Pinnacle

AUTO RECYCLING TRADING SYSTEM

Actual Systems UK Ltd

Information & Communication Worldwide

Pinnacle Release v3.1

The document contains details of recent updates to your Pinnacle System.

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Sales Module Enhancements

XML Invoices:
There has been a significant update with regards the layout of your invoices. We can now offer you a customized invoice including your company logo and work with you to create a layout that suits your requirements.

Search by Part Comments:
It is now possible to search for a part by the part comments. To search by part comments go to Sales > Find Parts and at the year prompt space bar and then choose part comments. It will bring up a Comments Text box. Type in the part comments and hit enter. It will bring up all the parts matching the word(s) entered. It is not case sensitive but it has to match exactly what is typed in the box. WARNING – Searches made by comments are NOT logged!

Part Details Column Added for Quotes/Workorders/Invoices/Purchase Orders Lookups
There is now an additional column added showing the first part, model, and year on the order when doing lookups for the following:

- Sales > Confirm/Edit Workorder > Page Up or Additional Search Options
- Sales > Reprint Options > Workorder > Page Up or Additional Search Options
- Sales > Reprint Options > Invoice > Page Up or Additional Search Options
- Sales > Credit Invoice > Page Up or Additional Search Options
- Sales > Quotes > Find A Quotation > For All Search Types
- Purchase Orders > View/Edit PO > For All Search Types

Sales Source Pop-up:

It is now possible to keep track of customer referrals. If the source pop-up is setup when a part is searched a source can be entered for each customer part lookup. There are not predefined sources, each source will need to be created. An example would be how the customer was referred to the business if it was an Advertisement, Web Site, or News Paper.

The first step is to go to Management > Utilities > Technical > Setup Inquiry Sources. From here a source can be created or deleted. To create a new source, tab over to Append and hit enter or type ctrl a. This will bring up a free text box labeled New Source. Once the source is entered hit enter and it will save the source. There is no limit for the number of sources entered. A source can be deleted if needed. When the source is deleted the quantity of searches under that source will be moved to "No or unknown source". If a source needs to be deleted, highlight the source tab over to delete and hit enter or type ctrl l. This will delete the source that was highlighted. The order of the sources can be changed. To move a source up in the order, highlight the source and tab over to Move Up or type ctrl u. To move a source down in the order, highlight the source and tab over to Move Down or type ctrl d. Once the sources are created a preference needs to be setup.

The preference is a user preference so it will need to be setup for each user it applies to. To setup the preference go to Management > Utilities > Technical > User Preferences > Edit Preferences go to the specific user this applies to and group FIND. Find the preference labeled "Source Popup: 0-nevr,1-if no cust,2-alws". If 0 (zero) is selected the source popup will not appear when performing a part search. If 1 is selected the source popup will only appear for new customers or searches w/o a customer. It will not appear for existing customers in the phonebook. If 2 is selected the source popup will appear for all searches performed.

Once the preference is setup a popup will appear when a part search is performed. It will appear right after choosing an interchange for a part. At this point the user can choose the source for the customer.

There is a report that can be run on all the different source lookups. Go to Management > Request Reports > Source Popup Report. In this report a date range can be chosen. The date range can be today, yesterday, week to date, month to date, last 30 days, last 60 days, last 90 days, last 180 days, last 365 days or a specific date range. When the report is generated it will list all of the different sources and how many lookups were performed for each source for the specified time period. There is also a place that will display "No or unknown source". This will show how many lookups were performed and a source was not chosen. This can be because the preference is set to 1 and a search was performed for a phonebook customer. In this case the popup won't appear so it will be put the lookup as a "No or unknown source". Or if the user escapes out of the source popup it will also put it as a "No or unknown source" lookup.

Updated Backorder Module:

The backorder module has been modified and it will now send an email out when a part on backorder is entered in Pinnacle.

Every sales person in Pinnacle may now have an e-mail address which can be specified in Management > Utilities > Users. This helps to fill out the backorder when created.

A backorder can be created in two ways in Pinnacle.

