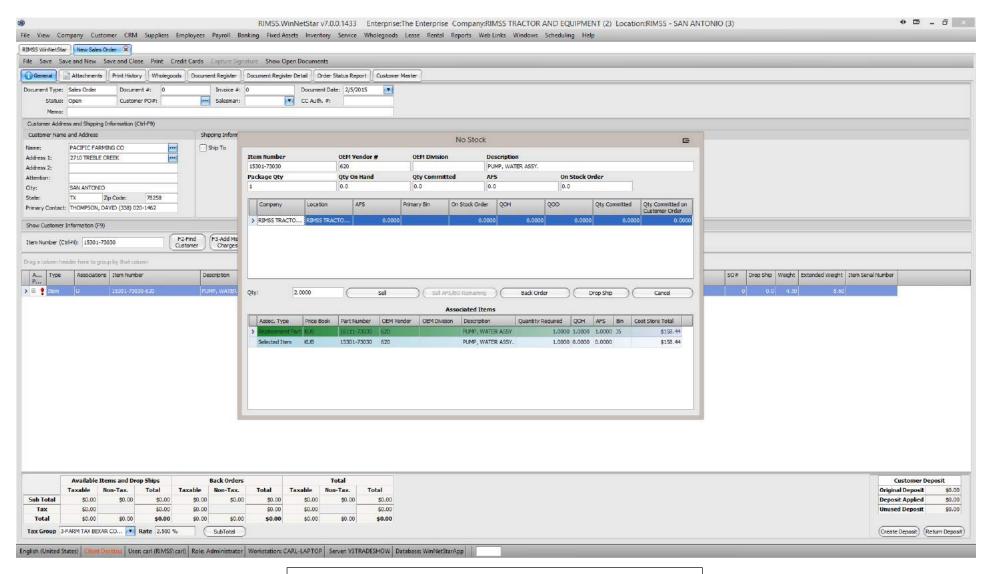# 2015 WinNetStar Training Classes

Replacement Parts

Software Development-M1

RIMSS Business Systems Technology

Replacement Parts

The No Stock popup includes information for Associated Items.
This feature allows the user to see Replacement Part information.

Item Number	OEM Vendor #	OEM Division	Description
15301-73030	620		PUMP, WATER ASSY.

Package Qty	Qty On Hand	Qty Committed	AFS	On Stock Order
1	0.0	0.0	0.0	0.0

	Company	Location	AFS	Primary Bin	On Stock Order	QOH	QOO	Qty Committed	Qty Committed on Customer Order
>	RIMSS TRACTO...	RIMSS TRACTO...	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000

Qty: 2.0000   [Sell]   [Sell AFS/BO Remaining]   [Back Order]   [Drop Ship]   [Cancel]

Associated Items

	Assoc. Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity Required	QOH	AFS	Bin	Cost Store Total
>	Replacement Part	KUB	16111-73030	620		PUMP, WATER ASSY	1.0000	1.0000	1.0000	J5	$158.44
	Selected Item	KUB	15301-73030	620			1.0000	0.0000	0.0000		$158.44

Replace Item

Add Item

Show All Associations

From this window, a user can right-click on a line item and either Replace an Item, Add an Item or show all of Replacement part information.

Reviewing Replacement Part Information

	Inactive	Associations	Has Associations	Data Source	Price Book	Oem Vendor	Item Number	Description	Primary Bin	QOH	Committed	AFS	Cost PCore	Average Cost	Dollar Value	Cost Store Total	List Store Total	Trade Store Total	Last Sale Date	Last Received	Current Month Sales	Previous 12 Months Sales
			■																			

The Inventory Master screen contains two items in helping the user view Replacing Part information. The Has Associations is a check box that shows the user that there is replacing information available. The Associations box will show the user a code if there is any type of replacement information. The codes are U, D, S, A or C. The U code denotes an Upstream part or newer part is found. The D code denotes a Downstream part or older part is found. The S code denotes a Supplemental part is found. An A code represents an Accessory part and lastly, the C code, denotes that a Component part is found in the chain.

