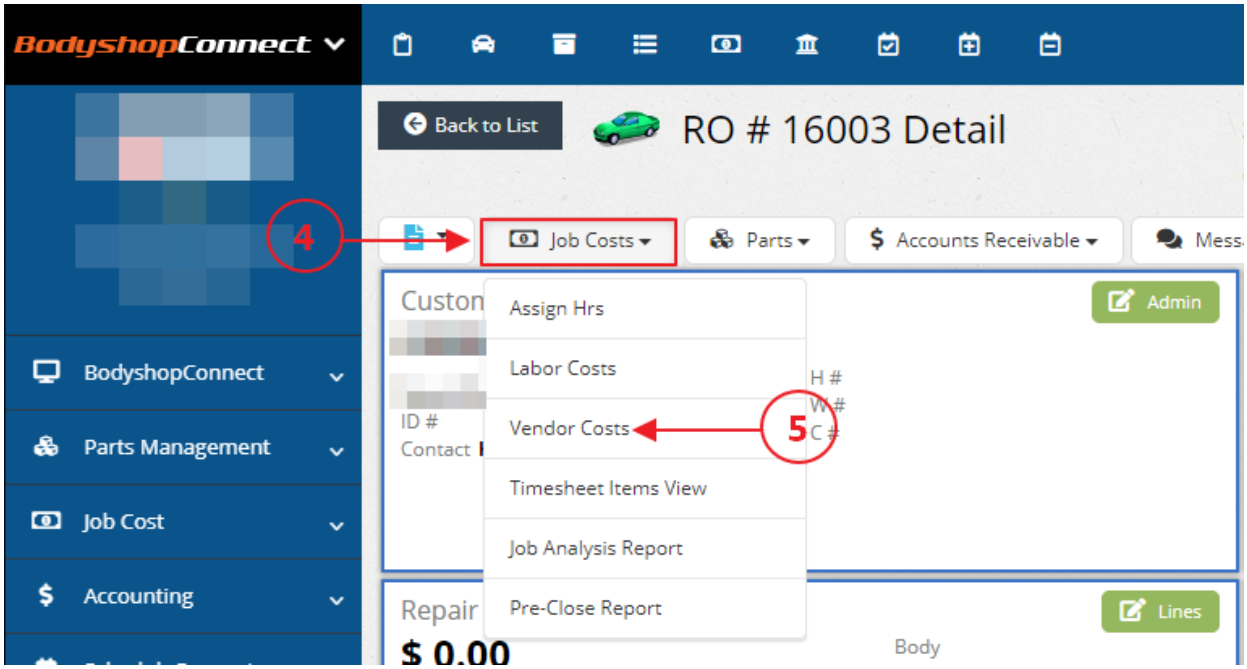


2 – On the left navigation menu select Open RO List under the BodyshopConnect section OR click on the Open RO icon on the top navigation bar (1):

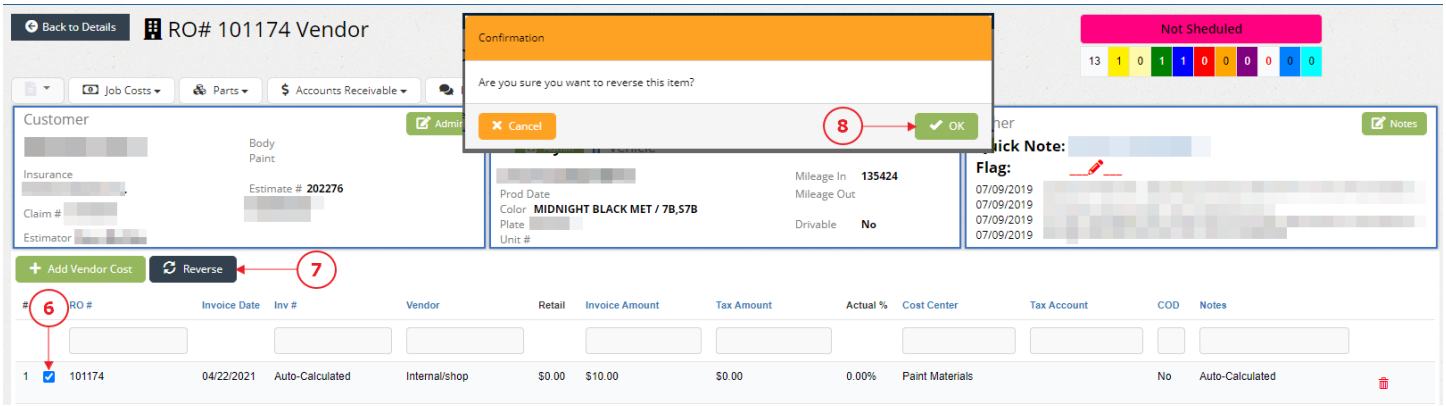
> Select 'View RO' (3) from the 'Action' drop-down (2)



> Select 'Vendor Costs' (5) from the 'Job Costs' drop-down (4)



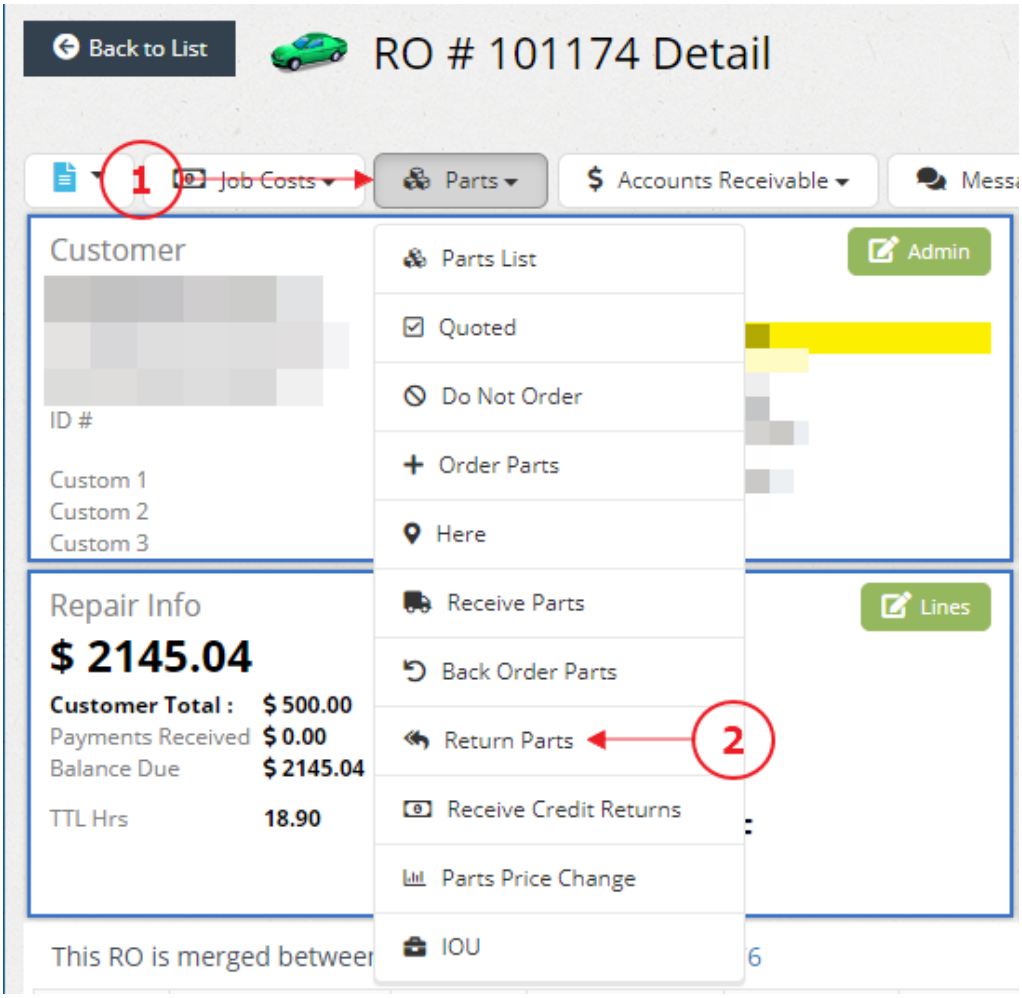
> Select or tag the cost that you would like to reverse (6) and click the Reverse button (7).
> Click 'OK' (8) to confirm that you would like to reverse the item.



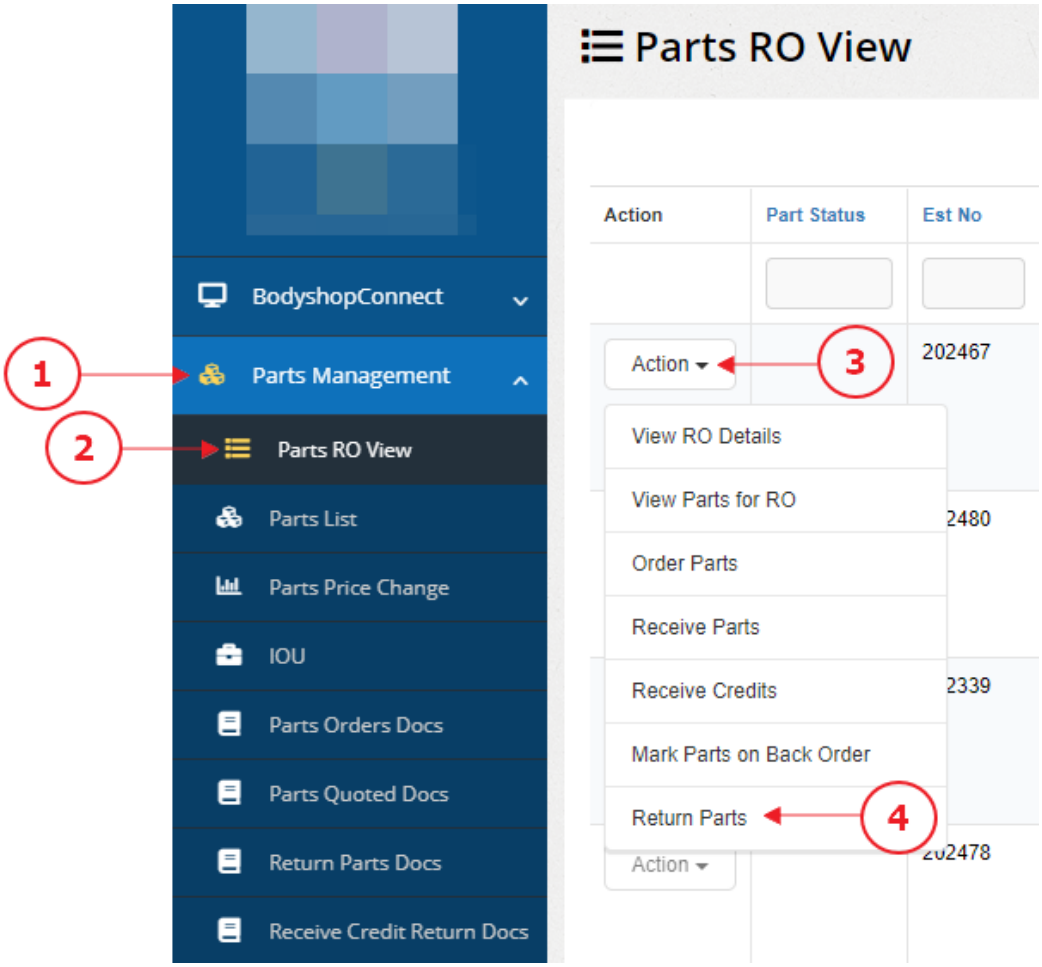
Return Parts

There are several ways to start parts return:

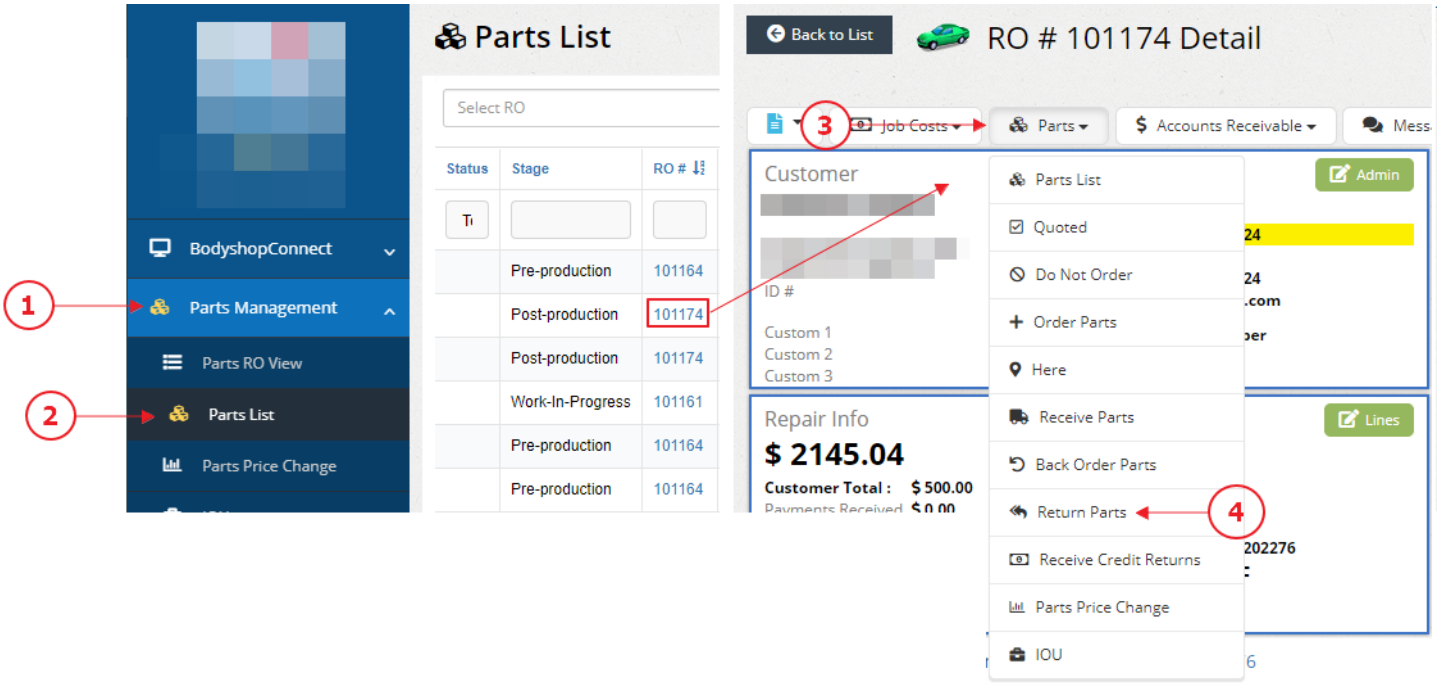
> ***Open (or Closed) RO View*** - Parts drop-down menu (1) – Return Parts option (2)



