PINNACLE Professional

UPDATE RELEASE NOTES

18.2

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Back Order Functionality

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18.2 Contents

Back order functionality

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18.2 Build Release Notes

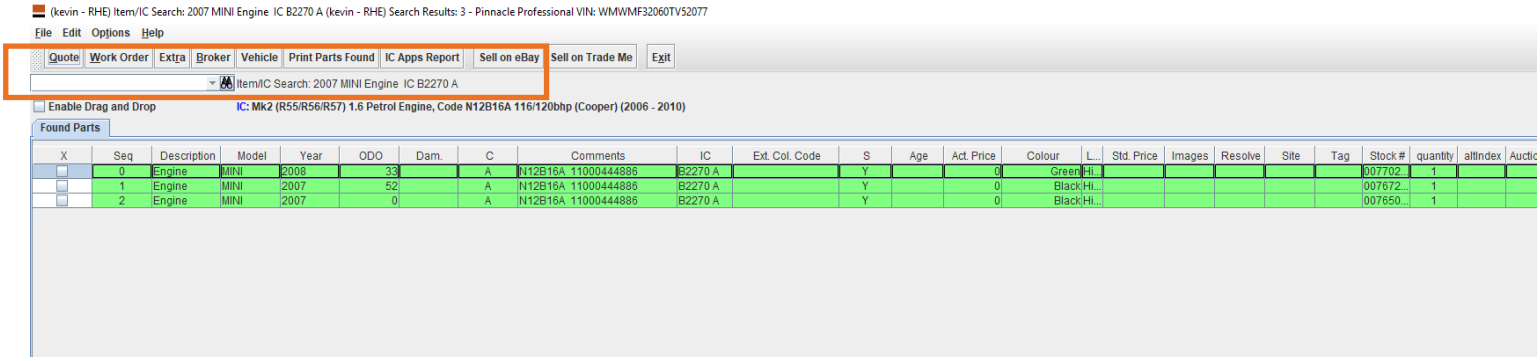
1.How to raise a back order in Pinnacle

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

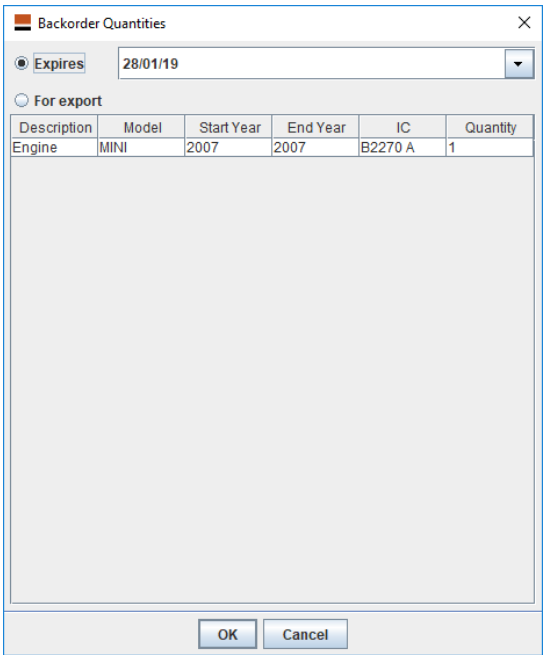
Customer contacts the yard looking for a Engine for a 2007 Mini Cooper, you search for the engine and find you have none and the customer is happy to wait a period until this part comes into stock



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

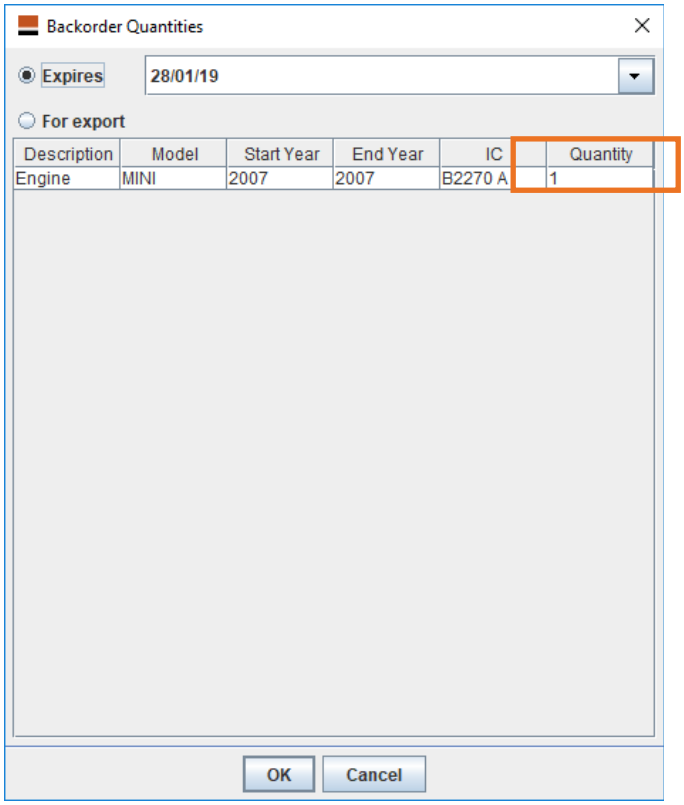
The below screen will now appear detailing the part you have searched for and you are raising a back order against.



