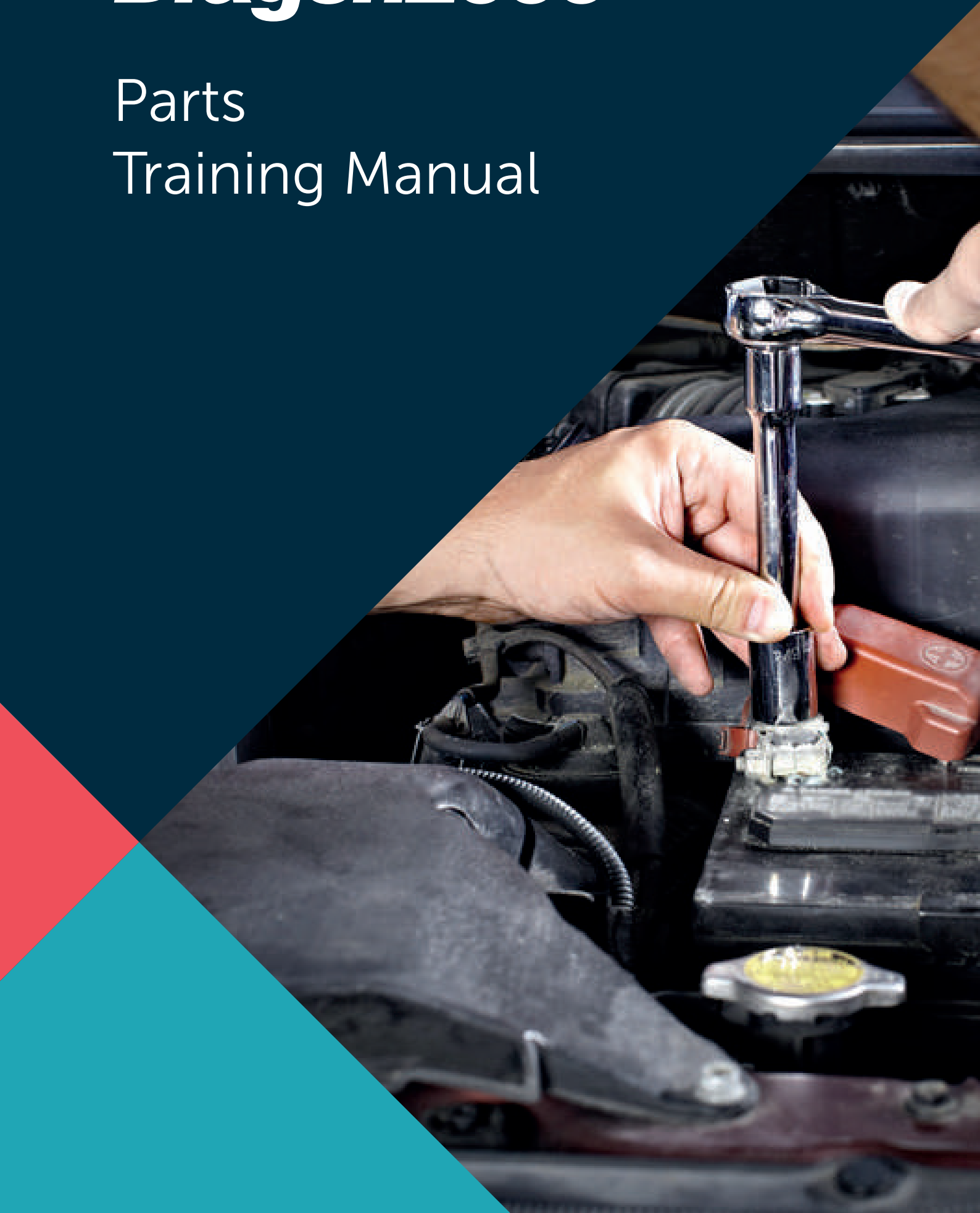


Dragon2000

Parts Training Manual



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Getting Started

Start DragonDMS from either your Desktop shortcut or the Programs Menu.



