

Version 25



Trapeze

Enterprise Asset Management

Shop Activity - Storekeeper

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Shop Activity Storekeeper - Administrator Guide

Version 25.x

February 2025

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1. Overview

The Shop Activity Storekeeper Portal is designed to provide your organization's storekeepers with a single, easy-to-use portal to all of the screens and functions required during their workday. Storekeepers can use the Shop Activity Storekeeper Portal to perform the following functions:

- Manage Part Requests
 - Review request line items across multiple requests
 - Act on (issue or order) multiple line items at one time
 - Flag request line items to notify the technician that parts are ready to pick up
- Manage Parts Requisitions
 - Review pending and open parts requisitions
 - Add new parts requisitions
 - Add new line items to parts requisitions
 - Act on requisitions (convert to purchase orders or requests for bid/quote/proposal (B/Q/P))
- Parts Ordering
 - Review pending and open purchase orders
 - Add new purchase orders
 - Add new line items to existing purchase orders
 - Receive line items
- Create New Parts
 - Add new part records to the system

The look and feel of the Shop Activity Storekeeper Portal was designed specifically to make data entry as easy as possible while maximizing its effect on the system.

Requirements

- Application 25.x
- Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

-  User defined required fields that do not appear in the Web Modules will return validation messages.
-  Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Installation and Upgrade

Installation: Initial module installation on the single machine that houses the Web Modules engine and Web broadcasting elements.

Upgrade: Upgrading a previously installed instance of Shop Activity Module version 1.6.x or greater.

No installation is required for Shop Activity Storekeeper Portal end user workstations.

Install Module

Please refer to the *Administrator Guide, Install, and Configure Web Modules* section for instructions on installing Web Modules.

Add Shop Activity Storekeeper Portal Tab to Web Modules

To make the functions of the Shop Activity Storekeeper Portal available to Web Modules users, create the tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

Upgrade an Existing Web Modules Instance

Please refer to the *Administrator Guide, Install, and Configure Web Modules* section for instructions on installing and upgrading Web Modules.

Add a Shop Activity Storekeeper Portal Tab to Web Modules

If you have not previously added a tab to make the functions of the Shop Activity Storekeeper Portal available to Web Modules users, you need to create a tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

 The Shop Activity Storekeeper Portal does not support anonymous access to “All Users.” A user must be logged into Web Modules for this module to function.

3. Configure the Storekeeper Portal

Once you have added the Storekeeper Portal tab to Web Modules, log in to Web Modules as Administrator and click on the Storekeeper Portal tab.

Configuration

Layout and Label Customization



To learn more about customizing your gadget layout, refer to the *Custom Gadget Layout – Reference Guide*.

Available Gadgets

Standard Gadgets

- Ad hoc Query
- Metrics
- URL

Storekeeper Gadgets

Part Requests		
1	Pending Requests	Requests
0	Pending Part Return Requests	Part Return Requests
1	Total Work Orders	
Commercial Requests		
0	Pending Commercial Requests	Requests
0	Total Work Orders	
Requisitions		
0	Pending line items	Requisitions
0	Total Requisitions	
Purchase Orders		
0	Open line items	Purchase Orders
3	Pending line items	
3	Total Purchase Orders	

- **Part Requests:** Shows a count of the pending part request count, how many are returns and how many work orders the pending part requests relate to, with buttons to see the lists and details
- **Commercial Requests:** Shows a count of the quantity of pending commercial requests on work orders with a button to go to see the list of requests.
- **Requisitions:** Shows a count of the quantity of pending line items on requisitions with a button to go to see the list of requisitions.
- **Purchase Orders:** Shows a count of the open line items and pending line items on Purchase Orders, with a button to open the list of purchase orders

Change Requests 				
ID ▲	Screen ID	Screen Name	Status	Description
1	2010	Employees - Primary	PENDING	REQUESTING TO BE MOVED TO THE LATE SHIFT NEXT
2	2037	Work Order Center	PENDING	NEED TO RESCHEDULE THIS WORK ORDER, EQ-003
3	2037	Work Order Center	COMPLETED	PUSHING BACK DUE DATE ON WORK ORDER, WE

- **Change Requests:** The change request gadget can be used to respond to requests for changes submitted via the Change Request Screen.



For more details on how this relates to Storekeeper Portal workflows, see the [New ID Request Settings](#) section below.

