

# 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 

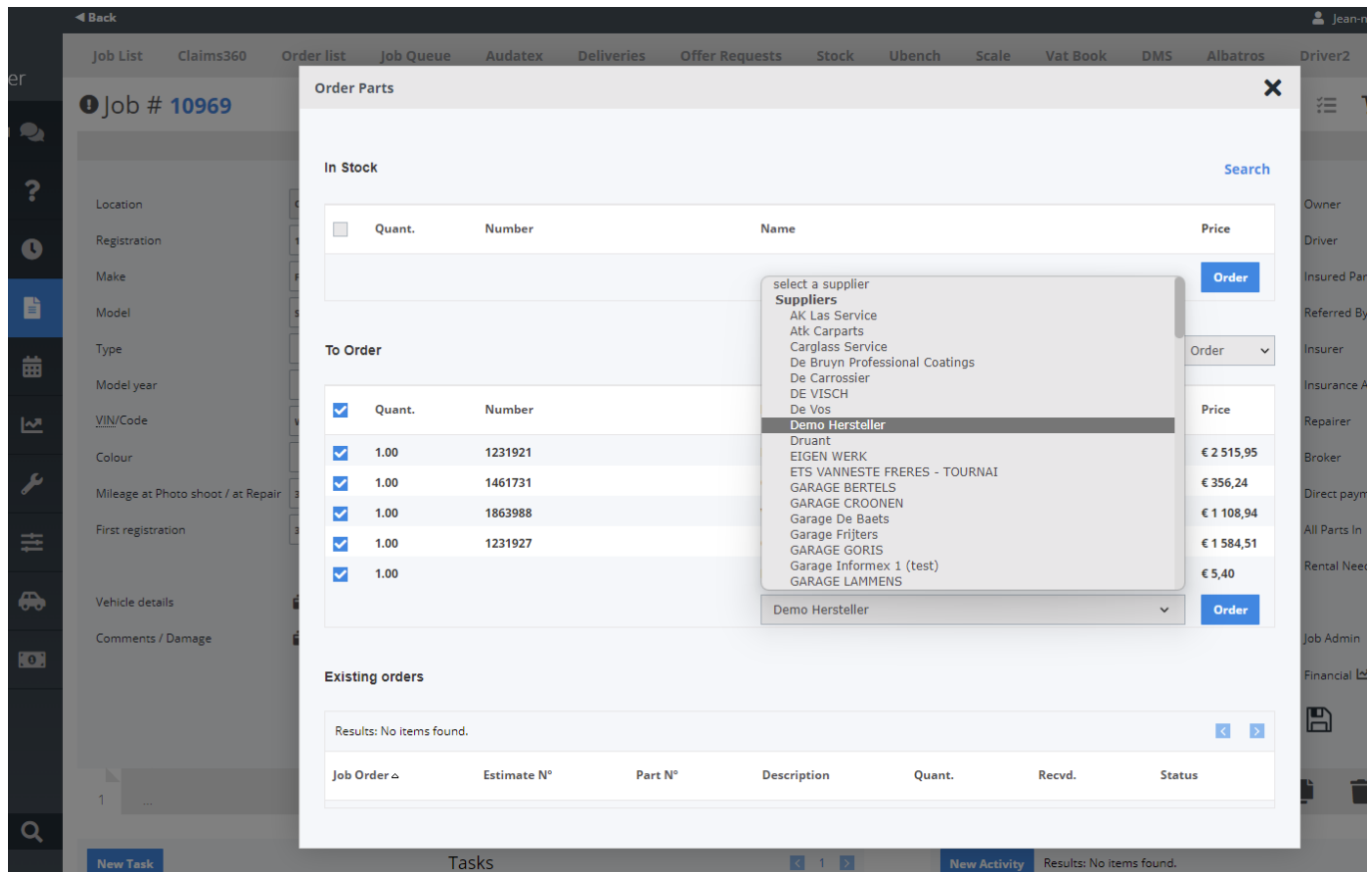



To order these items, click on the "Order" icon

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

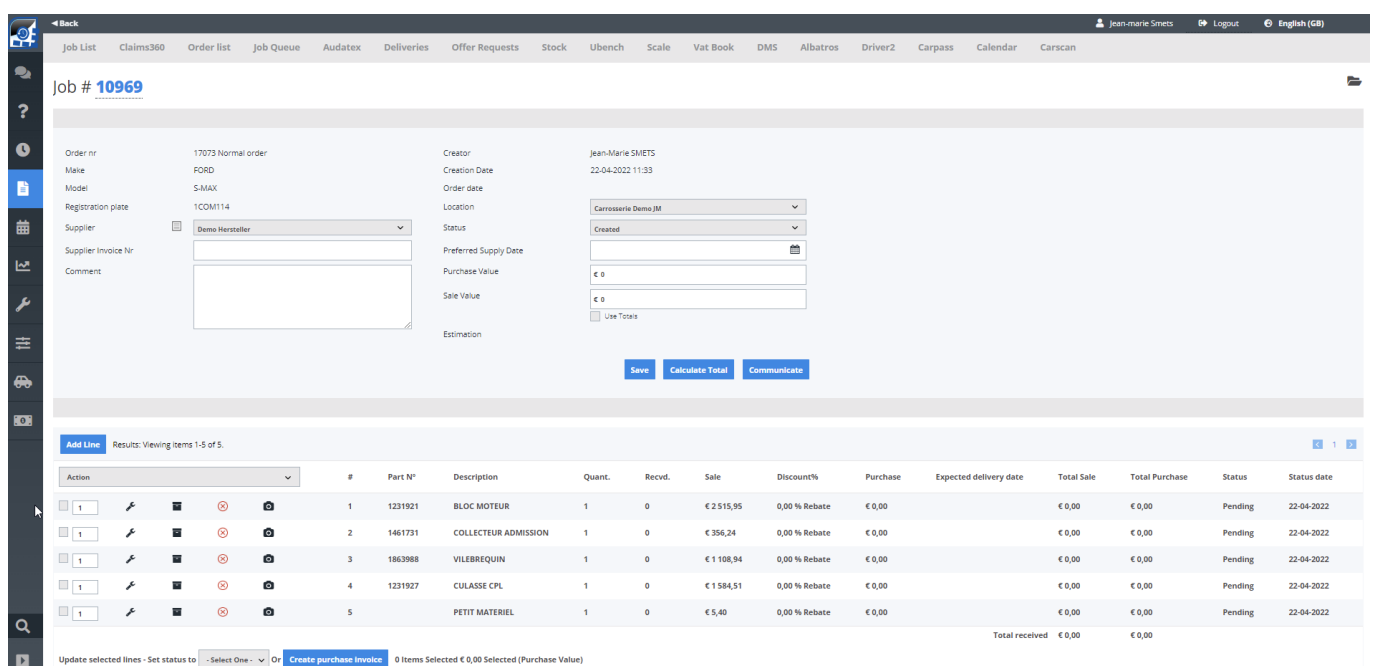
At the bottom of this window, select the supplier (external or internal) and click order.

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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**





