Electronic Parts Ordering

Introduction   This job aid describes the following tasks involved with electronic parts ordering:

Electronic Parts Ordering, Continued

View Configured Vendors	This section discusses how to view your existing configured electronic vendors in the Action Center. Review the vendors you already have configure prior to adding additional vendors.

Access Action Center	Follow the steps below to access Action Center in **CCC ONE** desktop and **cccone.com**.

To access the Acton Center in **CCC ONE** desktop:
- Select the Action Center **banner** in the top right, the Action Center page opens in cccone.com.

To access the Acton Center in **cccone.com**:		
• Select the **menu** (A) icon, then **Home** (B), the Action Center page opens.	**–OR–**	• Select the **Bell** (C) icon, the Action Center page opens.
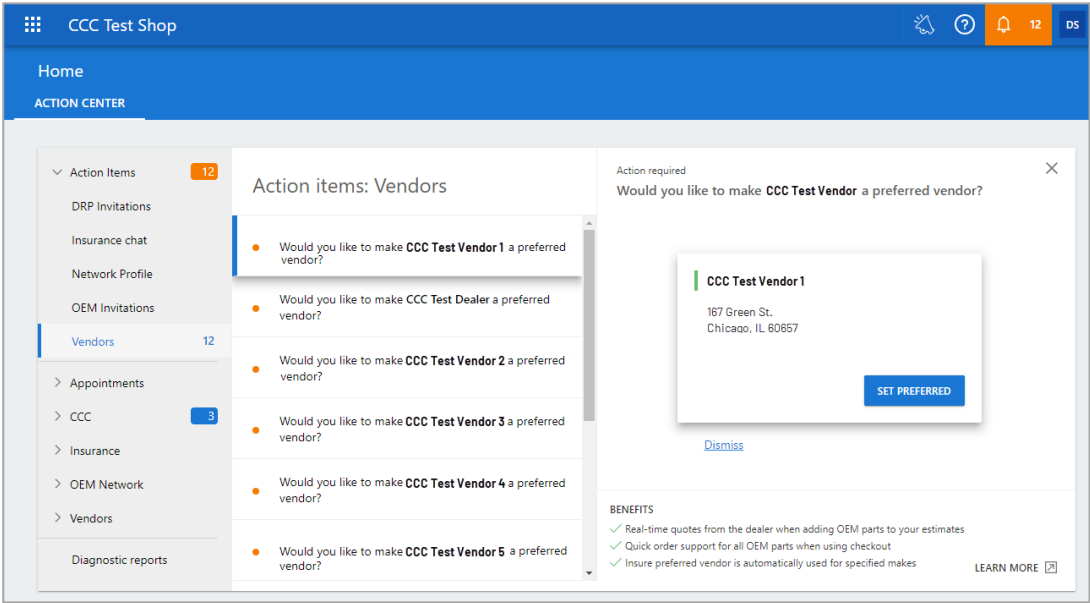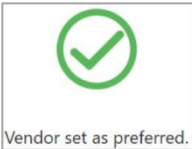
View Configured Vendors	This table reviews how to configure new electronic vendors using the Action Center.

Step	Action	
1	From the **Vendors** section, select the vendor from the in **Action items: Vendors** section and select **Activate**. **Note:** Select **Dismiss** to decline vendor activation and clear from Action Items.	
2	The **Vendor Activated** confirmation window will briefly appear prior to transitioning to the next **Action Item**.	

Electronic Parts Ordering, Continued

View Configured
Vendors, Continued

Step	Action
1	Select **Set Preferred** to update vendor as preferred.
2	**Preferred Vendor** confirmation window will briefly appear prior to transition to the next Action item.

# Electronic Parts Ordering, Continued

Adding Vendors This section discusses how to add vendors to your repair facility. Additionally, you can mark vendors as preferred.

