

REPAIR MODULE TRAINING MANUAL

Inventory Management System Menu

JONES Supplier E 1 new orders.ly Logged in as: jon (Jones Supply) Switch to: jbe

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Main Menu Dashboard

- Customer Orders**
 - Load
 - Create From Usage
 - Create From Requests
 - Create For Restock
 - Create From Rfq
 - Bill Of Lading Print
 - Edit
 - Restore
 - Inquiry
 - Reports
 - Line Audit Report
 - Quoting
 - Shipper Edit/Inquiry
 - Requests
 - Shipper Reports
 - Shipper Item Label Print
 - Acknowledgements
 - Receiving (CO)
 - Receipt Report
- Inventory**
 - Load
 - Edit
 - Copy
 - Inquiry
 - Stock Status Reports
 - Historical Reports
 - Adjustments
 - Kanban
- Transactions**
 - Load Disbursements
 - Inventory Count With Usage
 - Inventory Count With Adjust
 - Inventory Count
 - Edit Receipts
 - Correct Receipts
 - Edit Usage
 - Edit Transfers
 - Review And Stamp Usage
 - Usage Requests
 - Inventory Transfers
 - Customer Transfers
 - Location Transfers
- Purchasing**
 - Edit
 - Inquiry
 - Approval
 - Receiving
 - Receipt Review
 - Acknowledgement
 - Returns
 - Reports
 - Receipt Report
 - Line Audit Report
 - Sources Menu
 - Buyers Menu
 - Rfq Menu
- Billing**
 - Load Invoice
 - Invoice Edit
 - Invoice Inquiry
 - Invoice Reports
 - Billable Trans. Reports
- Asset Management**
 - Work Orders
 - Bill Of Materials
 - Machine Inventory
 - Repair
- Miscellaneous**
 - Supplier Catalog
 - Customer Catalog
 - Mfg Catalog
 - Edit Login
 - Manage Saved Reports
 - Administrative Functions
 - Customer Inquiry
 - Item Label Print
 - Misc. Customer Reports
 - Deletion Reports
 - Manufacturers
 - Brands
- Imports & Exports**

Select "Repair" to
Enter Repair Module

Managing an Asset

The screenshot displays the JONES Supplier software interface. At the top, the logo 'JONES' is on the left, 'Supplier' is in the center, and 'Jones Supply' is on the right. Below the logo is a navigation bar with the following menu items: Main Menu, Customer Orders, Inventory, Transactions, Purchasing, Billing, and Asset Management. A blue header bar below the navigation bar is labeled 'Repair Menu'. Underneath, a list of menu items is shown: Load, Edit, Inquiry, Label Print, Ship, Undo Shipper, Transfer, and Reports. Two callout boxes with arrows point to the 'Load' and 'Edit' items. The 'Load' callout box contains the text: "Load" - To Enter a New Repair Record. The 'Edit' callout box contains the text: "Edit" - Search History and/or update existing repair record.

JONES Supplier **E** Jones Supply

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management

Repair Menu

- Load
- Edit
- Inquiry
- Label Print
- Ship
- Undo Shipper
- Transfer
- Reports

"Load" - To Enter a New Repair Record

"Edit" - Search History and/or update existing repair record

Identifying Asset

JONES Supplier **E** Jones Supply

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous

Load Repair Item...

*Customer Fac/Loc: 1005 [MFG ENTERPRISES], PLANT 1, MAIN CRIB ▾

Bar Code: 12345D x

Service Type: Repair Warranty Calibrate Testing PM Check Out

No Repair history for BarCode [12345D]..

If Barcode already exists, item will auto-appear with item info.
In the above example the barcode does not exist in the system. Click on Find Item to search the system for a part.

Searching for an item

JONES Supplier **E** Jones Supply Logged in as

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Find Item for BarCode...

Find item for Barcode	<input type="text" value="12345D"/>	Load New Item Manually...
Customer	<input type="text" value="1005"/>	MFG ENTERPRISES
Facility	<input type="text" value="1"/>	PLANT 1
Location	<input type="text" value="A"/>	MAIN CRIB
Search Text	<input type="text"/>	Sort by:
IPN	<input type="text" value="2015"/>	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
Customer Item	<input type="text"/>	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
Supplier Item	<input type="text"/>	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
Mfg Item	<input type="text"/>	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
Source Item	<input type="text"/>	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>

Search for item using Description, Customer Part, Manufacturer's part or Suppliers Part

Creating New Item

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Find Item for Barcode...

