

Parts Manager Conversation

Collaborate with your Parts Manager to answer the following questions. Use this opportunity to share new ideas from the class and to coach your Parts Manager on how they can be implemented. Be sure to respect their expertise. **Provide your answers in a different color font.**

1. What formal parts management training does your parts manager have (for example, the NADA Academy Seminar)?
Achieved Parts Manager Master Level University of Toyota
2. Does your Dealership/Parts department have a Vision statement that all departmental employees know and understand? What is it?
3. Have you ever tracked your First Time Fill Rate (FTFR) manually (not using the DMS or your OEM)? What is your current Repair Order FTFR?
Yes
4. What percentage of your business comes from Inside (RO/Internal/Warranty/Body Shop) vs Outside (Counter Retail & Wholesale)?
90/10
5. What policies, controls, and security are in place on your DMS (via Privileges and/or the Exception or Deviation Reports) to prevent counter people from changing the pricing structure during daily transactions?
Cost Lock out. all price adjustment on ROS use coupons / Fee codes
6. Who can change/override parts pricing? Cashier? Service Director/Manager? Service Advisors?
None
7. Are you at Retail pricing for Internal? Who established your Internal parts pricing policies? Are they current?
Retail, upper management, yes current.
8. If you are in a Retail Reimbursement for Warranty state, are you at retail for warranty? If not, when was the last time you petitioned the OE for retail reimbursement?
Yes.
9. Do the Parts, Service and Body Shop Managers work with the Office Manager/Controller monthly to follow up on all Work in Process (WIP) documents. Do they verify that all parts invoices and repair orders are closed out in a timely manner? What does this look like?
10. Is the financial statement for the Parts department given to the manager and discussed on a weekly/monthly basis? If not, is a daily operating report of sales, gross profit, etc., provided to the Parts Manager for review (DOC)?
Daily DOC.
11. What is your retail pricing strategy for your Parts department? How often do you check to see whether your pricing goals are being achieved?
*Tiered Retail small \$ ↑
Large \$ ↓*

12. How often do you audit your dealership's Parts web page? How often are coupons, hours of business, etc., reviewed and updated? *Monthly*
13. Do you have a Parts online eStore? How do you ensure that parts order forms/queries are responded to in a timely manner? Who gets the email leads/questions?
being set up. Toyota
14. What sales training is available to Parts personnel? If training is available, is it mandatory? How often are sales skills assessed, tested, and refreshed?
University of Toyota
15. Do you have a process to offer accessories to 100% of your New and Used customers? If so, what does it look like? If not, why not?
16. What would help you sell more accessories?
17. Do you review your wholesale customers to see if their sales, gross, and returns justify the expense of conducting business with them? How often are they reviewed?
Continuous.
18. Do you know how much each of your Parts salespeople must sell each day just to breakeven?
Yes.
19. What procedures do you have in place to ensure inventory accuracy and integrity? How are variances communicated to the accounting office?
Inv. Adjustments are made on an Invoice/Policy
20. Are lost sales being tracked in your DMS? Do you have a common definition that all counter people understand? What is your definition?
Yes. If demand can not be filled past LS.
21. What is the biggest obstacle to getting your Special Order parts off the SOP shelves and installed/picked up?
No prepaid on service RO's.
22. In your store, what do you feel is the biggest cause of frozen capital and/or obsolescence? What is the current dollar value of your obsolescence?
Ø
23. What is your phase in/phase out strategy? How do you balance this strategy with factory recommended stocking guidelines (RIM, ARO, Parts Eye, etc.)?
3 mo. w/demand PE 9 mo w/o demand PE
24. On a scale of 1-10 (10 = expert level) what is your level of understanding of the information that is on your DMS's monthly summary?
8
25. What is the one thing that your organization can do or provide to help the Parts Manager do their job more effectively?
DMS Access.