- **Pending Core Claims Gadget:** Storekeeper can view a list of Core Claims which do not have an associated stocking ticket. When a tech brings the related Core to the Storekeeper, they will be able to action the item to create an associated stocking ticket which is automatically associated with the selected Core Claim.
- **Edit or Create New Part Gadget:** Use this gadget as a shortcut instead of navigating to the Part Definition pop-in. The workflow is the same as editing or creating a part through the pop-in.
- **Invoice Reconciliation:** Storekeeper can start a workflow that matches vendor invoices to receipts within the system
- **Invoices:** Storekeepers can review vendor invoices within the system.

Invoice Reconciliation Setup

1. From the Enterprise Portal, create Resolution IDs on the Resolutions screen (Screen 2507). These IDs will be used on the invoice lines when a receipt is reconciled to indicate work performed and final resolution.

The screenshot displays the 'Resolutions' interface. At the top, there is a header bar with the title 'Resolutions'. Below the header, there is a toolbar with buttons for 'Search', 'Reload', and 'Sort', along with dropdown menus for 'Select Filter' and 'Select Sort'. To the right of the toolbar are buttons for 'New' and 'Copy'. Below the toolbar is a table with the following data:

Row #	Resolution ID	Description	Act
1	MATCH	MATCH - NO DIFF.	Y
2	ADD-V	ADDITIONAL COST - VENDOR	Y
3	UNDER-V	UNDERCHARGED - VENDOR	Y

Below the table, there is a section for 'Basic Info' for the selected resolution 'MATCH'. This section includes a 'Description' field with the value 'MATCH - NO DIFF.' and a checkbox labeled 'Active' which is checked.

2. Create new Enterprise Purchasing Statuses on the Enterprise Purchasing Statuses screen (Screen ID 2335). With the addition of purchasing invoices, it is important to define statuses for the life cycle of the purchasing invoices and add to the existing purchase order status codes to reflect the new reconciliation workflow.

✓ Tip: Create statuses specific to purchasing invoices for the possible states: PENDING, OPEN, and CLOSED. In addition, creating a new status for purchase orders that are waiting on the reconciliation process is advised.

Enterprise Purchasing Statuses

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel

Row #	Status	Description	Item state	Used on purchase order	Used on requisitions
1	IN DISPUTE	ACTIVE DISPUTE	OPEN	N	N
2	INV-CLOSED	CLOSED INVOICE	CLOSED	N	N
3	INV-CLOSEOUT	AWAITING CLOSEOUT	OPEN	N	N
4	INV-PENDING	PENDING DATA ENTRY	PENDING	N	N

Status ID: IN DISPUTE ACTIVE DISPUTE

Basic Info

Description: ACTIVE DISPUTE

Item state: PENDING OPEN CLOSED

Used on:

- ☐ Purchase orders
- ☐ Requisitions
- ☐ Requests for bid/quote/proposal
- ☐ Responses to RFB/Q/P
- ☒ Invoices

3. Set and review Options on the Enterprise Purchasing – Setup – Options screen (Screen ID 2328).
 - Purchasing Invoice tab has primary options you need for the workflow. The most critical ones to set are the following:
 - Default Initial Status - Defines the default status of created invoices.
 - Require receipt invoice reconciliation before closing purchase orders - This enables the new step into purchase order's life cycle.
 - Require return receipt invoice reconciliation before closing purchase orders – This allows you to have return receipts appear in invoice reconciliation workflows.
 - Default resolution ID when receipt and invoice amounts match – Allows for easier and faster matching.
 - Default purchase order header status upon reconciling all receipts - Allows automation of moving purchase orders into a status for end of period processing or closed state.
 - Automatically update purchasing invoice once all associated purchase orders have been closed - Allows automation of moving the purchasing invoices to a closed state once all invoice lines items have been reconciled to a receipt.

- Review the Purchase Orders tab so you can update purchase order life cycle for the new invoice reconciliation process:
 - Automatically update purchase order header status when lines are closed and put-away cards approved - This allows purchase orders to be put into a special OPEN state status to indicate it needs to be put through the invoice reconciliation process.
-  **Note:** Enabling the “Require receipt invoice reconciliation before closing purchase order” setting makes the setting accept OPEN state statuses for this workflow.