Add New   Refresh   Print   Layouts   Bin Labels   Manual Entry

Location	Price Book	Item Number	OEM Vendor	OEM Division	Item Description
RIMSS TRACTOR AND E... ▾	All Price Books ▾		ALL ▾		

Fetch

Category	Group	Class	Pricing Source	Stock Class	
▾	▾	▾	▾	▾	☐ Include Catalog

Drag a column header here to group by that column

Inactive	Associations	Has Associa...	Price Book	Oem Vendor	Item Number	Description	Primary Bin	QOH	Committed	AFS	Cost PCore	Average Cost	Dollar Value	Cost Store Total	List Store Total	Trade Store Total	Last Sale Date	Last Received	Current Month Sales	Previous 12 Months Sales
⏷	U	☐																		
⊞ False	U	☑	KUB	620	01025-60614	BOLT ***		0.0	0.0	0.0	$0.00	0.3100	$0.00	$0.31	$0.47	$0.31	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	01125-60816	BOLT, M08X25 ***	K6	0.0	0.0	0.0	$0.00	0.3200	$0.00	$0.32	$0.48	$0.32	9/14/2007	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	01125-60820	BOLT, M6XL14 MM SEMS ...		0.0	0.0	0.0	$0.00	0.3100	$0.00	$0.32	$0.48	$0.32	2/14/2011	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	01513-60825	STUD ***	K6	0.0	0.0	0.0	$0.00	0.4500	$0.00	$0.47	$0.70	$0.47	11/13/2007	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	01517-61025	STUD ***		0.0	0.0	0.0	$0.00	0.6200	$0.00	$0.62	$0.92	$0.62	8/26/2013	4/5/2013	0	0.0000
⊞ False	U	☑	KUB	620	01574-61240	STUD ***		0.0	0.0	0.0	$0.00	0.8700	$0.00	$0.90	$1.34	$0.90	5/17/2011	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	01754-60816	BOLT, FLANGE (M8) ***	K6	0.0	0.0	0.0	$0.00	0.8400	$0.00	$0.90	$1.34	$0.90	3/26/2014	1/1/0001	0	7.0000
⊞ False	U	☑	KUB	620	01774-61025	BOLT, FLANGE ***		0.0	0.0	0.0	$0.00	1.1200	$0.00	$1.12	$1.66	$1.12	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	02074-60160	NUT ***		0.0	0.0	0.0	$0.00	0.6600	$0.00	$0.66	$0.99	$0.66	7/1/2009	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	02374-50220	NUT** *		0.0	0.0	0.0	$0.00	7.0000	$0.00	$7.21	$10.71	$7.21	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	02763-60080	NUT, FLANGE ***		0.0	0.0	0.0	$0.00	0.4500	$0.00	$0.47	$0.70	$0.47	9/28/2009	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	03017-50525	SCREW, BINDING HEAD ***	K7	0.0	0.0	0.0	$0.00	0.1400	$0.00	$0.15	$0.22	$0.15	5/4/2011	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04013-00080	WASHER, FLAT ***		0.0	0.0	0.0	$0.00	0.0700	$0.00	$0.07	$0.10	$0.07	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04015-60060	WASHER, PLAIN ***		0.0	0.0	0.0	$0.00	0.1400	$0.00	$0.15	$0.22	$0.15	5/31/2011	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04512-50160	WASHER, M16 SPRING LO...	K7	0.0	0.0	0.0	$0.00	0.1400	$0.00	$0.15	$0.22	$0.15	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04512-60060	WASHER, SPRING ***	K7	0.0	0.0	0.0	$0.00	0.0700	$0.00	$0.07	$0.10	$0.07	10/11/2012	9/11/2012	0	0.0000
⊞ False	U	☑	KUB	620	04512-60080	WASHER, SPRING ***	K7	0.0	0.0	0.0	$0.00	0.0700	$0.00	$0.07	$0.10	$0.07	4/28/2014	9/30/2011	0	1.0000
⊞ False	U	☑	KUB	620	04512-60120	WASHER, LOCK SPRING M...		0.0	0.0	0.0	$0.00	0.0700	$0.00	$0.07	$0.10	$0.07	8/26/2013	4/5/2013	0	0.0000
⊞ False	U	☑	KUB	620	04512-60140	WASHER, SPRING M14 ***		0.0	0.0	0.0	$0.00	0.0700	$0.00	$0.07	$0.10	$0.07	8/26/2013	4/5/2013	0	0.0000
⊞ False	U	☑	KUB	620	04810-00100	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.5600	$0.00	$0.63	$0.94	$0.63	12/11/2013	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04810-00110	O-RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.5200	$0.00	$0.52	$0.78	$0.52	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04810-00120	O-RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.5200	$0.00	$0.52	$0.78	$0.52	5/17/2011	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04810-00140	O-RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.7300	$0.00	$0.73	$1.09	$0.73	8/29/2011	9/20/2011	0	0.0000
⊞ False	U	☑	KUB	620	04810-00200	O-RING***	FILE CAB	0.0	0.0	0.0	$0.00	0.5600	$0.00	$0.47	$0.70	$0.47	7/1/2005	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04810-07230	O RING ***		0.0	0.0	0.0	$0.00	0.0000	$0.00	$0.94	$1.40	$0.94	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04811-00090	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.2800	$0.00	$0.28	$0.42	$0.28	7/17/2009	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04811-00140	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.2800	$0.00	$0.28	$0.42	$0.28	12/29/2009	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04811-00150	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.2800	$0.00	$0.55	$0.81	$0.55	2/2/2012	4/20/2012	0	4.0000
⊞ False	U	☑	KUB	620	04811-00180	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.2800	$0.00	$0.34	$0.50	$0.34	2/12/2014	1/1/0001	0	1.0000
⊞ False	U	☑	KUB	620	04811-00200	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.2800	$0.00	$0.76	$1.12	$0.76	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04811-05250	O RING ***	FILE CAB	0.0	0.0	0.0	$0.00	0.6600	$0.00	$0.66	$0.99	$0.66	12/4/2008	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620	04811-06370	O-RING	FILE CAB	0.0	0.0	0.0	$0.00	1.1500	$0.00	$1.19	$1.77	$1.19	1/1/0001	1/1/0001	0	0.0000
⊞ False	U	☑	KUB	620		O-RING ***		0.0	0.0	0.0							1/1/0001	1/1/0001	0	0.0000
1,185								0.00	0.00	0.00	392.42	124.80	-0.02							