- Find screen: Options > Create Backorder
- Pinnacle menu: Sales > Utilities > Backorders > Create a Backorder.

When a backorder is created from the find screen, it tries to pre-populate as many fields as it can: part information, customer data, salesperson email, etc. Pinnacle doesn't allow a backorder to be saved until contact information is filled out. The following fields must be entered: sales person's e-mail(s) and customer's e-mail(s) or phone number.

Once the backorder is created, Pinnacle checks if the part is already in stock. If the part is already in stock the user will be prompted with one of the following messages: "The part is already in stock. Save backorder anyway?" or "This part is already in stock, but is on workorder. Save backorder anyway?". If the backorder is saved the user will be notified via e-mail when another part on the backorder is entered into stock.

The sales person is able to open the backorder at any time and edit its details if necessary. Go to Sales > Utilities > Backorders > Find a backorder. The backorder number can be typed in or a page up will bring up a list of the active backorders. If the user decides the backorder is no longer needed the backorder can be removed by going into the backorder and choosing finalize. This will remove the backorder from the system.

The sales person and the customer (if customer e-mail address is specified) are automatically notified via e-mail when the part on the backorder becomes in stock from either of the following ways:

- Input Vehicle Parts - including the case when parts are imported from PinnaclePad
- Single Part Entry
- Input New Parts
- When a part is credited and restocked
- When a part is undeleted
- When the part is imported from the PIA (Handheld device)

The email notification for the user will contain: yard name, phone #, backorder #, date backorder was created, the customers name, the part description and what stock number the part was entered under. Only one email notification will be sent and the part will remain active until the backorder is finalized. Once a backorder is finalized it will be removed from the backorder list but it will not be deleted out of the system. The backorder can still be viewed by going to Sales > Utilities > Backorders > Find a Backorder and entering in the backorder number.

A report can be run to see current backorders or old backorders. The report is under Sales > Utilities > Backorders > Backorder Report. This report can view active backorders or both active and older backorders.

Backorders that expire are not deleted automatically from the system but rather become inactive. They will not show up in a backorder search and the user will not be notified when the related part is in inventory.

Update to Quotes:

Quotes can now be saved as PDF files. This has greatly improved the format of the quotes and allows us to include your company logo producing an impressive print out which can be faxed to the customer.
The quote can also be emailed to the customer quickly and easily, including all the parts details should they decide to purchase the part.

Management Module Enhancements

Adding a Charge to Every Invoice:

It can now be setup to automatically add a charge to every invoice created in Pinnacle. Go to Management > Utilities > Technical > User Preferences > Edit Preferences go to ADMIN then group INVOICE. There are two preferences:

- Automatically add surcharge on invoice
- Text of surcharge being added on invoice

Under the preference "Automatically add surcharge on invoice" is where the specific amount can be entered to charge each invoice. The preference "Text of surcharge being added on invoice" is what type of text you want to appear on the invoice for each charge.

Printing Part Location on Plain Paper Invoice:

The preference "Print Location on Invoice" now applies to plain paper invoices. Go to Management > Utilities > Technical > User Preferences > Edit Preferences and go to ADMIN then group INVOICE there is a preference "Print Location on Invoice". If the preference is set to "Y" it will print the part location on an invoice.

Tax Option in WO Screen:

There is now a preference to not allow certain users to alter the tax rate while creating a workorder/invoice. In Management > Utilities > Technical > User Preferences > Edit Preferences – go to the user that needs to be altered – then go to the GROUP Invoice. There is a preference "Ban to alter tax rate while wo/invoice". If this is set to "Y" for a user he/she will not be able to change the tax rate under options > tax status in a workorder/invoice. The user will be able to change what is taxed and not taxed.

Vehicle Profitability Report (B4) Additions:

This report now has an added report criteria called Cost based on. There are two options to choose from: vehicle cost or total cost. Vehicle cost will be the cost of the vehicle in the mvr. Total cost will be the total of the vehicle cost + tow charge + store charge + pool fee + bid commission in the mvr.