The image shows a Windows-style login window titled "Dragon2000 Login - C8888 (x64)". The window has a light blue header with the "DragonDMS" logo. Below the header, there are two input fields: "User Name" with the text "username" and "Password" with "*****". A note below the password field states "* Passwords are case sensitive". At the bottom, there are two buttons: "Cancel" and "Login".

The Login screen will appear with the username of the last user. If the last user was not you, you must enter your username and fill in your password and click [Login](#). You can also press the Enter key if you prefer. All passwords are case sensitive.

Main Menu Overview

Once you have successfully logged in the [Main Menu](#) will appear.



You will see all the DragonDMS Module Icons; however, you will only be able to access the Modules that have been enabled for your user account.

Stock Module



At the top of the Stock Menu are the Action Tabs. From left to right they are:

[Create Part](#) – Adding a new Part Record

[Create Orders](#) – Orders placed with your Suppliers

[Create Estimate](#) – Estimates for over the counter Part sales

[Create Invoice](#) – Invoices for over the counter Part sales

[Issues to Job](#) – Allocating Parts to service jobs

[Stock Checking](#) – Stock checking tools

[Utilities](#) – Tool to supersede, delete or mark Parts as not available

Setting your Default Terminology for Stock Items

In [Settings > System > Defaults > Terminology](#), you can choose the default terminology for your Stock Items. You have the option to choose from:

- Part
- Product
- Item

Part will be selected by default and will be used as the reference throughout this manual.

Setting Your Default Menu Screen

You can set which menu you want to have selected when the Part module is opened.

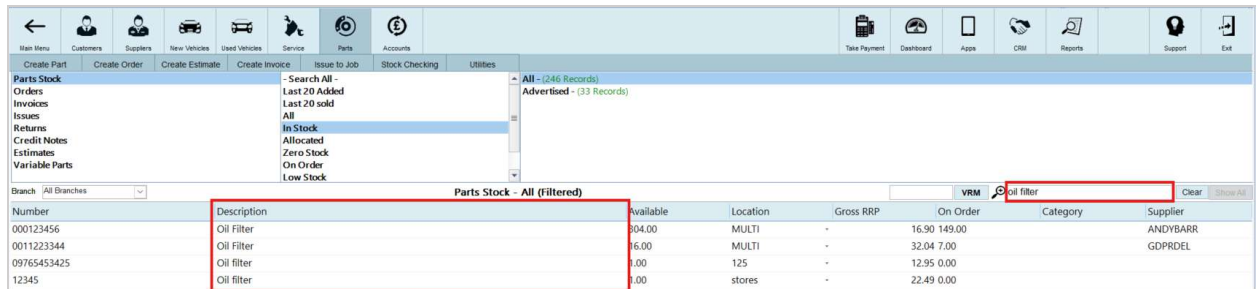
Go to [Settings > Parts > Settings > Menu](#) and double click on the menu item that you want to use. On the right-hand side set the number of records that you want returned.

By restricting the number of records in the list, the screen will load much faster than if all Part Records were to be displayed. You can still search for specific Parts using the search tools.

Customising Your Data

Searching

If you want to filter the list of stock, you can enter your search criteria into the search box which is above the stock list. Multiple search criteria can be added, just make sure you have a space between each word.



Number	Description	Available	Location	Gross RRP	On Order	Category	Supplier
000123456	Oil Filter	304.00	MULTI	-	16.90 149.00		ANDYBARR
0011223344	Oil Filter	16.00	MULTI	-	32.04 7.00		GDPRDEL
09765453425	Oil filter	1.00	125	-	12.95 0.00		
12345	Oil filter	1.00	stores	-	22.49 0.00		

To remove the search criteria click on the **Clear** button to the right of the search box.