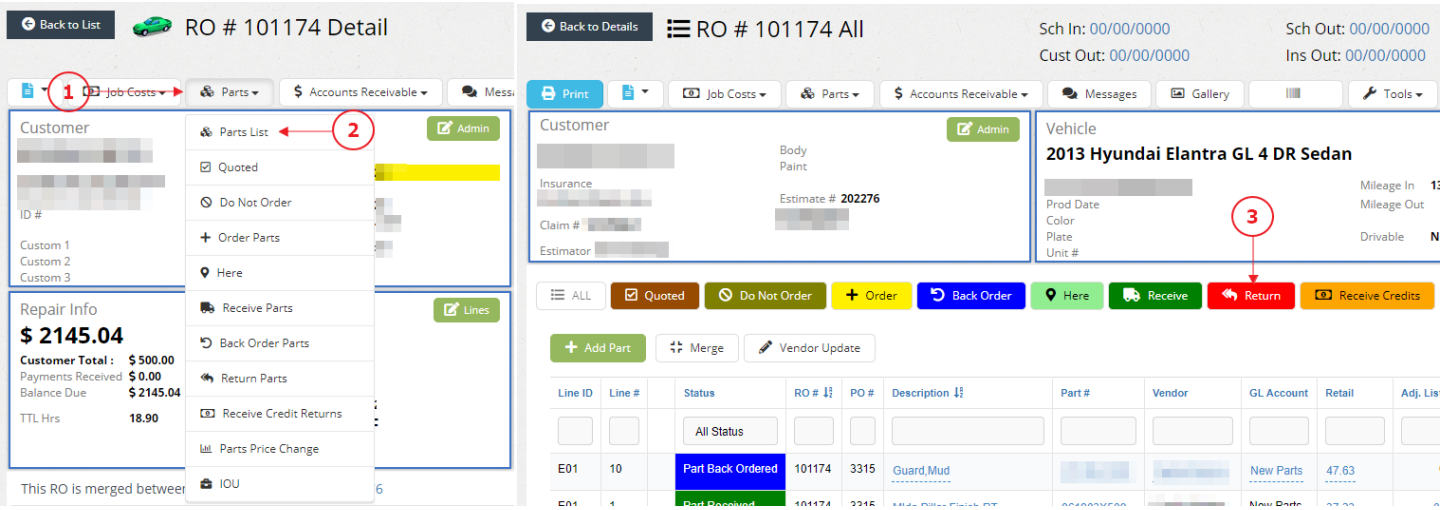
> ***Parts Management Section*** (1) - Parts RO View (2) - Action drop-down menu (3) – Return Parts (4)



> ***Parts Management Section*** (1) - Parts List (2) – ***Open RO View*** - Parts drop-down menu (3) – Return Parts option (4)

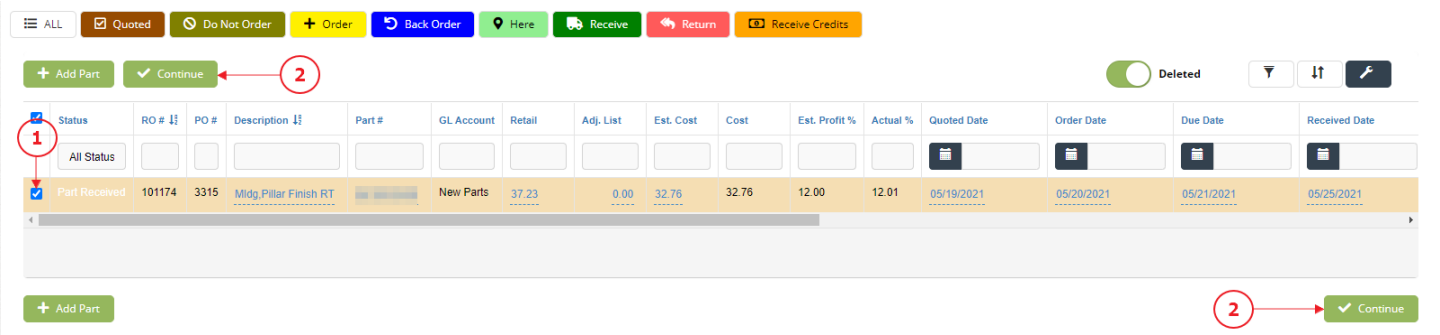


> ***Open (or Closed) RO View*** – Parts (1) - Parts List (2) – Return button (3)



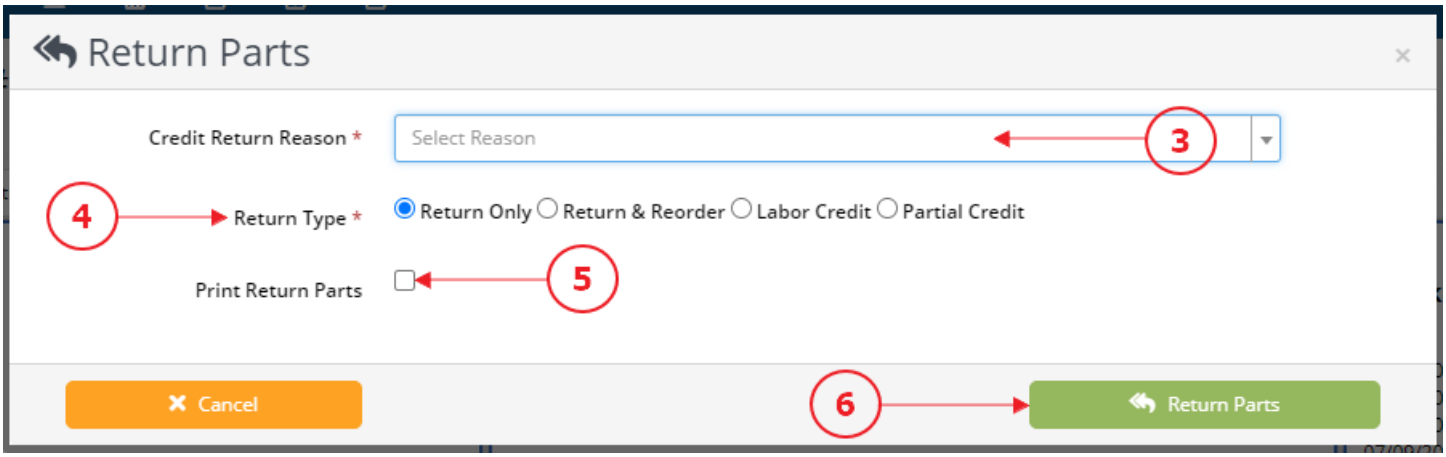
After that, the steps are the same wherever you started:

- Tag or select the part(s) you would like to return (1)
- Click on Continue button (2)



- Select a credit return reason from the drop-down list (3)
- Select a return type (*Return Only*, *Return and ReOrder*, *Labor Credit or Partial Credit*) (4)

a. If you choose ***'Return Only'***, just click the 'Return Parts' button (6) (or mark Print Return Parts (if needed) (5))

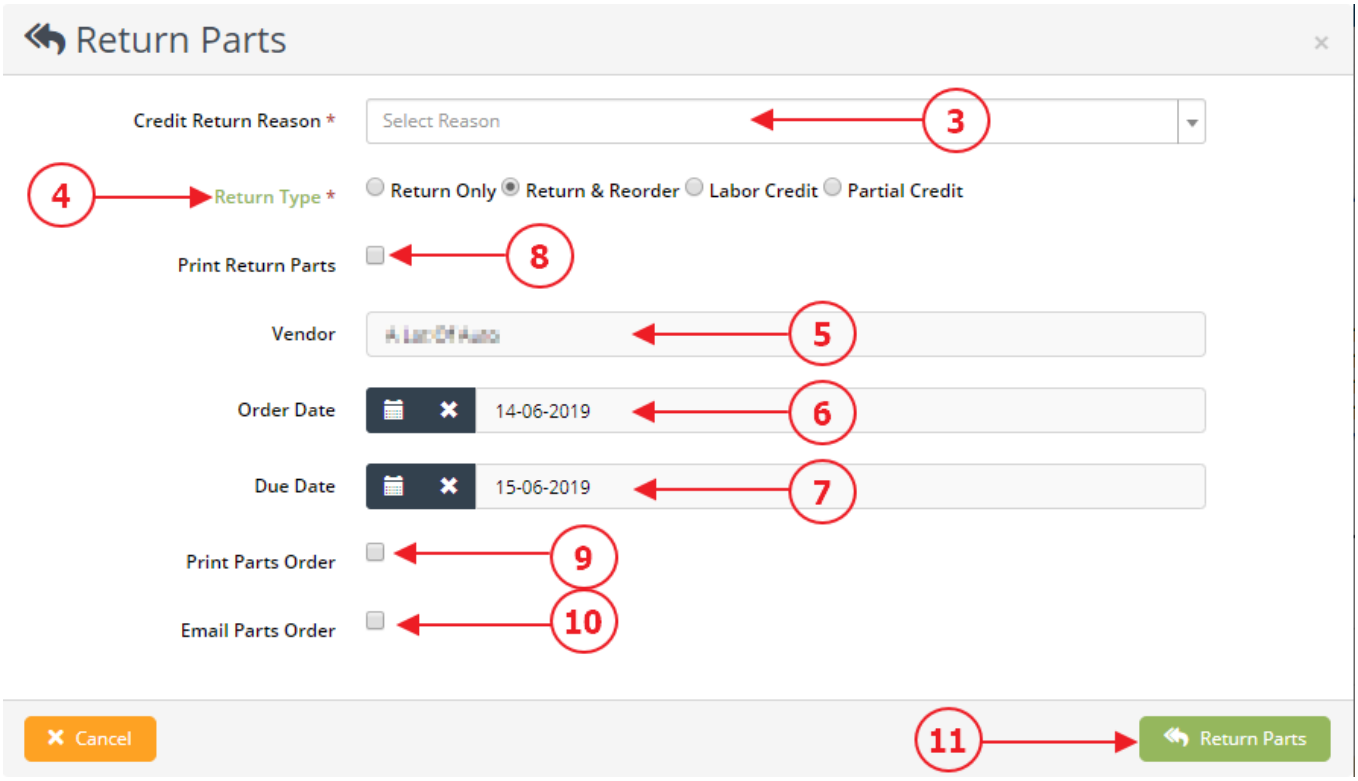


Return Only:

- Will create an outstanding credit return for that part.

- If line has been imported from the estimating system, an additional 'not ordered line' will show in the parts list in addition to the Outstanding Credit Return Line.
The line will need to be deleted in the estimating system to be removed from the estimate.
If line has NOT been imported from the estimating system (was manually created), the line will be deleted in the line items of the estimate.
This option is also available for Closed ROs.
If the rule "Do not create Blank Part when you choose "Return Only"" is Active when returning part", no additional line will be created. ***Note**: This rule will not work where returning parts in a Closed RO – in this case a blank part will be created anyway.*

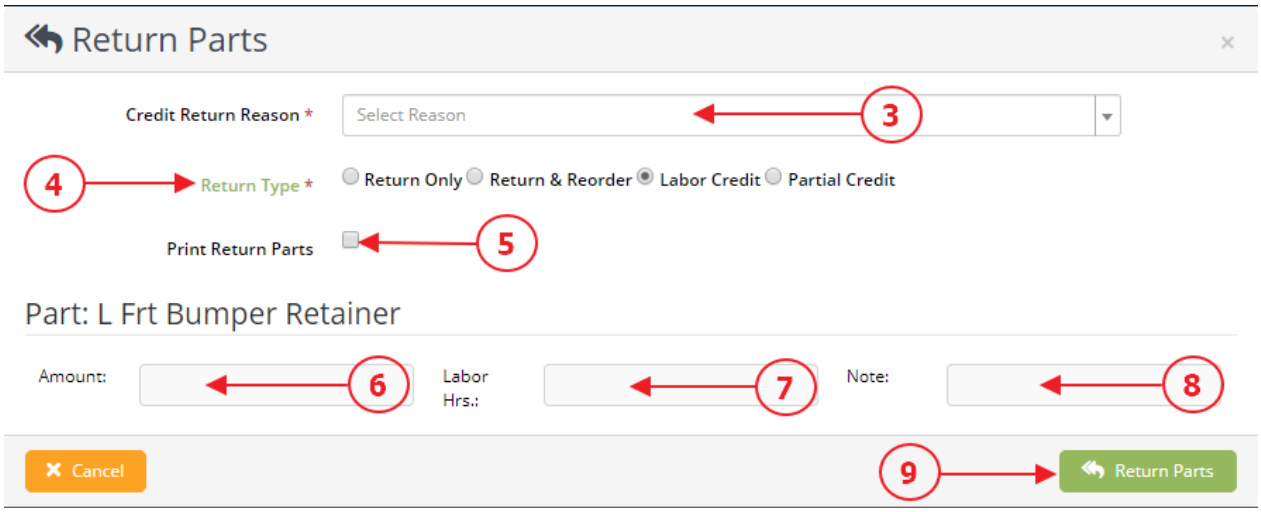
b. If you choose '***Return and ReOrder'***
   - Select a vendor to order parts from (5)
   - Select / verify order date (6)
   - Select / verify due date (7)
   - Mark the appropriate checkboxes to print return parts (8), print parts order (9) or email parts order (10) if needed
   - Click on 'Return Parts' button (11)



Return & Reorder:
- Will create an outstanding credit return for part(s) in parts list.
- Will create an additional line for the part on ReOrder in parts list.

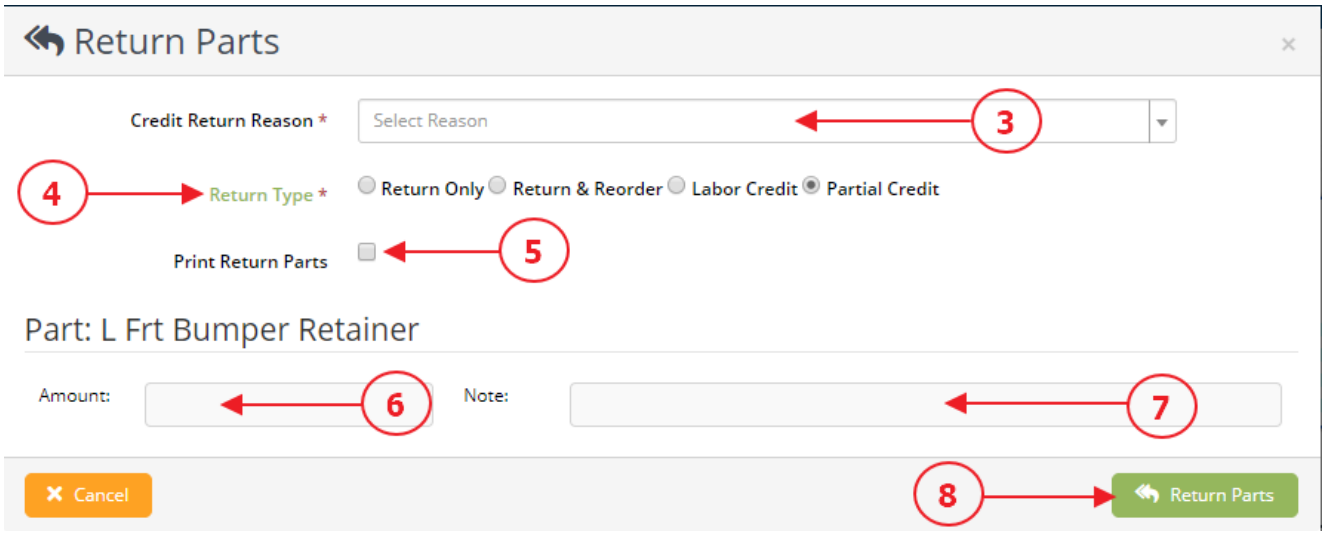
c. If you choose ***'Labor Credit' (****Labor Credit Option was created to allow the user to credit for labor. This is typically used if a part was received damaged from a supplier. The supplier offers a credit to repair the part****)***
   - Mark the checkbox to print return parts doc (5)
   - Enter the amount of credit expected (before tax) (6)
   - Enter / adjust Labor Hours (will default to automatic calculation using job rates) (7)

- Enter Notes (if necessary) (8)
- Click on 'Return Parts' button (9)



Labor Credit
- Will create an additional line in parts for the outstanding credit return
- Will still show original line as received
- Will add additional shop pay line in line items in order to allow user to pay technician for the labor for the repair.
- This option is also available for Closed ROs.

d. If you choose ***'Partial Credit'*** *(Partial Credit Option was created to allow the user to credit a portion of the invoice. This is typically used if only some parts of a multiple items invoice are being returned)*
   - Mark the checkbox to print return parts document (5)
   - Enter the amount of credit expected (before tax) (6)
   - Enter a note if needed (7)
   - Click on 'Return Parts' button (8)



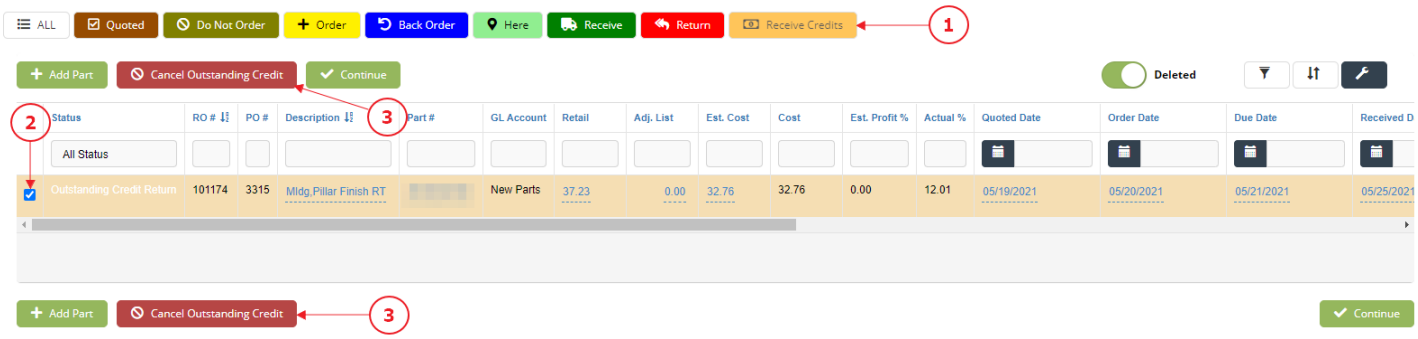
Partial Credit
- Will create an additional line in parts for the outstanding credit return.
- Will still show original line as received.
- This option is also available for Closed ROs.