Adding Vendors Follow the steps below to access the Vendors settings in **CCC ONE** desktop and **cccone.com**:

To view Vendors in **CCC ONE** desktop:
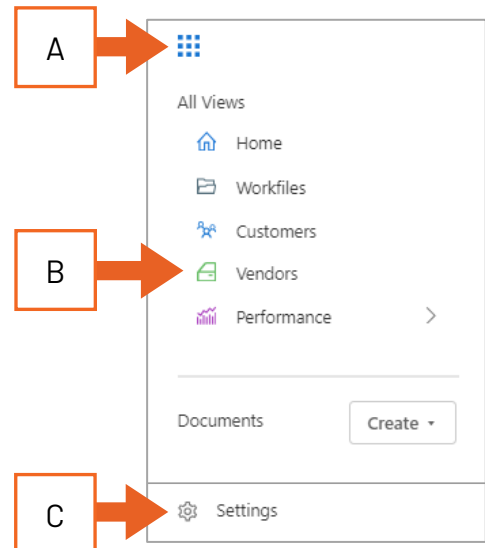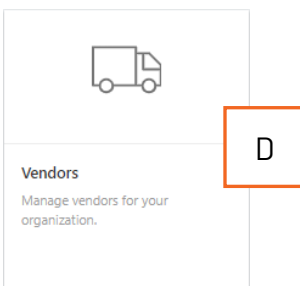- Select **View**, then **Vendors**, the Vendors page opens in cccone.com.
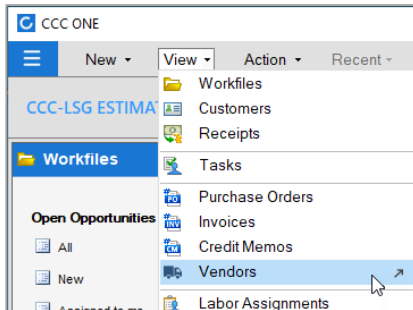
To view Vendors in **cccone.com**.
- Select the **menu** (A) icon, then **Vendors** (B), the Vendors page opens.

OR

- Select the **menu** icon, then **Settings** (C), then select the **Vendors** (D) tile on the Settings screen to open the Vendors page.
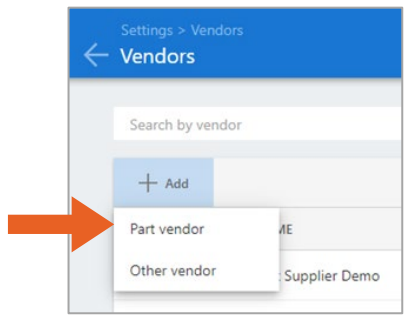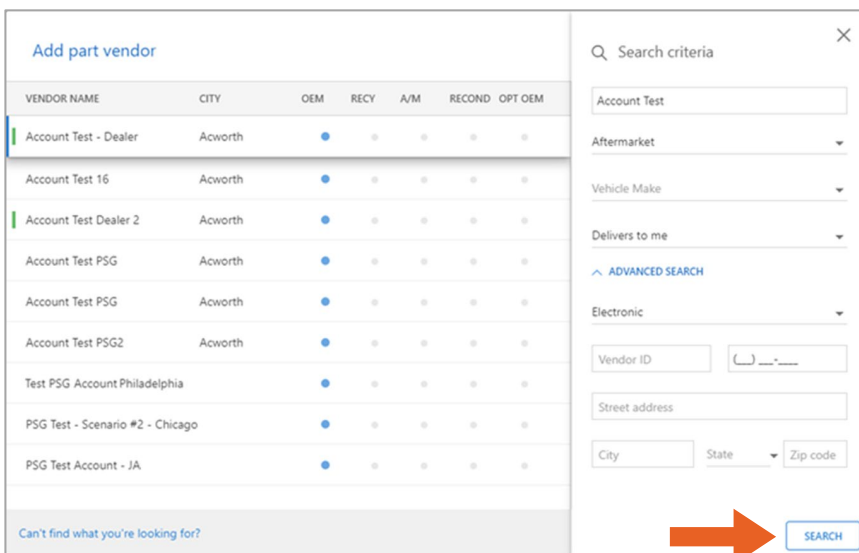
Electronic Parts Ordering, Continued

Adding Vendors, Continued

Follow the steps below to add a new vendor in **cccone.com**:

Step	Action
1	Select the **+Add** button, then select **Parts Vendor**, the **Add part vendor** popup opens.

