



ORDER ENTRY AND PARTS INQUIRY QUICK REFERENCE

CUSTOMER SEARCH OPTIONS

Use the following items to search for a customer in Order Entry from the Enter Account field.

By Account Number

In Enter Account field, type complete account number and press enter.

By Name

Press F2; in the Enter Name field, type the first letter, the first 3 letters or the complete customer's name (no punctuation).

By ZIP code

Press F2; in the Enter Name field, type customer's ZIP code and press enter.

By Phone Number

Press F2; in Enter Name field, type last 4 digits or complete customer's Phone number (no spaces or separators).

ORDER LINE ITEM ENTRY OPTIONS

Type the order quantity followed by the letter(s) representing the option you are applying to the line item. Example: To sell 3 of an item, enter a line item message and make a price change, type 3MP in the Qty field.

SALES OPTIONS

Backorder

- B Backorder the part's quantity when not available
- Z Backorder all quantity ordered

Cores

- C Core sale only
- E Core exchange

Cost & Pricing changes

- P Price change
- U List price change

Lost sales

- L Records lost sale and prints part number on invoice
- X Records lost sale but doesn't print part number on invoice

Special ordering options

- N No month-to-date sales update
- Q Special Orders (Creates purchase order)

Printing text on invoice

- D Change Part Description that prints on invoice
- M Line item message – prints below part number on invoice

RETURN OPTIONS

- 1C Core return (Creates core return with quantity of 1)
Core will be added to the dirty core inventory
- 1 Part return (Creates a part return with quantity of 1)
Part will be returned to saleable inventory
- 1W Warranty & defect part returns
(Part will be added to the defective inventory)

SHIPPING OPTIONS

- F Force ship the quantity ordered
- R Direct/Drop ship the quantity ordered

ORDER ENTRY CHANGE OPTIONS

Recall line item

//1 On a new line, type "//1" and press enter (will recall line item number 1 on the order)

Delete a line

X First recall the line to be deleted, then type "X" in the Quantity field and press enter

Change part

A# If alternate parts display, choose a part number, then type "A" followed by a number indicating which alternate part

S# If superseded parts display, choose a part number, then type "S" followed by a line number indicating the superseded part

ORDER ENTRY VIEW OPTIONS

In the Quantity field, type the letter representing the option you are applying (with no quantity) and press enter. Example: Type the letter "C" to display the cost of the part.

Part Information

A View part application information
C Displays the part cost
I View part quantity on hand in other branches
F5 Inventory inquiry for part number on line item

Customer Information

H View customer sales history

ORDER STATUSES

From the Customer Search Screen in Order Entry, press the F3 Function Key - OpenOrd Option and look in the ST (Status) field to determine the order status.

O Open order
B Backorder
C Completed (Invoiced)
TR Transfer request
TC Transfer confirmed
TX Transfer received
Q Quote
H Order on Hold
K Order on Credit Hold

PARTS SEARCH OPTIONS

Use the following options to search for parts. In the examples below, ABC is the vendor code.

Search Examples:

/12	finds "ABC72128", "XYZ92-012B", etc.
ABC/	finds all parts for "ABC" line
ABC/12	finds "ABC72128", "ABC1234", etc.
.12	finds "DEF555-12-AB" or "12 OZ PAINT"
.BEARING	finds "KLM700-BR549 BEARING, MUFFLER"
ABC.	is the same as "ABC/"
ABC.12	finds "ABC9285 12 INCH BRACKET"
12	does both "/12" and ".12" searches
MUFFLER	does both "/MUFFLER" and ".MUFFLER" searches

PARTS INQUIRY

To view part information, first display the part number on the screen, then type the letter(s) that will display the appropriate information.

Example: To view the outstanding orders that have not been invoiced, after the part is displayed in the part number field, type "BO".

VIEW DETAILED PART INFO

- B View bins
- C Displays cost
- BO View outstanding part orders not invoiced
- K View kit components or kits in which the part is a component
- S View part serial number
- O Go to order entry
- BW Go to previous page of branch locations
- FW Go to next page of locations
- P View purchase orders for the part number being displayed on screen

FUNCTION KEYS - BY PART – at the part number field, press the F-keys

- F1 Sales information
- F2 Product information
- F3 Alternate part numbers for this part
- F4 Superseded part numbers
- F5 Record Lost Sale
- F6 All activity for this part
- F7 Alternate vendors and part numbers
- F9 Specific customer's cost for the part
- F10 Unit Search (Unit Rebuilding)
- F11 View previous part number in this vendor line
- F12 View next part number in this vendor line