Enterprise Purchasing - Setup - Options

Search

Reload

Sort

Select Filter

Select Sort

New

Copy

Row #	Default replenishment generation item	Default purchase type for replenishment	Default keyword
1			

Basic Info

More Info

Requisitions

Purchase Orders

Request for B / Q / P

Response to RFB / Q / P

Purchasing Invoices

Enterprise purchasing options

Minimum lead days

0

Purchasing Invoices

Default initial status

INV-PENDING

Default resolution ID when receipt and invoice amounts match

MATCH

☒ Require receipt invoice reconciliation before closing purchase orders

☒ Require return receipt invoice reconciliation before closing purchase orders

Default purchase order header status upon reconciling all receipts

CLOSEOUT

☒ Automatically update purchasing invoice once all associated purchase orders have been closed

Default closed status

INV-CLOSEOUT

4. Set up Storekeeper Portal Web Options. Review the following options. Although these are not required, this can greatly improve the workflow for some use cases.
 - User Groups allowed to reconcile invoice lines to receipt - This gives explicit authority to users using user groups to directly reconcile lines within Storekeeper Portal. Typically, a user outside these user groups is only able to reconcile by signing-off if an invoice line is a perfect match to the receipt or if the invoice amount is less than the receipt amount using the other portal settings. This gives them the authority to directly reconcile an invoice line regardless of any discrepancies. This should only be given to trained users.
 - Automatically reconcile invoice lines when invoice amount is less than receipt amount – This provides the option to automatically reconcile if the customer's business does not care about handling discrepancies when the vendor charged less than what was recorded on the receipt.
 - Default Resolution ID when invoice amount is less than receipt amount - Defines the default resolution ID to enter to help track these cases if desired.

Do not allow edit of quantity on Multi-asset Work Order Part Issues

FULL ISSUES ONLY
FULL AND FINAL ISSUES
ALWAYS

Invoice Reconciliation Settings

User Groups allowed to reconcile invoice lines to receipts ... SYS-ADMIN Remove Remove All

Automatically reconcile invoice lines when invoice amount is less than receipt amount ☒

Default Resolution ID when invoice amount is less than receipt amount ...

Report Settings

Part Request Pick Report Restore Default
Parameters: LocID

Purchase Order All Lines Report Restore Default
Parameters: PONum

Purchase Order Selected Lines Report Parameters: PONum; Lines

Requisition Order Selected Lines Report Parameters: ReqID; Lines

Receipt Receive Report

Cancel Save

Add gadgets to Storekeeper Portal. Depending on user roles, add the following gadgets to the portal:

- Invoice Reconciliation (Clerk, Storekeeper probably wouldn't mind this either)
- Invoices (Storekeeper)

Invoice Reconciliation workflows can now be started from the Invoice Reconciliation gadget in the Storekeeper Portal.



Please see the *Shop Activity Storekeeper User Guide – Storekeeper Gadget* section for information about using these workflows.

Module Settings Section

- Date/Time Values in 24 hour or 12 hour format:** This section of the page is where you determine how to display date/time values, e.g., 24 hour (13:29) or 12 hour (1:29 PM) format.
 - ✓ Whether you keep the default values or change them, it is necessary to save your selection for the portal to function properly.
- Approves/denies part return requests:** This default indicates the storekeeper approves/denies part return requests and determines if the Part Return Requests button shows on the Main Page.
- Default ORDER choice-list status:** This section allows you to determine the default ORDER choice-list status when ordering parts and clicking the PO ID on a line item. The default is **Create New**.

- Purchase Order Action Types:** This section allows you to determine the action type that may be selected when Action is ORDER: Purchase Order ID, Requisition ID and Transfer From

- Enable parts workflow on creation of a purchase order or requisition:** Default is disabled. Enable this option to allow users to enter a line item when creating a new purchase order or requisition.
- Search 'ALL PARTS' regardless of supported locations:** Checking this setting allows a user to see parts used at other locations outside of their current location context when doing a part lookup.

- **Vendor choice-list details to display for ORDER part actions:** This section allows you to determine the Vendor choice-list details (Approved Vendor, Rank, and/or Contract) for ORDER part actions on the Part Request Detail and Parts Ordering edit pop-in pages.



Approved Vendor and Rank may be set on the Vendor/Part Information screen.



The choice-list only displays these new columns when the line item action type is "ORDER". If the all three settings are checked and the Part ID and Suffix are blank, only the Vendor Contract column will display. The Parts Ordering pop-in page also uses these same rules for the Vendor choice-list.



The Part ID drives the queries for looking up the Approved and Rank values and sorting is Approved Descending, Rank Ascending, and Vendor ID Ascending.

