

General

Ordering parts & managing stock

Parts ordering tool

You can order parts directly through PlanManager.

Creating an order

When you created your estimation, you received in your job the list of parts that you will need to order.

The screenshot displays the PlanManager interface. At the top, there is a header bar with a search icon, a user icon, and a toolbar with various icons. Below the header, there are two main panels. The left panel is titled 'Tasks' and contains a table with columns: Type, Comment, Work Units, Minutes, Rate, Amount, and Status. The right panel is titled 'New Activity' and shows 'Results: No items found.' Below these panels, there is a 'Parts' table with columns: N°, Name, Price, Quant., Total, and Replace. A red box highlights the 'Parts' table, and a red arrow points to the 'Replace' column. At the bottom of the screenshot, there is a 'New extra item' panel titled 'Extra'.

Type	Comment	Work Units	Minutes	Rate	Amount	Status
Stripping		91,8 WU	550 min	€ 4,00	€ 36,72	Created
Re-assembly		112,2 WU	673 min	€ 4,00	€ 44,88	Created
Other		0,0 WU	0 min	---	€ 3,00	Created
Total	204,0 WU	20h23		€ 84,60		

N°	Name	Price	Quant.	Total	Replace
1231921	BLOC MOTEUR	€ 2 515,95	1	€ 2 515,95	Yes
1461731	COLLECTEUR ADMISSION	€ 356,24	1	€ 356,24	Yes
1863988	VILEBREQUIN	€ 1 108,94	1	€ 1 108,94	Yes
1231927	CULASSE CPL	€ 1 584,51	1	€ 1 584,51	Yes
---	DEDUCTION (PIECES)	€ -166,97	1	€ -166,97	No
---	PETIT MATERIEL	€ 5,40	1	€ 5,40	Yes
			6,00	€ 5 404,07	€ 5 571,04

To order these items, click on the "Order" icon .

This will open a new window where all the parts of your estimation can be controlled.

At the bottom of this window, select the supplier (external or internal) and click order.

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Order Parts

In Stock

Quant.	Number	Name	Price
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To Order

Quant.	Number	Name	Price
1.00	1231921		€ 2 515,95
1.00	1461731		€ 356,24
1.00	1863988		€ 1 108,94
1.00	1231927		€ 1 584,51
1.00			€ 5,40

Existing orders

Results: No items found.

Job Order	Estimate N°	Part N°	Description	Quant.	Recvd.	Status
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You will be redirected to the screen of your order. You still have the ability to remove or add certain parts by clicking on the icon delete  and Add line

Add Line

Job # 10969
















Order nr: 17073 Normal order
Make: FORD
Model: S-MAX
Registration plate: 1COM114
Supplier: Demo Hersteller
Supplier Invoice N°:
Comment:

Creator: Jean-Marie SMETS
Creation Date: 22-04-2022 11:33
Order date:
Location: Carrosserie Demo JM
Status: Created
Preferred Supply Date:
Purchase Value: € 0
Sale Value: € 0
Use Totals:

Estimation



Save Calculate Total Communicate

Add Line Results: Viewing items 1-5 of 5.

Action	#	Part N°	Description	Quant.	Recvd.	Sale	Discount%	Purchase	Expected delivery date	Total Sale	Total Purchase	Status	Status date	
  	1	1231921	BLOC MOTEUR	1	0	€ 2 515,95	0,00 % Rebate	€ 0,00		€ 0,00	€ 0,00	Pending	22-04-2022	
  	2	1461731	COLLECTEUR ADMISSION	1	0	€ 356,24	0,00 % Rebate	€ 0,00		€ 0,00	€ 0,00	Pending	22-04-2022	
  	3	1863988	VILEBREQUIN	1	0	€ 1 108,94	0,00 % Rebate	€ 0,00		€ 0,00	€ 0,00	Pending	22-04-2022	
  	4	1231927	CULASSE CPL	1	0	€ 1 584,51	0,00 % Rebate	€ 0,00		€ 0,00	€ 0,00	Pending	22-04-2022	
  	5		PETIT MATERIEL	1	0	€ 5,40	0,00 % Rebate	€ 0,00		€ 0,00	€ 0,00	Pending	22-04-2022	
										Total received	€ 0,00	€ 0,00		