***Note**: the Return option is available for received parts only.*

Cancel Outstanding Credit Return

On occasion, outstanding credit return for a part may need to be cancelled, it can be done in the following way:

- On the RO parts list click 'Receive Credits' button (1)
- Mark the checkbox next to the part you want to cancel outstanding credit return for (2)
- Click the 'Cancel Outstanding Credit' button (3)

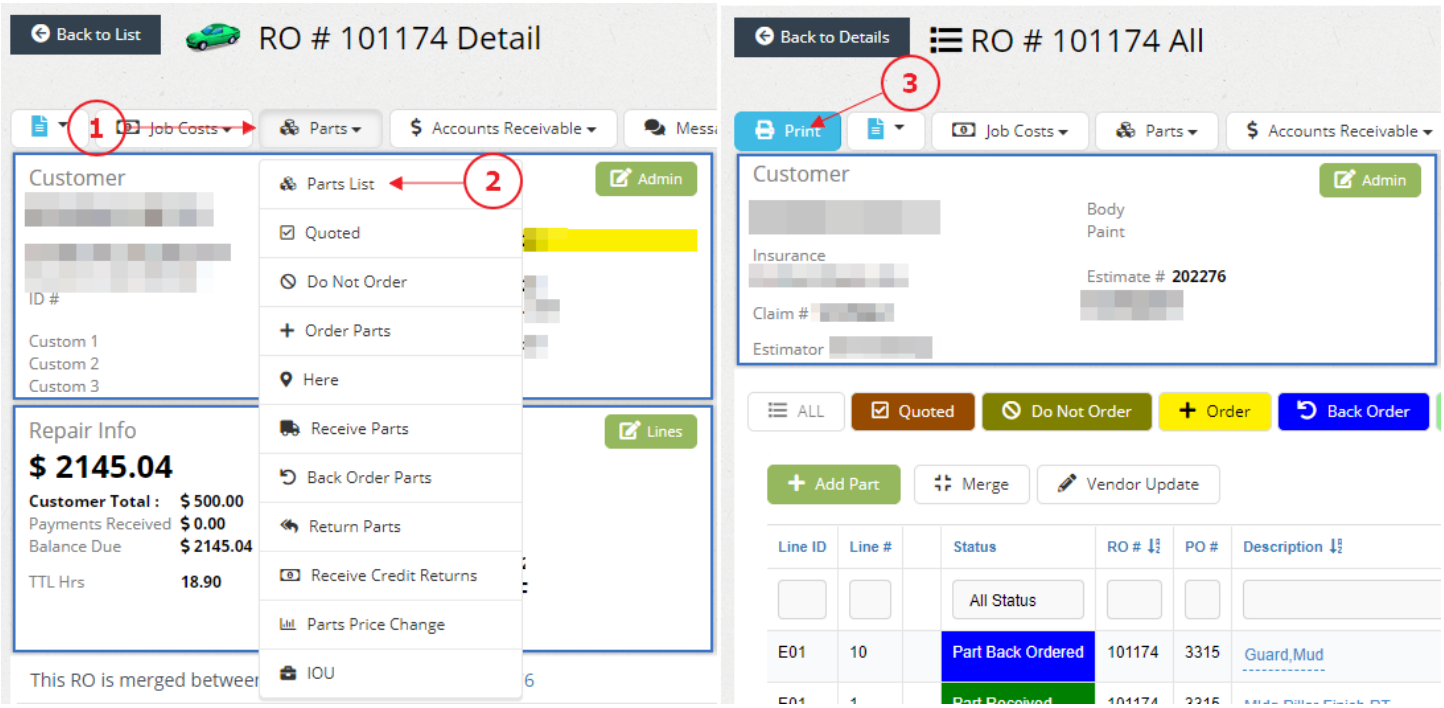


After that, the part will be marked as received.

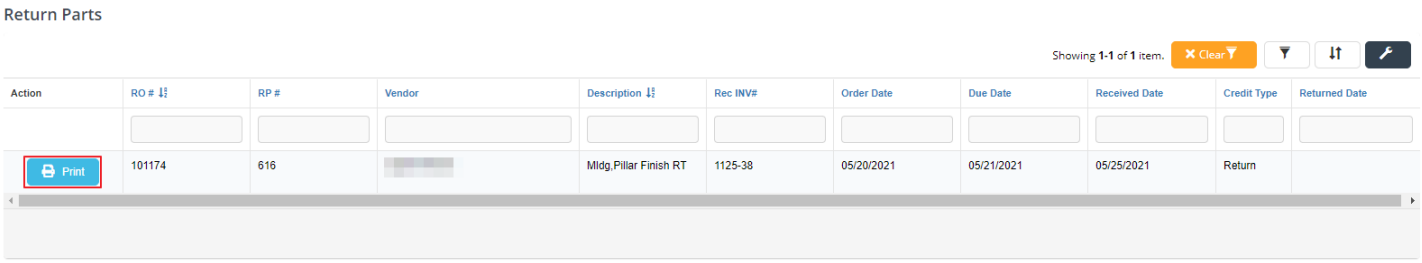
Return Parts Docs

On occasion, *Return Parts Invoices* may need to be viewed or printed. They can be printed from:

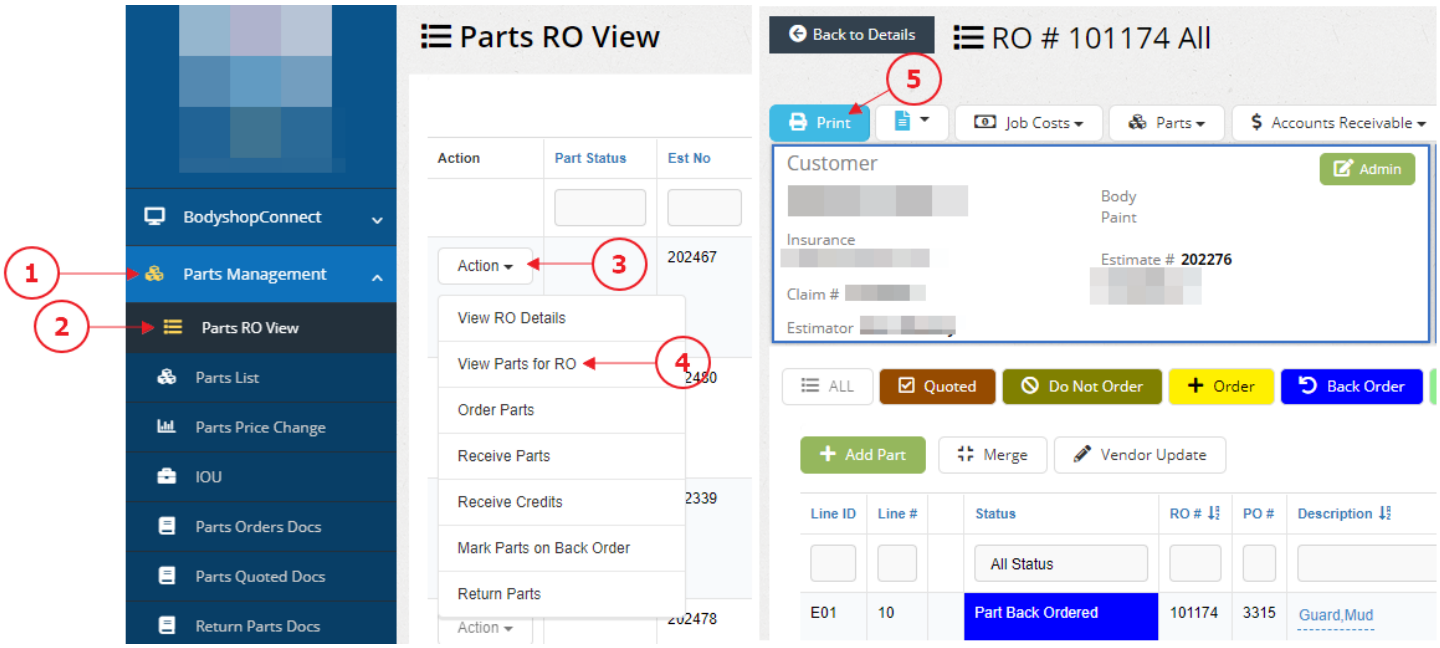
1. Open RO View → Parts drop-down list (1) **→ Parts List** (2) **–Print button** (3)



On the next page, you will see all the parts documents for the current RO. The third section shows the Return Parts documents. You can click 'Print' to open a document needed which can be printed or sent by email.

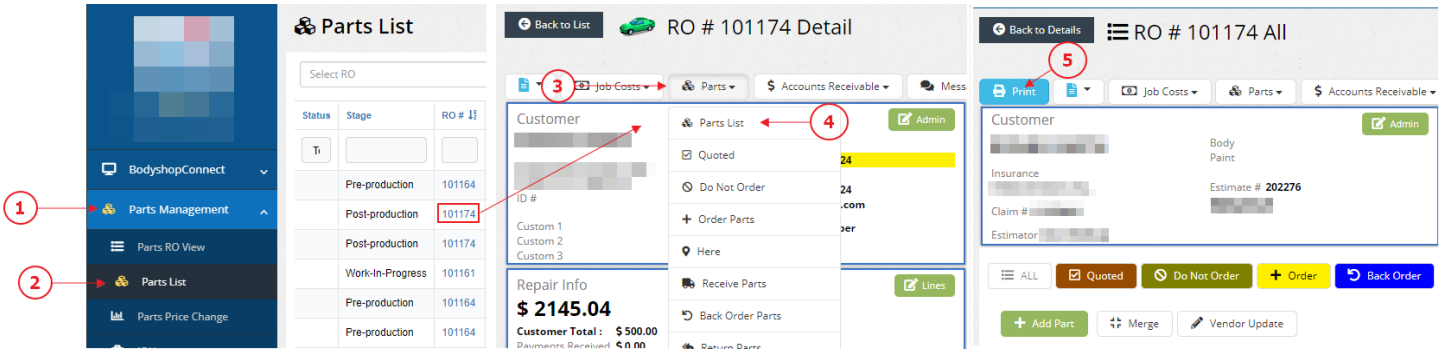


2. Parts Management Section (1) **→ Parts RO View** (2) **→ Find RO to print the document for → Action** (3) **→ View Parts for RO** (4) **→ Print button** (5)



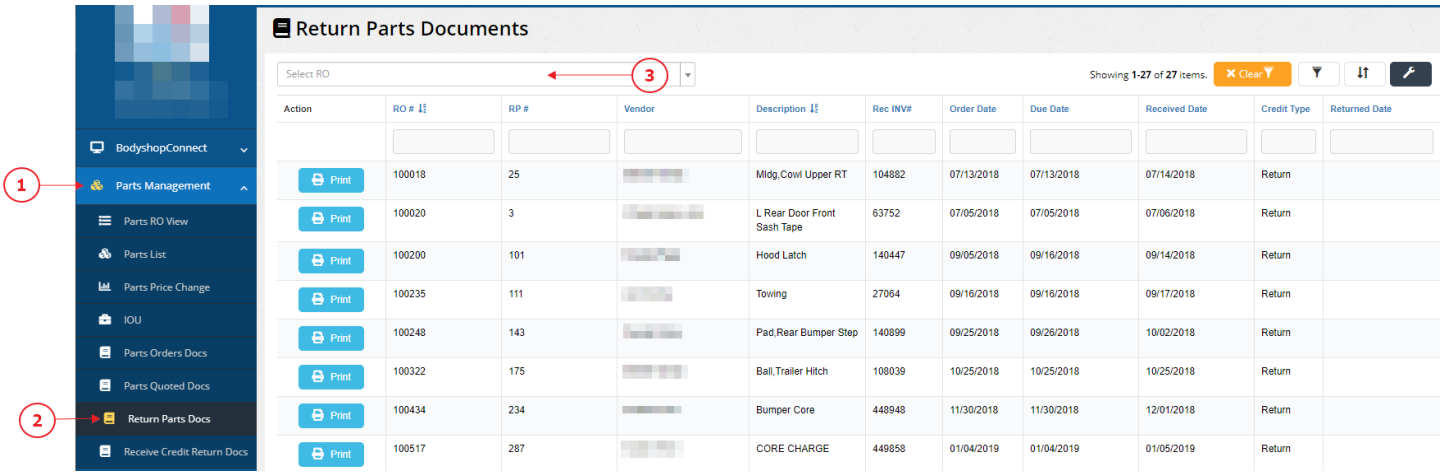
> Click the Print button beside the invoice that you would like to print.

3. Parts Management Section (1) **→ Parts List** (2) **→ Select an RO needed → Open RO View → Parts drop-down list** (3) **→ Parts List** (4) **– Print button** (5)



> Click the Print button beside the invoice that you would like to print.

4. Parts Management Section (1) **→ Return Parts Docs** (2) **→ Select an RO needed** (3) (or just click on Print button next to a needed document without using the drop-down list)



> Click the Print button beside the invoice that you would like to print.

