

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.



1




[Audatex nr: 8046352] [€ 5 490,34]



New Task

Tasks

 1 

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		

Apply a new rate to all tasks

New Activity

Results: No items found.

Results: No items found.

Job Order	Estimate N°	Part N°	Description
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New Part

Parts

 1 

New extra item

Extra

 1 

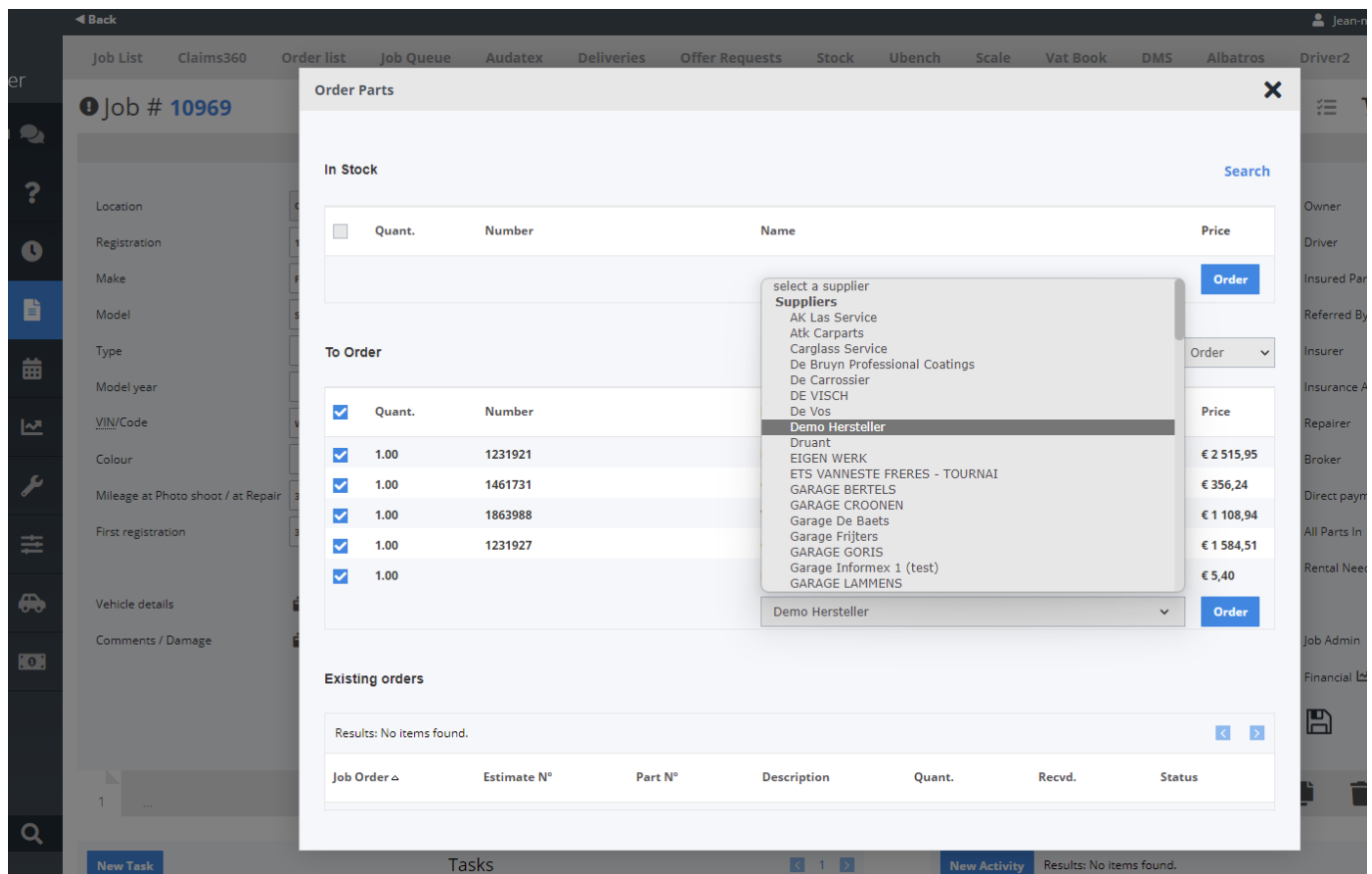



To order these items, click on the "Order" icon

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

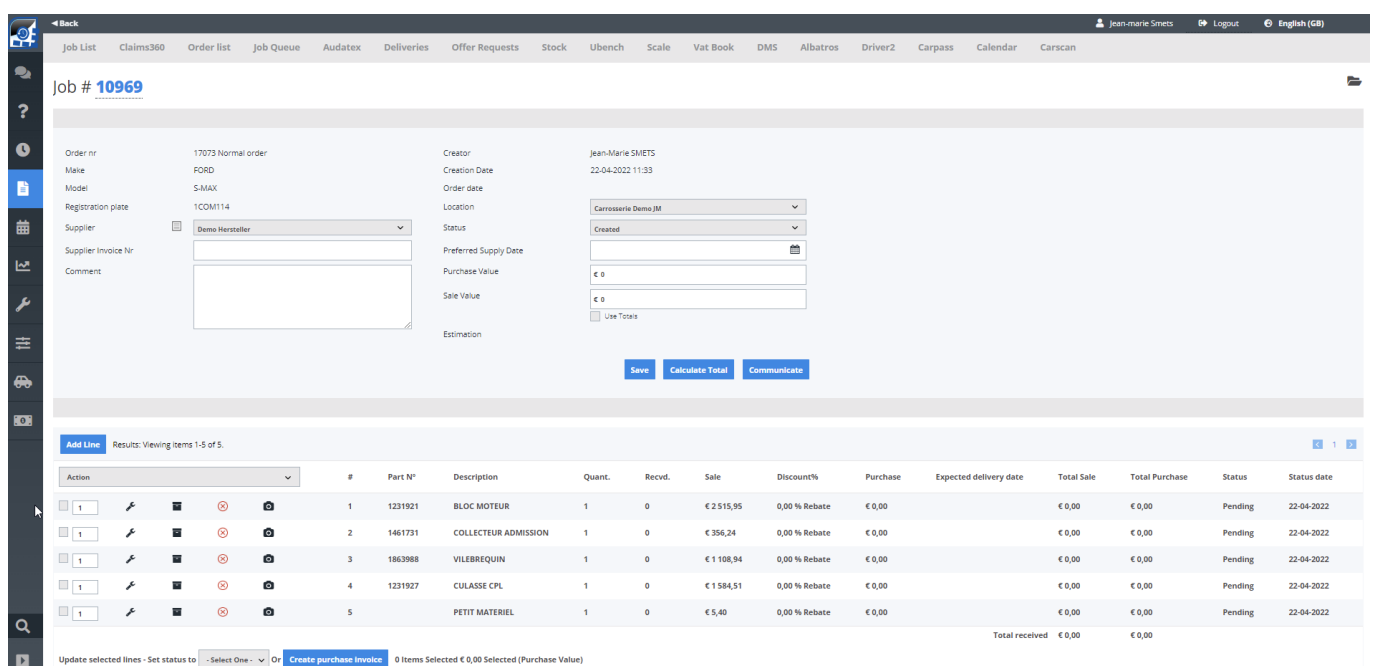
At the bottom of this window, select the supplier (external or internal) and click order.

General



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





Communication

Supplier ▼

To
support@insypro.com (Demo Hersteller);

CC
jean-marie.smets@solera.com.

Subject
Order 10969/17073

Date
22-04-2022 11:37

BCC

Template
Load 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)		

General

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

Order Parts

×

In Stock

Search

☐ Quant. Number Name Price

To Order

Mode Order ▾

☒ Quant. Number Name Price

select a supplier ▾

Existing orders

Deliveries Previous orders (1)

Results: Viewing items 1-5 of 5.