Find item for Barcode	12345D	Load New Item Manually...
Customer	1005	MFG ENTERPRISES
Facility	1	PLANT 1
Location	A	MAIN CRIB
Search Text		Sort by:
IPN	2015	<input checked="" type="radio"/> ↑
Customer Item		<input type="radio"/> ↑
Supplier Item		<input type="radio"/> ↑
Mfg Item		<input type="radio"/> ↑
Source Item		

IPN	Action	Cust Part	Bin	Description
1 2015	<input type="button" value="Use"/> <input type="button" value="Copy"/>	10153	9247	GAUGE 2015 PRESSURE DWYER

From the list of items, chose the proper item and either Select "Use" or "Copy".
Copy will create a new inventory item using the same info as the chosen item.
Use will use the same inventory item for the new barcode.
If the item does not exist clock load manual to enter a new item

Loading a repair

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005	MFG ENTERPRISES	Fac/Loc: 1	A						
IPN: 2015	Barcode: 12345D	Supplier Part: 2015	RepairID: 100196	Status: PENDING					
Serial ID: A221345	Fail Date: 03/09/2018	Machine ID: MACHINE 1	Use Search Sugg.						
Certification #: 	Cert. Date: 	Department: 200	Account: 						
Requestor: 1000	Operation: 	Station: 	Cell: 						
Service Date: 10/18/2018	Service Type:								
<input type="radio"/> SETUP <input checked="" type="radio"/> REPAIR <input type="radio"/> WARRANTY <input type="radio"/> CALIBRATE <input type="radio"/> TESTING <input type="radio"/> PM <input type="radio"/> CHECKOUT <input type="radio"/> CHECKIN									
CustItemID: 10153	Mfg: SPACEEN	Mfg Part: 2015							
Prev Cost: 2200.00	New Item Cost: 3200.00	Buyer: KP							
Description: GAUGE 2015 PRESSURE DWYER	Notes: QUIT WORKING								
Back		Delete							
Ship Out	Quote	Approve	Order	Ship Back	Receive	Warranty	Storage	Scrap	Misc

The “Load” function will auto-populate Inventory data.

Additional columns to fill if applicable: Serial Number, Requestor, Fail Date, Department, Operation, Station, Cell, and Failure Notes/Description of needs

Select Type of Repair Record: Repair / Warranty / Calibration / Testing / PM

Warranty

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply) Sw

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005 MFG ENTERPRISES Fac/Loc: 1 / A

IPN: 2015 Barcode: 12345D Supplier Part: 2015 RepairID: 100196 Status: **PENDING** ▼

Serial ID: A221345 Fail Date: 03/09/2018 ? Machine ID: MACHINE 1 [Use Search Sugg.](#)

Certification #: Cert. Date: Department: 200 Account:

Requestor: 1000 ? Operation: Station: Cell:

Service Date: 10/18/2018 ? Service Type:
 SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: 10153 Mfg: SPAVEEN Mfg Part: 2015

Prev Cost: 2200.00 New Item Cost: 3200.00 Buyer: KP

Description: GAUGE 2015 PRESSURE DWYER Notes: QUIT WORKING

[Back](#) [Delete](#)

[Ship Out](#) [Quote](#) [Approve](#) [Order](#) [Ship Back](#) [Receive](#) [Warranty](#) [Storage](#) [Scrap](#) [Misc](#)

Provider: ACME Status: NEW ▼ Purchase Price: 3100.00 Date: 03/02/2013 ?

Effective Date: 03/02/2013 ? Ending Date: 03/02/2018 ? Period: 5 YEARS Defined: 1: 2: 3:

Coverage: FULL Notes:

The "Warranty" tab will show all warranty info for this particular barcode.
New items can have warranty info loaded here.

