

Quick Guide – Inventory

New Parts

Management > Utilities > Discounts > Discount Levels. In this example we will leave the field blank.

Introduction

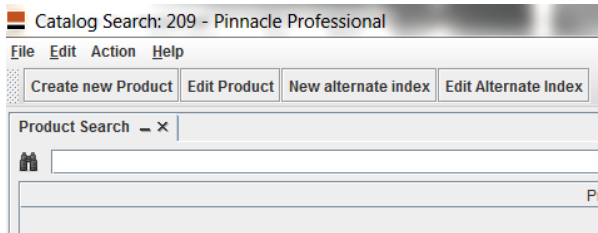
This quick guide explains what actions are required to add and manage New Parts on Pinnacle. Up to now if you have parts that are not associated with a vehicle you are able to add them as Loose Parts to be able to sell them from Pinnacle. However, if you are selling new parts that you purchase from a vendor and want to keep a check of your stock numbers and replenish as required, then this is difficult if you constantly keep adding these as loose parts. The New Parts module allows you to add new products and add parts to the product as and when they have been ordered and received. There is also a section that allows you to check current stock levels and raise a Purchase Order to increase the stock and replenish as required.

Please note that it is important that you follow the process in the order that this Quick Guide has been written.

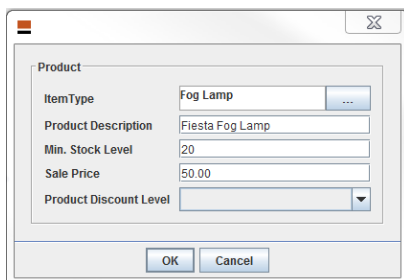
Create New Product

Before you add the new parts to Pinnacle you will first have to create a new product:

1. Select *Inventory > New Parts > Catalog Search* or press **F9**.
2. In the *Catalog Search* screen click onto the **Create new Product** button.



3. In the Product popup screen enter the following fields:



- **Item Type:** Click onto the selector button, choose a category then select a Part type. For example Category = *Lights/Lamps* and Part Type = *Fog Lamp*.
- **Product Description:** Add a description of the new product e.g. *Fiesta Fog Lamps*.
- **Min. Stock Level:** The minimum number you want to hold for this product e.g. 20.
- **Sale Price:** A general sales price for this product e.g. £50.00.
- **Product Discount Level:** Add the level of discount you want to apply to this product. You will need to create and set the discount levels by navigating to:

Add Vendor, Fitment and Parts to Product

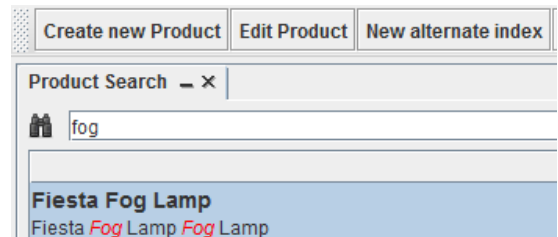
Now the product has been added we need to add Vendor, Fitment and Parts to the product description.

Alternative Index Number

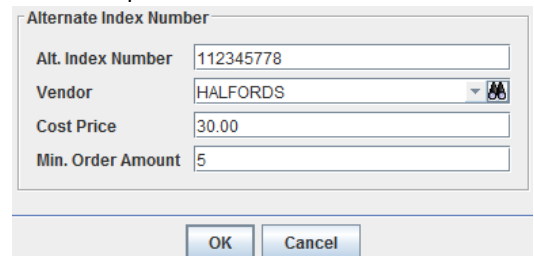
First we need to add a vendor against the product; this is so a Purchase Order can be raised when replenishing stock. This action needs to take place before parts are added; the reason for this is because the Index number will be associated with the parts, adding the Alternative Index number afterwards will not associate this number with the parts. It is worth noting at this stage that a Product can have more than one vendor associated against it.

To add a vendor against a product item complete the following process:

- Search for product and highlight required item then Click onto the **New alternative index** button:



- In the pop up window enter the following:
 - **Alt.Index Number:** Add the Vendor Number e.g. 112345778.
 - **Vendor:** Select the vendor from the drop list or add a new vendor by right clicking and selecting *Add Quick Customer*. In our example we chose *Halfords*.
 - **Cost Price:** Enter cost price of part e.g. £30.00.
 - **Min.Order Amount:** Enter minimum order number e.g. 5
 - When completed click onto **OK**.