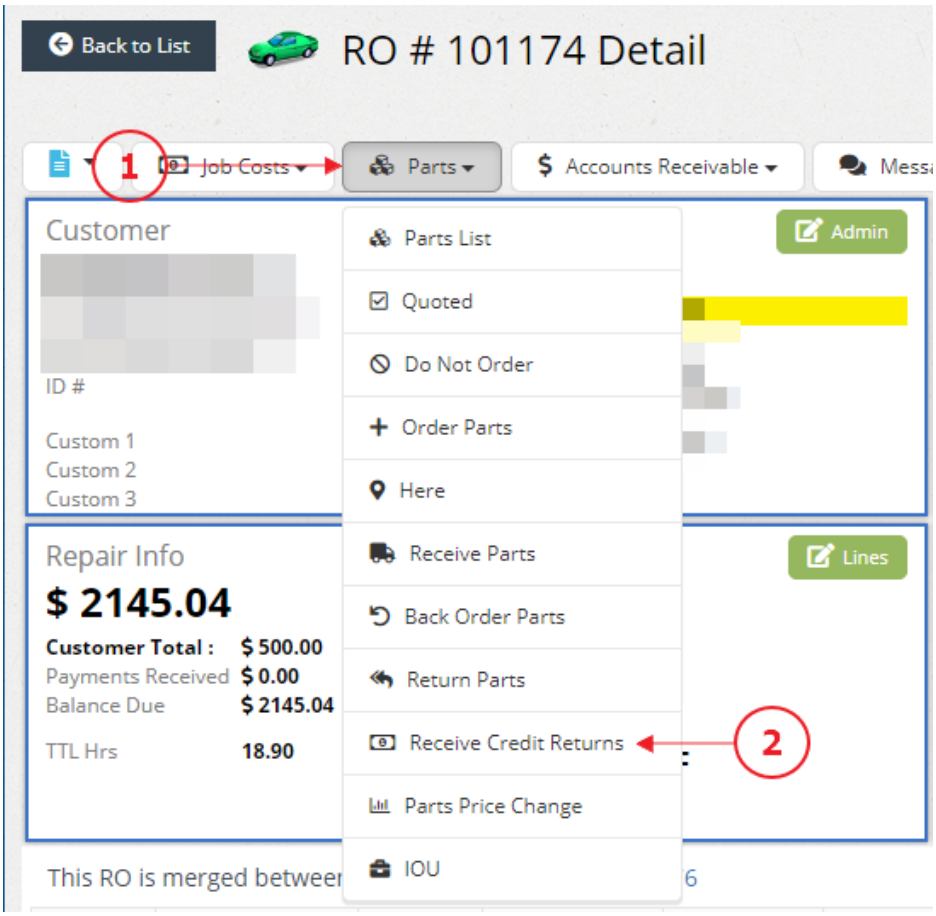
Receive Credits

Credits Return can be received only if the parts returned got the new 'Outstanding Credit Return' status.

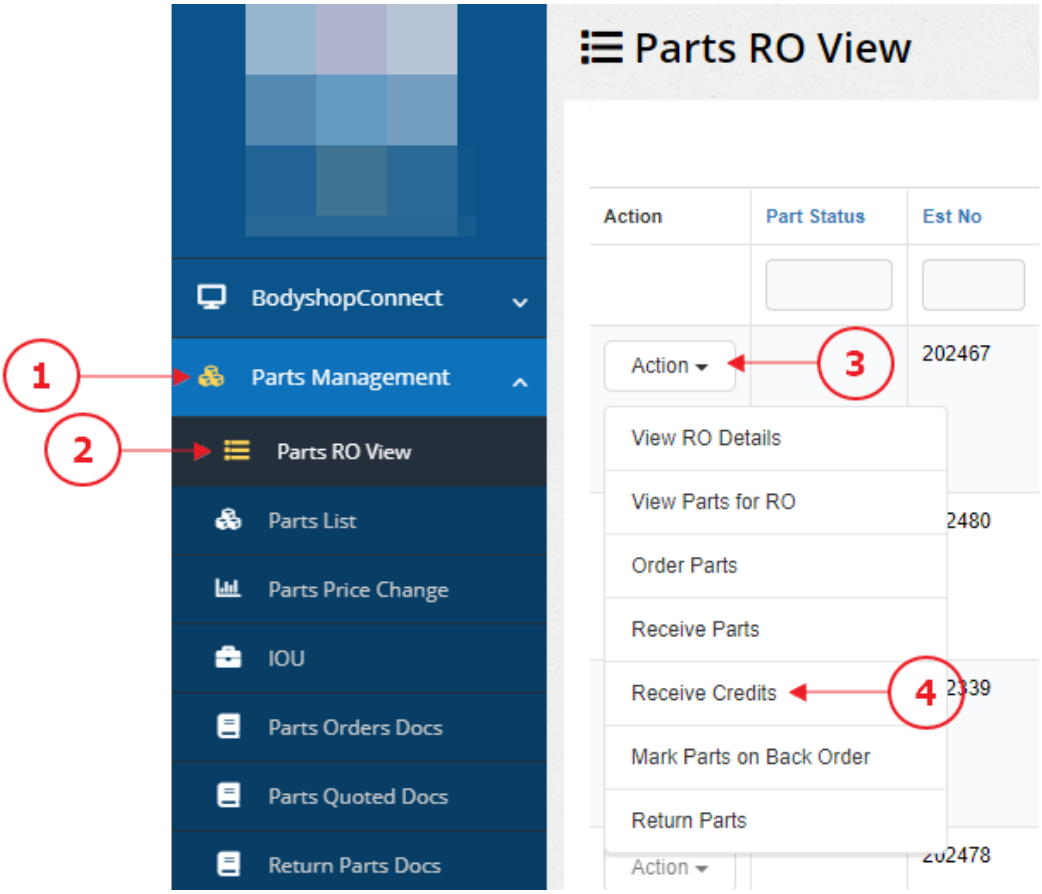
Receive Credits Return option was created to allow the user to receive credits for returned parts.

There are several ways to start Receive credits process:

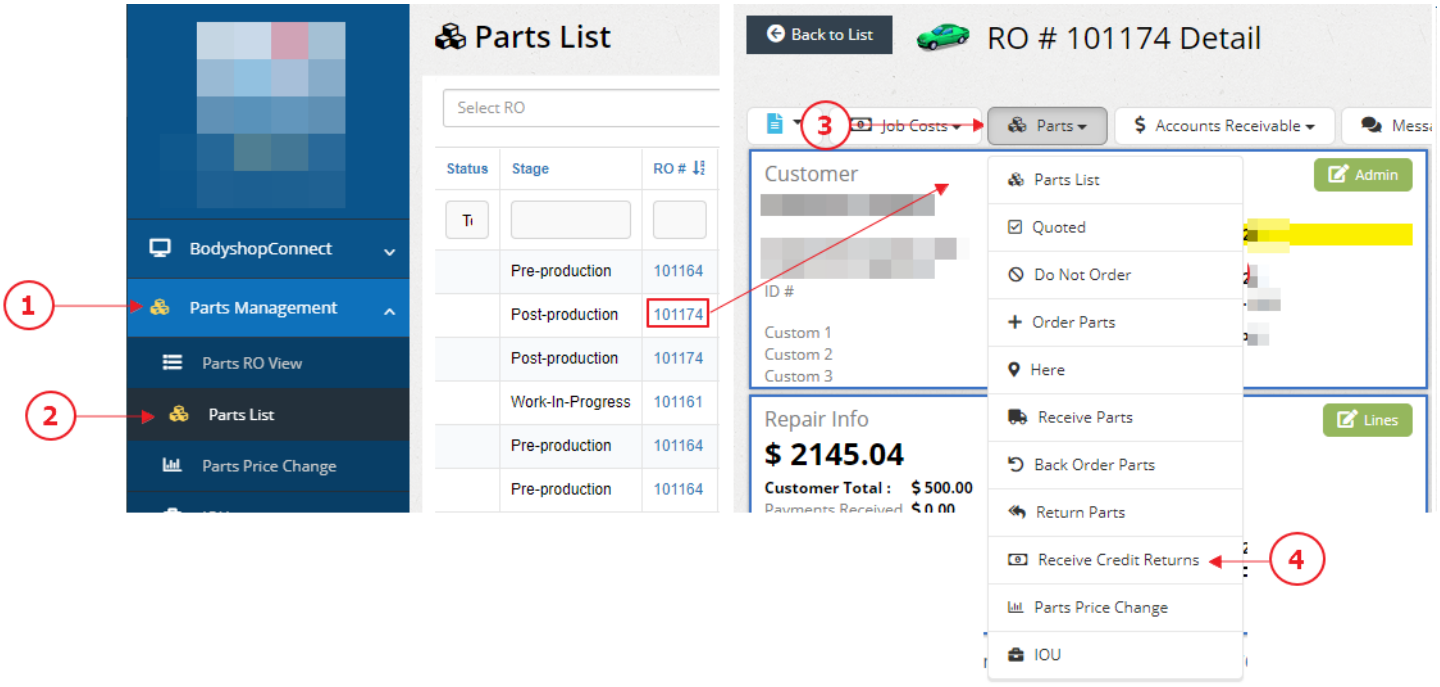
> ***Open (or Closed) RO View*** - Parts drop-down menu (1) – Receive Credit Returns option (2)



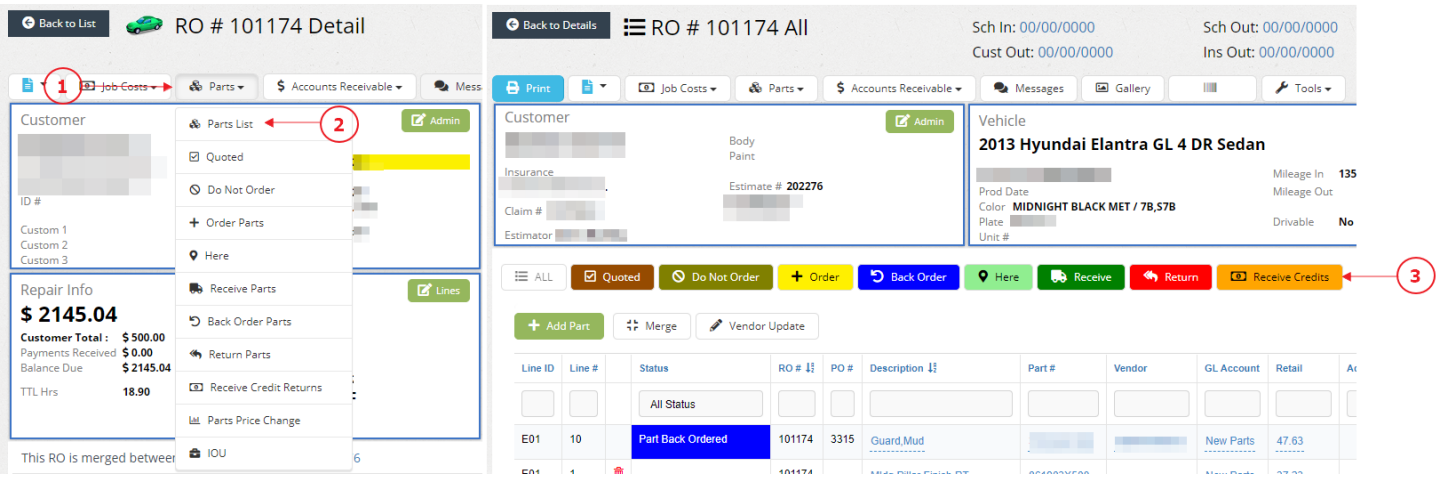
> ***Parts Management Section*** (1) - Parts RO View (2) - Action drop-down menu (3) – Receive Credits (4)



> ***Parts Management Section*** (1) - Parts List (2) - ***Open RO View*** - Parts drop-down menu (3) – Receive Credit Returns option (4)

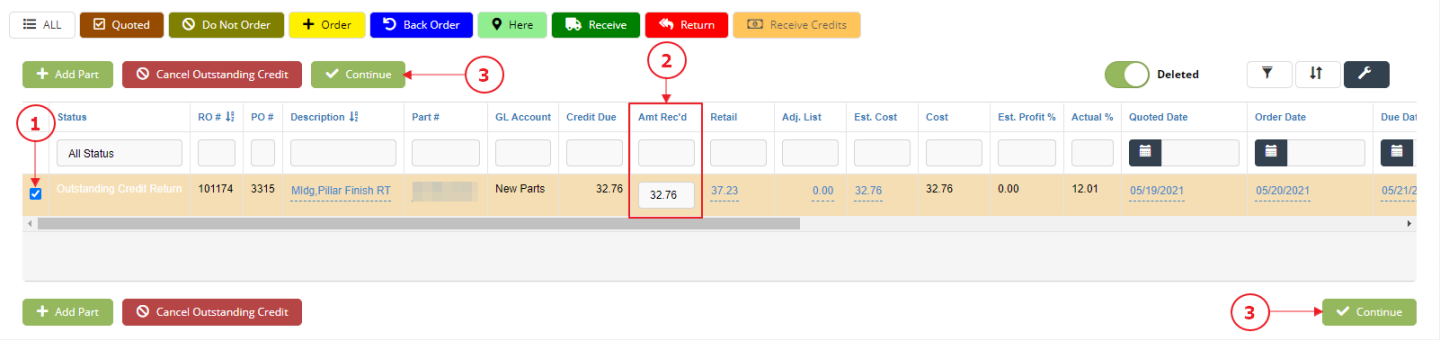


> ***Open (or Closed) RO View*** – Parts (1) - Parts List (2) – Receive credits button (3)

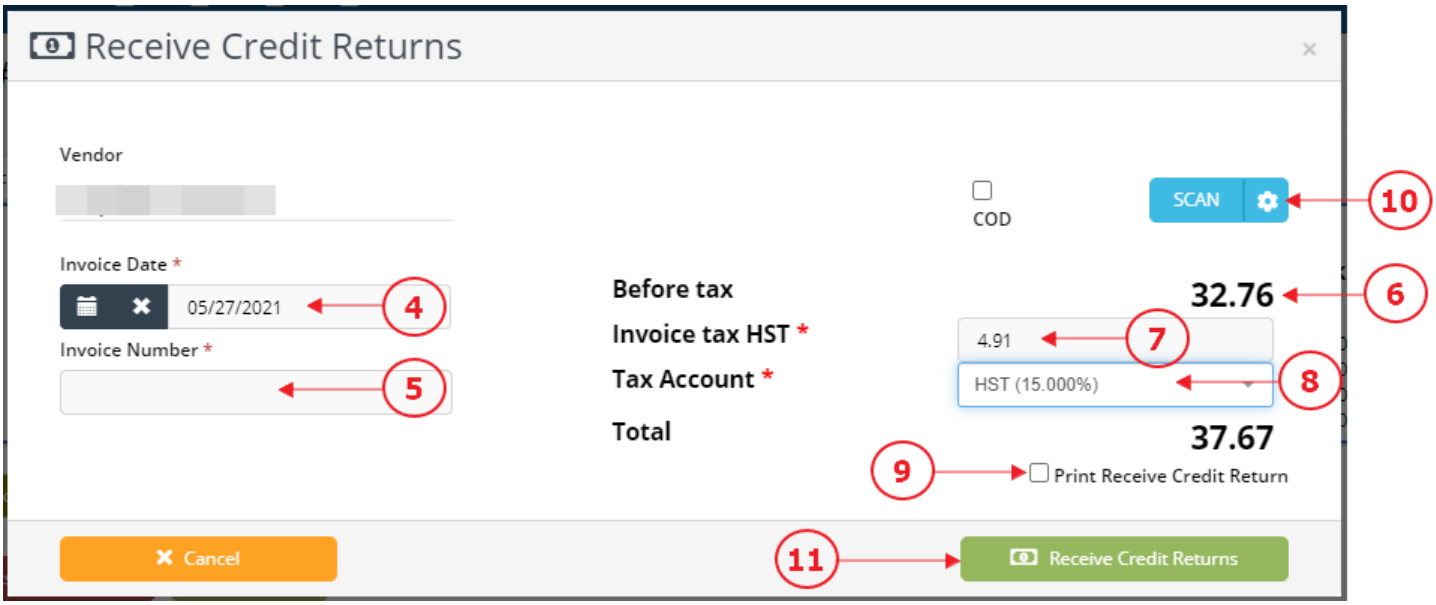


The next steps are the same wherever you started the process:

- Select one or several Outstanding credit return lines you need to receive credits for (1)
- Check/adjust if needed the amount received (2)
- Click the Continue button (3)



- Verify/edit the invoice date (4)
- Enter the invoice number (5)
- Verify the amount received before tax (6). If the amount is not correct, you have to go back to the step (2) and adjust the amount there.
- Verify/edit the invoice tax amount (7)
- Verify/edit the tax account (8)
- Mark the checkbox to print receive credit return document (9)
- Use the Scan option to scan the invoice to PDF and save it to the RO gallery (10)
- Press the 'Receive Credit Returns' button (11).