2	To locate a vendor, choose from the following **Search criteria** fields:
	• **Vendor Name:** Enter a Vendor's **Name**.
	• **Part Type:** Select the types of **Parts** a vendor provides.
	• **Vehicle Make:** Select the types of **Makes** a vendor provides parts for.
	• **Delivers to Me:** Select to include vendors that **Delivers to me** or **All vendors nationally**. **Note:** It is recommended to search by **Delivers to me**.
	• Additional **Advanced Search** options allow you to specify your search results by:
	   ○ **Ordering:** Select an option for the Ordering method **Electronic** or **Manual**.
	   ○ **Vendor ID:** Enter the Vendor ID.
	   ○ **Vendor Phone:** Enter the Vendors phone number.
	   ○ **Street Address/City/State/Zip:** Enter the Vendors address details.

3	Select **Search**.

Hint: In the **Add part vendor** popup select the **search** icon in the top right to reopen the closed **Search criteria** panel.

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Adding Vendors,
Continued
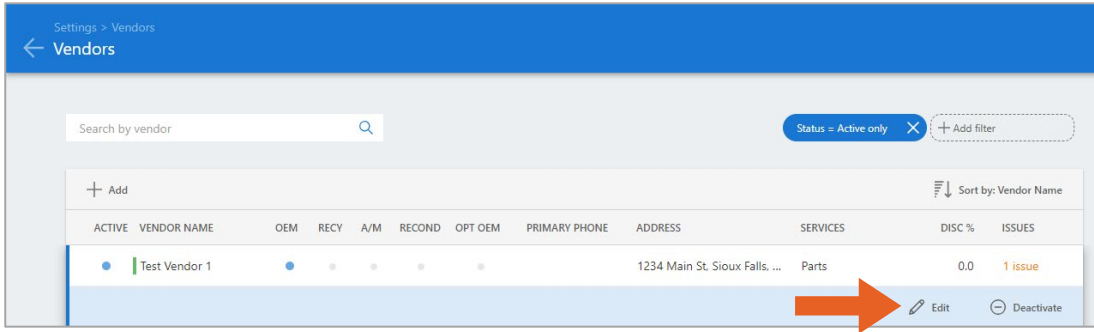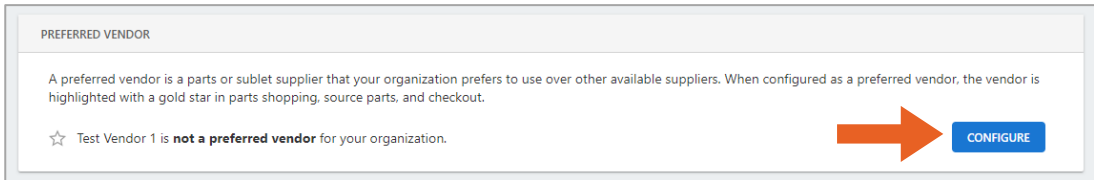
Step	Action
4	Select a **vendor**, then select **OK** to add. The Edit Vendors page opens.
5	Review the **vendor** details on the Edit Vendor page and make any necessary changes, then select **Save**. Repeat steps to add additional vendors.
6	You will be redirected to the Vendors page and the new vendor will now appear in your list of vendors.

Electronic Parts Ordering, Continued

Setting Vendor as Preferred

This section discusses how to set a vendor as preferred for your repair facility in **cccone.com**.

Follow the steps below to set a vendor as preferred in **cccone.com**:

Step	Action
1	Select a **Vendor**, then select **Edit** from the Vendors page, the Edit Vendors page opens. **Note:** You have the option to **Deactivate** the Vendor.
2	Scroll to the Preferred Vendor section, then select **Configure**. The Edit Preferred Vendor page opens. The Edit Vendors screen will show the following to let you know if the vendor is enabled for electronic ordering: **Green Bar:** Electronic Vendor that is **enabled** for electronic purchase orders. **Yellow Bar:** Electronic Vendor that is **not enabled** for electronic purchase orders. **No Bar:** Manual Vendor.
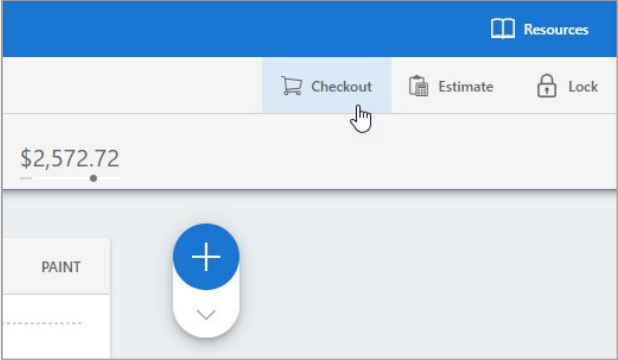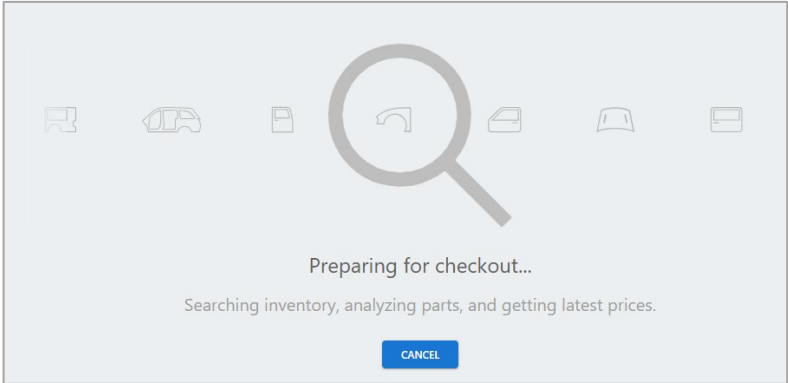
**Setting Vendor
as Preferred**,
Continued

Step	Action
3	Move the slider to **Enabled.** Additional **Part Account** and **Vehicle Makes** sections will appear.
4	Select the desired options in the **Part Account** and **Vehicle Makes** section. A minimum of one part type and one vehicle type is required for each section.
5	Select **Save** to apply your changes.
6	The vendor will now show as **Preferred** in your list of vendors indicated by an outlined orange star.

Electronic Parts Ordering, Continued

Submitting an Order   Follow the steps below to submit an order to a supplier:

Step	Action
1	Open a **Repair Order (RO)** that is ready with parts added.
2	Select the **Checkout** button. **Note:** This quotes the supplier part availability and cost to shop. The Preparing for Checkout screen will appear briefly before the **Parts Checkout** screen opens.

Submitting an Order, Continued

Step	Action
3	The **Parts Checkout** screen displays the parts on the estimate and the status of the part in the Part Checkout process segmented by **Tabs** and **Columns**:

Tabs (A):
- **Not Ordered:** Number of parts that have not been ordered.
- **Ordered:** Number of parts that have been ordered.
- **Received:** Number of parts that have been received.
- **All Parts:** Number of all the parts added to the estimate.

Columns (B):
- **Description:** Part name and number.
- **Extended Price:** Total part cost to customer.
  - Select **+** to expand and view more details.
- **Vendor:** Preferred Vendor.
  Unit Cost: Part cost to shop.
  - Select **+** to expand and view more details.
- **Stock:** Supplier Quantity Available. *(if shared by supplier)*
- **Delivery:** Anticipated deliver timeframe in Days.
- **Quantity:** Number of parts being ordered.
- **Order $:** Based on quantity cost to shop.
- **Margin ($/%):** Shops margin in percentage or dollars, can be toggled to show $ or %.