Select Vendor ID ✕

Vendor ID Starts with: 199 item(s) found

1 8 A B C D E F G H I J K L M N O P R S T U V W X
Z

And Vendor ID contains:

Vendor ID	Name	Approved	Rank	Vendor Contract
1000	NAPA CAR AND PARTS	Y	1	Y
NAP850254510	NAPA AUTO PARTS	Y	2	Y
860298157	SUBIA	Y	3	
ABT161775998	A B TRAILERSy LLC			
ACC270058028	ACCESSORIES UNLIMITED INC			
ACC542105218	ACCESSORIES DEPOT OF NM			
ACL850420442	A CLASSIC GLASS SHOP			
ACM850216187	ACME RADIATOR SERVICE			
ACT850410052	ACTION HOSE INC			
ALB760757139	ALBUQUERQUE AUTO GLASS - TINT			

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Choice-list display when setting is checked for Approved Vendor, Rank, and Contract

Select Vendor ID x

Vendor ID Starts with: 199 item(s) found

1 8 A B C D E F G H I J K L M N O P R S T U V W X
Z

And contains:

Vendor ID	Name	Vendor Contract
WES850123064	WESTERN TRACTOR INC	
TRI850153833	TRIGAS INC	
WAG840703569	WAGNER EQUIPMENT CO.	
WES850157047	WESTFLEET	
TEL50157151	TELCO ELECTRIC INC	
RIC850158548	RICH FORD	
FRA850162920	FRANKS SUPPLY CO INC	
MES850164580	MESA TRACTOR INC	
KNI850194905	KNIGHTONS AUTO MACHINE SHOP	
TOM850196695	TOM GROWNEY	

Page 1 of 20

Only Vendor Contract displays when Approved Vendor, Rank, and Contract are checked but Part ID and Suffix are blank

- **Display Manufacturer Name and Manufacturer Part Number:** Checking this option adds the setting and the display to the Storekeeper Part Request List.

Request Management

Current Location: Refresh

Pending Parts Requests: 40 Pending Commercial Requests: 1 Notify Requests: 0 Ordered Requests: 17

	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Descr...	Manufacturer	Comments	Qty Reqd	Qty on Hand	Qt
☐			Y	58	001-MOLLY TELLO	P-2003-0-CLEAR LENS; CLEAR LENS			1	26	
☐			Y	54	LMEMPID01-CHAD WALKER	18-19AS-0-*?; WIPER BLADES	AC DELCO ()		2	25	
☐			Y	106	001-MOLLY TELLO	10100094-0-GASKET; GASKET	AC DELCO (219-323)		1	25	
☐			Y	129	001-MOLLY TELLO	P-1002-0-GASKET; GASKET	KD (13241)	INSTALL BRAKE SHOES	1	19	
☐			Y	131	001-MOLLY TELLO	P-1002-0-GASKET; GASKET	KD (13241)		1	19	
☐			Y	135	001-MOLLY TELLO	P-2006-0-BRAKE DRUM; BRAKE DRUM	911 (42256-7243627)		1	49	
☐			Y	73	001-MOLLY TELLO	P-2009-0-THERMASTAT; THERMASTAT			1	16	
☐			Y	86	001-MOLLY TELLO	PART009-0-0-A / FILTER; AIR FILTER			1	16	
☐			Y	89	001-MOLLY TELLO	P-1013-0-STARTER REBUILD; STARTER			1	5	

Current Filter

What do you want to do?

for Checked Items:

Column Displayed Based on Storekeeper Portal Setting (Manufacturer shown in parenthesis)

Part Request Detail

Request ID: 129 Date and Time Requested: 03/30/2010 10:10 AM
 Location ID: 1000 Requested By: MOLLY TELLO
 Issue Together: ☐

Line Items: 1

Work Order: 1000-2010-137 (OPEN) Equipment: C-1003: CHEVCAVALIER03 2010 CHVRL CAVALIER NRV BLUE CHEV. CAVALIER 4 DOOR SEDAN
 Delay Status: Hat No: Parking Stall: YELLOW

Action: (PENDING) ☐ NFI Part ID: P-1002 - 0 ...

Manuf Part No: 13241 Manufacturer: KD
 Part description: GASKET, GASKET
 Task ID: B1 PM-B1

WAC: 10 ... INSTALL
 Quantity: 1.00 EA Qty Ordered: 2.00 Unit Price: 34,6200 Est. Unit Cost: 0.00
 Qty Committed: 0.00 WOs: 2.00 Core Value: 0.00
 Qty on Hand: 19.00 Qty Avail: Y Total: 4.00

Comment: INSTALL BRAKE SHOES Bin:

Action Comment:

Vendor ID: ACT850410052 ... Vendor Contract ID:

Account ID:

☐ Parts are ready

Manufacturer Part Info Displayed Based on Storekeeper Portal Setting

To accommodate additions to the Request Management page, some columns may now appear as you scroll to the right. For example, the Issue Together column is indicated in the screenshot below.