Communication

Supplier ▾

---

To

CC

Subject

Date

BCC

Template  

Load template ▾

---

**B** *I* U Font Size... Font Family... Font Format

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 WF0SXGBWSDK74645 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 pictures

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.

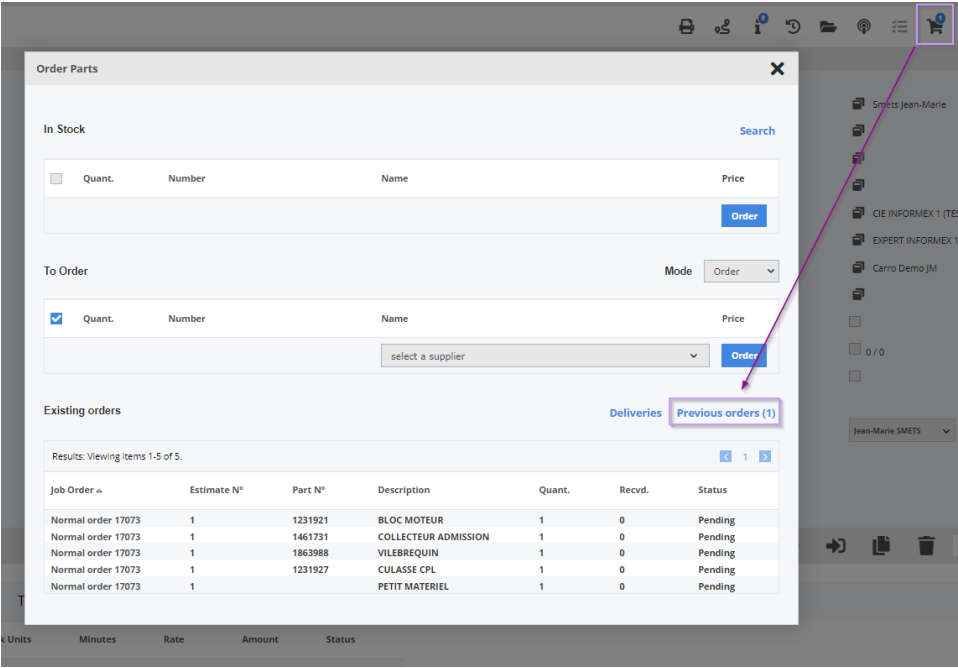
Send the communication by clicking the button send and save  at the bottom of the screen