Part number	Part description	Class	SO	Qty Ord	Qty Fill	Qty B.O.	SOR	12 MO Sales	SS
04009-86125	KIT, PUMP, FUEL		999	1	1	0	N	204	
04009-95106	HOOK, REAR SEAT CUSH		999	2	2	0	N	437	
Total number of ROs for TOYOTA:			48	(Make Subtotal)					
- That required a Special Order:			5	SORs required rate:				10%	
- With all parts filled on the Same Day:			43	Same Day fill rate:				90%	
Total number of ROs for 31JUL21:			49	(Daily Subtotal)					
- That required a Special Order:			5	SORs required rate:				10%	
- With all parts filled on the Same Day:			44	Same Day fill rate:				90%	
Total number of ROs for ACURA:			3	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			3	Same Day fill rate:				100%	
Total number of ROs for AUDI:			1	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			1	Same Day fill rate:				100%	
Total number of ROs for BMW:			4	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			4	Same Day fill rate:				100%	
Total number of ROs for CADILLAC:			1	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			1	Same Day fill rate:				100%	
Total number of ROs for CHEVROLET:			4	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			4	Same Day fill rate:				100%	
Total number of ROs for CHRYSLER:			1	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			1	Same Day fill rate:				100%	
Total number of ROs for DODGE:			2	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			2	Same Day fill rate:				100%	
Total number of ROs for FORD:			7	(Make Grand Total)					
- That required a Special Order:			0	SORs required rate:				0%	
- With all parts filled on the Same Day:			7	Same Day fill rate:				100%	

Part number	Part description	Class	SO	Qty Ord	Qty Fill	Qty B.O.	SOR	12 MO Sales	SS	
=====										
Total number of ROs for GMC:			5	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			5	Same Day fill rate: 100%						
=====										
Total number of ROs for HONDA:			15	(Make Grand Total)						
- That required a Special Order:			1	SORs required rate: 7%						
- With all parts filled on the Same Day:			14	Same Day fill rate: 93%						
=====										
Total number of ROs for HYUNDAI:			3	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			3	Same Day fill rate: 100%						
=====										
Total number of ROs for JEEP:			2	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			2	Same Day fill rate: 100%						
=====										
Total number of ROs for KIA:			1	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			1	Same Day fill rate: 100%						
=====										
Total number of ROs for LEXUS:			15	(Make Grand Total)						
- That required a Special Order:			1	SORs required rate: 7%						
- With all parts filled on the Same Day:			14	Same Day fill rate: 93%						
=====										
Total number of ROs for MERCEDES BENZ:			2	(Make Grand Total)						
- That required a Special Order:			1	SORs required rate: 50%						
- With all parts filled on the Same Day:			1	Same Day fill rate: 50%						
=====										
Total number of ROs for MITSUBISHI:			2	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			2	Same Day fill rate: 100%						
=====										
Total number of ROs for NISSAN:			8	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			8	Same Day fill rate: 100%						
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Total number of ROs for RAM:			1	(Make Grand Total)						
- That required a Special Order:			0	SORs required rate: 0%						
- With all parts filled on the Same Day:			1	Same Day fill rate: 100%						
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Part number	Part description	Class	SO	Qty Ord	Qty Fill	Qty B.O.	SOR	12 MO Sales	SS
=====									
Total number of ROs for SCION:		2		(Make Grand Total)					
- That required a Special Order:		1		SORs required rate:		50%			
- With all parts filled on the Same Day:		1		Same Day fill rate:		50%			
=====									
Total number of ROs for SUBARU:		4		(Make Grand Total)					
- That required a Special Order:		0		SORs required rate:		0%			
- With all parts filled on the Same Day:		4		Same Day fill rate:		100%			
=====									
Total number of ROs for TOYOTA:		1464		(Make Grand Total)					
- That required a Special Order:		156		SORs required rate:		11%			
- With all parts filled on the Same Day:		1308		Same Day fill rate:		89%			
=====									
Total number of ROs for VOLKSWAGEN:		2		(Make Grand Total)					
- That required a Special Order:		0		SORs required rate:		0%			
- With all parts filled on the Same Day:		2		Same Day fill rate:		100%			
=====									
Total number of ROs for 01JUL21-31JUL21:		1549		(Report Grand Total)					
- That required a Special Order:		160		SORs required rate:		10%			
- With all parts filled on the Same Day:		1389		Same Day fill rate:		90%			
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EH&S Achievements

Code	Description	Hrs	Date	Code	Description	Hrs	Date
EHM001:	Expires 08/19/2023	8.0	08/19/2020	EHM001:	Expired 05/23/2020	8.0	05/23/2017
EHM001:	Expired 04/14/2017	8.0	04/14/2014	EHM001:	Expired 05/04/2014	8.0	05/04/2011
EHM001:	Expired 05/03/2014	8.0	05/03/2011	EHM011:	04/15/2014	8.0	04/15/2014
EHM011:	05/02/2011	8.0	05/02/2011				

