

Quick Guide - Sales Selling Inventoried and Non- Inventoried parts V2.3

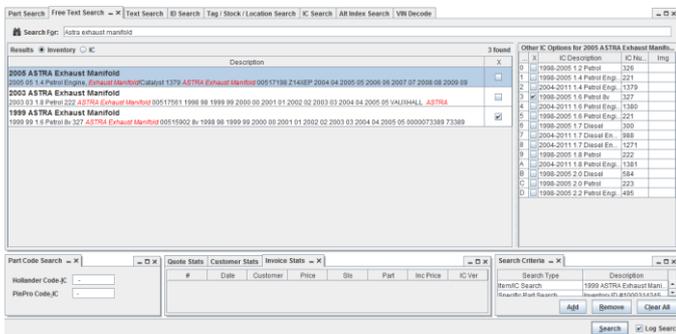
SALES ONE

Introduction

This section explains what actions are required on Pinnacle when selling an inventoried part. This is the recommended method of selling within Pinnacle as full reporting and Interchange history can be accessed, however this method is also the most intensive and time consuming.

Search for Parts

1. Select **Sales > Find Parts, Find Parts** from Welcome page or press **Ctrl + Alt + P** to access the **Find Parts** screen.
2. Select which search tab you want to use we recommend that you use **IC Search**, although you may find it easier to use **Free Text Search** initially.



3. Type in **Sales Query** in the **Search For** field, in this case we are looking for an Astra exhaust manifold.
4. Select the item required then click onto **Search**.

IC	IC Description	IC No.	IC Imp
1	1998-2005 2.0 Petrol	2205	
2	1998-2005 1.4 Petrol Eng.	2211	
3	2004-2011 1.4 Petrol Eng.	1279	
4	1998-2005 1.6 Petrol En.	2217	
5	2004-2011 1.6 Petrol Eng.	1280	
6	1998-2005 1.6 Petrol Eng.	2211	
7	1998-2005 1.7 Diesel	2202	
8	2004-2011 1.7 Diesel En.	1271	
9	1998-2005 1.8 Petrol	2212	
A	2004-2011 1.8 Petrol Eng.	1281	
B	1998-2005 2.0 Diesel	584	
C	1998-2005 2.0 Petrol	2213	
D	1998-2005 2.0 Petrol Eng.	445	

Found Parts

Found items will be displayed in white, found items not in yard will be displayed in green and found items not inventoried will be displayed in purple.

Select required item from list.

Quote (Optional)

To create a quote click onto the **Quote** button this will initiate the Order Wizard, add to required field then press the **Next** button:

- Customer: Enter customer name and search by clicking onto the binoculars icon, or right click onto search field to Add Quick Customer.



The screenshot shows the 'Order Wizard' window. The question 'Which customer are you selling to?' is displayed above a text input field containing 'MIKE FURLONG'. There is a binoculars icon to the right of the input field.

- Source of Request: Select request source from list.

- Contact: Only add contact if customer is an organisation.
- Quote Number: Quote number is created.
- Price: Accept or amend price.
- Warranty: Add warranty or ignore if no warranty is required.

Save and print quote.

Work Order

If you do not use quotes go straight to Work Order by clicking onto the **Workorder** checkbox

Work Order Wizard

- Customer: As Described above.
- Source of Request: As Described above.
- Contact: As Described above.
- PO Number: If used add PO number.
- Ship Type: Select appropriate shipping type.
- Sale Type: Select appropriate type of sale.
- Price: As Described above.
- Warranty: As Described above.

Save and exit, then print Work Order for distribution.

Additional Parts

To add additional parts click onto **Add Part** beneath the **Items** screen:



The screenshot shows a grid of buttons for adding additional parts: Discount, Freight, Warranty, Core, Private Comment, Public Comment, Remove, Set Tax Rate, and Add Part.

- Search for part
- In the **Found Parts** screen enable the Drag and Drop checkbox
- Select part and drag to items screen

Save and exit, then print Work Order for distribution.