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

General

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

Back

Job ListClaims360Order listJob QueueAudatexDeliveriesOffer RequestsStockUbenchScaleVat BookDMSAlbatrosDriver2CarpasCalend

Filter

ResetExport

select a locationselect a supplierselect a statusselect a type

10969type a registrationtype an Order numbertype a part number or name

Advanced

type a job number

Order From Stock

Results: Viewing items 1-1 of 1.

		N°	Creation Date	Registration	Job	Make	Model	Supplier	Sale Value
		17073	22-04-2022 11:33	1COM114	10969		S-MAX	Demo Hersteller	€ 0,00
Total								€ 0.00	

How to Mark parts as received.

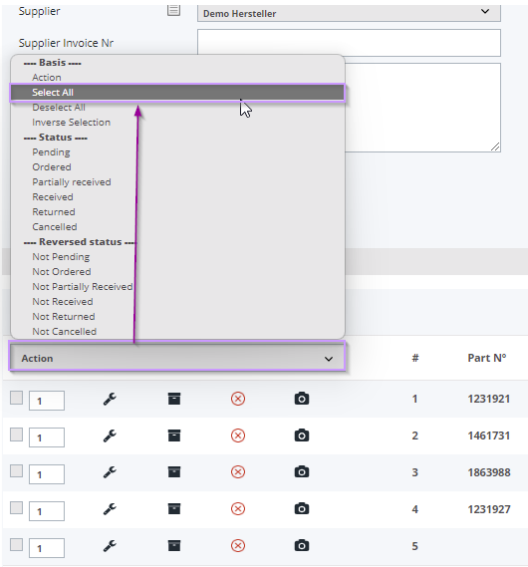
Once you clicked on the order you can mark parts as received. This can be done in

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URL: <http://faq.insypro.com/index.php?action=artikel&cat=57&id=513&artlang=en>

General























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

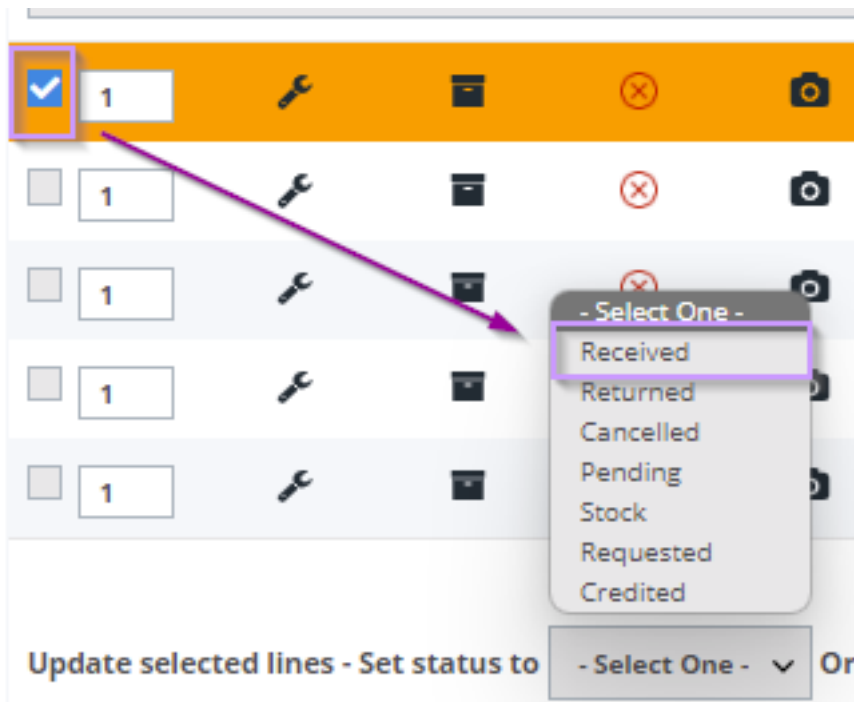
- Select One -

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.



