

AdjustRite® Parts Management

Features & Functions Guide:



- **Create and Manage Preferred Parts Provider Network**
 - Go to Maintenance > Parts Provider > Add New
 - Provide vendor name, address, and contact information
 - Indicate required Pricing preferences (List Price & Cost, Cost Only, or List Price Only)
 - Specify optional Mark-up Percentage by Vendor (applies cost plus to estimate)
 - Set optional filter preferences to search vendors by Part Types, Manufacturers, and Equipment Types

- **Create & Save Multiple Parts Order Lists per Estimate/Repair Order**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Order Lists Tab
 - Input the Parts List name and click Add
 - Customize the parts list by removing any rows that do not apply
 - Repeat from Step 2 to create additional lists

- **Choose Photo Images to Send to Parts Providers with the Price Request**
 - Estimate or Claim Menu > Photos
 - Switch the Privacy toggle for images (to view or make private in Parts Price Request)

- **Request Parts Pricing from Multiple Parts Providers**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Vendors Tab
 - Select the Parts List from dropdown of lists that you created
 - Click “Add Part Vendors” to search your list of Parts Providers
 - Filter the list of providers by Part Types, Manufacturers, and Equipment Types (optional)
 - Select the Parts Providers that you would like to provide pricing
 - Click “Add Selected Vendors” button
 - Add any instructions/comments in the “Add your own text” field (optional)
 - Change the Subject line (optional)
 - Check the box(s) for provider(s) that you would like to Email
 - Click “Email Selected Providers” button (this is a closed bid process)
 - Parts Providers will receive an email request with a link to a secure AdjustRite webpage to submit pricing
 - Web-page will include Unit information, selected photos, and parts list
 - Web-page indicates required pricing (List Price & Cost, Cost Only, or List Price Only)
 - Parts vendor inputs Pricing, Part Numbers, & Availability then clicks Submit
 - An email will be received when each vendor submits pricing

- **Review Part Price Responses for Each Parts Order List**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Pricing Responses Tab
 - Select the Parts List from dropdown of lists that you created, to review list-specific pricing results
 - View the results in the Parts Price Response grid
 - Repeat from step 2 for each Parts List (if multiple parts lists were created)

- **Choose/Order Parts from One or More Vendors:**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Pricing Responses Tab
 - Select the Parts List from dropdown of lists that you created, to review list-specific pricing results
 - View the results in the Parts Price Response grid
 - Click the Order button to choose part(s) from the preferred provider(s)
 - Review part availability, price, profit margin, and shipping costs for an informed choice
 - Input the PO# for each vendor in which parts have been selected or select Not Available (optional)
 - Click the “Send Selected Parts to Vendors” button
 - Parts Providers will receive an email request with a link to a secure AdjustRite webpage to view the parts order (each provider will receive an email with the selected parts from the respective provider only)
 - Parts Order Web-page will include Unit information, PO #, and Parts Order List
 - Parts vendor inputs the Expected Ship Date for each part and clicks Submit
 - An email will be received when each vendor submits the Expected Ship Date

- **Import Parts Pricing to the Estimate (optional)**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Pricing Responses Tab
 - Select the Parts List from dropdown of lists that you created, to review selected parts
 - Click the “Apply Selected Pricing to Estimate” button
 - Estimate prices will be updated based on selected parts from each provider
 - Prices provided based on Cost Only, will apply the mark-up that is associated with each vendor listed in the Maintenance/Parts Provider page
 - Prices provided based on List Price will import the List Price to the estimate
 - Part Numbers will also import to the estimate (as provided by the supplier)

- **Review Parts Shipment Confirmations**
 - Go to Estimate or Claim Menu > Parts Order Management > Parts Ordering Status Tab
 - Select the Parts List from dropdown of parts lists that you created, to review list-specific order results
 - View the Parts Ordering Status grid to see the Expected Ship Dates for each part (this is the expected ship date for each part, for repair planning, not the actual ship date)

- **Generate Parts Management Reports (coming soon)**
 - Parts Management Cycle Time Detail Report (detail by Provider)
 - Parts Management Summary Report
 - Parts Management Margin Analysis Detail Report (detail by Provider)
 - Parts Management Margin Analysis Summary Report