



Pinnacle Release

v3.1



Actual Systems of America
Information & Communication Worldwide

Sales Module Enhancements

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.

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.

Print Parts Found Report Modified:

In the search results under options > print parts found the column PART/MODEL has been widened to allow more room for the part description and model description.

Surplus Parts:

In the search results screen surplus parts will now show their specified location.

Inventory Module Enhancements

Move Parts in Bulk from Location to Location or Multi-location to Multi-location:

There is a new feature under Inventory > Utilities called Move Stock. When in move stock there are two new options available: "Parts: Location -> Location" and "Location: Multi-location -> Multi-location".

The feature Parts: Location -> Location allows a user to move all of the parts in one location to another location. When this is selected a location will need to be entered then it will prompt for the location where the parts will be moved to. Once this is entered it will display how many parts are in that location and if this is correct to move these parts.

The feature Location: Multi-location -> Multi-location is for an ABC configuration yard. It gives the ability to move parts in one multi-location to another multi-location. When this is selected a location will need to be entered and it will prompt for the multi-location this location exists. Once the multi-location is selected it will prompt for the multi-location these parts will be moved to. After the multi-location is entered it will display how many parts will be moved and make sure this is correct.

Crush Vehicle:

When a vehicle that does not have a dismantled status is crushed the message on removing all parts has been changed. It used to read "Vehicle not dismantled. Remove ALL parts?" and it now reads "Vehicle not dismantled, remove ALL parts? (Select Y to remove status W,Y,U,C,S parts, select N to remove only Y,U parts)

Multi-location PIA Export:

There are now different directories for a multi-location PIA export. When generating a pdr the location that the user is logged in when he/she answers yes to make PDR available to the handheld is the directory that vehicle will be exported to. Each multi-location will have its own directory to export to PIA. This makes only vehicles that pertain to that location to appear on the PIA for inventory purposes.

Input Assembly and Assembly Parts thru Single Part Entry:

Under Inventory > Single Part Entry an assembly may be entered along with its assembly parts. Once the assembly is selected and saved a prompt will pop up asking "Input assembly parts?". When Yes is selected a list of defined assembly parts will appear. To select or de-select a part use the space bar. When a part is selected a box will pop up prompting for a price. Once all the parts are selected go to save and it will prompt "Input selected parts as assembly parts?". When yes is selected the assembly and its sub-parts will be entered. The assembly and its sub-parts can be further modified thru Inventory > Utilities > Modify Part.

Management Module Enhancements

Price Unpriced Parts:

A new feature has been added under Management > Utilities called Price unpriced part. In this feature it will list all of the unpriced parts in inventory displaying the tag number, part, stock number, year, model and location. When a part is selected it will bring up a box displaying the set price, new cost price, price last sold, list price and selling price. When a price is entered in the selling price field it will become the actual price for that part. If the standard b price is zero the selling price will also become the standard b price

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.

Treat Complete Vehicle as a Regular Part:

There is a new preference to treat a complete vehicle like a part in inventory. In Management > Utilities > Technical > User Preferences > Edit Preferences – go to ADMIN then group INVENT there is a preference “Treat Complete Vehicle as a regular part”. If this is set to “Y” the complete vehicle will be treated like a part where the condition, repair hours, status, comments, location and price can be entered. If the status of the vehicle is W the vehicle will now be able to have a tag printed for it.

Multi-location Move MVR Function:

There is a new preference to allow certain users from an ABC Configuration to move an mvr from one multi-location to another. Under Management > Utilities > Technical > User Preferences > Edit Preferences – go to the user that needs access – then go to GROUP INVENT. There is a preference “User can change vehicle’s multi-location”. If set to yes that particular user has access to move an mvr from one multi-location to another.

To move an mvr go into Inventory > Create/Edit MVR. Find the particular stock number that should be moved then go to section 1 which displays the yard location and the multi-location. When highlighted on the multi-location select page up which will list all of the multi-location options then choose the one the mvr should be moved to.

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.

Remaining Parts Report (T21) Additions:

This report now shows days in stock for a vehicle stock number. Days in stock is displayed to the right of stock number, year, model and color for each vehicle on the report.

Sales by Screen Suggestion (S28):

The Sales by Screen Suggestion report has been modified to exclude new part sales.

Assigning Users to Groups:

There is now an option to create groups and assign users to them. When a group is created security settings can be made for that group and when a user or users is assigned to that group they will automatically take on the groups security settings. In Management > Utilities > Users- go to New and there is now an option to create a user or group. When the group is created go to Management > Utilities > Technical > Security Settings – then go to the group created and hit enter. Now just like a user a group can have specific security settings.

A new or existing user may be assigned to a group. Once the user or users are assigned to a group they will take on the group's security settings. For example a sales group can be created and all of your salesmen can be assigned to that group and they will all take on the security settings of that group. This ensures that all of those users have the exact same security and saves time from having to go into every user and create security settings individually.

Re-calculate Group Close Rates by Specific Date:

Now have the ability in re-calculate group close rates to pick a specific cutoff date. Under Management > Utilities > Technical > Re-calculate Group close rates there is now a date field to enter in. It will default to today's date but that may be overridden to an earlier date. The date entered is the cutoff for the close rate statistics. Anything after the date entered will not be calculated in the close rate. Example: If it is in the middle of the month and you want to recalculate group close rates based on the end of the previous month then that date can be entered in and it will recalculate the close rate based on the end of the previous month.