Part Exercise 12.07.2021
Sidney Rustvang
N393

Stock Order for Shelf:
Parts truck arrives/ drops off parts at 4:00am. They have a key to the building. Our shipping/ receiving lead arrives at 7:30am. He goes through the shipping list. For stock parts that go upstairs he puts on the conveyor belt and for parts that remain downstairs he puts in totes to be put on the shelves. Our parts assistant will then organize the parts by bin (found on shipping tag) then put the parts on the shelves. He makes new tags as needed for the shelves when stocking. Once they put the parts on the shelves then they receipt them in CDK (adjust & receipt). The assistant circles on the packing slip indicating that the parts have arrived. The assistant uses the shipping sheet/packing slip to receipt in the parts, he places a time stamp on the shipping sheet/packing slip once he completes the receipt process.

To receipt in the part
CDK → RA (receive and adjust) → parts orders → type in part number
On the shipping sheet/packing slip there will be control numbers ("R" numbers indicate RIM-automated order, other control numbers are made by us, we use the date and then 2 for AM and 3 for PM). When we see the part that we would like to receipt in, check the box next to it →F6 → receipt on order quantity, check quantity → enter vendor # (shipping #) from the shipping sheet/packing list

To verify the part was checked in properly → CDK →Parts data archiving →parts detail activity display

CDK → RA (receive and adjust) → all orders (outstanding) → enter control # (control numbers are made by us, we use the date and then 2 for AM and 3 for PM, these are typically special orders for customers) → F2 shows all orders with that control # → you can receipt in all (except backordered parts, this will be noted on the shipping sheet/packing list) → F6 process, transfer on order quantity (backordered get transferred and not receipted in, they will be receipted in at a later date once they arrive) → receipt all → enter vendor # (shipping #) from the shipping sheet/packing list

Notes:
- Shipping sheets/packing list received by the Shipping/Receiving Lead then given to the parts assistant
- Special orders list goes to parts assistant and then the shipping/receiving lead gives the SOP card to the parts guys who ordered it
- Shipping sheets/packing list are kept, time kept was not specified
- GM statement → verify all parts on the statement have been receipted in then parts assistant matches with the original shipping sheet/packing list (this seems to be repetitive, parts assistant said he rarely finds an error)

- Backordered packing slips come individually, the shipping receiving lead prints out the sheets from CDK and puts the packing slips/shipping labels on the bottom of the sheet from CDK then gives to the parts assistant to receipt in
- We keep all GM statements until all parts on the sheet have been receipted in, if we have not received a part on the statement after 7-10 days then we file a claim with GM

Receipt in the part:
What stocking status is the parts?
What is the parts demand history (demands in 12 months) which instituted the order?
Where the bill of lading or shipping docs go?
Controller- see how the order is charged on your parts statement.

On the part I receipted in the parts assistant wasn't sure how to determine the demand history, so I had the inventory control clerk pull a report, CDK- "Order report with demand", that shows our sold amount and then the number of sold per month via CDK. The shipping docs are placed in different files until everything has been receipted in, once the parts are all receipted in then they store the documents upstairs in the parts department, time kept was not specified.

Controller stated that after the part is receipted in it will go into account 242. Then after the part is sold it is pasted to account 482 (sales) and 682 (cost) relieving inventory.

Special Orders:
Parts truck arrives/ drops off parts at 4:00am. They have a key to the building. Our shipping/ receiving lead arrives at 7:30am. He goes through the shipping list, generally the SOPs are on the top of the list). He grabs the special order cards that are on our Inventory Control Clerks desk, once he has the card he will circle the part on the card indicating that it is here then he will put the part on the SOP shelf, then marks on the card where he put the part. Gives a copy of the card to our dispatcher. Our parts assistant will then receipt them in CDL (adjust & receipt). Auto.live (service system) will update the advisor and the technician if the repair order is still open after the part has been receipted in. Auto.live (service system) will update the customer if the repair order is closed after the part has been receipted in, notifying them to call and set up an appointment.

Parts process will be changed- New scanners from CDK come 12/20/21.

Special Order Part for customer vehicle in service:
See above notes for receipting in the part. After the part is receipted in, Auto.Live (service program) automatically sends an alert to parts person regarding the parts arrival. The parts person opens the RO and sees the part note (typically indicates an "M number" or use the RO #) → in CDK open that RO → F7 to show part order, save and then the part gets billed to the RO → in Auto.Live mark the part as filled in the repair line → get part from back counter and then

bring part out to technician → the technician will get an alert in the Auto.Live program notifying them that the parts have been filled (automated) → the technician will then perform their inspection on the vehicle making notes in Auto.Live, submits for parts on the recommendations → the customer and advisor will automatically be sent an email/text of any recommendations → while the technician waits to hear back from the customer he will perform the approved work, in this case it was a recall, once the recall is performed he adds his notes and finishes out the line (he punches into the line on CDK for his time) → once all repairs have been completed by the technician the advisor will go to the pre-invoice tab in Auto.Live → advisor will select send invoice to customer (this will close-out the RO in Auto.Live) → customer is notified that the vehicle is ready → advisor will communicate with customer regarding pick-up time and if requested they can collect payment prior to arriving to the dealership, if they want to pay when they arrive then the advisor will collect payment at that time → after payment is collected the advisor will close out the RO (if warranty work was completed, they will finish out the repair and flag it to our warranty admin, they do not fully close the RO, our warranty admin will close warranty Ros after payment for the warranty work has been completed).

Perpetual Inventory Bin Count
The parts manager ran an inventory report for Bin 1200. The report was a created report, no DMS report number, the report name is "Bin check for Gateway Chevrolet Parts". I verified that the report quantities and the shelf quantities matched.