Submitting an Order,
Continued

Step	Action
4	Use the **checkboxes** (A) to select the parts you would like to order, while deselecting the parts you're not ready to order.
	Note: To find an alternative vendor select the **search** icon (B) then in the popup that appears select **Seach all active vendors**, then search and select the desired vendor.
5	Once all the desired parts have been selected proceed to the **Purchase Order Summary** section at the bottom of the screen. This section shows the **Vendor(s)** selected, **Total PO Quantity**, **Total PO $**, and **Total Margin**. Use the checkboxes in this section to:
	• **Send vehicle photos:** This will send the appropriate vehicle photos to the vendor.
	• **Send estimate lines with purchase order:** This will send to estimate lines for non-ordered parts to the vendor.
	Note: Select the **information** icons to learn more.
6	Select **Order Parts** once you're ready to order your parts. A screen will appear to indicate that the Parts have been successfully ordered.
	To manually create a PO, select the **ellipsis** icon, then select **Save order without send**.

Electronic Parts Ordering, Continued

Order Confirmation

Follow the steps below to navigate to your inbox in **cccone.com** or **CCC ONE desktop** to review the message from the supplier once they have confirmed your order or view changes that may have been made:

View messages in **cccone.com**:

Step	Action
1	Select the **Bell** icon. **Note:** If open close the Repair Order.
2	Select to expand **Vendors** and open **Electronic Orders**.
3	Select a **Purchase Order** from the list, here you will see the details of the order including: **Expected Delivery, Part Avaliblity, and Pricing**.

Electronic Parts Ordering, Continued

Order Confirmation, Continued

Note: This section is for **Repair Workflow** user only.

From the workfile view follow the steps below to view messages in **CCC ONE®** desktop:

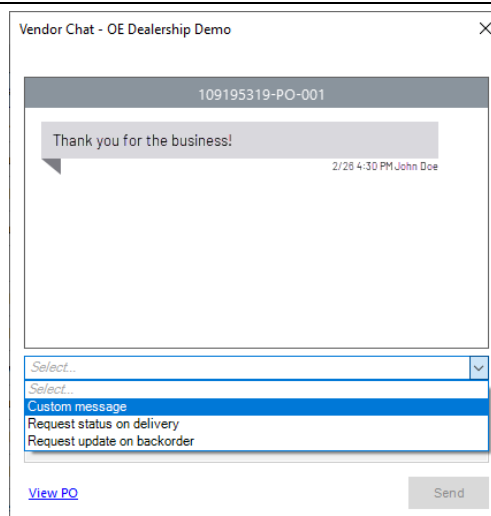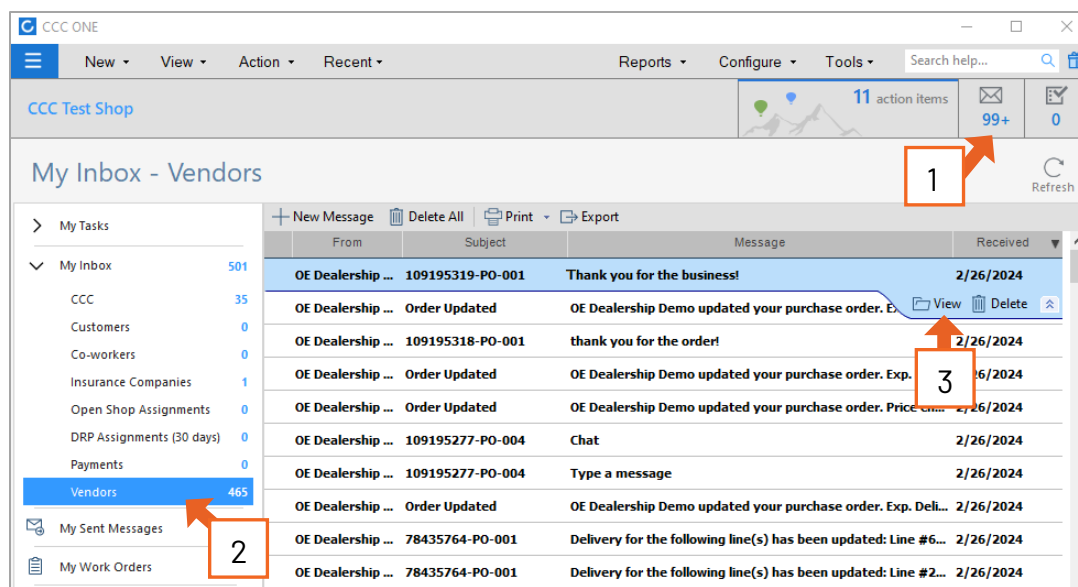| Step	Action
1	Select the **Parts** tab.
2	Then under Views select **By RO Lines**. Here you will see the details of the order such as **Backorder**, **Expected Delivery**, **Added Parts**, **Expected Delivery** changes.