Request Management

Current Location: 1000 - FULL SERVICE SHOP Refresh: Off

Pending Parts Requests: 39 Pending Commercial Requests: 1 Notify Requests: 0 Ordered Requests: 17

Asset ID	Work Order	Work Order Status	Delay	Account ID	Date Requested	Days Open	Date Required	Status	Issue Together
C-1003	1000-2010-28				02/24/2010 12:57 PM	1888		RECEIVED	
A-1002	1000-2010-9				02/23/2010 12:34 PM	1890		PENDING	
C-1003	1000-2010-137				03/29/2010 12:13 PM	1856		PENDING	
C-1003	1000-2010-28				03/30/2010 11:09 AM	1855		PENDING	
C-1005	2000-2010-3				03/31/2010 11:08 AM	1854	04/02/2010	PENDING	
C-1004	2000-2010-12				03/17/2010 08:14 AM	1868	03/19/2010	RECEIVED	
C-1004	2000-2010-12				03/25/2010 09:26 AM	1860	03/26/2010	PENDING	
C-1002	2000-2010-8				03/25/2010 09:42 AM	1860	03/26/2010	PENDING	
A-1003	1000-2010-3				02/23/2010 11:57 AM	1890		PENDING	

- **Display Asset Manufacturer and Model ID:** Checking this option adds the setting and the display to the Storekeeper Part Request List.
- **Enable Asset Viewer:** Checking this option provides access to the Asset Viewer via the View Asset zoom icon. The default is enabled/checked. The Asset Viewer displays in any location where there is an Asset Type Work Order and an Asset ID. Refer to the *Supervisor User Guide* or the *Technician User Guide* for additional information about the Asset Viewer.

Work Orders: 1

Delete	Location	Year	Number	Qty	Task ID	WAC	Equipment ID
☐	1000	2011	1	1	02-004		00207
☐							

Asset Viewer

Equipment ID: **C-1004** 2010 CHVRL CAVALIER
CHEV. CAVALIER 4 DOOR SEDAN

MILES **3215**

Service Status:

Basic Info

Codes

Scheduled Svcs

Warranty

Addl Data

Bill of Materials

Parts Used

Files

Comments/Notes

Relationships

Basic Info

Model Year 2010

Manufacturer CHEVROLET

Model CAVALIER

Equipment Type CAVALIER

Description CHEV. CAVALIER 4 DOOR SEDAN

Color NAVY BLUE

Serial Number C-1004-CHEVCAVALIER04

Asset Number CHEV-CAVALIER04

Asset Type ASSET

Assignment Info

Department 1000 - MOTORPOOL DEPARTMENT

Company ID 02

Motor Pool

Dispatch Status IN

Dispatch Location 1000 - FULL SERVICE SHOP

Pool Vehicle Type P120 - SEDAN

Last Out Meter 1 0 MILES

Last In Meter 1 0 MILES

Last Reservation ID

Meter Info

Meter Types Class M-1000

Meter 1 3215 MILES

Meter 1 Life Total 3215 MILES

Locations

Assigned PM 1000 - FULL SERVICE SHOP

Assigned Repair 1000 - FULL SERVICE SHOP

Assigned Mobile Station

Stored

Current

Parking Stall YELLOW

Acquisition

Historical Costs

Delivery Date 01/26/2010

In Service Date 01/26/2010

Months Remaining 0

Original Cost 12582

Capitalized Value

Original Cost + Capitalized Value 12582

- **Enable Automatic Claim Settlement on Core Receipt**
- **Default Claim Status for Settlement**
- **Skill Types Allowed to Pick Parts**
- **Include Part Requests on Request Management page**
- **Include Transfer Requests on Request Management page**
- **Adjustment reason code for new stock locations:** When creating a stock location from the New/Edit Part dialog, this is the reason code that will be used when performing the initial part adjustment. Choice-list provides options for the reason codes.
- **Use Direct Issues portal popin instead of Enterprise Portal Direct Issues screen:** Check this box to use the Parts Direct Issue pop-in instead of opening the Enterprise Portal Direct Issues screen. This option is enabled by default.
- **Use Asset Chooser instead of Choice-list:** Check this box to enable use of the Asset Chooser instead of the choice-list.
- **Use Vendor Chooser instead of Choice-list:** Check this box to enable use of the Vendor Chooser instead of the choice-list.
- **Do not allow edit of quantity on Multi-asset Work Order Part Issues**
 - NEVER - Quantity textboxes never be disabled.
 - FULL ISSUES ONLY - Quantity textboxes only disabled for full issues with no previous issues on the request.