Update selected lines - Set status to: -Select One- Or Create purchase invoice 0 Items Selected € 0,00 Selected (Purchase Value)

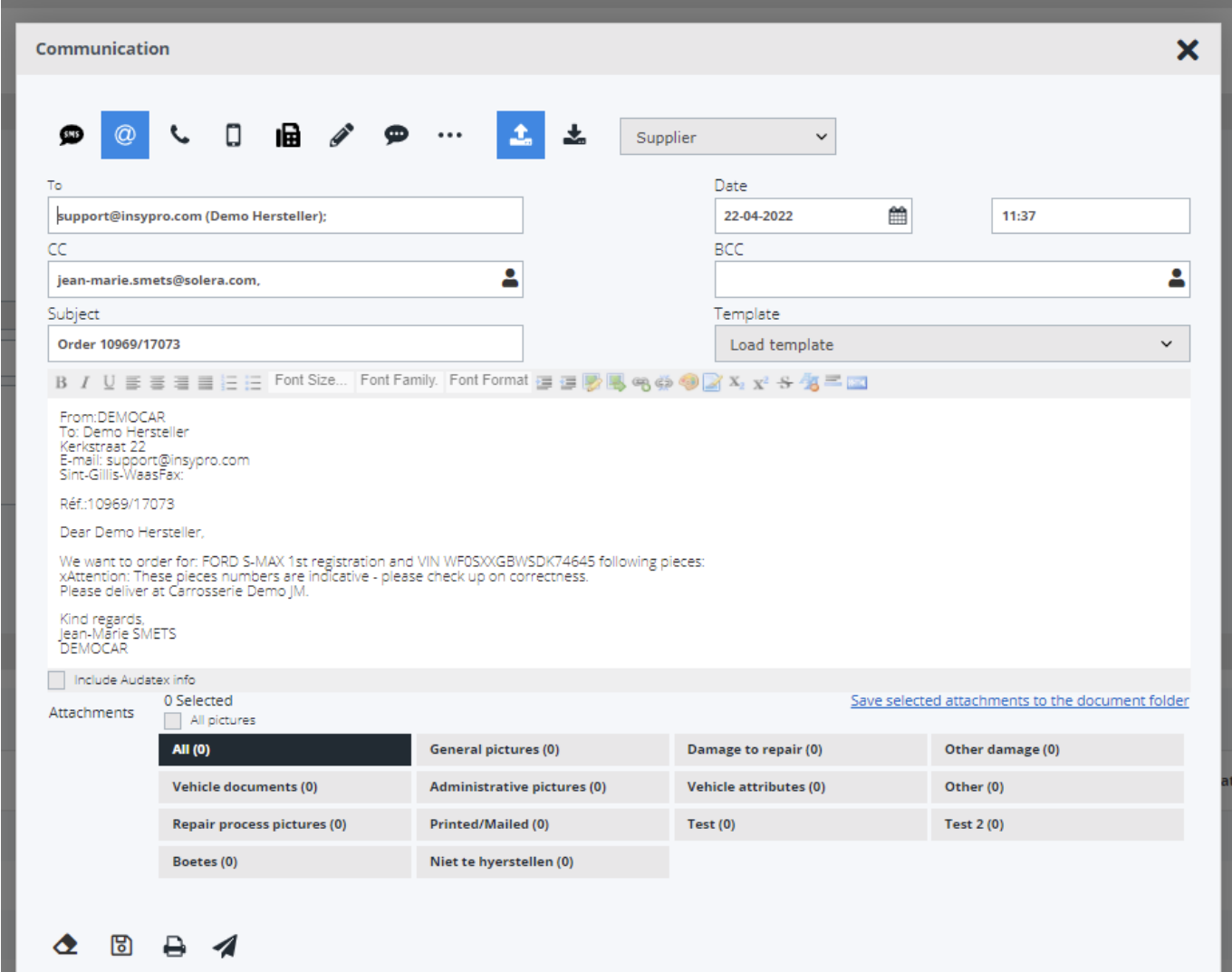
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You can even add a photograph  of the part and move the parts directly to your stock  (if for any reason the part won't be replaced).