Course Achievements

Code	Description	Hrs	Date	Code	Description	Hrs	Date
S4178	Leading Team Meetings Webinar	1.0	05/27/2021	RBN226	Optimizing Parts Operations and Toyota Inve	2.0	01/28/2021
S2130	TXM Launch Meeting	8.0	09/20/2017	RNY10	Intro to Inventory Control	8.0	05/12/2016
RBN46	Soft Skills Selling for Service Drive	4.0	06/02/2015	GDWL07	Fixed Ops 2014 Region Credit	1.0	04/30/2014
E2140	Safety Recall D0F - Front Passenger Airbag	1.0	10/08/2013	S2138	Marketing Fixed Ops in the Digital Age	8.0	10/19/2012
S2122	S & P Technology	8.0	10/13/2009	SPB092	Fixed Ops Perf Group 2	8.0	09/15/2009
S8200	STAR Wholesale Meeting	8.0	04/09/2009	S8154	STAR Wholesale SOX/IRF	8.0	05/22/2008
S8134	STAR Wholesale Sox/IRF	8.0	08/02/2007	S896	Making Your Training Pay Off	8.0	06/13/2007
S422	Focused Delivery	8.0	03/13/2007	S284	STAR Wholesale Marketing	8.0	08/08/2006
S282	Hiring to Retain Toyota Associates	8.0	06/15/2006	S281	Mrktng Your Dirshp's Fixed Ops Dept	8.0	03/17/2005
S406	Coaching Strategies for Managers	8.0	05/26/2004	S275	Wholesale Parts	8.0	11/21/2003
S402	Power of Communication - Fixed Ops	8.0	09/19/2003	S259	Retailing Tires	8.0	06/04/2002
T02C2	2002 Technical New Model Course	8.0	10/23/2001	S245	Service & Parts Strategic Marketing	8.0	09/05/2000
S095	Service and Parts Personnel Mgmt	8.0	04/06/1999	S089	Toyota Parts Center (TPC)	8.0	02/25/1999
S089	Toyota Parts Center (TPC)	8.0	02/04/1999	S096	Managing for Increased S & P Profit	8.0	11/11/1998
S098	Parts Inventory Strategies	8.0	09/16/1998	S099	Service & Parts Competitive Mktg.	8.0	04/14/1998

Self-Paced Modules / Test Achievements

Code	Description	Hrs	Date	Code	Description	Hrs	Date
E4241	Toyota Engage App Mastery	0.5	01/28/2021	E4245	2020 GR Supra: Audio Multimedia	1.0	10/08/2019
E2221	Apple CarPlay Audio Multimedia Enhancement	0.5	09/20/2019	E4262	2019 Prius	0.5	08/26/2019
SC19P	Special Service Campaigns & Recalls	0.5	08/21/2019	E4261	2020 Corolla	0.5	08/21/2019
E4254	Parts Inventory Management	0.5	08/21/2019	E4253	Retention Parts Competitive Comparison	0.5	08/21/2019
E4229	Enhancing your Digital Communications	0.5	08/21/2019	E2222	Apple CarPlay Audio Multimedia Enhancement	0.5	08/21/2019
E4260	2019 RAV4	0.5	07/15/2019	E2200	Intro to Toyota Engage: Digital Learning To	0.5	07/15/2019
E2185	Warranty Parts Scrapping	0.5	07/15/2019	E245	Introduction to Reputation Management	0.5	09/14/2017
E240	Service & Parts Marketing Programs	1.0	05/12/2017	E238	Entune Essentials	1.0	09/13/2016
E4121	2016 RAV eLearning with Assessment	0.5	04/28/2016	E4120	2016 Prius Product Launch eLearning	0.5	04/28/2016
E241	Special Order Parts Made Profitable	1.0	04/28/2016	SC15P	Toyota Recall & Service Campaign Essentials	1.0	10/22/2015
E231	Parts Inventory by the Numbers	1.0	10/22/2015	E230	Parts Inventory Concepts	1.0	10/22/2015
E239	Customer First Stocking & Return	0.5	07/03/2015	E224	Applying Smart Storage Practices	1.0	11/06/2014
E125	Servicing Scion Customers	1.0	11/06/2014	SS034	Scion Says Quiz IV - 2014	1.0	10/06/2014
E227	More Essentials in Retail Tires Post Test	1.0	09/12/2014	SS033	Scion Says Quiz III - 2014	1.0	07/22/2014
E228	Bulk Brake Cleaner - Product & Refilling Sy	1.0	07/22/2014	SS032	Scion Says Quiz II - 2014	1.0	06/06/2014
SS031	Scion Says Quiz I - 2014	1.0	06/06/2014	SS030	Scion Says Quiz IV - 2013	1.0	10/10/2013
SS029	Scion Says Quiz III - 2013	1.0	09/03/2013	SS028	Scion Says Quiz II - 2013	1.0	09/02/2013
SS027	Scion Says Quiz I - 2013	1.0	09/02/2013	E3123F	2013 Toyota Avalon Fixed Ops Completion Qui	1.0	08/29/2013
E2144F	Toyota Communication Techniques	1.0	08/29/2013	E2143F	Toyota Communication Fundamentals	1.0	08/29/2013
SS026	Scion Says Quiz IV - 2012	1.0	10/12/2012	SS025	Scion Says Quiz III - 2012	1.0	10/12/2012
SS024	Scion Says Quiz II - 2012	1.0	10/12/2012	E2138	Marketing for Fixed Ops PreWork	1.0	10/12/2012