- FULL AND FINAL ISSUES - Quantity textboxes only disabled for full issues with no previous issues or full issue with previous issues on the request.
- ALWAYS - Quantity textboxes always be disabled.

Report Settings Section

This section of the page is where you provide report information. Complete the following fields:

- **Part Request Pick Report:** This field specifies which report is printed when the Print Pick Report hyperlink is pressed. If you decide to change the default report, please be aware that it has one parameter: LocID.

Request Management

Current Location: 1000 - FULL SERVICE SHOP

Pending Parts Requests: 39 Pending Commercial Requests: 1 Notify Requests: 0 Ordered Requests: 17

☐	Priority R...	Notify	Qty Avail?	Request ID	Requested By	Part ID - Suffix - Descr...	Manufacturer	Comments
☐			Y	58	001-MOLLY TELLO	P-2003-0-CLEAR LENS; CLEAR LENS	()	
☐			Y	54	LMEMPID01-CHAD WALKER	18-19AS-0-*?; WIPER BLADES	AC DELCO ()	
☐			Y	106	001-MOLLY TELLO	10100094-0-GASKET; GASKET	AC DELCO (219-323)	
☐			Y	131	001-MOLLY TELLO	P-1002-0-GASKET; GASKET	KD (13241)	
☐			Y	135	001-MOLLY TELLO	P-2006-0-BRAKE DRUM; BRAKE DRUM	911 (42256-7243627)	
☐			Y	73	001-MOLLY TELLO	P-2009-0-THERMASTAT; THERMASTAT	()	
☐			Y	86	001-MOLLY TELLO	PART009-0-0-A / FILTER; AIR FILTER	()	
☐			Y	89	001-MOLLY TELLO	P-1013-0-STARTER REBUILD; STARTER	()	
☐			N	53	001-MOLLY TELLO	XF12-19E616-CA-0-MOTOR ASSY; MOTOR ASSY	()	

Current Filter: No filter defined. Define Filter Clear Filter

What do you want to do?

Back for Checked Items: Set Notify Flag Process **Print Pick Report**

- **Purchase Order All Lines Report:** This field specifies which report is printed when the Print All Lines hyperlink is pressed. If you decide to change the default report, please be aware that it has one parameter: PONum.

Purchase Order Detail

Vendor: V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR

Purchase order ID: 1000-2011-0000018

Purchase type: PTYPE1

Date ordered: 04/28/2015 09:16 AM

Expected Delivery: 04/30/2015 09:00 AM

Needed By: 04/30/2015 09:00 AM

Lead Days: 0

Replenishment batch ID: 0

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line Item # 1 PART009-0-0 BRAKES SYSTEM

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location	Line Item Type	Date Ordered	Expected Delivery	Required	Lead Days	Funding Source
1	PART009-0-0 BRAKES SYSTEM			2	2.00	\$34.50	OPEN	1000 - FULL SERVICE SHOP	STOCK PART	04/28/2015 09:16 AM	04/30/2015 09:00 AM	04/30/2015 09:00 AM	0	

Actions: Receive All Receive Checked Review and Receive Delete Checked Manage Receipts **Print All Lines** Back

- **Purchase Order Selected Lines Report:** This field specifies which report is printed when the Print Selected Lines hyperlink is pressed. If you decide to change the report, please be aware that it has two parameters: PONum and Lines.

Purchase Order Detail

Vendor: V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR
 Purchase order ID: 1000-2011-0000018
 Purchase type: PTYPE1
 Date ordered: 04/28/2015 09:16 AM
 Expected Delivery: 04/30/2015 09:00 AM
 Needed By: 04/30/2015 09:00 AM
 Lead Days: 0
 Replenishment batch ID: 0

New Line Item | Files
 Edit PO Header | Attributes
 New Note | Comments

Line Items: 1

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Qty not yet Received	Unit price	Status	Location	Line Item Type	Date Ordered	Expected Delivery	Required	Lead Days	Funding Source
1	PART008-0-01 BRAKES SYSTEM			2	2.00	\$34.50	OPEN	1000 - FULL SERVICE SHOP	STOCK PART	04/28/2015 09:16 AM	04/30/2015 09:00 AM	0		

Actions: Receive All | Receive Checked | Review and Receive | Delete Checked | Manage Receipts | **Print Selected Lines**

Back

- **Requisition Order Selected Lines Report:** This field specifies which report is printed when the Print Selected Lines hyperlink is pressed. If you decide to change the report, please be aware that it has two parameters: ReqID and Lines.