Communicating the order

An order is saved in PlanManager and in most cases is emailed to the supplier. To achieve this in PlanManager, you can click on the "Communicate" button.

This will open the communication screen. A parts ordering mail will be created. You can always manage these automatic mail messages by changing or adding text manually.



Communication

Supplier:

To:

CC:

Subject:

Date: 11:37

BCC:

Template:

From: DEMOCAR
To: Demo Hersteller
Kerkstraat 22
E-mail: support@insypro.com
Sint-Gillis-WaasFax:
Réf.: 10969/17073
Dear Demo Hersteller,
We want to order for: FORD S-MAX 1st registration and VIN WF0SXXGBWSDK74645 following pieces:
xAttention: These pieces numbers are Indicative - please check up on correctness.
Please deliver at Carrosserie Demo JM.
Kind regards,
Jean-Marie SMETS
DEMOCAR


Include Audatex info

Attachments: 0 Selected [Save selected attachments to the document folder](#)

All (0)	General pictures (0)	Damage to repair (0)	Other damage (0)
Vehicle documents (0)	Administrative pictures (0)	Vehicle attributes (0)	Other (0)
Repair process pictures (0)	Printed/Mailed (0)	Test (0)	Test 2 (0)
Boetes (0)	Niet te hyerstellen (0)		

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CHOOSE in Attachments if you want to include pictures or documents in the communication.

Send the communication by clicking the button send and save  at the bottom of the screen

Receiving the part

The control of products to be delivered can be done in the "order List" section.

To open this screen click the "Order" button in the job screen and then the

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The screenshot displays the 'Order Parts' window with the following sections:

- In Stock:** A table with columns 'Quant.', 'Number', 'Name', and 'Price'. A search bar and an 'Order' button are present.
- To Order:** A table with columns 'Quant.', 'Number', 'Name', and 'Price'. It includes a 'Mode' dropdown set to 'Order', a 'select a supplier' dropdown, and an 'Order' button.
- Existing orders:** A section with a 'Deliveries' link and a 'Previous orders (1)' button highlighted with a red box. Below it is a table showing order details.

Job Order	Estimate N°	Part N°	Description	Quant.	Recvd.	Status
Normal order 17073	1	1231921	BLOC MOTEUR	1	0	Pending
Normal order 17073	1	1461731	COLLECTEUR ADMISSION	1	0	Pending
Normal order 17073	1	1863988	VILBREQUIN	1	0	Pending
Normal order 17073	1	1231927	CULASSE CPL	1	0	Pending
Normal order 17073	1		PETIT MATERIEL	1	0	Pending

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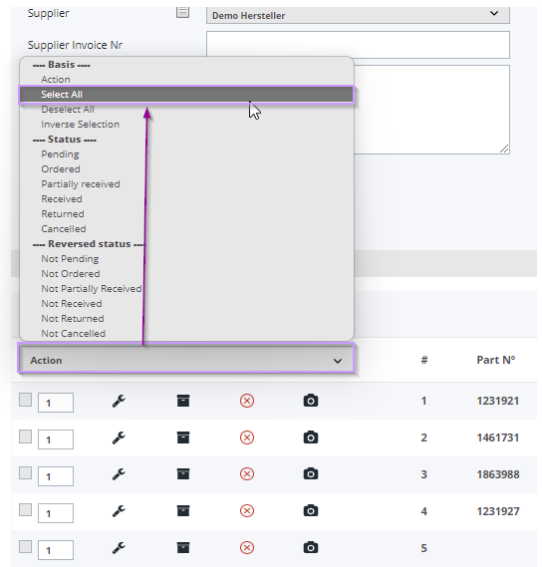
This will open the screen of the list of orders. Select the concerned order by clicking it.

