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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.

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.
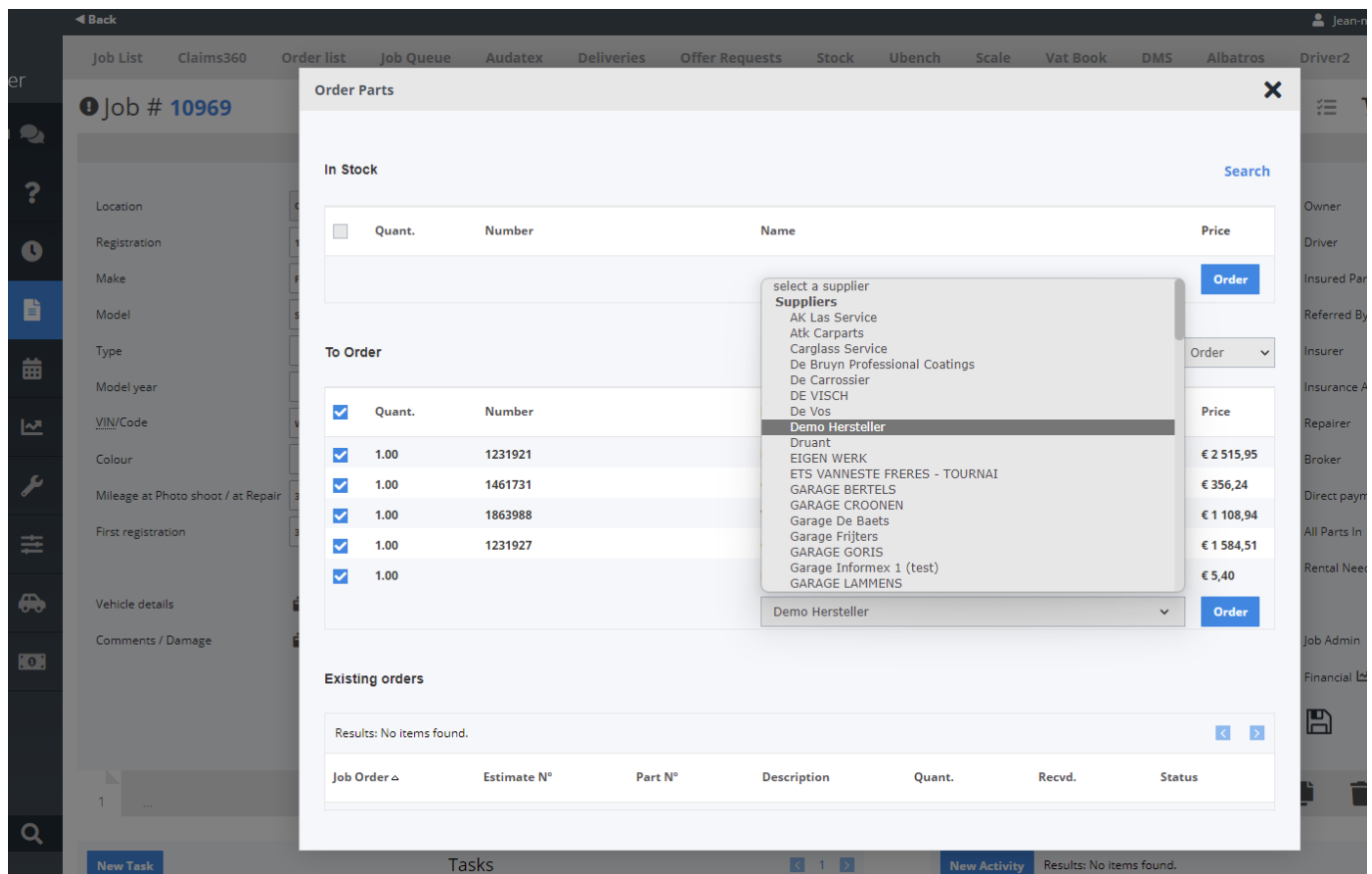