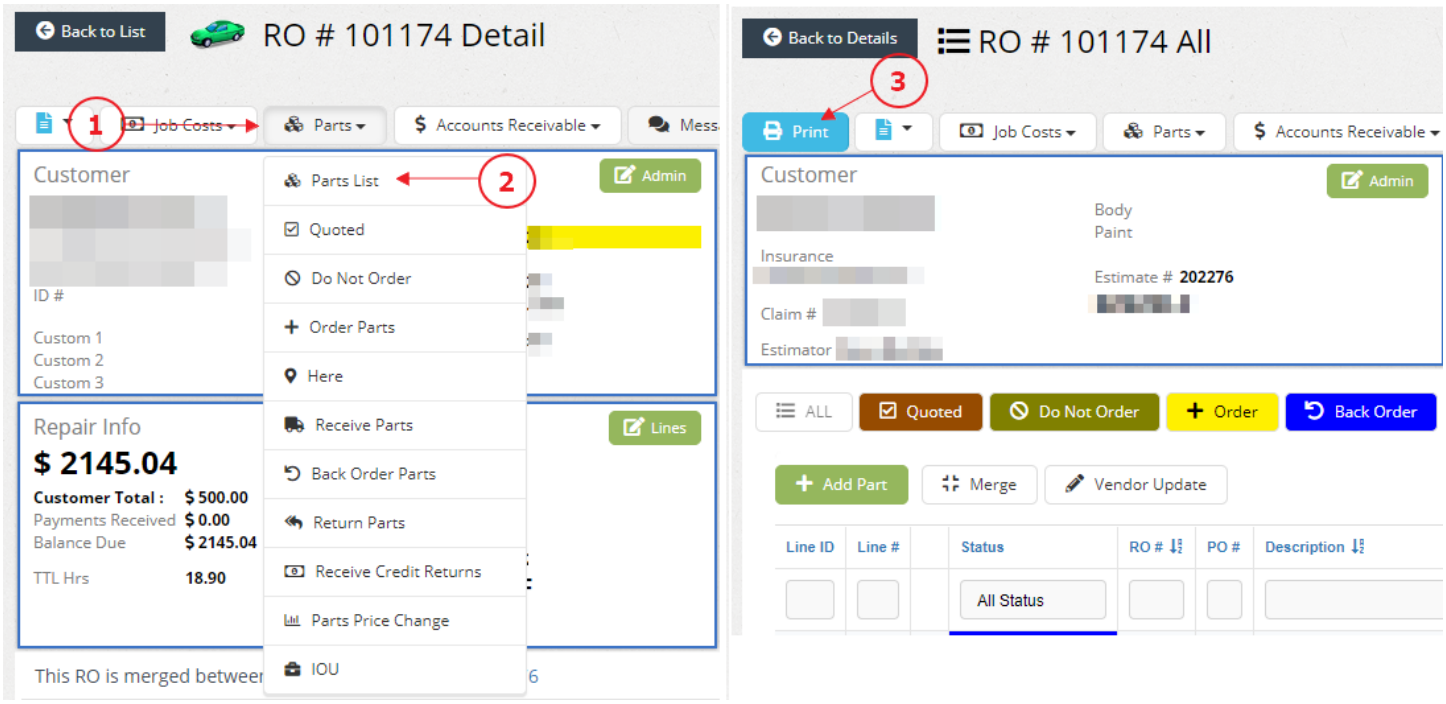


Receive Credit return
- Will still show the original line as Received Credit Returns (Orange line with Black Numbers).

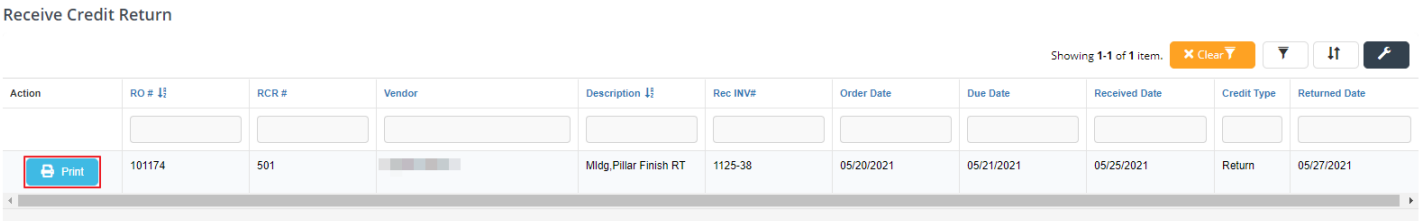
Receive Credit Return Docs

On occasion, *Credit Return Invoices* may need to be viewed or printed, they can be printed from:

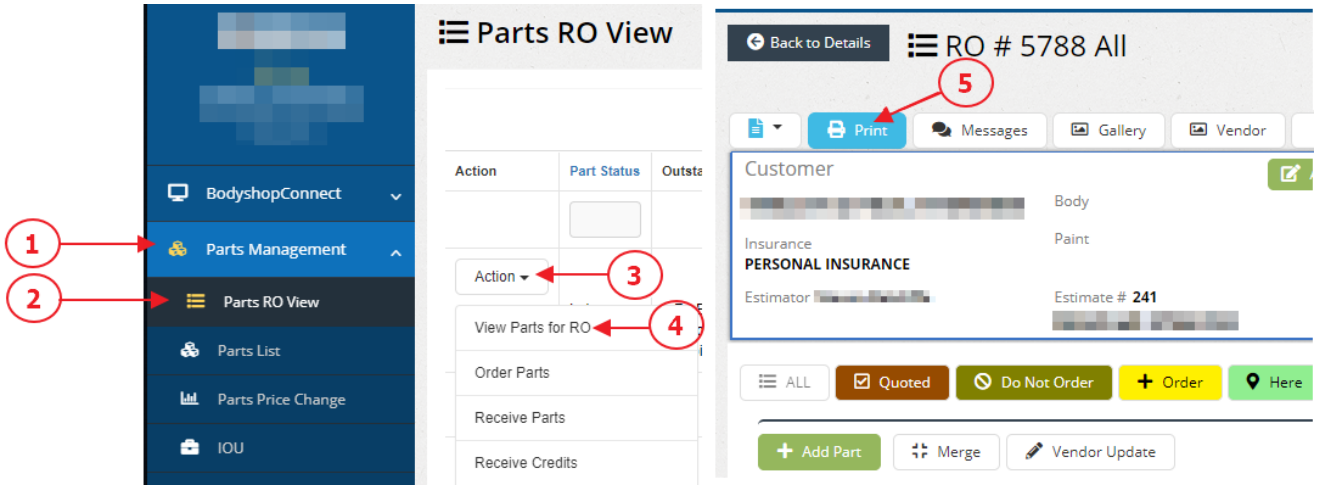
1. Open RO View → Parts drop-down list (1) **→ Parts List** (2) **– Print button** (3)



On the next page, you will see all the parts documents for the current RO. The fourth section shows the Receive Credit Return documents. You can click 'Print' to open a document needed which can be printed or sent by email.

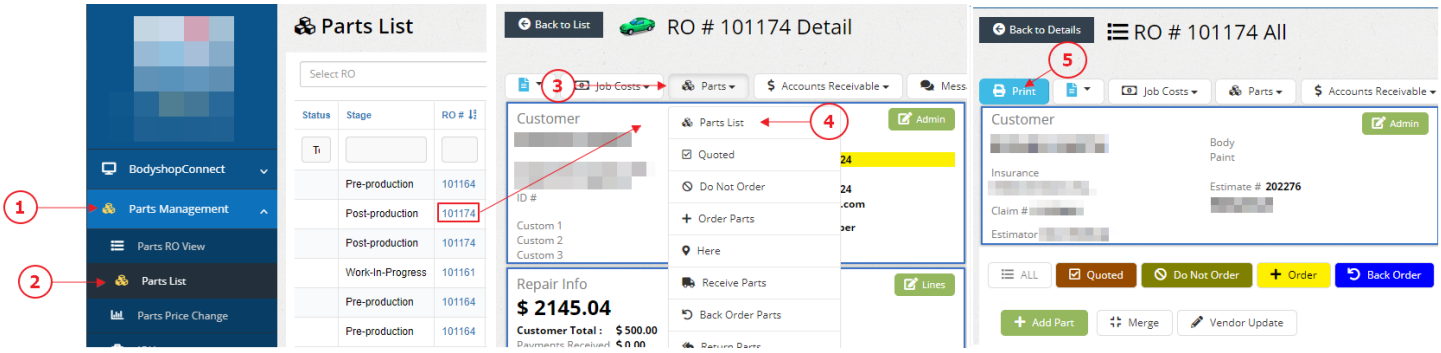


2. Parts Management Section (1) **→ Parts RO View** (2) **→ Find RO to print the document for → Action** (3) **→ View Parts for RO** (4) **→ Print button** (5)



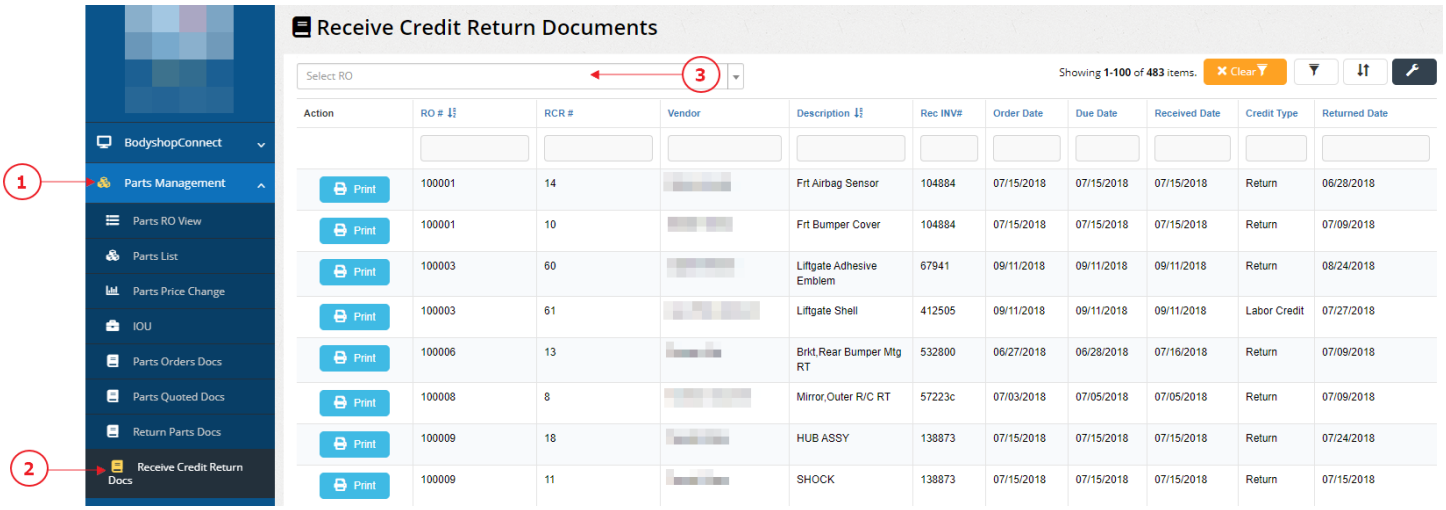
> Click the Print button beside the invoice that you would like to print.

3. Parts Management Section (1) **→ Parts List** (2) **→ Select an RO needed → Open RO View → Parts drop-down list** (3) **→ Parts List** (4) **– Print button** (5)



> Click the Print button beside the invoice that you would like to print.

4. Parts Management Section (1) → **Receive Credit Return Docs** (2) → **Select an RO needed** (3) (or just click on the Print button next to the needed document without using the drop-down list)

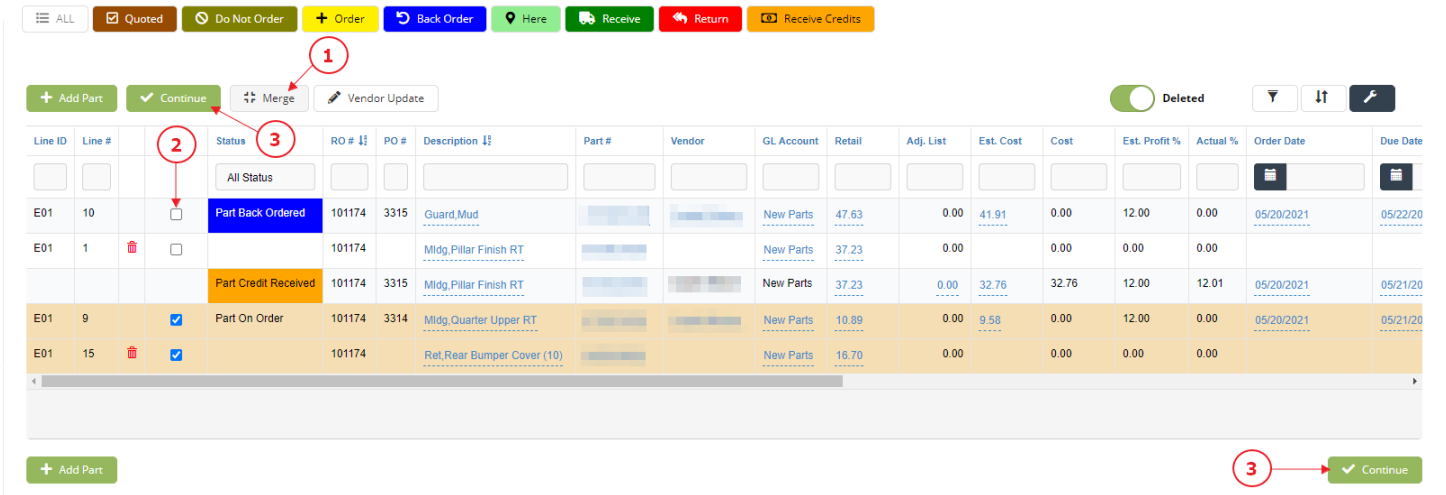


> Click the Print button beside the invoice that you would like to print.

Merging Parts

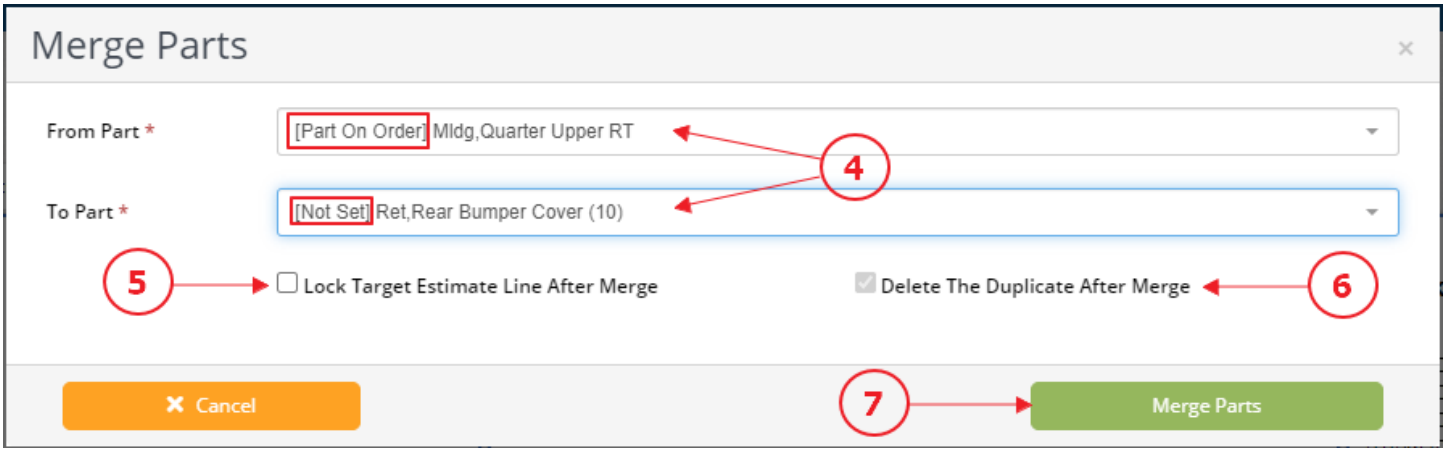
On occasion, a part may be added manually in the BodyshopConnect system prior to being added to the estimating system. When the estimate is updated in the estimating system, a new line will show in the parts screen with a blank status "not on order". It may be necessary to merge the two lines together.