The screenshot shows a web application interface for managing orders. At the top, there is a navigation bar with tabs: Job List, Claims360, Order list (selected), Job Queue, Audatex, Deliveries, Offer Requests, Stock, Ubench, Scale, Vat Book, DMS, Albatros, Driver2, Carpass, and Calend. Below the navigation bar is a filter section with the following fields: 'select a location' (dropdown), 'select a supplier' (dropdown), 'select a status' (dropdown), and 'select a type' (dropdown). There are also input fields for '10969' (with placeholder 'type a registration'), 'type an Order number', and 'type a part number or name'. A 'Reset' button and an 'Export' button are located to the right of the filter section. Below the filter section is a table with the following columns: N°, Creation Date, Registration, Job, Make, Model, Supplier, and Sale Value. The table contains one row with the following data: N° 17073, Creation Date 22-04-2022 11:33, Registration 1COM114, Job 10969, Make Ford, Model S-MAX, Supplier Demo Hersteller, and Sale Value € 0,00. A 'Total' row is also present with a Sale Value of € 0.00. The interface also includes a sidebar with various icons and a search bar at the top right.

How to Mark parts as received.

Once you clicked on the order you can mark parts as received. This can be done in

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two ways: through the automatic selection of lines,

or either line by line.

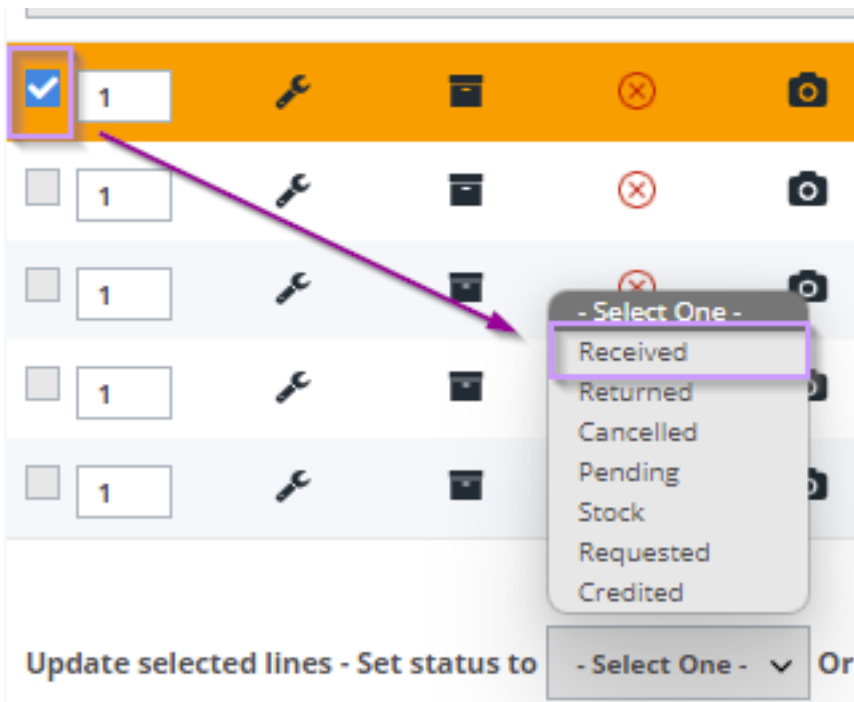
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Add Line Results: Viewing items 1-5 of 5.