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 data 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.

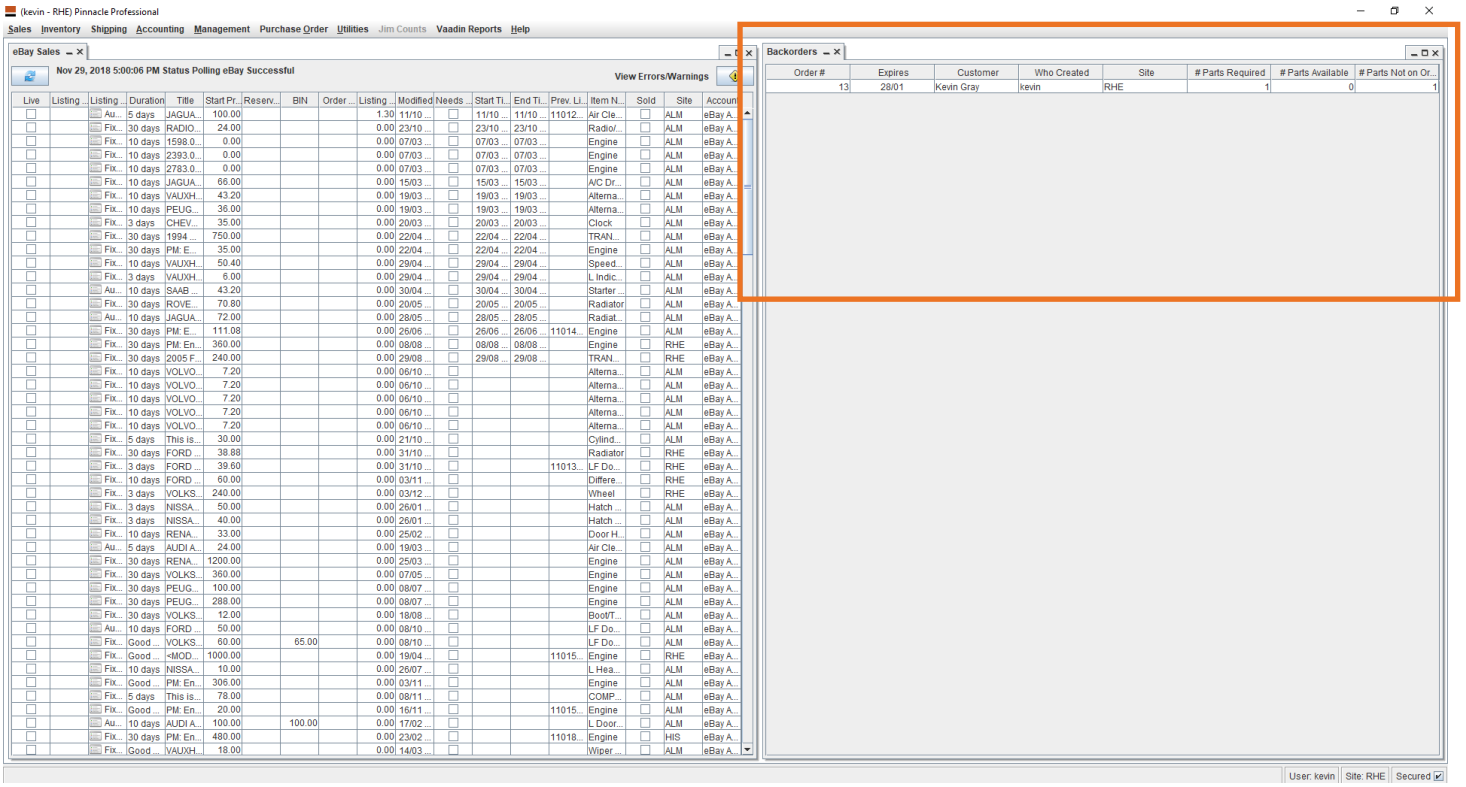
Once completed click ok.