Notes Field on Parts Listed on the Quote Screen

It is now possible to edit the notes associated with individual parts on a quote. If the user highlights the part price on the quote, hits <enter>, they will be given the opportunity to edit the corresponding notes on the line directly below the part itself. Neither the part price nor the part notes can be edited after 24 hours.

Part Total on Quote Screen

A total column has been added to the quotes screen which tallies the total of all parts associated with that quote. This total does not include warranty information at this time.

Additional Quote Preferences

A new preference has been added to the "QUOTES" group that allows a salesperson to choose whether or not they would like to sell to the customer or to the shop when selling directly from a quote. The preference is located within the "QUOTES" group (management/utilities/technical/user preferences) as "Ask about Selling quote to Cust. or Shop." When this preference is set to "Y", the salesperson is prompted with the option to sell to either the customer OR the shop when converting a quote to a workorder or an invoice.

Utilizing the ESC key on the quote screen indicates to Pinnacle that "no action" needs to be taken. Exiting the screen will prompt the "SAVE/DISCARD/CANCEL" options to appear.

Editing of Quote Details

It is now possible to edit the "QUOTE DETAILS" on a quote regardless of the date created. Previously, this information could not be edited 24 hours after the quote was created.

WO Alternate Items with Multilocations Shown First

When choosing alternate parts on a workorder within a multi-yard, alternate parts from the yard which the part was selected will be shown first. Prior to this enhancement, parts from multi-locations were shown in no particular order.

Rounded Freight Charge on WO

A preference has been added to show freight charges as a rounded figure on the workorder. This preference is located within Management/Utilities/Technical/User Preferences/Workorder under the heading "Print Freight charge on workorder?" When this preference is set to "Y," the freight charge will be rounded on the workorder, when set to "N," no freight charge is printed.

Utility to Combine Price and Freight on Invoice

A new preference has been added to the group INVOICE called 'Apply shipping & handling to Invoice Items.' When set to yes, the invoice will just show a total price of the parts and freight without actually listing the freight as a separate line item.

Credit Card Information on Invoices

Credit card numbers are now hidden on invoices with the exception of the last for digits. The end user does however have the capability to view the credit card number in its entirety if the invoice is previewed on the screen rather than printed.

Additionally, the credit card number will now print on credit invoices in its blocked format. Again, the entire number can be seen by previewing the invoice in Pinnacle.

Utility to Block Specific IC's from Price Changes

A new menu option has been added to Management->Utilities->Parts Excluded from Pricing that will allow the end user to block specific IC's from price changes within automatic pricing. This means that if an IC is blocked from price changes, these prices can only be changed through manual pricing.

New Parts Module Enhancements

A new utility has been added within the purchase order module which gives the ability to create a misc. purchase order for new parts. The functionality of this new utility is essentially the same as a standard misc. PO, however when the parts are received they can be added directly into stock. In addition, several existing reports have been modified to incorporate new parts for extended reporting.

Create Misc. PO for New Parts

To create a misc. purchase order for new parts, go to "Purchase Orders" from the main menu and select "Misc. PO for New Parts." Like a standard purchase order, you will be prompted to enter a vendor, contact name and a reference. Next you will choose the part(s) to be added to the PO. The process of choosing parts is the same as a standard

PO, with one significant difference. After the interchange is selected, a new input screen is displayed which allows you to enter the quantity ordered as well as cost per item or a total cost. If you choose to enter a cost per item, the total is automatically calculated by multiplying that cost by the quantity ordered. Conversely, if a total price is entered, the cost is automatically calculated by dividing the total cost by the quantity ordered. Once this is saved, the parts ordered will be added to the PO. Although the price per unit has already been defined, it is possible to change each individual part's price the same as you would on any other PO. Additionally you can add parts by selecting "Pick Parts" and the same process described above is used to add these additional new parts. Once all of the parts have been added, the PO can be completed by selecting "Complete."

Receive New Parts PO

In order to receive parts on a misc. new parts PO, you need to go into "View/Edit PO" within the purchase order module and select the purchase order. Once in the purchase order, each item needs to be received individually by highlighting the line item and typing "R" to receive. For each line item, the received by and received date needs to be entered. Once the appropriate items have been received, the purchase order needs to once again be completed by selecting "Complete." After the freight information has been reviewed, a new prompt has been added which gives the option to add the newly received parts directly into Pinnacle's inventory.