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E2138	Marketing for Fixed Ops PreWork	1.0	10/10/2012	E446F	Scion FR-S New Model Preview for Fixed Oper	1.0	10/03/2012
SS021	Scion Says Quiz III - 2011	1.0	06/04/2012	E3122F	Prius PHV & Prius c New Model Preview - Fix	1.0	03/08/2012
E3118F	2012 New Model Fixed Operations Preview	1.0	02/23/2012	SS023	Scion Says Quiz I - 2012	1.0	01/23/2012
SS022	Scion Says Quiz IV - 2011	1.0	10/10/2011	E094	Audio/Navigation Systems Featuring Entune	1.0	09/30/2011
SS021	Scion Says Quiz III - 2011	1.0	09/29/2011	SS020	Scion Says Quiz II - 2011	1.0	09/29/2011
SS019	Scion Says Quiz I - 2011	1.0	09/29/2011	SS018	Scion Says Quiz IV - 2010	1.0	09/29/2011
E3115	2011 Scion tC Product Training	1.0	09/29/2011	E3117	Scion What's New 2011	1.0	05/19/2011
E155B	Managing Your eBusiness-Mgt(FixedOps)	1.0	05/19/2011	E154	Managing eBusiness-Parts & Accessories	1.0	05/17/2011
E3115F	2011 New Model and Scion tC Product Overvie	1.0	05/14/2011	E150	Managing eBusiness-Intro	1.0	05/14/2011
SS017	Scion Says Quiz III - 2010	1.0	08/02/2010	SS016	Scion Says Quiz II - 2010	1.0	08/02/2010
SS015	Scion Says Quiz I - 2010	1.0	08/02/2010	E218	Toyota 0W-20 Synthetic Motor Oil	1.0	08/02/2010
E3113F	2011 Sienna Product Overview	1.0	05/13/2010	E3112F	2010 4Runner Product Overview	1.0	05/07/2010
E091	Scion What's New 2010	1.0	05/07/2010	E219	Parts Core Return Processing	1.0	05/05/2010
E217	Toyota Customer Care Products	1.0	05/05/2010	E215	Essentials in Retail Tires	1.0	04/30/2010
SS014	Scion Says Quiz IV - 2009	1.0	10/05/2009	SS013	Scion Says Quiz III - 2009	1.0	10/05/2009
SS012	Scion Says Quiz II - 2009	1.0	10/05/2009	SS011	Scion Says Quiz I - 2009	1.0	10/05/2009
E31094	2010 Prius vs the Competition	1.0	10/03/2009	E073	Toyota Rewards Visa	1.0	09/21/2009
SS010	Scion Says Quiz IV - 2008	1.0	11/20/2008	SS009	Scion Says Quiz III - 2008	1.0	11/20/2008
SS008	Scion Says Quiz II - 2008	1.0	11/20/2008	E059	Scion What's New 2009	1.0	11/20/2008
E063	Mentoring for Success	1.0	09/30/2008	E041	Why Buy a Toyota: SAFETY	1.0	09/30/2008
SS007	Scion Says Quiz I - 2008	1.0	02/06/2008	SS006	Scion Says Quiz IV - 2007	1.0	10/31/2007
SS005	Scion Says Quiz III - 2007	1.0	10/31/2007	SS004	Scion Says Quiz II - 2007	1.0	10/31/2007
SS003	Scion Says Quiz I - 2007	1.0	10/31/2007	E047	Scion Audio	1.0	12/13/2006
E046	Scion Safety	1.0	12/05/2006	SS001	Scion Says Quiz I - 2006	1.0	11/30/2006
SS002	Scion Says Quiz II - 2006	1.0	11/29/2006	E054	Scion What's New '07	1.0	10/02/2006
E050	Scion Competitive Advantage	1.0	10/02/2006	E033	Scion Style	1.0	07/10/2006
393	Air Conditioning and Heating II	1.0	07/10/2006	E045	4WD Simplified	1.0	07/06/2006