Requisition Detail

Vendor: V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR
 Requisition ID: 1000-2011-0000004
 Purchase type: STOCK PART
 Date ordered: 02/05/2013 06:39 AM
 Needed By: 02/05/2013 06:39 AM
 Lead Days: 0
 Replenishment batch ID: 0

New Line Item | Files
 Edit Requisition | Attributes
 New Note | Comments

Line Items: 1

Line Item Status: ☐ PENDING ☐ OPEN ☐ CLOSED ☒ ALL

Line #	Part or Comment	Manuf Part No	Manufacturer	Qty Ordered	Unit Price	Lead Days	Status	Location	Line Item Type	Required	Funding Source
1	P-2000-01 WIPER BLADE			1	\$34.63	0	OPEN	1000 - FULL SERVICE SHOP	STOCK PART		

Actions: Line Item(s) Action: **Print Selected Lines**

Back



For any of the report links to display there must be setting value. In other words, you may “hide” the link by not setting the setting value.

- **Receipt Receive Report:** This field specifies the report that is printed when the Batch ID hyperlink is pressed. A Print All Receipts hyperlink also displays upon selecting a receipt (or multiple receipts) with a batch ID and prints the report. If you decide to change the report, please be aware that it has one parameter: BatchID.

Manage Receipts

Show Filters Received By: 1000-11

Receipts: Showing 19 of 19

	Vendor	Purchase Order ID	Line #	Part ID - Suffix - Description	Manuf Part No	Manufacturer	Quantity @ Unit Price	Batch ID	Date Received
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000005	15	P-2003-0 - CLEAR LENS			1@25.52	20150428-00001	08/02/2013
☒	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000023	3	P-1000-0 - OIL FILTER	435734	BG	2@34.64	437-233	08/06/2012
☒	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000023	2	P-1000-98 - OIL FILTER			2@2.29	20120806-00008	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2011-0000007	1	P-1003-0 - FILTER AIR			1@12.75	20120806-00005	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000016	2	P-1000-0 - OIL VESSEL	435734	BG	8@34.64	20120806-00004	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000016	1	P-2018-0 - BELTS			25@34.43	20120806-00004	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2011-0000008	1	P-1000-0 - OIL FILTER	435734	BG	1@34.64	20120806-00003	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2010-0000023	1	P-2009-0 - THERMASTAT			1@213.74	20120806-00001	08/06/2012
☐	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	1000-2011-		P-1000-0 - OIL FILTER	435734	BG	6@34.64	20120725-	07/25/2012

What do you want to do with checked items?

Batch ID:

Leave blank to use default Batch ID

Actions: Assign Checked Print All Receipts Process

Part Wizard Settings Section

This section determines the maximum number of purchase orders and work orders to display on the Part Wizard. The default setting is 25. To change the amount, select a number from the drop-down box for each of the following:

- Maximum Number of Recent Purchase Orders to Display:** This selection sets the maximum number of recent purchase orders to show in the Part Wizard. The out-of-the-box default is 25, Null = 25, and Blank = ALL.

Part Definition

Part Definition

Edit Existing Part ID: - 0 ... Lookup Edit New Part

Part ID: P-2006

Suffix: 0

Keyword: BRAKE DRUM ...

Short Description: BRAKE DRUM

Product Category: BRAKE ...

Part Classification: 90 ... OTHER/MISC

Save

Basic Info Recent Purchase Orders Recent Work Orders Cross References Tasks

Receipt Date	PO ID	Vendor	Phone	Qty Ordered	Qty Received	Receipt Price	UOM
02/25/2010 08:54 AM	1000-2010-0000009	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	561-281-9871	50	25	98.5300	EA
03/08/2010 09:52 AM	2000-2010-0000001	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	561-281-9871	4	4	129.0000	EA
04/25/2012 09:10 AM	1000-2010-0000009	V-1000 - NAPA AUTO PARTS - FULL SERVICE VNDR	561-281-9871	50	25	98.5300	EA

Cancel

- Maximum Number of Recent Work Orders to Display:** This selection sets the maximum number of recent work orders to show in the Part Wizard. The out-of-the-box default is 25. Null is equal to 25, and Blank is equal to ALL.