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

Back

Job ListClaims360Order listJob QueueAudatexDeliveriesOffer RequestsStockUbenchScaleVat BookDMSAlbatrosDriver2CarpasCalendar

Filter

ResetExport

select a location

select a supplier

select a status

select a type

10969

type a registration

type an Order number


type a part number or name

Advanced

type a job number

Order From Stock

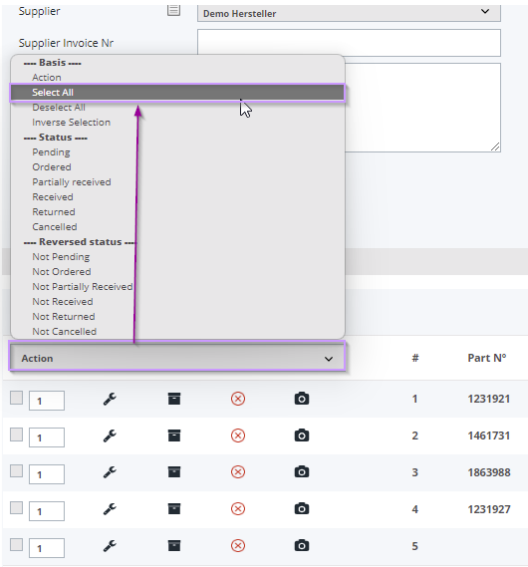
Results: Viewing items 1-1 of 1.

		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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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