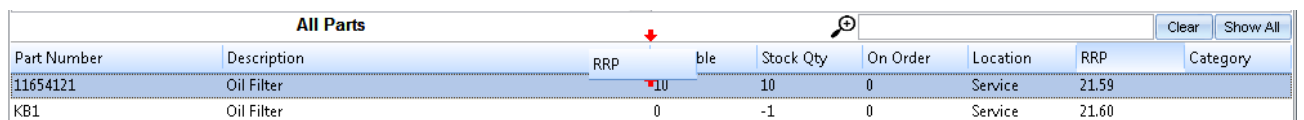
Sorting

The stock list can easily be sorted and ordered to help you organise your stock. Decide which column you want to sort by, click on the column heading to sort the list Z to A, click on the column heading again to sort A to Z. If the column has numerical data it will sort highest to lowest first and then lowest to highest.

Re-Ordering

The order of the columns can be changed by dragging and dropping the column headings, allowing you to get the data the way you want it.

Click on a column heading and drag left or right until you see two red arrows where you want the column to be, and then drop the column heading.



Part Number	Description	RRP	ble	Stock Qty	On Order	Location	RRP	Category
11654121	Oil Filter	10	0	0	Service	21.59		
KB1	Oil Filter	0	-1	0	Service	21.60		

Dragging and Dropping

To 'drag' click and hold the left mouse button and at the same time move the mouse. When you get to the position you want you can 'drop' by releasing the left mouse button.

If you drag a column heading up or down you will see a black cross, the column of data will be removed when you drop the column heading.

Part Number	Description	On Order	Available	Stock Qty	On Order	Location
11654121	Oil Filter	0	10	0		Service

Extra columns of information or columns that have been removed can be added back to the list. Right click on any of the column headings and a list will appear showing the column headings available.



Drag and drop these column headings to add them back into your menu list. After you have added or removed columns the new list layout will be saved for your user profile.

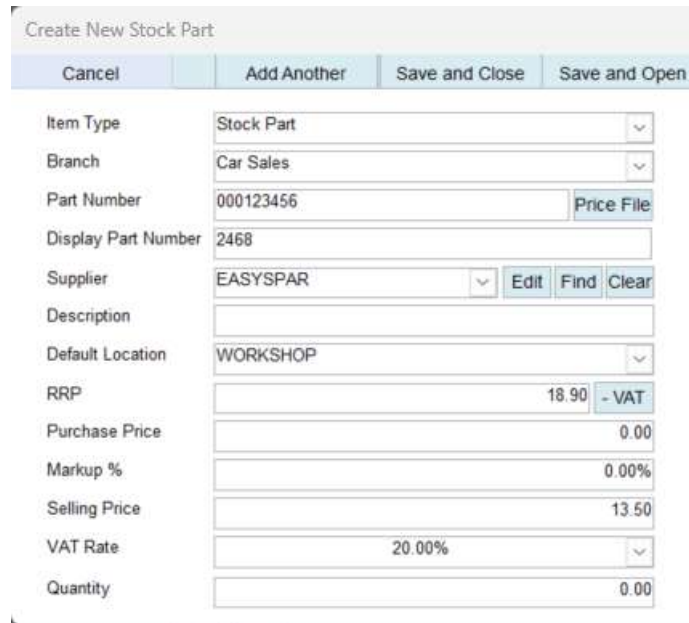
Custom Fields

Custom fields can be used to log any additional information that you require on the Part Record. You can create up to 20 Custom Fields by going to [Settings > Parts > Settings > Custom Fields](#). For each Custom Field, you can either create your own dropdown list of answers or leave it blank for free text entry.

These Custom Fields can then be dragged and dropped to customise your data on the Service screen by right clicking on any of the column headings as per the process above.

Creating a Part Record

Click on the [Create Part](#) action tab and enter the Part details. New locations can be added directly onto this form, just type the name of the new location and a prompt will display asking you to confirm that you wish to create the new location.