- To start parts merging, first, you need to open RO parts list.
- Then click the Merge button (1)
- Mark two parts you want to merge (2)
- Click Continue button (3)



- Verify the part that you are merging from (the on order, on re-order or received part) and the part that you are merging to (the blank or "no status" part) (4)
- Mark the checkbox to 'Lock Target Estimate Line After Merge' to block the ability to update a line (5)
- Mark the checkbox to 'Delete the Duplicate After Merge' (6)

- Click 'Merge Parts' (7)



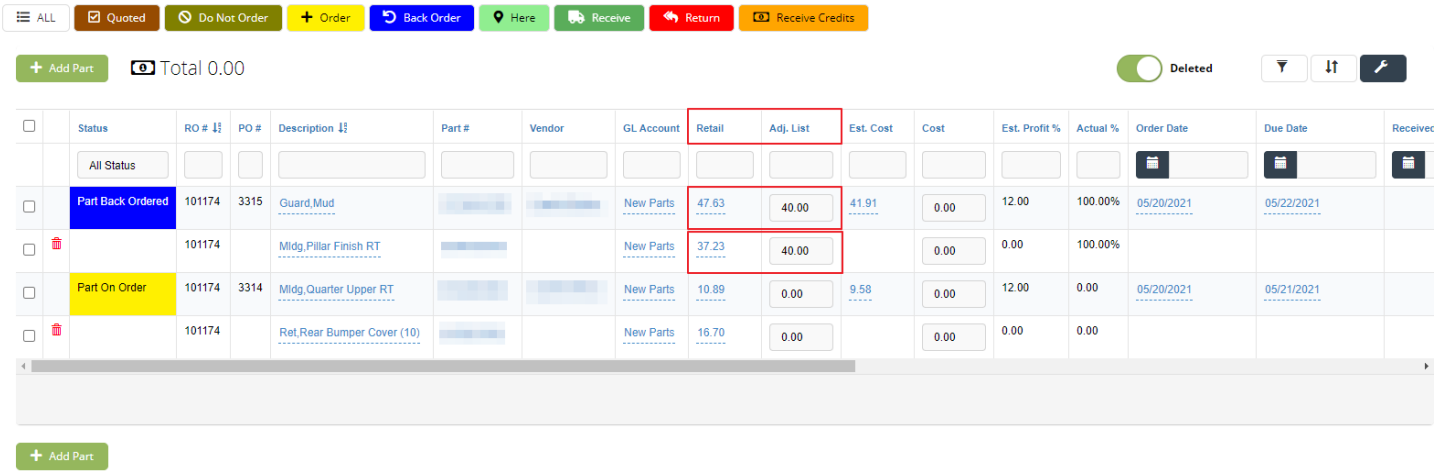
> There will only be one line left upon the completion of the merge function.
> The second line will be deleted automatically.

** The 'Merge Parts' Screen can be accessed in several ways:

> BodyshopConnect Section - Open RO List - when viewing RO - Parts drop-down options
> Parts Management Section - Parts RO View - Action drop-down options
> Parts Management Section - Parts List - when filtering by RO.

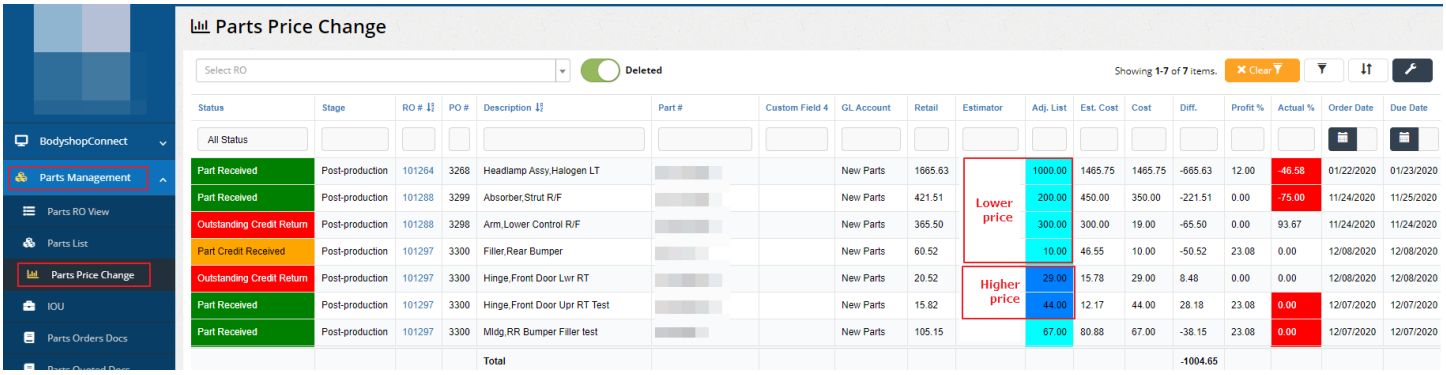
Parts Price Change

Part Price Change means that the part's price when ordering (retail) is different from the part's price when receiving the part. The new price can be entered in the 'Adj. List' column after receiving the part.

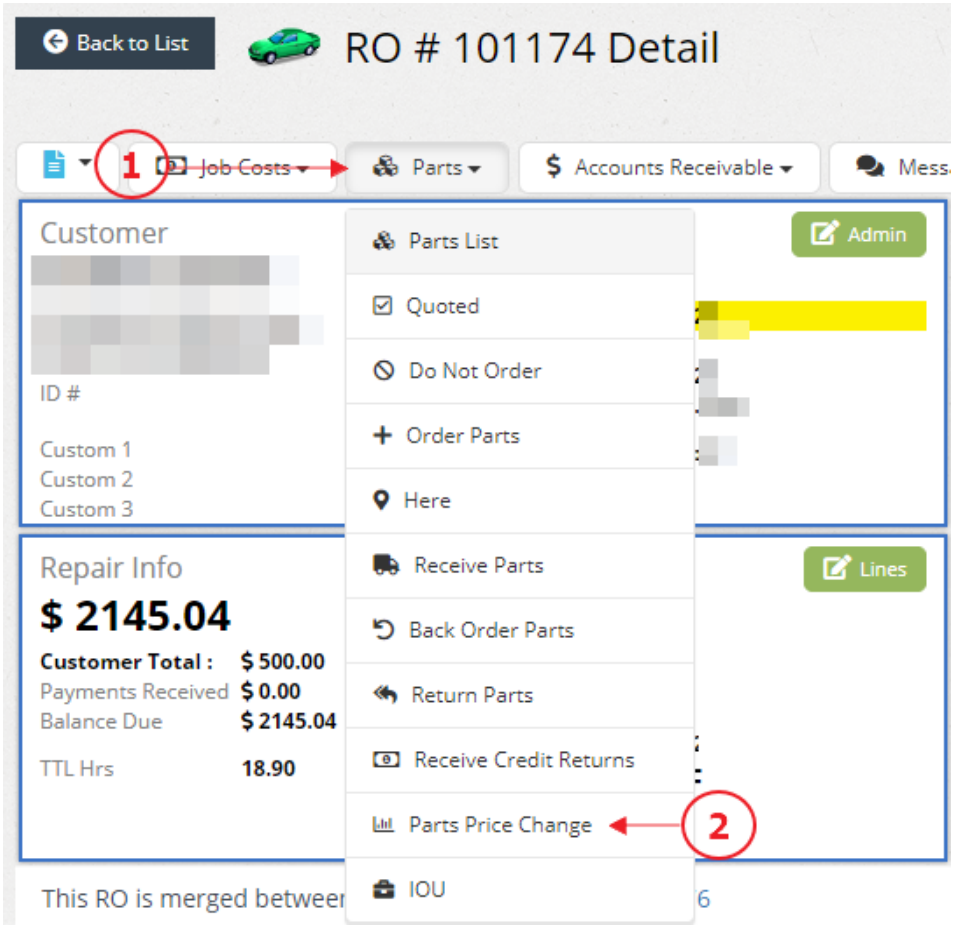


You can see all the ROs with PPC on a special grid in the 'Parts Management' section - 'Parts Price Change'.

The adjusted list fields change the color depending on how the price changes: if it is a lower price, the field is highlighted with light blue and if it is a higher price, the field is highlighted with a darker color.



OR On ***Open RO View*** – Parts drop-down menu (1) – Parts Price Change (2)



IOU

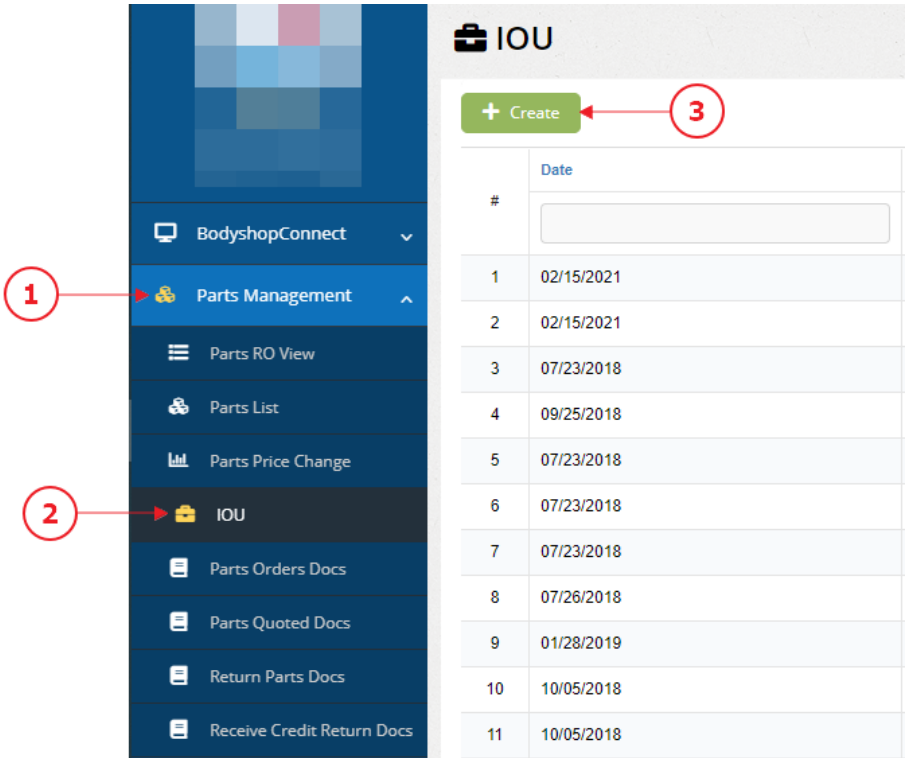
On occasion when a vehicle leaves (delivered) a part may still be "on order". The shop would like a way to track items that are owed to the customer.

An IOU can be quickly created for a specific RO (open or closed) with a description of what is owed.

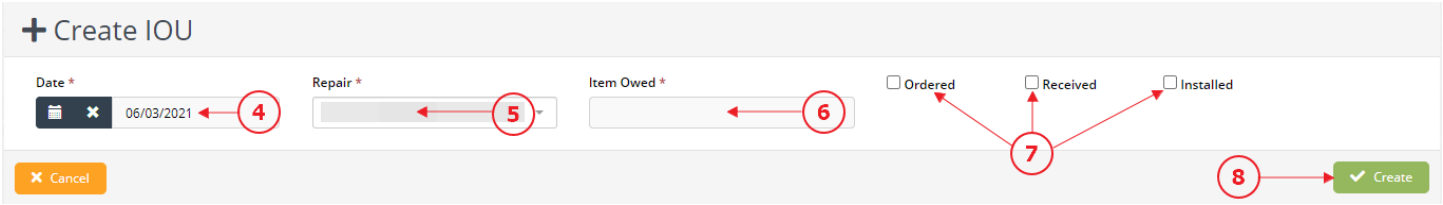
There are several ways to do this:

- On the left navigation panel open Parts Management section (1).
- Click on "IOU" (2).

- Click on "+ Create" button (3).

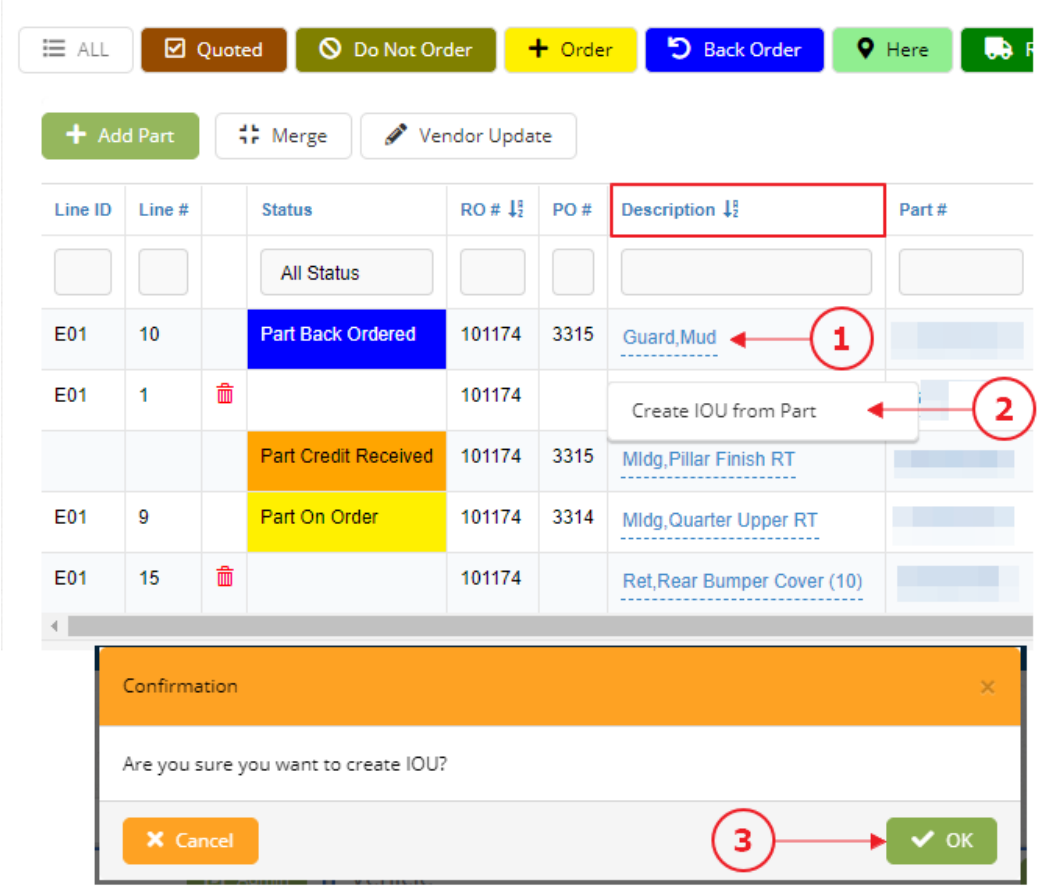


- Choose Date (4).
- Choose RO# (5).
- Select Item Owed (6).
- Select the appropriate checkbox - Ordered or Received or Installed (7).
- Click on "Create" button (8).