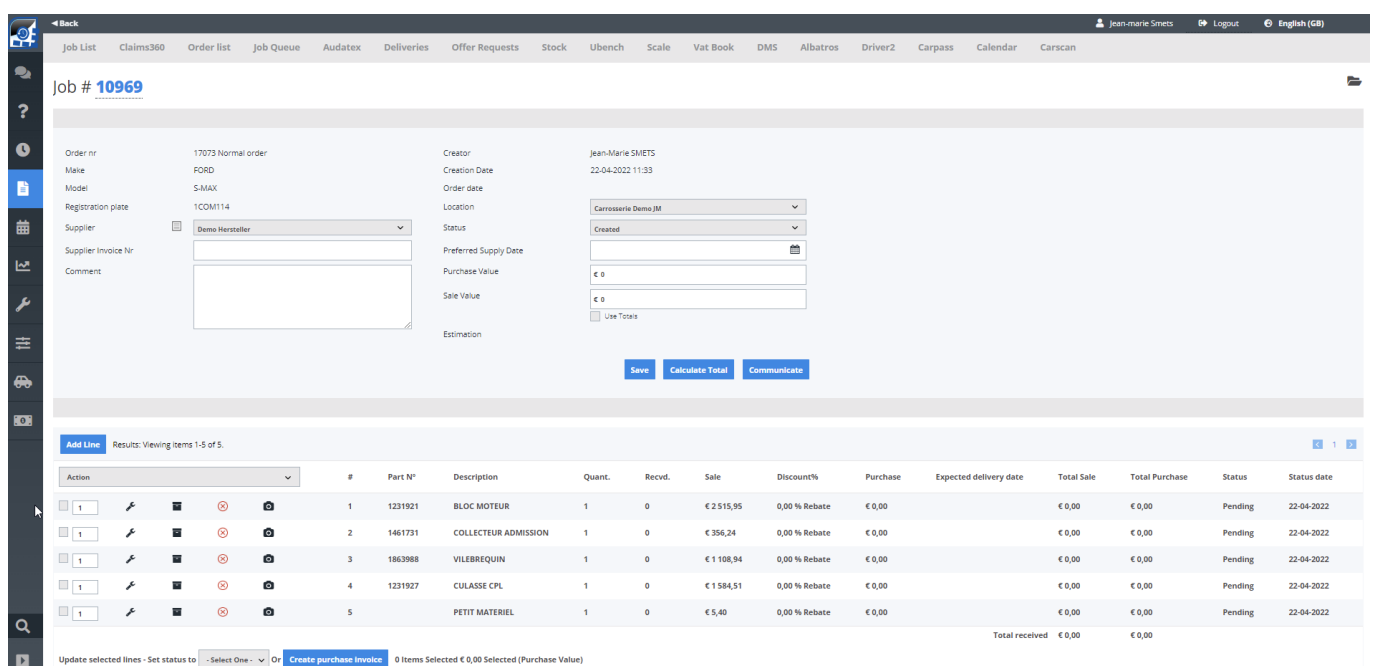
You will be redirected to the screen of your order. You still have the ability to remove or add certain parts by clicking on the icon delete ⊗ and Add line