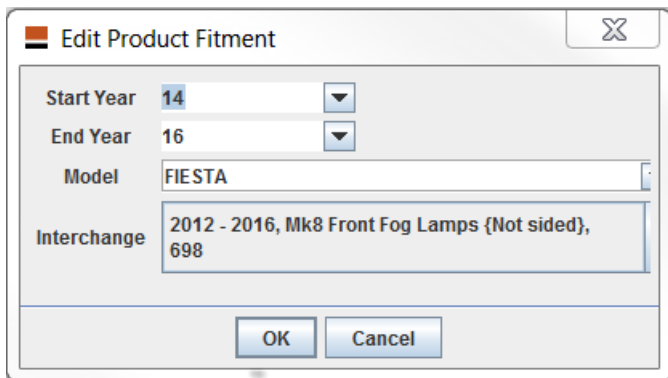
You will notice that *Alt. Index Numbers* section has been completed.

Alt. Index #	Vendor	Cost	Min. Order #
112345778	HALFORDS	30.00	5

If you use more than one vendor add them in using the method above.

Adding Product Fitment

Next you need to add the Product Fitment. This allows us to add specifics against the part such as Year, Model and Interchange. Right Click onto the Product Fitment screen area then select *Add Product Fitment*.



Edit Product Fitment

Start Year: 14
 End Year: 16
 Model: FIESTA
 Interchange: 2012 - 2016, Mk8 Front Fog Lamps (Not sided), 698

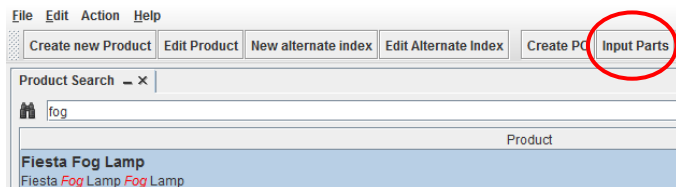
OK Cancel

In the *Edit Product Fitment* screen enter the following fields:

- Start Year
- End Year
- Model
- Interchange – Ensure Interchange fits model and years selected

Adding parts to Product

We have only defined the product as *Fiesta Fog Lamp*, the next step is to add Fog Lamp parts that we want to sell against this product. We do this by highlighting the product description then click onto the **Input Parts** button:



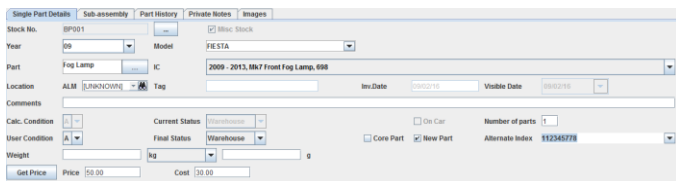
File Edit Action Help

Create new Product Edit Product New alternate index Edit Alternate Index Create PO **Input Parts**

Product Search: fog

Product: Fiesta Fog Lamp

You will now be presented with the *Single Part Input* screen. Note that most of the fields have been completed.



Single Part Details Sub-assembly Part History Private Notes Images

Stock No: BPP01
 Year: 09
 Part: Fog Lamp
 Location: ALB (UNKNOWN)
 Comments:
 Calc. Condition: Final Status: Warehouse: Core Part: New Part: Alternate Index: 112345778
 Get Price Price: 30.00 Cost: 30.00

All you need to complete is Location if known, Comment Field and number of parts. Most important is the Comments field as any entry added here can be searched on in the *Free Text* search. For example part numbers can be added as can the

vendor that you purchase the part from and so forth. Enter number of parts that you currently hold, this is important because when you save this screen the number of parts dictate how many entries of that part will be added to Pinnacle, each one having their own unique Tag number. When completed click onto **Save and Print Tags** to save entry and print tags for all parts held.

Check Stock Levels

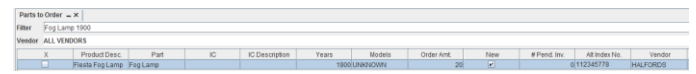
If you have been following the steps within this Quick Guide, when you created the Product you were prompted for a Minimum stock level. When the number of parts held falls below this level AND there is a vendor associated with the product then this part will be available for restocking, this can be found by navigating to: *Inventory > New Parts > New Parts Under Stock*.



