
PINNACLE

PROFESSIONAL

UPDATE RELEASE NOTES

18.2

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Back Order Functionality



Solera

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18.2 Contents

Back order functionality

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18.2 Build Release Notes

1.How to raise a back order in Pinnacle

New Functionality to Pinnacle Pro 18.2 is the the ability to back order parts currently not in stock.

Pinnacle now allows you to list parts and quantity of parts that customers are wanting and then notifies the user who created the back orders that the stock is now available to fulfil this order and then create a work order and invoice.

Example Scenario / How to

Customer contacts the yard looking for a Engine for a 2007 Mini Cooper, you search for the engine and find you have none and the customer is happy to wait a period until this part comes into stock

(Kevin - RHE) Item/IC Search: 2007 MINI Engine IC B2270 A (Kevin - RHE) Search Results: 3 - Pinnacle Professional VIN: WMMWF32060TV52077

File Edit Options Help

Quote Work Order Extra Broker Vehicle Print Parts Found IC Apps Report Sell on eBay Sell on Trade Me Exit

Item/IC Search: 2007 MINI Engine IC B2270 A

Enable Drag and Drop IC: Mik2 (R55/R56/R57) 1.6 Petrol Engine, Code N12B16A 116/120bhp (Cooper) (2006 - 2010)

Found Parts

X	Seq	Description	Model	Year	ODO	Dam.	C	Comments	IC	Ext. Col. Code	S	Age	Act. Price	Colour	L	Std. Price	Images	Resolve	Site	Tag	Stock #	quantity	altIndex	Audic
<input type="checkbox"/>	0	Engine	MINI	2008	33		A	N12B16A 11000444886	B2270 A		Y		0	Green/Hi...							007702	1		
<input type="checkbox"/>	1	Engine	MINI	2007	52		A	N12B16A 11000444886	B2270 A		Y		0	Black/Hi...							007672	1		
<input type="checkbox"/>	2	Engine	MINI	2007	0		A	N12B16A 11000444886	B2270 A		Y		0	Black/Hi...							007650	1		

To create a back order for the part in question simply follow the below steps to access the BackOrder Parts screen.

- Select a customer in the search bar at the top left of the screen
- Go to Options and then Backorder Parts

The below screen will now appear detailing the part you have searched for and you are raising a back order against.

Backorder Quantities

☒ Expires 28/01/19

☐ For export

Description	Model	Start Year	End Year	IC	Quantity
Engine	MINI	2007	2007	B2270 A	1

OK Cancel

2. BackOrder Options

There are two Options to choose between:

Expiry – Typically used if the customer indicates a time period, they are happy to wait for.

Export – If you want to keep track of item requirements to fill an export list such as a freight container.

For expiry the user can simply pick a date to populate the field from the available calendar using the drop-down button.

The quantity field is the only editable field and you can stipulate how many parts of this type you wish to place on back order.

Once completed click ok.

Once the parts arrive in stock the Pinnacle user who created the back order is notified via email.

Backorder Quantities

☒ Expires 28/01/19

☐ For export

Description	Model	Start Year	End Year	IC	Quantity
Engine	MINI	2007	2007	B2270 A	1

OK Cancel

3. BackOrder Monitoring

Back Orders created can be monitored on the Pinnacle home screen by adding the Backorder Control Center to the home screen of Pinnacle.

Do this by selecting File > control center > backorder

Nov 29, 2018 5:00:06 PM Status Polling eBay Successful

View Errors/Warnings

Order #	Expires	Customer	Who Created	Site	# Parts Required	# Parts Available	# Parts Not on Or...
13	28/01	Kevin Gray	Kevin	RHE	1	0	1

User: Kevin | Site: RHE | Secured

4. How to Create a Work Order for a back order

Once the Available parts meet the back-order Parts Required status, a work order can be created.

- Double click on the Back order that can be fulfilled from the Backorder Control Center.
- Select the Part you want to complete the order for.
- Then go to Create WO in the top left of the screen.
- From here you will be able to complete and Invoice the Order.

The screenshot shows the 'Pinnacle Professional' Backorder Control Center window. The title bar reads '(kevin - RHE) Backorder: 228 - Pinnacle Professional'. The menu bar includes 'File', 'Edit', 'Action', and 'Help'. Below the menu are three buttons: 'Create WO', 'Cancel Backorder', and 'Remove items'. The main area displays 'Backorder Number 13' and 'Customer Kevin Gray' with a dropdown arrow. Below this is a table with three columns: 'Description', 'Order Number', and 'Available Part'. The first row of the table contains 'MINI Engine IC B2270 A' in the 'Description' column, an empty 'Order Number' column, and a checked checkbox in the 'Available Part' column. The bottom status bar shows 'User: kevin', 'Site: RHE', and 'Secured' with a lock icon.

Description	Order Number	Available Part
MINI Engine IC B2270 A		<input checked="" type="checkbox"/>

Please note Future enhancements are planned to develop this Backorder functionality further.

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