E256	VDQ Dealer Installed Options	1.0	07/03/2006	E250	VDQ Introduction	1.0	07/03/2006
407	4WD Systems	1.0	07/03/2006	404	Scheduled Maintenance	1.0	07/03/2006
403	Electrical Starting & Charging Sys.	1.0	07/03/2006	E053	Scion What's New '06	1.0	03/01/2006
398	2005 Avalon PKB	1.0	04/21/2005	396	2005 Tacoma PKB	1.0	04/21/2005
P281	Marketing Your Dealership's Fixed Ops Dept	8.0	03/15/2005	E045	4WD Simplified	1.0	12/22/2004
390	2004 Solara PKB	1.0	12/22/2004	395	2005 Scion tC	1.0	10/30/2004
E035	Scion Comfort and Convenience	1.0	01/08/2004	E034	Scion Performance	1.0	01/08/2004
E033	Scion Style	1.0	01/08/2004	E030	Scion Finance	1.0	01/08/2004
E035	Scion Comfort and Convenience	1.0	12/31/2003	E034	Scion Performance	1.0	12/31/2003
E033	Scion Style	1.0	12/31/2003	E030	Scion Finance	1.0	12/31/2003
E036	2004 Scion Sales Introduction	1.0	12/31/2003	E032	Scion Sales Management	1.0	11/10/2003
E031	Scion Service Process	1.0	11/10/2003	E029	Scion Purchase Process	1.0	11/10/2003
E028	Scion Customer	1.0	11/10/2003	E027	Scion Foundations	1.0	11/10/2003
318	Body And Paint	1.0	08/04/2003	317	Reman Products	1.0	08/04/2003
316	Disc Brakes	1.0	08/04/2003	308	Toyota Transmissions	1.0	08/04/2003
306	Brake Systems	1.0	07/25/2003	304	Air Conditioning & Heating	1.0	07/25/2003
386	2004 Sienna PKB	1.0	07/08/2003	370	Fix It Once Fix It Right	1.0	07/08/2003
388	Parts Professional Roles & Resp.	1.0	05/21/2003	380	2003 Corolla PKB	1.0	04/16/2003
379	2002 Camry Product Knowledge Book	1.0	04/16/2003	381	2003 Matrix PKB	1.0	02/26/2003
385	2003 4Runner PKB	1.0	02/24/2003	384	2003 New Models PKB	1.0	02/24/2003
T01F1	Welcome to Toyota	1.0	07/25/2001	378	Highlander PKB	1.0	03/27/2001
368	2001 Sequoia (PKB)	1.0	02/20/2001	367	2001 RAV4 (PKB)	1.0	02/20/2001
348	2001 Prius New Model (PKB)	1.0	09/20/2000	347	Toyota Hybrid System (THS)	1.0	06/28/2000
346	2000 MR2 Spyder & Camry Solara	1.0	06/28/2000	345	Seven Storage Techniques	8.0	03/15/2000
340	Scheduled Maintenance	1.0	01/26/2000	343	2000 New Model Launch	1.0	01/25/2000
344	2000 New Model Launch	1.0	12/03/1999	338	2000 Tundra	1.0	06/15/1999
339	2000 Tundra New Model Intro	1.0	05/14/1999	336	Electrical Starting & Charging Sys.	1.0	04/29/1999
333	1999 New Models	1.0	10/28/1998	332	Engines III	1.0	09/15/1998
331	1998.5 Mid Year New Model	8.0	05/23/1998	324	Suspension And Steering	1.0	05/23/1998
329	Part Time / Full Time 4 Wheel Drive	1.0	03/06/1998	327	Safety Features II	1.0	11/07/1997
711	Parts/Service Comm. It Takes Two	8.0	10/27/1997	326	1998 New Models	8.0	10/27/1997
325	1998 New Models	1.0	10/27/1997	321	Toyota Then And Now	1.0	10/27/1997