Shipping out

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: **1005** MFG ENTERPRISES Fac/Loc: **1** / **A**

IPN: **2015** Barcode: **12345D** Supplier Part: **2015** RepairID: **100196** Status: **PENDING**

Serial ID: **A221345** Fail Date: **03/09/2018** Machine ID: **MACHINE 1** Use Search Sugg.

Certification #: Cert. Date: Department: **200** Account:

Requestor: **1000** Operation: Station: Cell:

Service Date: **10/18/2018** Service Type:
 SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: **10153** Mfg: **SPACEEN** Mfg Part: **2015**

Prev Cost: **2200.00** New Item Cost: **3200.00** Buyer: **KP**

Description: **GAUGE 2015 PRESSURE DWYER** Notes: **QUIT WORKING**

* Provider: **X 10004** Provider Receipt Date:

Shipper: Sent: Sequence #:

CustPO:

Cust Shipper:

Set values and click on Ship Out button.

Ship Tab: Enter "Provider" you wish to send repair to, In addition to noting customer PO# if applicable

Click the SHIP OUT BUTTON

Quoting

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: **1005** MFG ENTERPRISES Fac/Loc: **1** / **A**

IPN: **2015** Barcode: **12345D** Supplier Part: **2015** RepairID: **100196** Status: **OUTBOUND** ▼

Serial ID: **A221345** Fail Date: **03/09/2018** ? Machine ID: **MACHINE 1** Use Search Sugg.

Certification #: Cert. Date: ? Department: **200** ? Account: ?

Requestor: **1000** ? Operation: Station: Cell:

Service Date: **10/18/2018** ? Service Type: SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: **10153** Mfg: **SPACEEN** Mfg Part: **2015**

Prev Cost: **2200.00** New Item Cost: **3200.00** Buyer: **KP**

Description: **GAUGE 2015 PRESSURE DWYER** Notes: **QUIT WORKING**

Quote #: **12345** Quote Price: **299.00** Quote Date: **3/9/2018** ?

RMA: WorkOrder:

Lead Time: Quote Notes:

Eval. Fee:

Quote Tab – Upon receiving quote from Provider, enter quote price, RMA (if applicable) Quote Date, Provider Work Order and quoted lead time.

Update the Status to ATVENDOR

Approval

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005 MFG ENTERPRISES Fac/Loc: 1 / A

IPN: 2015 Barcode: 12345D Supplier Part: 2015 RepairID: 100196 Status: **ATVENDOR** ▾

Serial ID: A221345 Fail Date: 03/09/2018 ? Machine ID: MACHINE 1 Use Search Sugg.

Certification #: Cert. Date: Department: 200 Account:

Requestor: 1000 ? Operation: Station: Cell:

Service Date: 10/18/2018 ? Service Type:
 SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: 10153 Mfg: SPAVEEN Mfg Part: 2015

Prev Cost: 2200.00 New Item Cost: 3200.00 Buyer: KP

Description: GAUGE 2015 PRESSURE DWYER Notes: QUIT WORKING

Approval Date: 03/09/2018 ? Approver: JIM Approval Type:

PO Number: 23324 Expected Return Date: 03/10/2018 ?

Approve Tab – Once Customer has made a disposition on submitted quote, enter Approval Date, Approver, Type (Repair/Warranty/Return Un-Repaired/Scrap. Etc) HDI's PO to Provider and Expected Return Date per Providers Quote

Receive

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005 MFG ENTERPRISES Fac/Loc: 1 / A

IPN: 2015 Barcode: 12345D Supplier Part: 2015 RepairID: 100196 Status: INBOUND

Serial ID: A221345 Fail Date: 03/09/2018 Machine ID: MACHINE 1
Certification #: Cert. Date: Department: 200 Account: Requestor: 1000 Operation: Station: Cell:

Service Date: 10/18/2018 Service Type: SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: 10153 Mfg: SPAVEEN Mfg Part: 2015

Prev Cost: 2200.00 New Item Cost: 3200.00 Buyer: KP

Description: GAUGE 2015 PRESSURE DWYER Notes: QUIT WORKING

Back Delete

Ship Out Quote Approve Order Ship Back **Receive** Warranty Storage Scrap Misc

* Receipt Date: 03/09/2018 Repair Notes: FIXED VALVE ON GAUGE
New Primary Bin: 9247
* Actual Cost: 330.00
Ship Savings:

Set values and click on a Receive button.