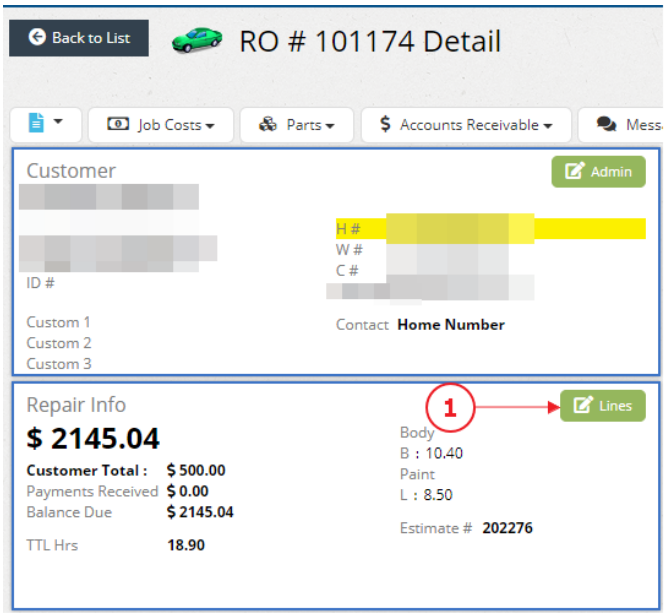
OR

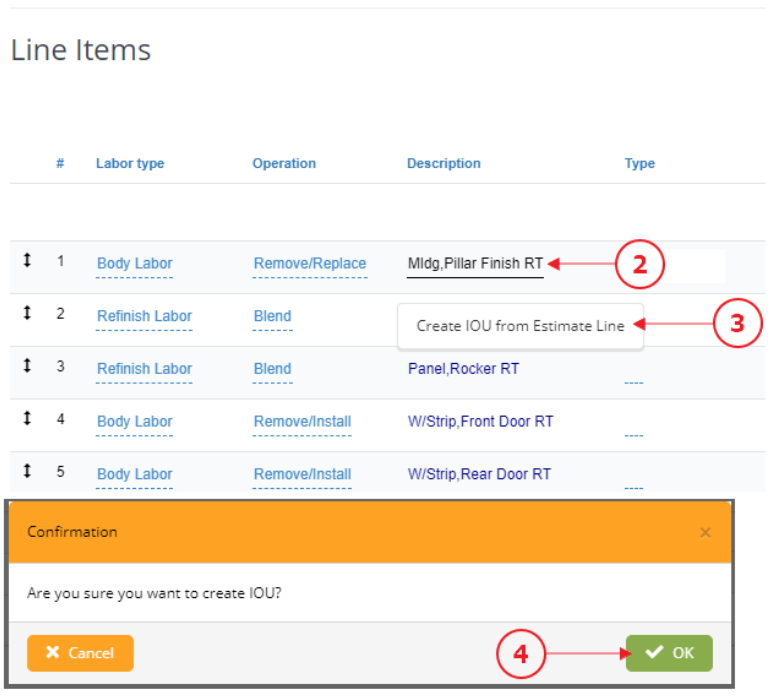
Right-click on the Description (1) of the needed part from any Parts screens:
Click on 'Create IOU from Part' (2)
Once clicking on OK button (3) to confirm the IOU's creation, IOU will be automatically created



OR

IOU's can be created from Line Items. When in Open RO View, click the 'Lines' button (1) in Repair Info section. Right-click on Description of the needed line (2), click on 'Create IOU from Estimate line' (3). Click OK (4) in the pop-up window to confirm IOU creation.

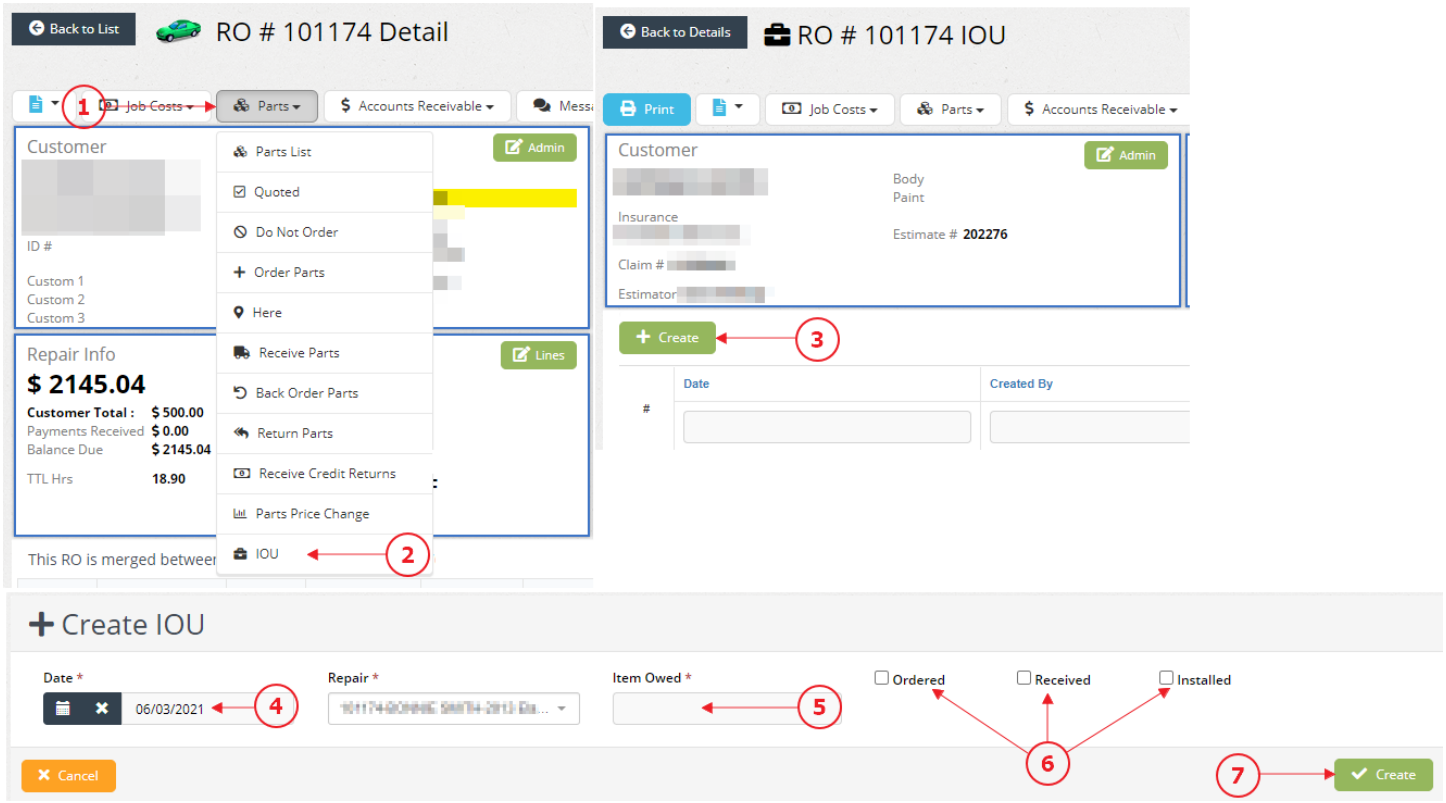




OR

From Open RO detail view:

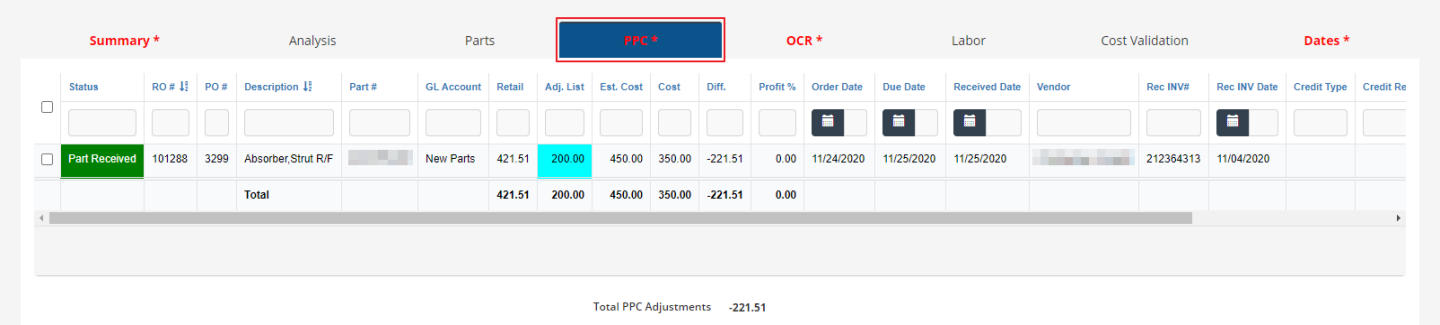
- Open the 'Parts' drop-down menu (1)
- Select 'IOU' (2)
- Click '+Create' button (3)
- Select date (4)
- Select an Item Owed (5)
- Select the appropriate checkbox - Ordered or Received or Installed (6)
- Click 'Create' button (7)



Business rules related to Parts

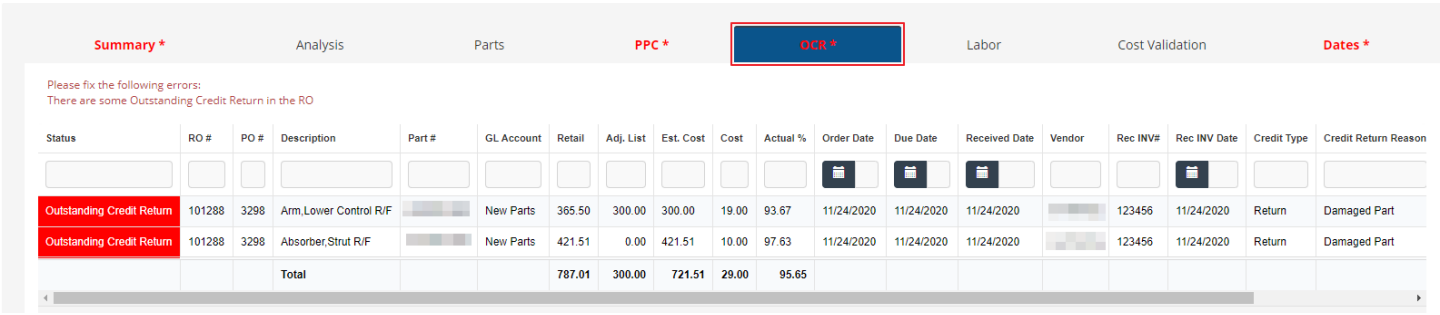
1. **PPCs are not allowed when closing RO**

When the rule is set to Active, Parts Price Change is not allowed when closing an RO. You will need to adjust the retail to balance the prices and close a file OR mark the checkbox next to the PPC line and the system will allow to bypass it.



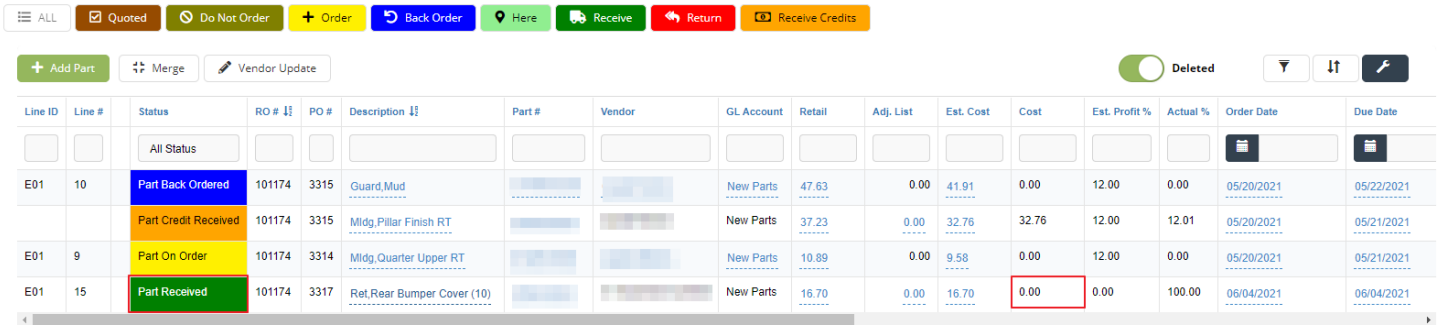
2. Outstanding Credit Return isn't allowed

When the rule is set to Active, all the outstanding Credit Returns need to be received. Otherwise, an RO would not be closed.



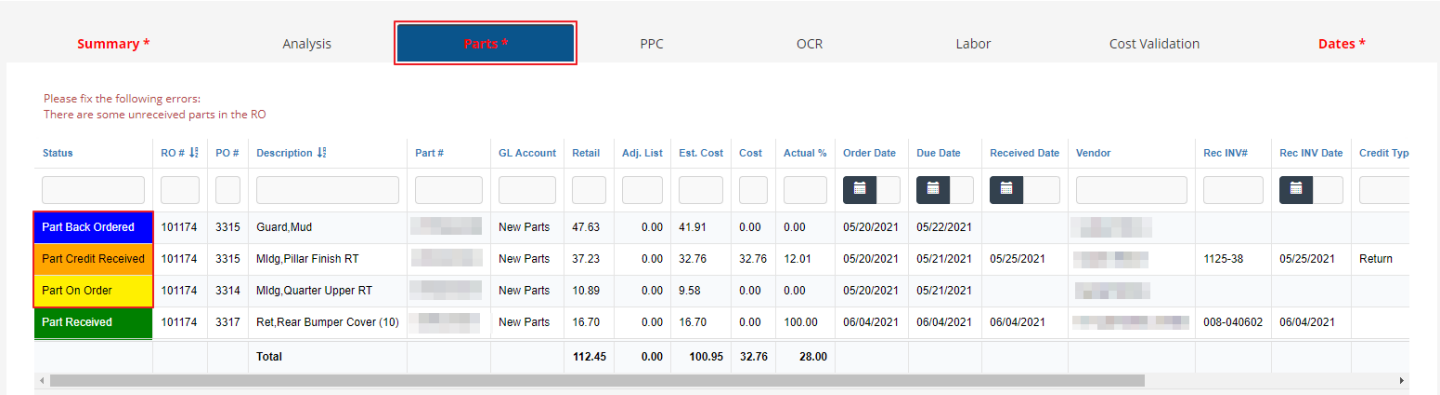
3. Receive zero Invoices for Parts

When the rule is set to Active, it is possible to receive a part with zero cost.



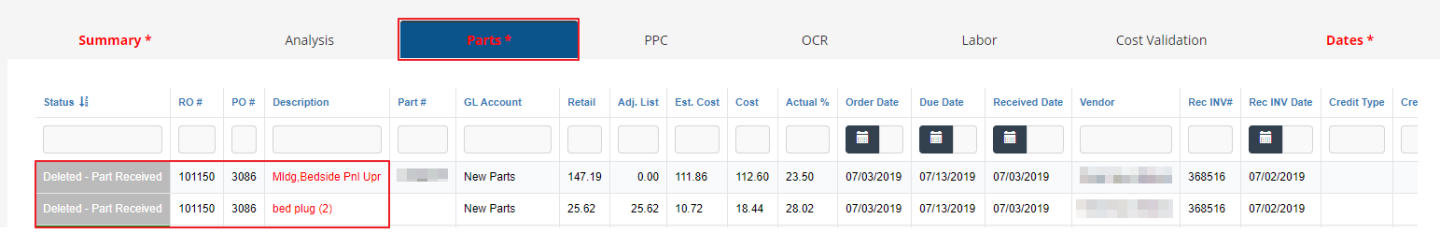
4. Require all parts Received for Closing an RO

When the rule is set to Active, parts would be required as received in the 'Parts' tab while closing RO. Otherwise, the RO would not be closed.