Issue Date: 08/03/2021

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320	Parts Inventory Management/TDOS	8.0	10/27/1997	E4280	2020 Highlander	0.5	01/28/2021
E3137	2016 Tacoma Launch	1.0	10/22/2015	E3134F	2015 Yaris Regional eLearning	1.0	10/22/2015
E3132F	2015 Camry Regional Launch Events eLearning	1.0	10/22/2015	E3133F	2015 Sienna Regional eLearning	1.0	10/20/2015
E3131F	2014 Highlander New Model Preview (Fixed Op	1.0	07/22/2014	E3127F	2014 Corolla New Model Preview	1.0	04/15/2014
E3129	2013 Scion tC eLearning	1.0	09/18/2013	E3126F	2013 RAV4 New Model Preview	1.0	08/29/2013

At-a-Glance

Invoices: 12 Sales\$: 1,214.18

Gross Profit\$: 381.26

Gross Profit Per Invoice\$: 31.77

Average Gross Profit%: 32.7

Invoice	Customer	Contact	Phone	Employee	SOR	Open Date	Sale Type	Employee	Sales\$	GP\$	GP%
53981	M&m Nario Auto Body		(978)794-5988	BUTEAU II,DENNIS	53981	08/02/2021	WCASH	BUTEAU II,DENNIS	359.04	89.22	24.8
53984	Johnny K			BUTEAU II,DENNIS	53984	08/02/2021	WCASH	BUTEAU II,DENNIS	268.19	22.95	9.1
53990	Certified Inspection & Repair		(978)365-2311	O'Brien,Patrick	53990	08/02/2021	WCASH	O'Brien,Patrick	40.36	10.02	24.8
53991	Jean Castillo		(000)000-0000	BUTEAU II,DENNIS	53991	08/02/2021	CASH	BUTEAU II,DENNIS	208.47	113.17	57.7
53992	Breezy Hill Auto		(978)386-2387	O'Brien,Patrick	53992	08/02/2021	WCASH	O'Brien,Patrick	19.86	4.94	24.9
53993	Retail Cash		(000)000-0000	BUTEAU II,DENNIS		08/02/2021	CASH	BUTEAU II,DENNIS	5.99	2.24	39.7
53994	Retail Cash		(000)000-0000	BUTEAU II,DENNIS		08/02/2021	CASH	BUTEAU II,DENNIS	21.23	14.98	75.0
53995	Retail Cash		(000)000-0000	O'Brien,Patrick		08/02/2021	CASH	O'Brien,Patrick	18.73	10.57	60.0
53996	Retail Cash		(000)000-0000	O'Brien,Patrick		08/02/2021	CASH	O'Brien,Patrick	2.11	.99	49.7
53997	Retail Cash		(000)000-0000	O'Brien,Patrick		08/02/2021	CASH	O'Brien,Patrick	107.55	40.25	39.8
53998	Chris Lillyman		(000)000-0000	O'Brien,Patrick	53998	08/02/2021	CASH	O'Brien,Patrick	115.11	54.07	49.9
54002	Clemons, Tony		(978)235-5010	LOPEZ,CHRISTO PHER	AN 54002	08/03/2021	CASH	LOPEZ,CHRISTO PHER	47.54	17.86	39.9

Lost Sale Quiz

First, read each situation and then indicate whether your department would have you post a lost sale by placing a check mark in either Yes or the No column.