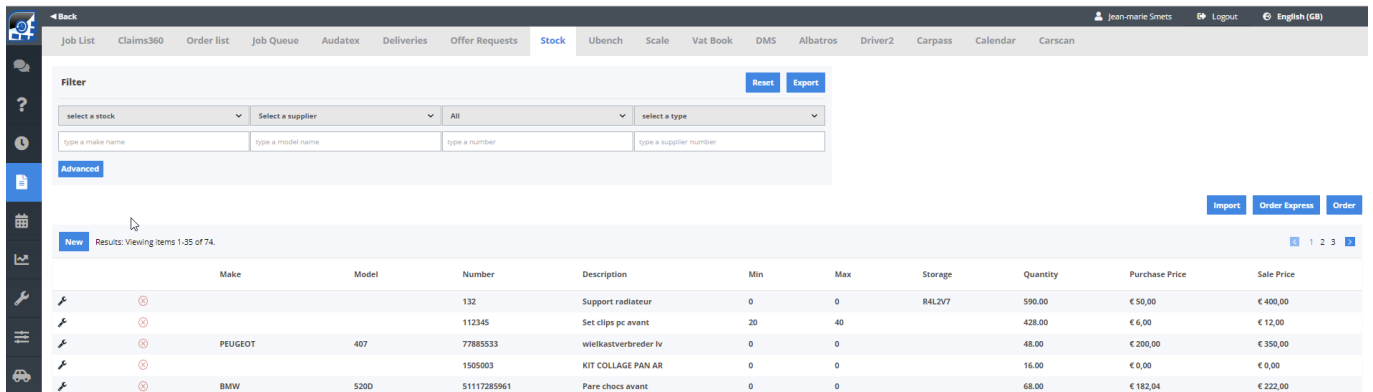
Stock managment

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.

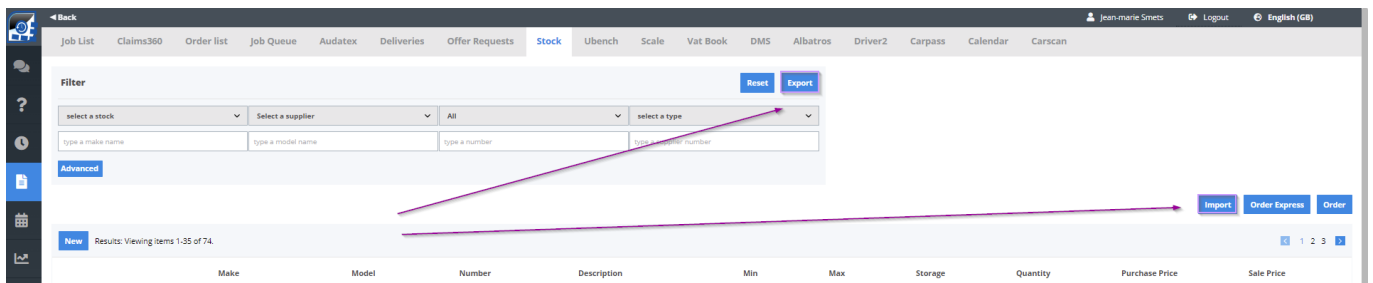
General



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 4v	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).



Make	Model	Number	Description	Min	Max	Storage	Quantity	Purchase Price	Sale Price
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Or you create a new part by clicking new , this will generate following screen:

General

Part Description		Vehicle	
Make Of Part	<input type="text"/>	<input type="checkbox"/> All Makes	
Number	<input type="text"/>	<input type="checkbox"/> All Models	
Description	<input type="text"/>	Make	<input type="text"/>
Type	<div>Parts</div>	Model	<input type="text"/>
Prefered Stock			
Min	<input type="text"/>	Max	<input type="text"/>
Storage	<input type="text"/>		
Default Suppliers			
Supplier 1	<div>select a supplier</div>	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>
Supplier 2	<div>select a supplier</div>	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>
Supplier 3	<div>select a supplier</div>	Last Price	€ <input type="text"/>
		Part Number	<input type="text"/>

Save

New

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:

General

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

select a supplier

Order

Existing orders

Deliveries Previous orders (1)

Results: Viewing items 1-5 of 5.

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

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