Action	#	Part N°	Description	Quan
<input checked="" type="checkbox"/> 1	1	1231921	BLOC MOTEUR	1
<input type="checkbox"/> 1	2	1461731	COLLECTEUR ADMISSION	1
<input type="checkbox"/> 1	3	1863988	VILEBREQUIN	1
<input type="checkbox"/> 1	4	1231927	CULASSE CPL	1
<input type="checkbox"/> 1	5		PETIT MATERIEL	1

Update selected lines - Set status to Or **Create purchase Invoice** 1 Items Selected € 0,00 Selected (Purchase Value)

Once you selected the parts you want to take in, you can click on Update selected lines and set to the desired status.



Stock management

There is the possibility of using the stock tool. This tool allows to introduce the parts from your stock in the program. So when we order a part that is in your stock, the program will automatically warn you that this part does not have to be ordered.

Creating a new stock item

Click on the tab stock menu. On this page you can see all of your items in the stock, also on the right you have a filter function to easily find the part you are looking for.

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	Make	Model	Number	Description	Min	Max	Storage	Quantity	Purchase Price	Sale Price
⚙️			132	Support radiateur	0	0	R4L2V7	590.00	€ 50,00	€ 400,00
⚙️			112345	Set clips pc avant	20	40		428.00	€ 6,00	€ 12,00
⚙️	PEUGEOT	407	77885533	wielkastverbreder lv	0	0		48.00	€ 200,00	€ 350,00
⚙️			1505003	KIT COLLAGE PAN AR	0	0		16.00	€ 0,00	€ 0,00
⚙️	BMW	520D	51117285961	Pare chocs avant	0	0		68.00	€ 182,04	€ 222,00

To create a stock item, there are two possibilities.

Either you have an Excel spreadsheet incorporating your different parts and you import it in PlanManager by clicking on "Import" (the excel list has to have the same structure as the one in PlanManager, to be sure first export this excel list, that way you can compare both).

Or you create a new part by clicking new **New**, this will generate following screen:

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✕

Part Description	Vehicle
Make Of Part	<input type="text"/> <input type="checkbox"/> All Makes
Number	<input type="text"/> <input type="checkbox"/> All Models
Description	Make <input type="text"/>
Type	Model <input type="text"/>
<input type="text" value="Parts"/> ▼	

Min	<input type="text"/>	Max	<input type="text"/>
Storage	<input type="text"/>		

Supplier 1	<input type="text" value="select a supplier"/> ▼	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>
Supplier 2	<input type="text" value="select a supplier"/> ▼	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>
Supplier 3	<input type="text" value="select a supplier"/> ▼	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>

Here you can put in the make, number, description, minimum and max, etc.

By clicking save the part is now added to your stock.

Looking for stock parts when ordering

When you click on the icon "Order" you will see the following screen:

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Order Parts

In Stock Search

<input type="checkbox"/>	Quant.	Number	Name	Price
<input type="checkbox"/>	1.00	132	Support radiateur	€ 400,00

[Order](#)

To Order Mode Order ▾

<input checked="" type="checkbox"/>	Quant.	Number	Name	Price
<input checked="" type="checkbox"/>	1.00	132	Support radiateur	€ 178,71

▾ [Order](#)

Existing orders [Deliveries](#) [Previous orders \(1\)](#)

Results: Viewing items 1-5 of 5. < 1 >

Job Order ▾	Estimate N°	Part N°	Description	Quant.	Recvd.	Status
Normal order 17073	1	1231921	BLOC MOTEUR	1	0	Pending
Normal order 17073	1	1461731	COLLECTEUR ADMISSION	1	0	Pending
Normal order 17073	1	1863988	VILEBREQUIN	1	0	Pending
Normal order 17073	1	1231927	CULASSE CPL	1	0	Pending
Normal order 17073	1		PETIT MATERIEL	1	0	Pending

If you want to use the part which is in your stock, simply select the case before the line of the part in stock.

Unique solution ID: #1537

Author: Jean-Marie

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