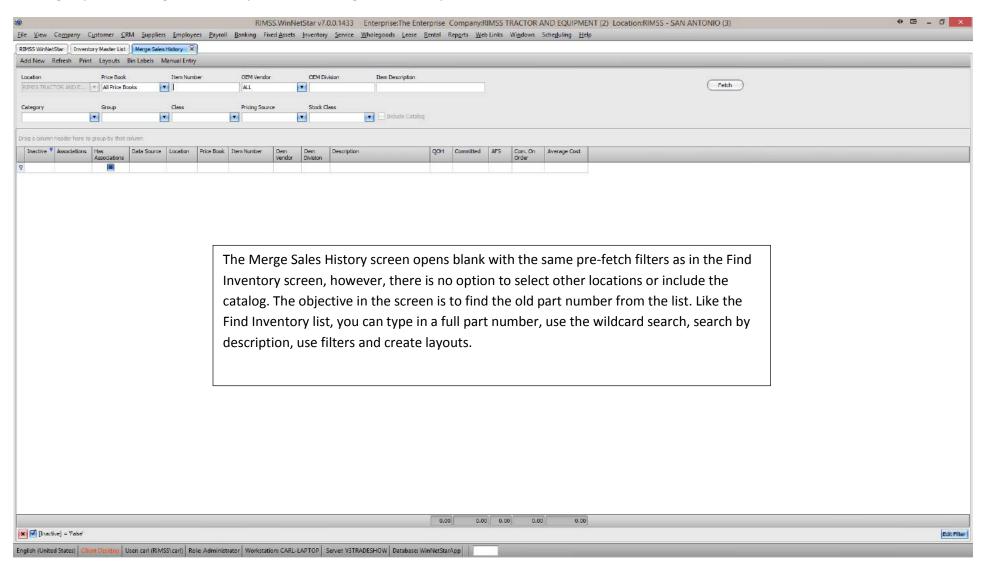❌ ☑ [Inactive] = 'False' And [QOH] = '0.0' And [Associations] = 'U'   Edit Filter ▾

A good way for a user to find obsolete parts, or those that should be merged to a new part number is to open the inventory list and fetch all parts. From there create a filter for all parts with a U in the Associations and a Quantity On Hand of zero. This report represents all parts that should be reviewed and possibly merged with the most current part number.

| > | ⊟ False | U | ☑ | KUB | 620 | K2501-62500 | PANEL, CLUSTER *** | 0.0 | 0.0 | 0.0 | $0.00 | 148.5300 | $0.00 | $148.53 | $220.67 | $148.53 | 1/1/0001 | 1/1/0001 | 0 | 0.0000 |

| Prices | Associations | Locations |

Drag a column header here to group by that column

	Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity Required	QOH	AFS	Bin	Cost Store Total
>	Replaceme...	KUB	K2501-62502	620		PANEL CLUSTER ***	1.0000	1.0000	1.0000	H7	148.530000
	Selected Item	KUB	K2501-62500	620		PANEL, CLUSTER ***	1.0000	0.0000	0.0000		148.530000

This part represents a candidate that should be replaced. Part number K2501-62500 has zero on hand, its replacement K2501-62502 has one on hand. A user could mistakenly try to sell the old part number, see that there are no on hand and then back order the part. Steps that can be avoided by merging the old part into the new part. Now, let's go and merge the old part number into the new part number.

Merging Part Numbers

To merge a part number go to Inventory > Utilities > Merge Sales History.

The Merge Sales History screen opens blank with the same pre-fetch filters as in the Find Inventory screen, however, there is no option to select other locations or include the catalog. The objective in the screen is to find the old part number from the list. Like the Find Inventory list, you can type in a full part number, use the wildcard search, search by description, use filters and create layouts.