Electronic Parts Ordering, Continued

Supplier Messages

Note: This section is for **Repair Workflow** user only. You must have a confirmed order to begin sending messages to a vendor.

Follow the steps below to view/ respond to messages received from the supplier in **CCC ONE** desktop:

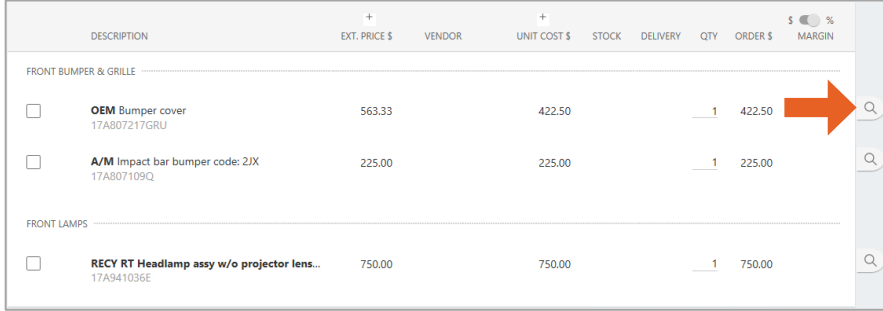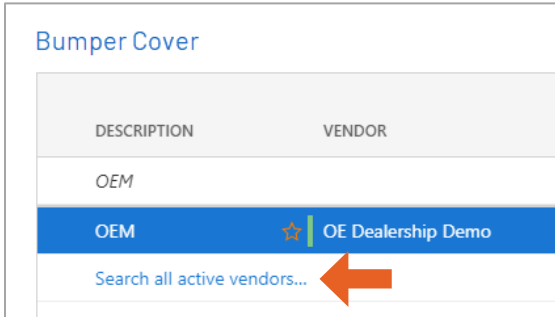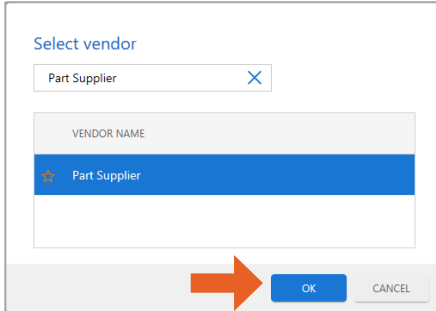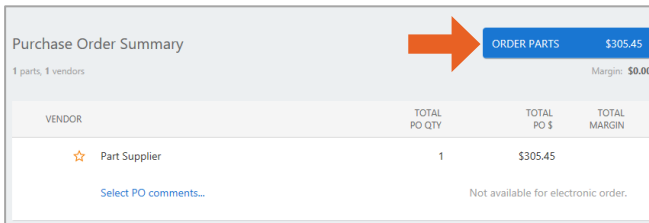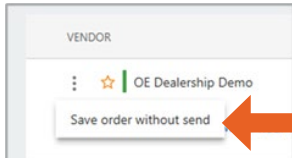| Step	Action
1	Select the **Envelope** icon to open your inbox.
2	Then select **Vendors**, to view messages sent by your Vendors.
3	Select the message you want to view, then select **View**. The Vendor Chat window opens.
4	To respond select an option from the dropdown: • If you select **Custom message**, enter the message in the field, then select **Send**. • If you select **Request status on delivery**, it will prompt a status message, edit if needed then select **Send**. • If you select **Request update on backorder**, it will prompt a status message, edit if needed then select **Send**.

Electronic Parts Ordering, Continued

Manual PO   Follow the steps below to create a Manual PO via the Checkout Cart.