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

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.

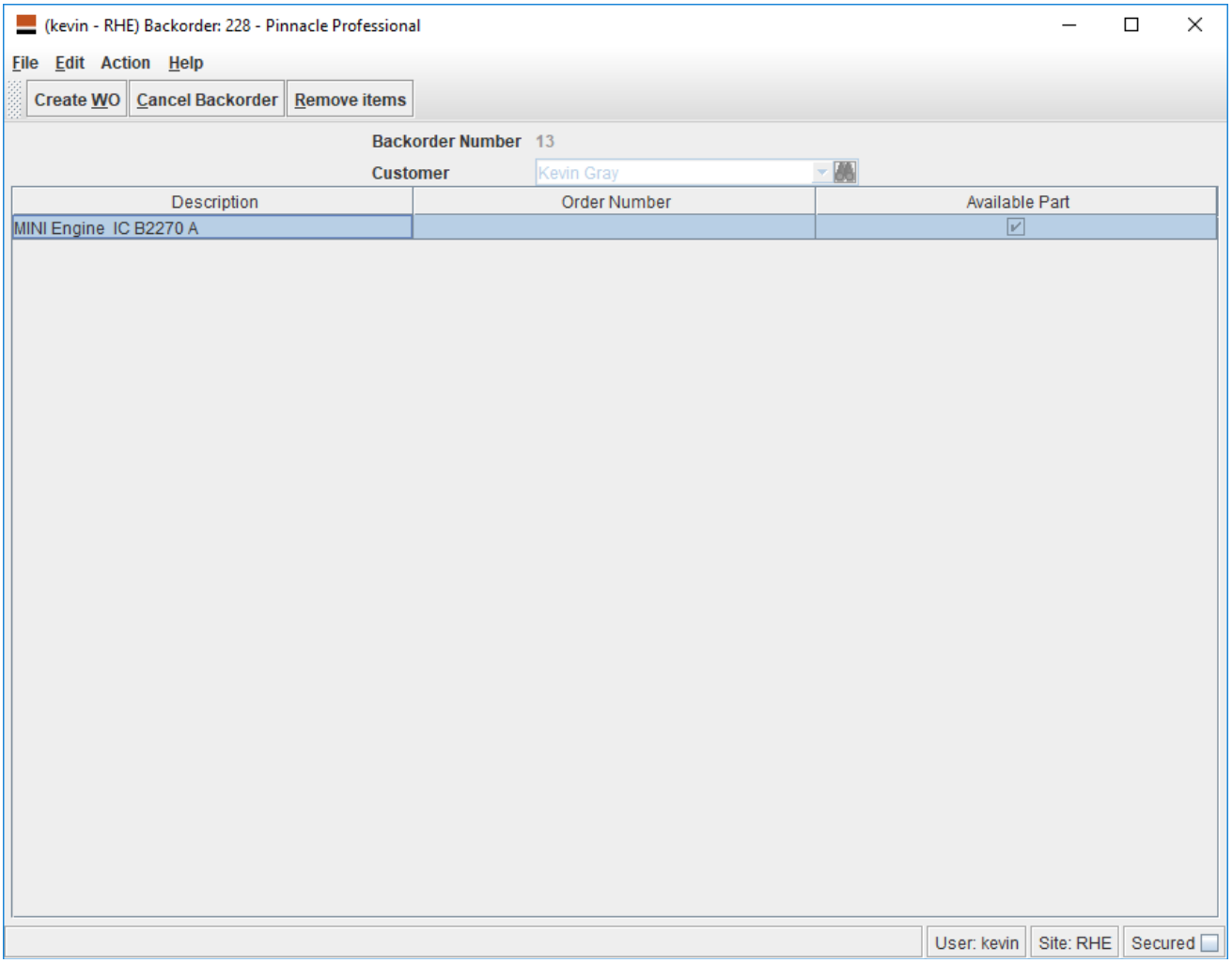
Do this by selecting File > control center > backorder



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.



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

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RELEASE NOTES

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