RECEIVE RECEIVE & CREATE NEW

Receive Tab – Enter Receipt Date, Actual Cost (Quoted amount if approved, eval fee, zero dollar, etc) Primary Bin (if not auto-filled from load) Repair Report info and Shipping Savings (if applicable) then click Receive button (this will auto-change the status to receive)

Store for Later Repair

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply) S

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005 MFG ENTERPRISES Fac/Loc: 1 / A

IPN: 2015 Barcode: 12345D Supplier Part: 2015 RepairID: 100196 Status: STORAGE

Serial ID: A221345 Fail Date: 03/09/2018 Machine ID: MACHINE 1 Use Search Sugg.

Certification #: Cert. Date: Department: 200 Account: Requestor: 1000 Operation: Station: Cell:

Service Date: 10/18/2018 Service Type: SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: 10153 Mfg: SPAVEEN Mfg Part: 2015

Prev Cost: 2200.00 New Item Cost: 3200.00 Buyer: KP

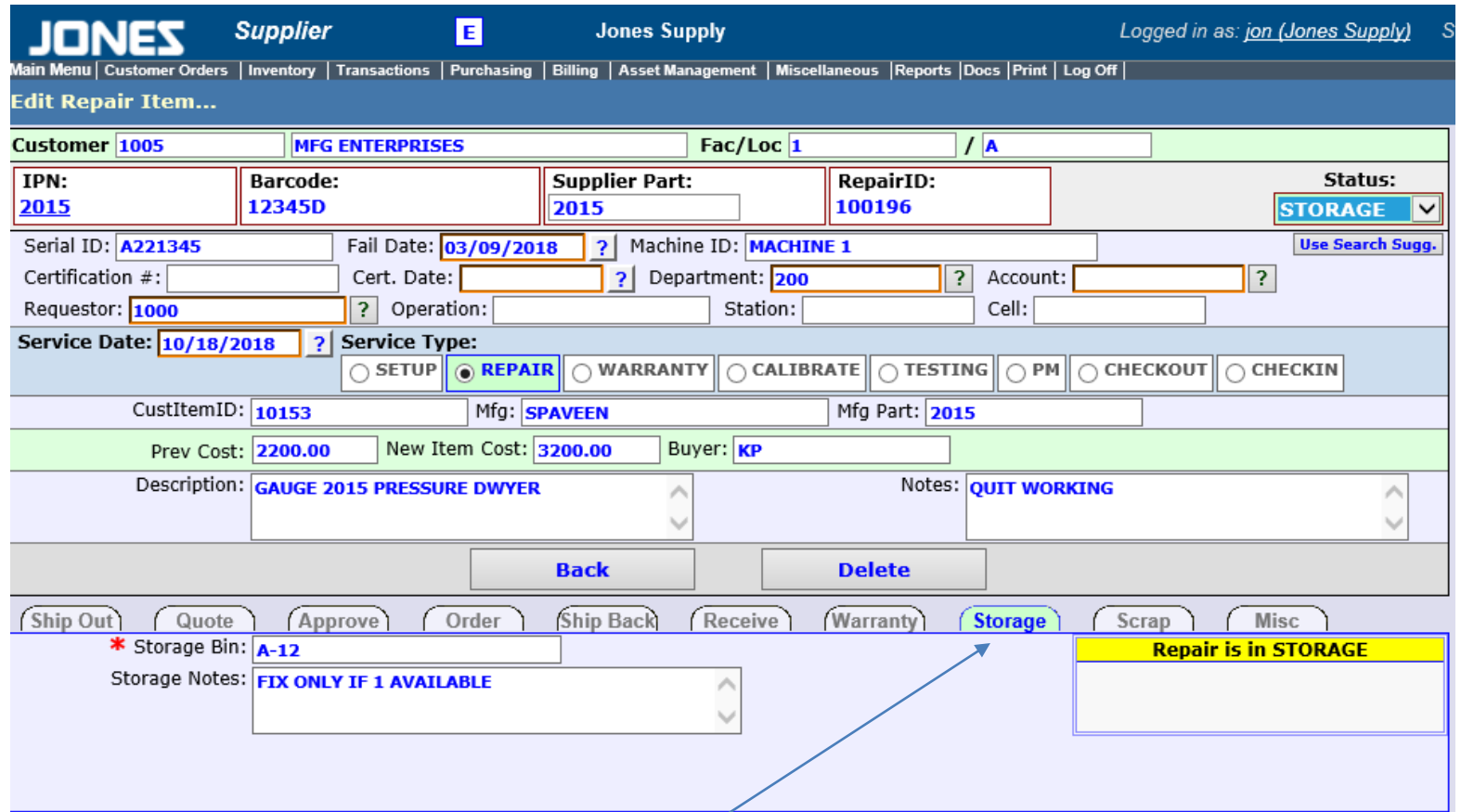
Description: GAUGE 2015 PRESSURE DWYER Notes: QUIT WORKING