Invoice

Once the part has been located and ready for sale you will be required to produce an invoice:

- Click onto the Invoice Checkbox.
- Click onto the **Save & Exit** button to print off Invoice.
- Ensure correct Printer is setup and enter the correct payment type.

SALES TWO & THREE

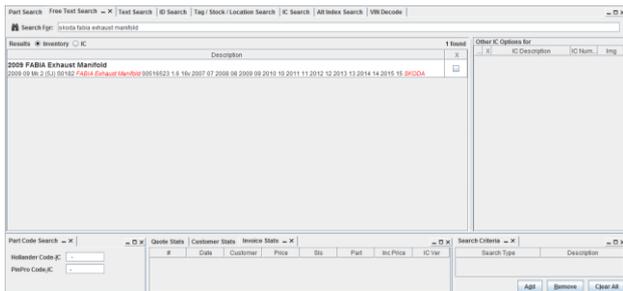
Introduction

The following sections explain what actions are required on Pinnacle when selling a non-inventoried part and parts via Pick and Pull. Although quicker than selling inventoried parts, selling non-inventoried parts will not be fully reported on and any parts sold via Pick and Pull will **not have any** reporting and Interchange (IC) history recorded against them.

Non-Inventoried Parts

This process allows you to sell a part that has not been inventoried but you know you have this part on location.

1. Select **Sales > Find Parts**, **Find Parts** from Welcome page or press **Ctrl + Alt + P** to access the **Find Parts** screen.
2. Select which search tab you want to use we recommend that you use **IC Search**, although you may find it easier to use **Free Text Search** initially.
3. Type in your sales query in the **Search For** field, in this case we are looking for a Skoda Fabia exhaust manifold.



4. As expected you can see from the screen shot above that this part has not been listed. Highlight the first item in the list then click onto **Search**.
5. It is possible that the **Found Parts** section will either be empty or the wrong part is listed or that you have some items in green (parts available but at other yards), in either case click onto the **Extra** button.



Select the item coloured purple from list.

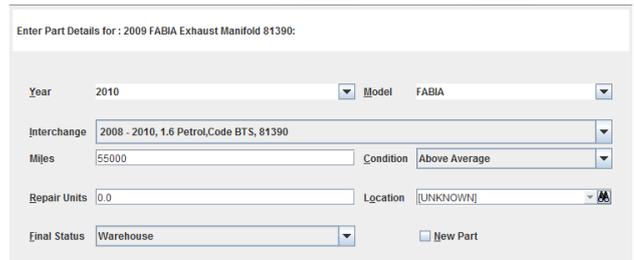
Work Order

If you do not use quotes go straight to Work Order by clicking onto the **Workorder** checkbox

Work Order Wizard

- Customer: *As described in Sales 1.*
- Source of Request: *As described in Sales 1..*
- Contact: *As described in Sales 1.*
- PO Number: *If used add PO number.*
- Ship Type: *Select appropriate shipping type.*

- Sale Type: *Select appropriate type of sale.*
- Price: *As described in Sales 1.*
- Warranty: *As described in Sales 1.*
- Stock Number: *Enter MISC*
- Add any addition information in the Parts Detail screen then click onto the **Next** button.



Save and exit, then print Work Order for distribution.

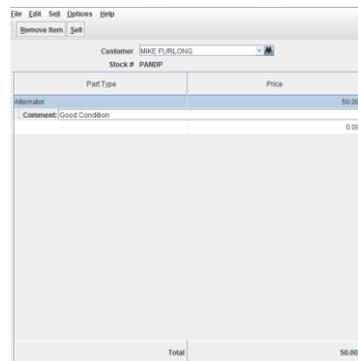
Invoice

Once the part has been located and ready for sale you will be required to produce an invoice.

Pick and Pull

If you want to sell a part without creating a Work Order than follow this process:

1. Select **Sales > Pick and Pull**.



2. Add customer details and search for part type, add comments if required.
3. Once complete click onto the **Sell** button the select Payment type, click onto **OK**.
4. Note the Invoice number at bottom of Pick & Pull screen, this can be located from the Control Centre then printed off.



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, as we will be required to log in remotely to your PC. This application can be uploaded from the following site: <https://www.teamviewer.com>.