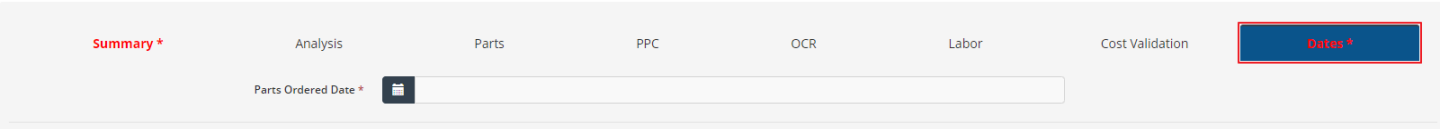
5. Not allow deleted Parts Received on Total Loss validation

When the rule is set to Active, you can't close an RO with Total Loss set if there are deleted Parts Received.



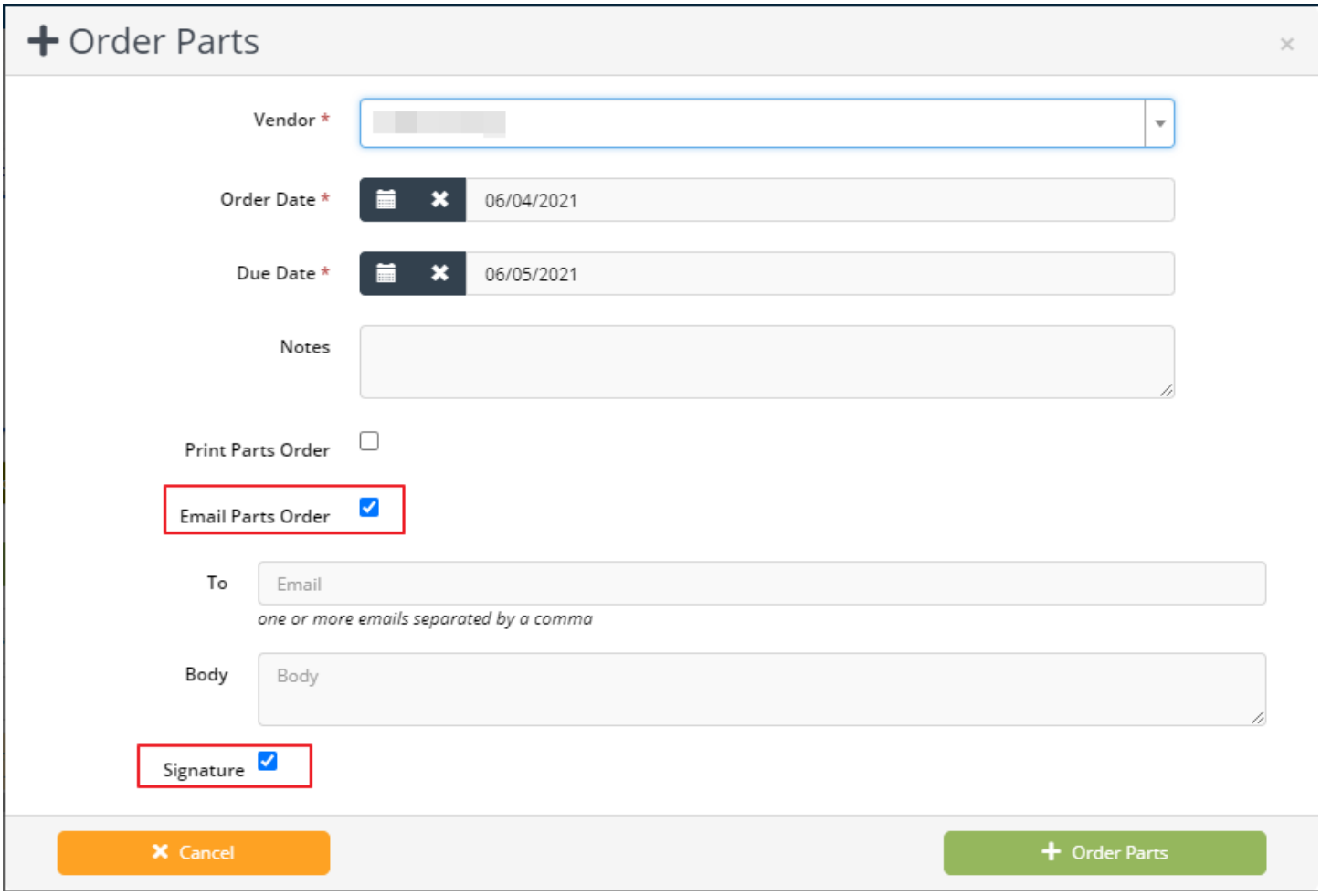
6. Parts Ordered Date

When the rule is set to Active, Parts Ordered Date field would be required as mandatory in the ‘Dates’ tab while closing RO. The RO would not be closed if the Parts Ordered Date isn’t stated.



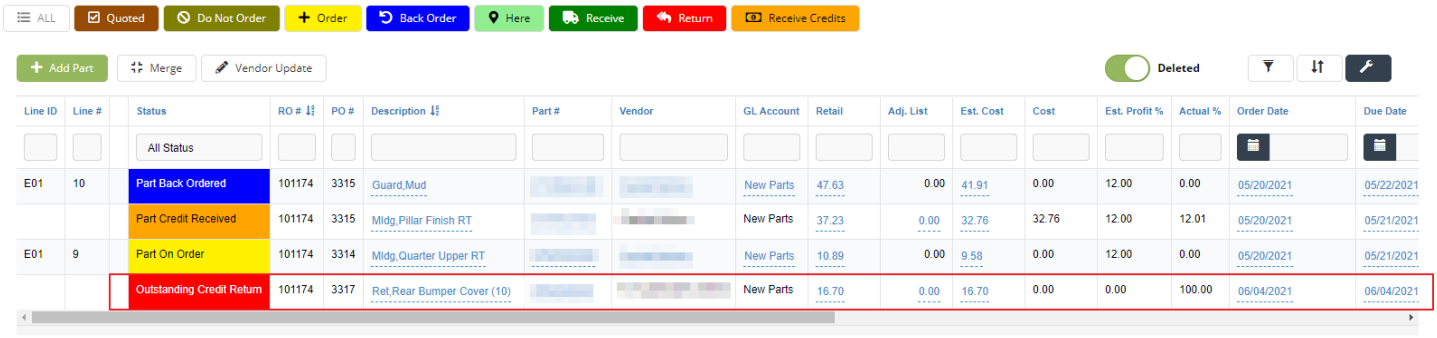
7. Default Parts Order to be sent by email

When the rule is set to Active, the boxes "Emails Parts Order" and "Signature" will be checked by default when ordering parts. When the rule is set to Inactive, nothing will be checked.

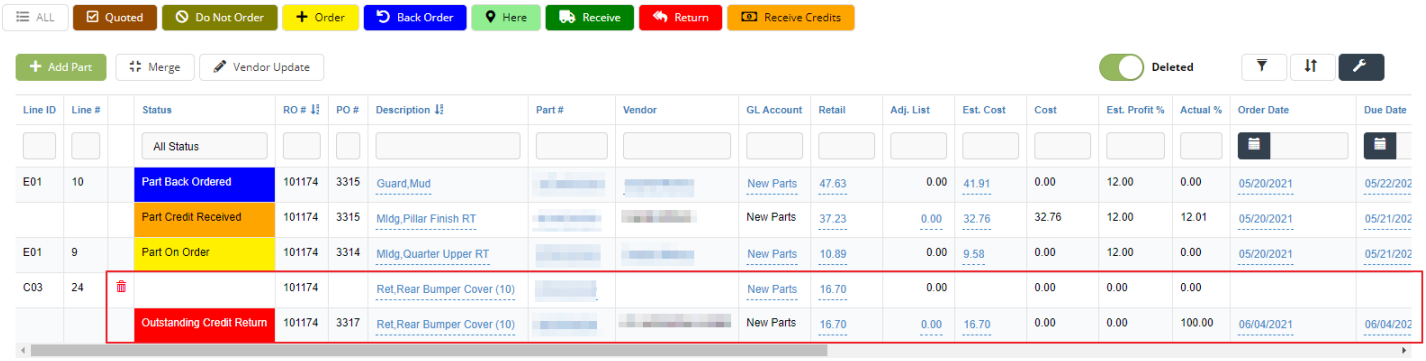


8. **Do not create Blank Part**

When this rule is set to Active, a blank part would not be created when you return part and choose "Return Only"

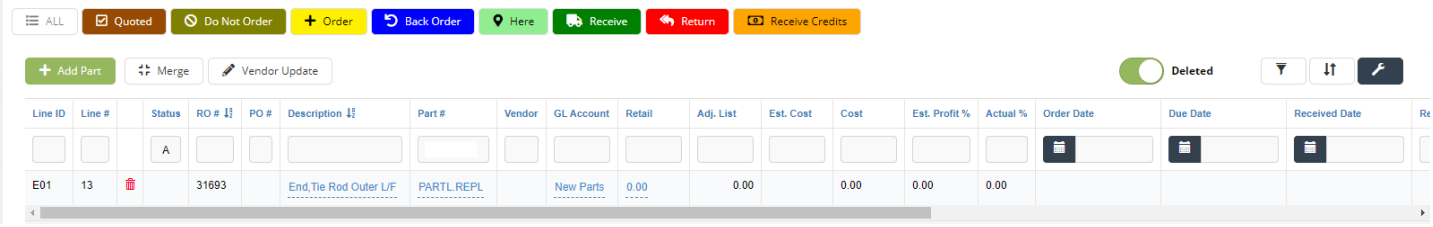


When this rule is set to Inactive, blank part would be created when you return part and choose "Return Only". ***Note**: This rule will not work when returning parts in a Closed RO – in this case a blank part will be created anyway.*



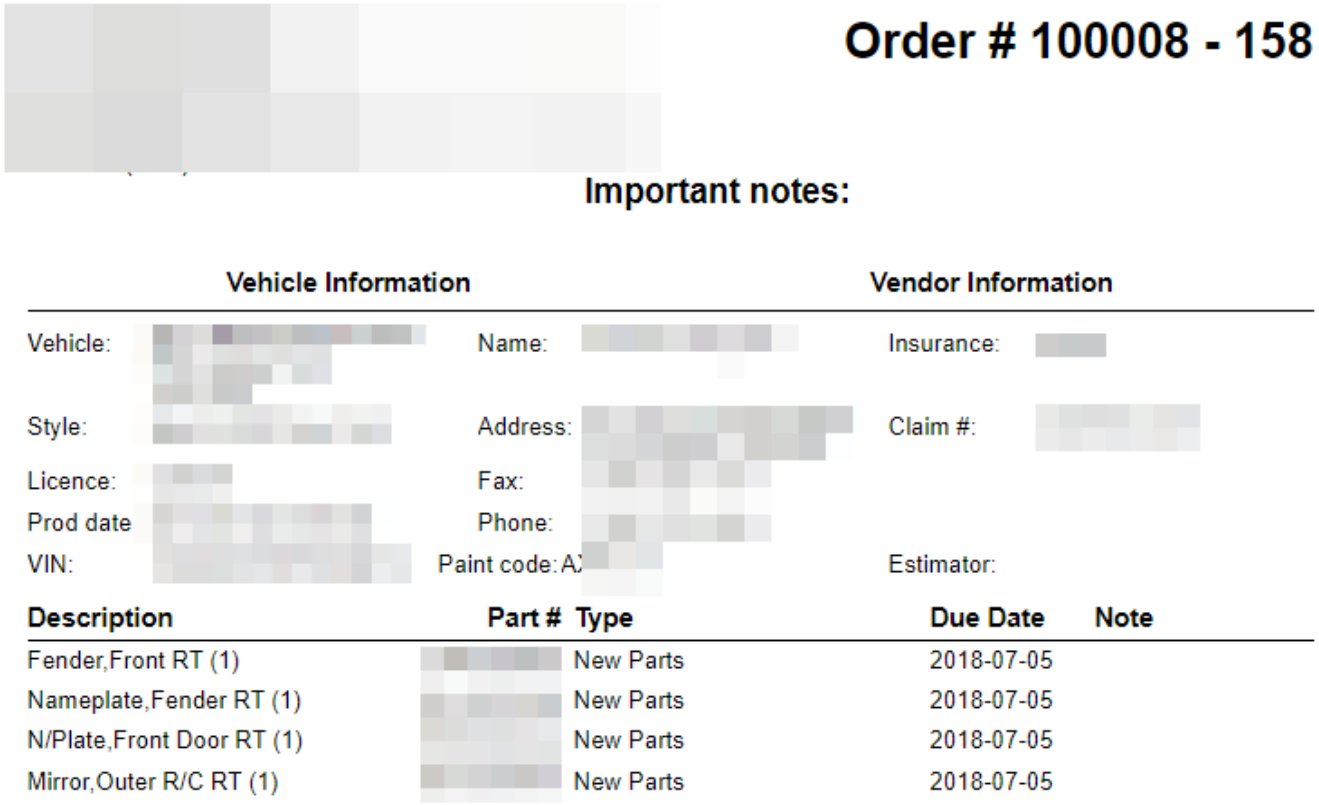
9. Do Not Show Partial Replace "Zero $$" lines in Parts

When the rule is set to Active, the partial replacement lines with zero dollars amount will not be shown in part list after importing.



10. Do not show price in Reprint documents

If this rule is set to Active, the price will not be indicated in the Parts Orders documents.

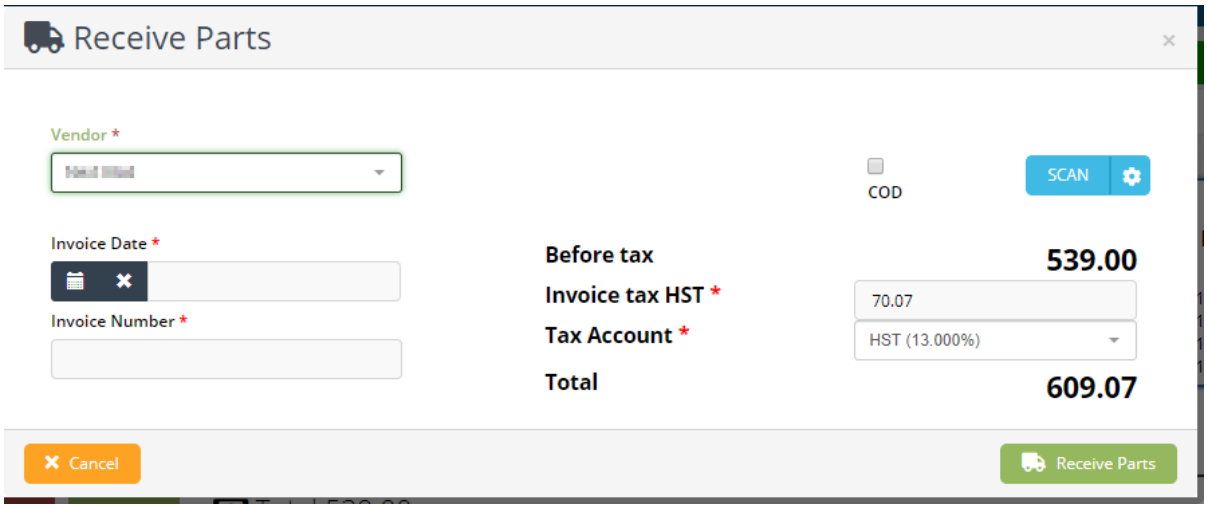


11. **Don't update Part Number and Description for Lines on Cieca Import**

When this rule is set to Active, the part number and description will not be changed after the original import.

12. **Disable "Confirm vendor change" option**

If this rule is set to Active, you are free to change a vendor when receiving parts, any additional confirmation is not needed.



If this rule is set to Inactive, you have to mark the checkbox 'Confirm Vendor Change' to change a vendor when receiving parts.