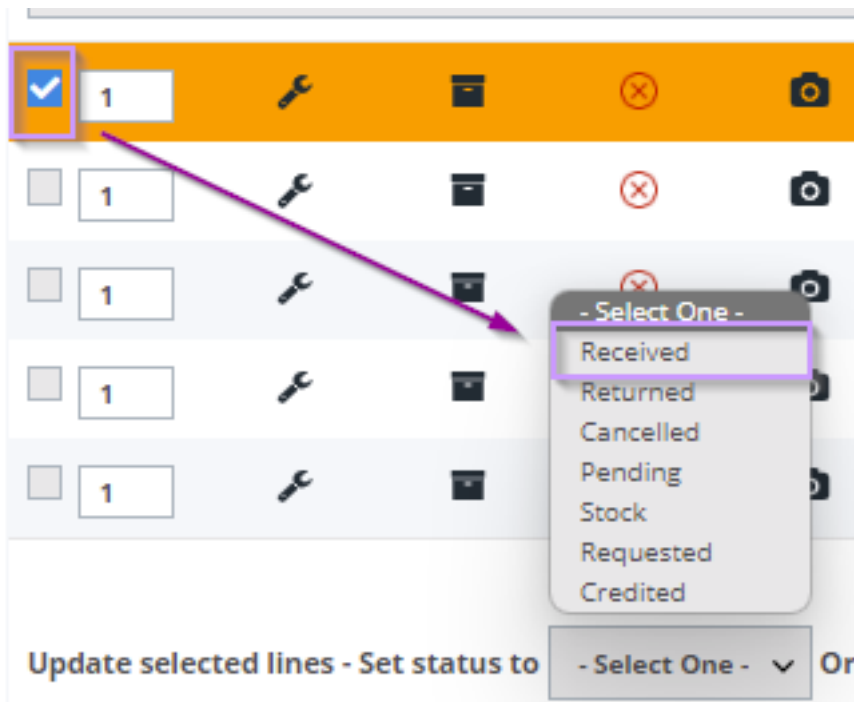
- Select One -

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

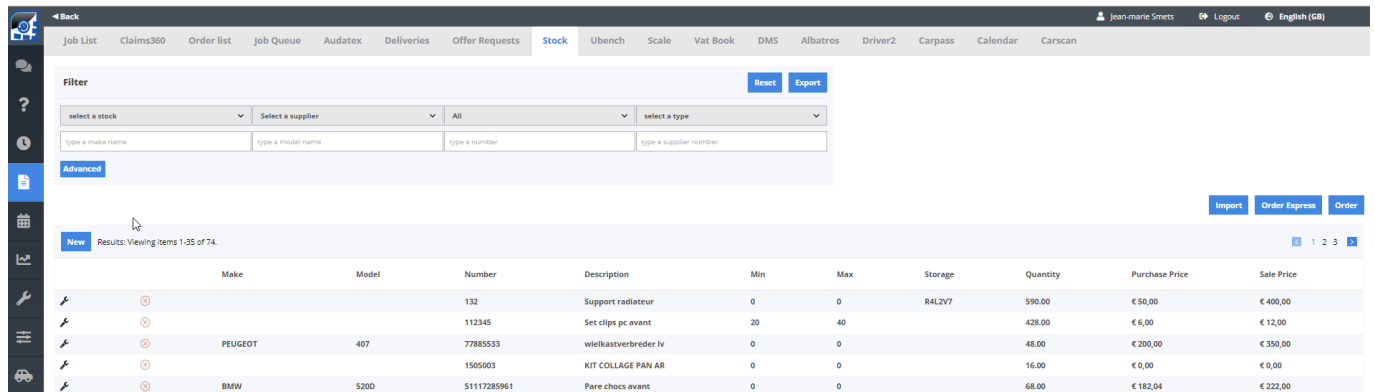
There is the possibility of using the stock tool. This tool allows to introduce the parts from your stock in the program. So when we order a part that is in your stock, the program will automatically warn you that this part does not have to be ordered.

## 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.



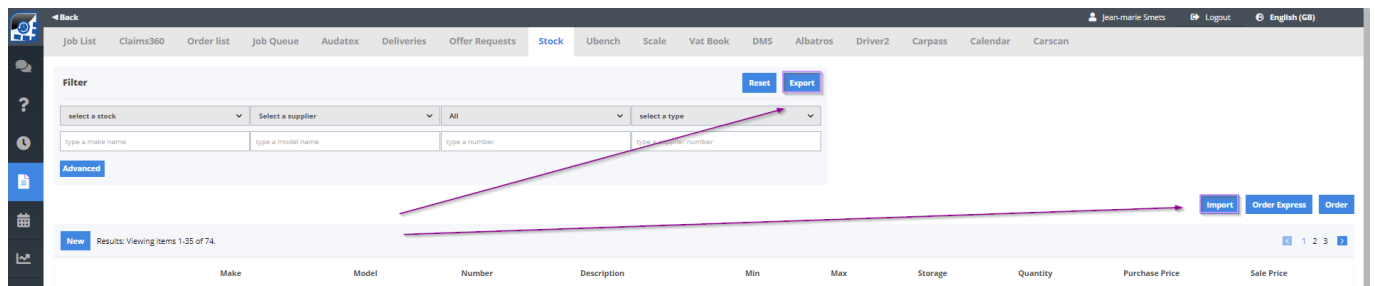
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Make	Model	Number	Description	Min	Max	Storage	Quantity	Purchase Price	Sale Price
		132	Support radiateur	0	0	R4L2V7	590.00	€ 50,00	€ 400,00
		112345	Set clips pc avant	20	40		428.00	€ 6,00	€ 12,00
PEUGEOT	407	77885533	wielkastverbredter Iv	0	0		48.00	€ 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
------	-------	--------	-------------	-----	-----	---------	----------	----------------	------------

Or you create a new part by clicking 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	<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

☐

Quant.

Number

Name

Price

☐

1.00

132

Support radiateur

€ 400,00

Order

To Order

Mode 

Order

☒

Quant.

Number

Name

Price

☒

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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Last update: 2022-04-22 12:03