Parts to Order: Fog Lamp 1900

Vendor	Product Desc	Part	IC	IC Description	Years	Models	Order Amt	New	# Part. In.	Alt Index No.	Vendor
	Fiesta Fog Lamp	Fog Lamp			1900	UNKNOWN	20		0		

In this example we are looking for the *Fiesta Fog Lamps* we created earlier. When I added the parts I only accounted for 5 parts so I was under the Minimum stock level of 20 when I created the Product. You will also note that there are no Vendors listed, that is because we associated two vendors against this part, to select a vendor click onto the blank field of *Alt Index No.* and select vendor from displayed list.

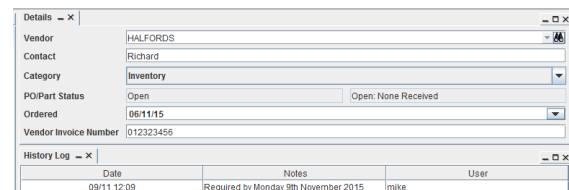


Vendor	Product Desc	Part	IC	IC Description	Years	Models	Order Amt	New	# Part. In.	Alt Index No.	Vendor
	Fiesta Fog Lamp	Fog Lamp			1900	UNKNOWN	20		0	112345778	HALFORDS

At this point a Purchase Order for any new parts can be created.

Create Purchase Order

To create the Purchase Order, ensure part is highlighted the checkbox and a Vendor is selected, click onto **Create PO**.



Details: HALFORDS

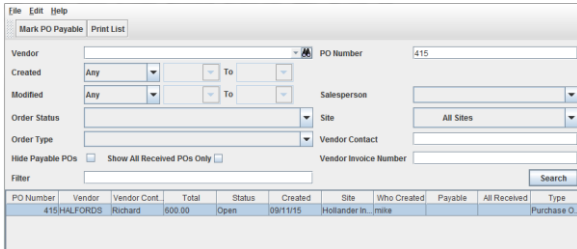
Vendor: HALFORDS
 Contact: Richard
 Category: Inventory
 PO/Part Status: Open
 Ordered: 06/11/15
 Vendor Invoice Number: 012323456

History Log: 09/11 12:09 Required by Monday 9th November 2015 mike User

You will be presented with a preview of the purchase order and to the right of this, the Details screen. As you complete Details these will be presented and seen in the Preview screen. The *Vendor* will already be selected for you but this can be change if required. Amend the *Category* as required; in this case I am adding to the Inventory so have chosen accordingly. Select an *Ordered* date and *Vendor Invoice Number* if known. Finally I added a note to the PO and this has been reflected in the History Log. When completed click onto **Save** or **Save and Exit**, you will then be presented with a choice to either **Print** or **E-Mail** the PO. Note the History Log when you have completed this action. At this point you will be sending the PO to the Vendor by post or e-mail.

Receiving Parts

When the parts have arrived you will have to acknowledge the PO on Pinnacle. To locate PO navigate to *Purchase Order > Find Purchase Orders*. In the *Find Screen* enter the PO Number and click onto the **Search** button:



PO Number	Vendor	Vendor Cont.	Total	Status	Created	Site	Who Created	Payable	All Received	Type
415HALFORDS	Richard	606.00	Open	09/11/15	Hollander In.	mike			<input checked="" type="checkbox"/>	Purchase O.

Double click onto the required PO to open. In the Items section, click onto the *Add to Inventory* checkbox then click onto the **Receive Parts** button. When prompted enter the day that the parts were received then press **Save & Exit**. In the pop-up box check *Print* and *Complete* checkboxes to print the Purchase Order and to complete the process. An entry will appear in the Find Purchase Order screen informing you that the PO is complete and that parts have been received.

Status	Created	Site	Who Created	Payable	All Received	Type
Old	09/11/15	Hollander International HQ	mike			Purchase Order
Old	09/11/15	Hollander International HQ	mike			Purchase Order
Completed	09/11/15	Hollander International HQ	mike		99/11	Purchase Order

If you have any questions regarding this Quick Reference or have any issues regarding Pinnacle please contact Support using the follow information:

eMail: support@hollandereu.com

Tel: +44(0)131 538 8999

Note: Before calling support please ensure that you have TeamViewer loaded, this application can be uploaded from the following site: <https://www.teamviewer.com>. When prompted select Basic Installation and Personal use.