Part Definition

Part Definition

Edit Existing Part ID: 0

Part ID: CNPART001

Suffix: 0

Keyword: ANGLE ANGLE

Short Description: TEST

Product Category: 430 TRUCK PARTS - RAL

Part Classification: CN CONSUMABLE

Recent Work Orders

Issue Date	Equipment ID	Work Order ID	Issue Location	Qty Issued
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	
06/04/2010	CNPART011-1	CNLOC4-2010-1199	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	

- **Apply Vendor location security via Employee Supported Locations:** This setting is unchecked by default. Enabling it allows location security support which will restrict the Vendors and Purchase Order Receipts section in the dialog to only those that support the same location as the current employee.

Part Search Settings

- **Default Part Lookup Part ID search option:** This drop-down sets the default for the Part ID search option on the Part ID Lookup page. The drop-down list has the following choices:
 - **Include Xref** allows the **Lookup** button (on pages with a Part ID field and choice-list that's linked to the Parts Lookup dialog) to look up parts through cross reference ID's. **Include Xref** (with the **...even if xref part ID exists as stock part option** checked (ON)): Searches the part IDs and the cross references and includes cross referenced parts that also are stocked as parts themselves. **Include Xref** (with the **...even if xref part ID exists as stock part option** unchecked (OFF)): Searches the part IDs and the cross references and does not include cross referenced parts that are themselves stocked part IDs.
 - **Only Xref:** Searches only the cross references
 - **No Xref:** Searches only the part IDs and not the cross references
 - **Manuf Part Only:** Searches only Manufacturer part IDs and not cross references or part IDs

- Always include cross references if Include XRef is selected even if xref parts exist as stock part ID: Checking this box ensures that cross references are always searched even if the cross referenced part also exists as a stock part ID. This setting applies to the part lookup search functionality and the setting default is not active.

When you are finished setting the default values and settings, click the **Save** button.

After you have finished configuring Shop Activity's Storekeeper Portal, log off, then exit your browser and open a new browser window prior to using the Storekeeper Portal tab to view or update data.

Please refer to the *Web Modules Shop Activity Storekeeper User Guide* for details about using the portal.

New ID Request Settings

The New Part ID Request and New Vendor ID Request functionality is set up through User Control Rights.

The User must have View and Change Request rights checked for the Parts Primary (2077) and Vendor Primary (2013) screens and the User Group must also have View and Insert rights checked for the Change Request screen (2439). These rights are set on the Rights Templates > Screen Rights screen.

The settings control the **Request New Part** and **Request New Vendor** buttons on the Part Definition Pop-in when responding to a Part Request.

Part Definition

Part Definition

Edit Existing Part ID: [] - [0] [Lookup] [Edit] [New Part] **Request New Part**

Part ID: JH-P1 [Q] Manufacturer Name: [] [Q]
 Suffix: 0 Manufacturer Part Number: []
 Keyword: ABS SENSOR [Q] ABS SENSOR
 Short Description: BRAKE ABS - SENSOR
 Product Category: C.000 [Q] COMMON-COMMON ITEM
 Part Classification: 1 [Q] ROUTINE

[Save]

Basic Info | Recent Purchase Orders | Recent Work Orders | Cross References | Tasks

Stock Locations: 1 [ADD]

Location	Primary Bin	UOM	Qty on Hand	Unit Price	Preferred Vendor
JHLOC1 - JH LOC		EA	11	415.8800	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.

Vendors: 1 [ADD] **Request New Vendor**

Vendor	Manufacturer Part ID	Order Price	Comments
100-5661 - SYNAPSE ENERGY ECONOMICS, INC.		0.0000	

[Cancel] [Apply]

Click the **Request New Part** or **Request New Vendor** button to open the Enterprise Portal window for adding a new part or vendor in the change request mode.

Vendors - Primary Information ADMIN MODE **CHANGE REQUEST** HELP PREFERENCE

Search [Q] Reload [↺] Sort [↑↓] Select Filter [v] Select Sort [v]

[New] [Copy] [Delete] [Edit] [Save] [Cancel] [Export]

Vendor ID: []

Basic Info

Name: [] Sales tax rate: []
 Accounting system number: []
 Contact name: []
 Email address: [] Vendor type ID: [v]
 Address: [] Vendor status ID: [v]
 Line 2: []
 Line 3: []
 Line 4: []
 Address addl info: []
 Line 2 addl: []
 Line 3 addl: []
 Phone: []
 Fax: []

☐ Active
☐ Minority-owned
☐ Women-owned
☐ Drug-free

Expiration date: [v]
 Associated file: []
 File path: []
 Description: []