Situation		Yes	No
X 1 NO OVER STOCKED DEMAND	A technician needs a part to complete a repair. The part is not available in your inventory. You locate the part at a neighboring dealership and inform the service advisor managing the job. The advisor authorizes you to order the part. The part is given to the technician later that day and the repair is complete.	✓	
X 2 NO OVER STOCKED DEMAND	A technician needs a part to complete a repair. The part is not available in your inventory, nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job: He/she authorizes a daily order and places the vehicle in a down condition. The next morning, the part arrives and the technician completes the repair.	✓	
✓ 3	A technician needs a part to complete a repair. The part is not available in your inventory nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job. Since the vehicle is safe to drive, he/she requests that you order the part for later and the customer takes possession of the vehicle. The needed part is added to that week's stock order as a customer order.		✓
✓ 4	What would you do if the customer described in item 3 above had prepaid for the special-order part? <i>Billed at paid for</i>		✓
X 5 NO X DMS thinks you need more	A customer comes in to buy a part that is available in your inventory. However, upon learning that the part's cost is more than he is willing to pay (even after you offer him a reasonable discount), he leaves without making purchase.	✓	
6 YES GOOD DEMAND	About two months after the customer special order described above in item 3, the customer has not returned to have the part installed. Your manager gives you a new bin location and tells you to relocate the special-ordered part from the special-order bin to the new location.	✓	✓
X 7 YES	A local dealership calls looking for a needed part to complete a repair in their service department. You check but discover that you don't have the part in stock.		✓
✓ 8	A service customer asked to have repair done but the needed part is not available in your inventory. You learn that a local dealership has several in stock but is unwilling to sell to you because the part is on national back order. You offer to place a special order for your customer but he/she declines and leaves.	✓	
✓ 9	A customer is leaving town tomorrow morning at 5:30 a.m. and needs their car back today. The needed part is not available in your inventory nor is it available locally. At the customer's insistence, you locate an after-market part and technician completes the repair before the day's end.	✓	✓
X 10 YES	A customer calls and request a door handle for a 1971 Cuda and to your amazement, you don't have the part.	⊗	✓

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First, read each situation and then indicate whether your department would have you post a lost sale by placing a check mark in either Yes or the No column.

Situation		Yes	No
1	A technician needs a part to complete a repair. The part is not available in your inventory, You locate the part at a neighboring dealership and inform the service advisor managing the job. The advisor authorizes you to order the part. The part is given to the technician later that day and the repair is complete.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	A technician needs a part to complete a repair. The part is not available in your inventory, nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job: He/she authorizes a daily order and places the vehicle in a down condition. The next morning, the part arrives and the technician completes the repair.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	A technician needs a part to complete a repair. The part is not available in your inventory nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job. Since the vehicle is safe to drive, he/she requests that you order the part for later and the customer takes possession of the vehicle. The needed part is added to that week's stock order as a customer order.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	What would you do if the customer described in item 3 above had prepaid for the special-order part?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	A customer comes in to buy a part that is available in your inventory. However, upon learning that the part's cost is more than he is willing to pay (even after you offer him a reasonable discount), he leaves without making purchase.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	About two months after the customer special order described above in item 3, the customer has not returned to have the part installed. Your manager gives you a new bin location and tells you to relocate the special-ordered part from the special-order bin to the new location.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	A local dealership calls looking for a needed part to complete a repair in their service department. You check but discover that you don't have the part in stock.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	A service customer asked to have repair done but the needed part is not available in your inventory. You learn that a local dealership has several in stock but is unwilling to sell to you because the part is on national back order. You offer to place a special order for your customer but he/she declines and leaves.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	A customer is leaving town tomorrow morning at 5:30 a.m. and needs their car back today. The needed part is not available in your inventory nor is it available locally. At the customer's insistence, you locate an after-market part and technician completes the repair before the day's end.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	A customer calls and request a door handle for a 1971 Cuda and to your amazement, you don't have the part.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Lost Sale Quiz

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2	A technician needs a part to complete a repair. The part is not available in your inventory, nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job: He/she authorizes a daily order and places the vehicle in a down condition. The next morning, the part arrives and the technician completes the repair.	✓	
3	A technician needs a part to complete a repair. The part is not available in your inventory nor is it available locally. You find that plenty are available in your facing PDC. You inform the service advisor managing the job. Since the vehicle is safe to drive, he/she requests that you order the part for later and the customer takes possession of the vehicle. The needed part is added to that week's stock order as a customer order.	✓	
4	What would you do if the customer described in item 3 above had prepaid for the special-order part?	✓	
5	A customer comes in to buy a part that is available in your inventory. However, upon learning that the part's cost is more than he is willing to pay (even after you offer him a reasonable discount), he leaves without making purchase.	✓	
6	About two months after the customer special order described above in item 3, the customer has not returned to have the part installed. Your manager gives you a new bin location and tells you to relocate the special-ordered part from the special-order bin to the new location.		✓
7	A local dealership calls looking for a needed part to complete a repair in their service department. You check but discover that you don't have the part in stock.	✓	
8	A service customer asked to have repair done but the needed part is not available in your inventory. You learn that a local dealership has several in stock but is unwilling to sell to you because the part is on national back order. You offer to place a special order for your customer but he/she declines and leaves.	✓	
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