Back Delete

Ship Out Quote Approve Order Ship Back Receive Warranty Storage Scrap Misc

* Storage Bin: A-12 Storage Notes: FIX ONLY IF 1 AVAILABLE

Repair is in STORAGE



Storage Tab – If Unique storage info is required in addition to Inventory load info, you can add here

Misc Information

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005 MFG ENTERPRISES Fac/Loc: 1 / A

IPN: 2015 Barcode: 12345D Supplier Part: 2015 RepairID: 100196 Status: STORAGE

Serial ID: A221345 Fail Date: 03/09/2018 Machine ID: MACHINE 1

Certification #: Cert. Date: Department: 200 Account:

Requestor: 1000 Operation: Station: Cell:

Service Date: 10/18/2018 Service Type: SETUP REPAIR WARRANTY CALIBRATE TESTING PM CHECKOUT CHECKIN

CustItemID: 10153 Mfg: SPAVEEN Mfg Part: 2015

Prev Cost: 2200.00 New Item Cost: 3200.00 Buyer: KP

Description: GAUGE 2015 PRESSURE DWYER Notes: QUIT WORKING

Back Delete

Ship Out Quote Approve Order Ship Back Receive Warranty Storage Scrap **Misc**

UserDefined: 1: EXAMPLE 1
2:
3:

InventoryDefined: 1:
2:
3:

Misc. Saving Amt: Balance:
Misc. Saving Type:

Internal Notes:

Misc Tab – Customer specific info can be entered here for unique customer requests/requirements as well as misc. savings info.

Scrap Item

JONES Supplier **E** Jones Supply Logged in as: jon (Jones Supply)

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit Repair Item...

Customer: 1005	MFG ENTERPRISES	Fac/Loc: 1	/ A						
IPN: 2015	Barcode: 12345D	Supplier Part: 2015	RepairID: 100196	Status: STORAGE					
Serial ID: A221345	Fail Date: 03/09/2018	Machine ID: MACHINE 1	Use Search Sugg.						
Certification #:	Cert. Date:	Department: 200	Account:						
Requestor: 1000	Operation:	Station:	Cell:						
Service Date: 10/18/2018	Service Type:								
<input type="radio"/> SETUP <input checked="" type="radio"/> REPAIR <input type="radio"/> WARRANTY <input type="radio"/> CALIBRATE <input type="radio"/> TESTING <input type="radio"/> PM <input type="radio"/> CHECKOUT <input type="radio"/> CHECKIN									
CustItemID: 10153	Mfg: SPAVEEN	Mfg Part: 2015							
Prev Cost: 2200.00	New Item Cost: 3200.00	Buyer: KP							
Description: GAUGE 2015 PRESSURE DWYER	Notes: QUIT WORKING								
Back		Delete							
Ship Out	Quote	Approve	Order	Ship Back	Receive	Warranty	Storage	Scrap	Misc
* Scrap Info: CANT BE REPAIRED ANY FURTHUR					Set values and click on Scrap Item button.				
					SCRAP ITEM				

Scrap Tab – If an item is scrapped, click on the “Scrap” Tab

Enter in any Scrap Info and click “Scrap Item”