If "Yes" is selected, you are immediately prompted to enter the stock number that will be used to inventory the associated parts. This, of course, must be a valid stock number created through "Create/Edit Misc. Stock Number." Next you are asked to create an alternate index, either select yes or no. Following alternate index, you are taken to the new parts input detail screen. This is the same screen that is used within the "Input New Parts" module, however a new menu item has been added which will give you access to the new parts pricing module for that interchange. Within the new parts pricing module, you can update the standard, retail and wholesales prices as well as update the minimum stock level for new parts with that interchange. Once out of the pricing module you have the option to "Save" or "Save & Print Tags." After all of this information is saved, those parts will have been added into inventory.

If you answer "No", you can always go back into the PO and receive them again. At this point you will again be prompted to enter the parts into stock.

New Parts Pricing Module

As mentioned above, it is now simpler to access the new parts pricing module. Not only can the new parts pricing module be accessed when inputting new parts, but through the find screen as well. This means that you can get into the "New Parts Pricing Module" for any IC by just looking up the part type in "Sales."

Report Enhancements

New Part Stock Level Report (T19)

The T19 report has been modified to include some new criteria. The View criteria has been expanded to include over & under priced parts, unpriced parts with activity, all parts with activity & stock, and all price level & stock level problems. Within the report itself, new columns have been added for average sales price, recommended stock level (based on J. Counts formula), new cost, wholesale and retail price and alternate index number.

PO Detail Report (P3)

The P3 report has been modified to include new criteria for tracking new parts purchase orders. A new criterion has been added called "Type of PO," which can be ordered by new parts, used parts or all parts.

Shakedown Report (T4)

The T4 report has been modified to show the TOTAL COST for New parts at the end of the report.

Addition of Shakedown Report – Shakedown with Recommendations (T4A)

An enhanced version of the T4 report (Shakedown) has been added called the T4A (Shakedown w/ Recommendations). This report can be found in two places, either 'Management' -> 'Stock reports' -> 'Shakedown w/ Recommendations' OR 'Inventory' -> 'Invoice Reports' -> 'Shakedown w/ Recommendations.' In addition to the data found on the T4, the T4A includes the following fields:

-Recommended QOH for the IC#
-Total QOH for the IC# (Includes all parts)
-Requests for the IC#
-Not Found Requests for the IC#
-# of Sales for the IC#
-Average Sale for the IC#
-Mileage for the Stock#

An associated preference has been added for this report under the group 'REPORTS' called 'T4A rep.: blank-all, W-W parts, Y-Y parts.' If this preference is left blank, the report will be generated taking all parts into account regardless of the status, if set to 'W,' the report will include only 'W' status parts and if set to 'Y,' the report will only include 'Y' status parts.

Within the preference group STATS, you can define long and short term stats as it pertains to the T4A report. There is now an additional preference called 'short term stats' which can be defined the same as long term stats.

Full Invoice Report (S12)

Modifications to this report include the following: Salespersons initials, initials of individual that created the WO, stock #, PO # (listed as PO ####), freight cost (which is only shown with the first item sold on any invoice), and customer business type. The report criteria can now be selected to define multiple business types prior to generating.

Detailed Quotes Report (Q4)

The Q4 Report will show number of converted quotes with a valid claim No.

Account Transaction Report (A2)

The A2 report has now been modified to give the ability to show a salesperson associated with a specific account as well as the associated quote. There are three new preferences that need to be set to make this work. The first is located in the group ACCOUNTS called 'Is a salesperson responsible for an acct.' This preference must be set to yes for the other two to work. Within the group REPORTS there are an additional two new preferences, the first is called 'Print Salesperson Associated on A2' and the second is 'Print Quote Number on A2.' When set to yes, the salesperson and/or quote number will print on the A2 report. This is only relevant if a salesperson is in fact assigned to an account. Assigning a salesperson to an account is done within Create/Modify Account