Add New   Refresh   Print   Layouts   Bin Labels   Manual Entry

Location	Price Book	Item Number	OEM Vendor	OEM Division	Item Description
RIMSS TRACTOR AND E... ▼	All Price Books ▼	K2501-62500	ALL ▼		

Fetch

Category	Group	Class	Pricing Source	Stock Class	
▼	▼	▼	▼	▼	☐ Include Catalog

Drag a column header here to group by that column

Inactive ▽	Associations	Has Associations	Data Source	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOH	Committed	AFS	Com. On Order	Average Cost	Current Item # - Sales History
▽		☐													
⊟ False	U	☑	Location	RIMSS T...	KUB	K2501-62500	620		PANEL, CLUSTER ***	0.0	0.0	0.0	0.0	148.5300	K2501-62500-620

"Fetching" with no filter criteria will produce a list of all parts in your system. The format of the screen is similar, however, you may want to add a new column from the Column Chooser, Current Item # - Sales History. This column will help distinguish parts that have been merged and the new master part number related to that merge, showing the most current part in that column . This list can be modified, like the Find Inventory List, to include other columns and allow for grouping.

	0.00	0.00	0.00	0.00	148.53

☒ ☑ [Inactive] = 'False'   Edit Filter

Add New   Refresh   Print   Layouts   Bin Labels   Manual Entry

Location	Price Book	Item Number	OEM Vendor	OEM Division	Item Description
RIMSS TRACTOR AND E... ▼	All Price Books ▼	K2501-62500	ALL ▼		

Category	Group	Class	Pricing Source	Stock Class	
▼	▼	▼	▼	▼	☐ Include Catalog

Fetch

Drag a column header here to group by that column

	Inactive	Associations	Has Associations	Data Source	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOH	Committed	AFS	Com. On Order	Average Cost	Current Item # - Sales History
▼			☐													
⊞	False	U	☑	Location	RIMSS T...	KUB	K2501-62500	620		PANEL, CLUSTER ***	0.0	0.0	0.0	0.0	148.5300	K2501-62500-620

> Copy
> Merge Sales History
> Show Documents
>
> Record Lost Sale

To initiate the Merge, right-click on the line item. There will be three option, Copy, Merge Sales History and Show Documents. Copy only copies the part number to allow you from having to retype it in a list. Merge Sales History begins the process to merge the sales history between two parts. Show Documents shows all transactions of a part.

| | 0.00 | 0.00 | 0.00 | 0.00 | 148.53 |

✖ ☑ [Inactive] = 'False'   Edit Filter

The Show Documents is a transaction detail of the part. From here you will be able to determine any open documents that may prevent you from merging sales history between two parts. The Show Documents is also available in the Find Inventory List, so this list can be used to show related documents for parts that are committed.

Merge Sales History

Old Item Number: K2501-62500-620

New Item Number: [_____] [...]

- [ ] Move Quantities from Old to New
- [ ] Copy Pricing Source from Old to New
- [ ] Copy Stock Source (including any overrides) from Old to New
- [ ] Copy Accounting Source from Old to New
- [ ] Copy Stock Class from Old to New
- [ ] Copy Raw Manufacturer Pricing from Old to New
- [ ] Copy # of Pricing Units in Cost from Old to New
- [ ] Copy Set Multiple from Old to New
- [ ] Copy Package Multiple from Old to New
- [ ] Copy Associated Misc. Charges from Old to New
- [ ] Copy Minimum Order Quantity from Old to New
- [ ] Copy Old Item #, UPC and SKU into the Secondary ID field of the New Item
- [ ] Inactivate Old Item Master Record

[OK]   [Cancel]

The Merge Sales History option will show this pop-up. The first thing is to find the New Item Number by clicking on the ellipses to initiate the item search. The next check boxes are all determined by the user. That means it is up to the person making the change from the old item to the new item to check the correct boxes that are important to the dealership.

Of note…

Move Quantities from an old part number to a new part number will automatically create an Inventory Adjustment.

Copy Raw Manufacturer values copies the pricing set by the price file or manually set by the user.

Copy Old Item#, UPC and SKU to the Secondary ID allows a user to still search by the original/old part number in Find Inventory or from a POS Document.

Inactivating the Old Item Master will set this part to Inactive, meaning that it will not be shown in a list, unless the Inactive filter is turned off.

In the event that a part needs to be unmerged, the right-click option will show a new option to Un-Merge Sales History. The un-merge will only break the chain between the two parts. An Inventory Adjustment would be required to move quantities back to the original part, along with changing any sourcing, pricing, etc. This process should be handled with care knowing all implications beforehand.