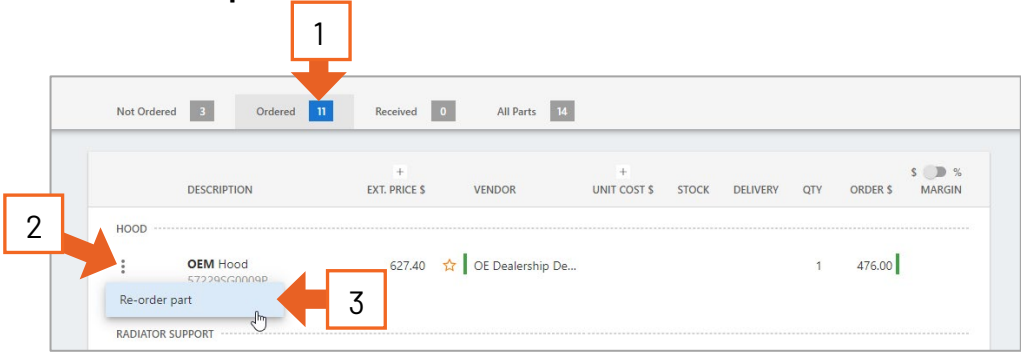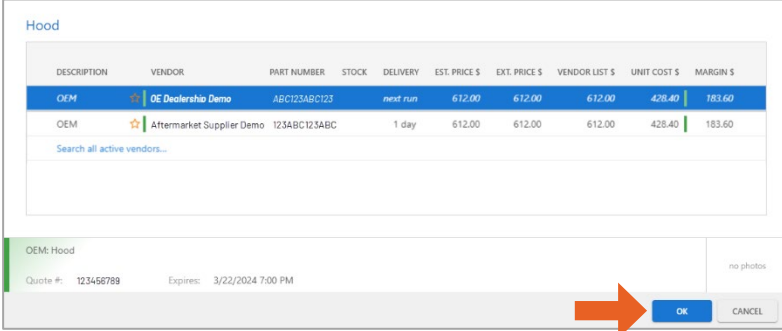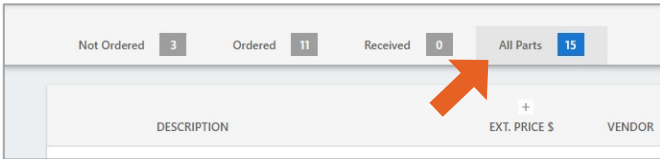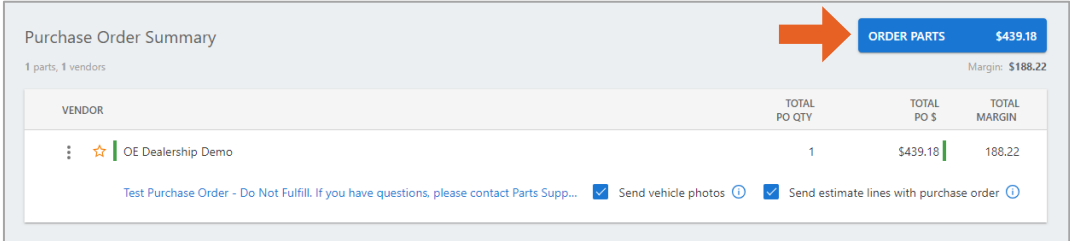| Step	Action
1	Select the **magnifying glass** icon.
2	Select **Search all active vendors**.
3	Search for, then select preferred supplier for your purchase order, then select **OK**. **Hint:** To mark you vendor as Preferred, follow the steps in the **Set Preferred Vendor** section.
4	Select **Order Parts**. If vendor is electronically enabled, to manually create a PO, select the **ellipsis** icon, then select **Save order without send**.

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Electronic Parts Ordering, Continued

Re-order Part   This section describes how to **Re-order parts** from a supplier.

Follow the steps below to submit an order to a supplier:

Step	Action
1	Select the **Ordered** tab.
2	Locate part to re-order then select the **ellipsis** icon.
3	Then select **Re-order part**.
4	Select the desired vendor, then select **OK**.
5	Select the **All Parts** tab, the part reordered will be selected.
6	Select **ORDER PARTS**. The part is now ordered.