Add Line.

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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.

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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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"Previous orders" button.

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

How to Mark parts as received.

Once you clicked on the order you can mark parts as received. This can be done in
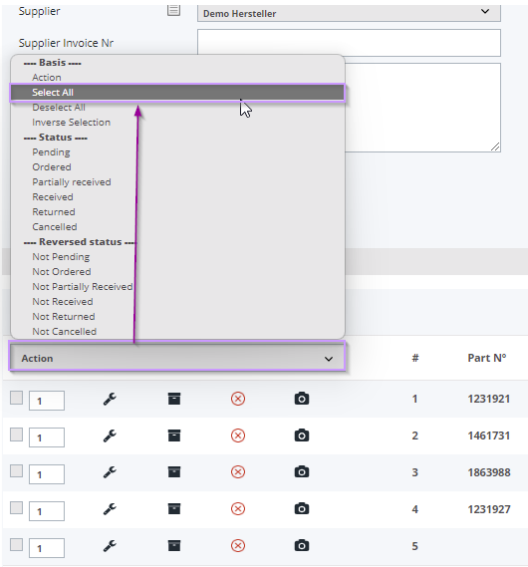
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two ways: through the automatic selection of lines,

or either line by line.

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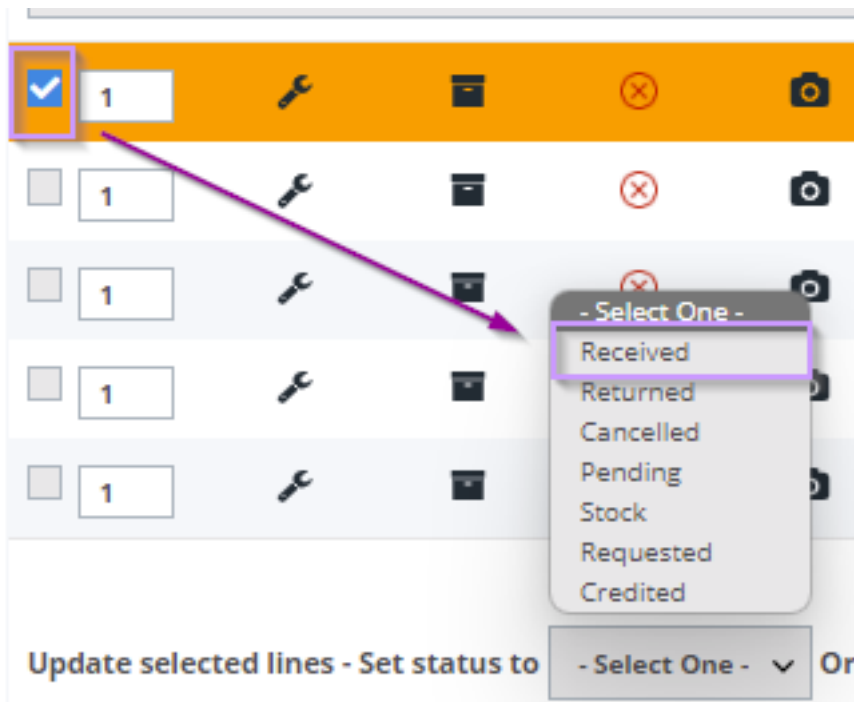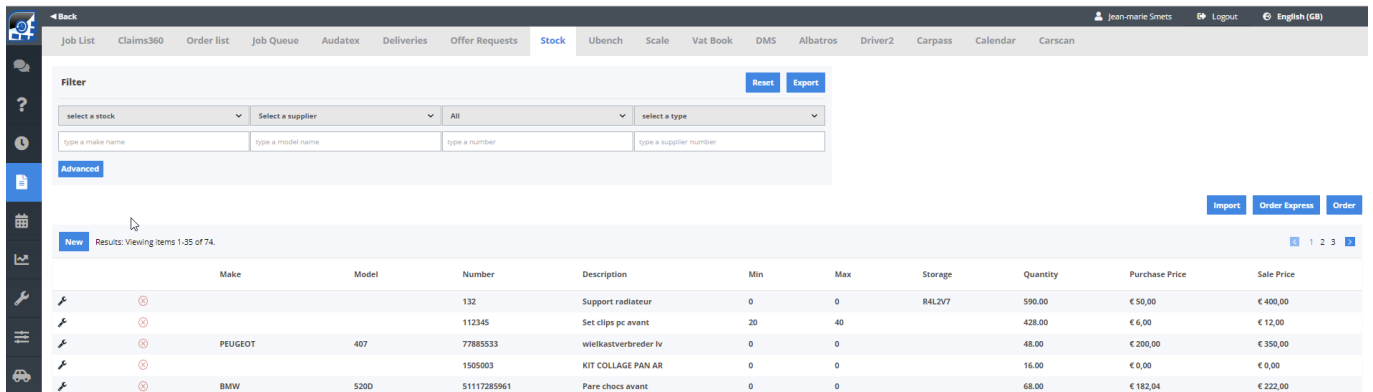
Stock managment

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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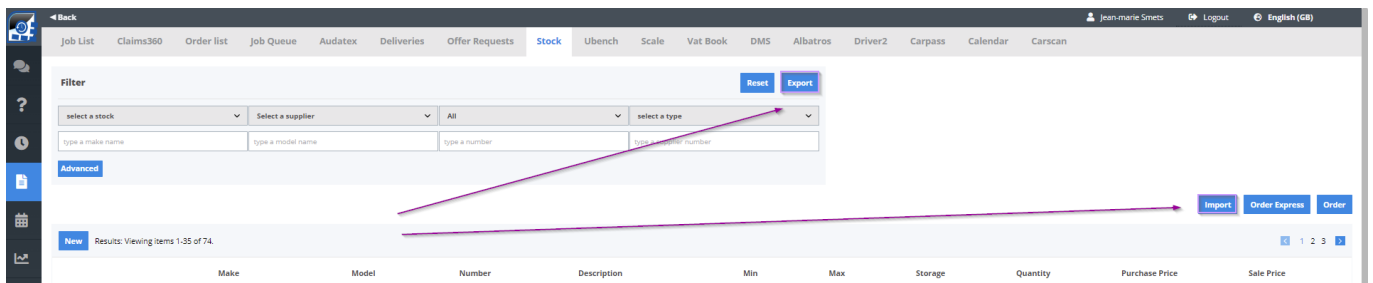To create a stock item, there are two possibilities.

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:

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

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