The screenshot shows a web form titled "Create New Stock Part". At the top, there are four buttons: "Cancel", "Add Another", "Save and Close", and "Save and Open". The form fields are as follows:

Item Type	Stock Part	▼
Branch	Car Sales	▼
Part Number	000123456	Price File
Display Part Number	2468	
Supplier	EASYS PAR	▼ Edit Find Clear
Description		
Default Location	WORKSHOP	▼
RRP	18.90	- VAT
Purchase Price	0.00	
Markup %	0.00%	
Selling Price	13.50	
VAT Rate	20.00%	▼
Quantity	0.00	

The buying and selling prices should be entered as NET figures. These are the default prices that will be used when you order and sell or issue the part unless you change them manually.

The Quantity on the Create Part Record should only be entered if you have an existing stock of this Part at the time of creation.

Price File

If you are authorised to use a Manufacturers Parts Price File, please contact us to enable the price file option on your DragonDMS system.

Part Record

Part Record

←

Part: 000123456

Oil Filter

Close

Overview

Stock Check

Add Images

Pricing

Part Information

Branch

Leicester

Supplier

CAR002

Edit

Find

Brand

Number

000123456

Display Number

2468

Description

Oil Filter

Barcode

Print

Units

Each

Unit Weight

0

Dimensions (mm) L:

H:

W:

OEM Status

Category

Price File

Pricing

Net R.R.P

18.89

- VAT

VAT Rate

20.00%

Selling Price

18.89

Edit

Purchase Price

12.23

Edit

Surcharge

0.00

Time Limit (days)

Stock

Stock Qty

4

Allocated

3

Qty Available

1

Qty On Order

0

Min. Stock Level

Max. Stock Level

Default Order Qty

1

Shipping

Country of Origin

HSC Code

Overview

Usage: Allocations

Usage: In

Usage: Out

Custom Fields

Advertising

Overview Details

Stock Quantity

4

Net RRP

18.89

Date Last Sold

30/08/2023

Last Sold Price

18.89

Total Sold

2

Total Purchased

6

Stock Value

43.64

☐ Apply Selling Price Banding

Locations

Location	Max Stock	Stock Qty
Location 1	0	4

New Location

Nominal Codes

Parts

Nominal Sales Code

4050

Nominal Purchase Code

5050

Used Vehicles

Nominal Sales Code

4050

New Vehicles

Nominal Sales Code

Notes

Supplier

Enter your preferred Supplier for this Part. The Supplier will be used to generate suggested orders when the Part quantity reaches the minimum stock level. This Part can still be ordered from different Suppliers.

Barcode

Barcodes for each Part line can be printed from DragonDMS, either from within the Part Record (Clicking on the Print button opposite the barcode field) or Parts barcodes can be printed in bulk (Reports > Parts Stock Barcodes). If no Barcode Number is entered on the Part Record, DragonDMS will generate a barcode based on the Part Number.

Net RRP

When you open the Part Record for the first time, the Net RRP will show the same value as the selling price, the Net RRP can be edited. If you add a discount to a part on a service record or a parts invoice, you have the option in Settings to show your Customers the discount from RRP that you are giving them.

Item Number	Description	Qty	R.R.P	Discount	Unit Price	VAT Amount	Rate	Total
000125784	Oil Filter	1	19.99	1.01	18.98	3.80	20.00	22.78

Surcharge

The value of the Part surcharge if applicable.

Time Limit

The time limit within which the old Part must be returned in order to have the surcharge repaid.

Stock Quantity

Quantity of Parts currently in stock.

Allocated

Parts that have been issued to a service booking or added to a Parts estimate will show as allocated and will not affect the current stock quantity or stock value.

Qty Available

Stock quantity minus allocated stock.

Qty on Order

Quantity of Parts currently on Parts Orders.

Min. Stock Level

The minimum stock holding you want to keep of this Part. This is used to create a suggested order when the Parts reach the minimum stock level. However the Part Record must also contain a Source, this is your preferred Supplier of this Part (see [Source](#) above)

Max. Stock Level

The maximum stock holding you want to keep of this Part.

Default Order Qty

Set the default quantity so when the Part is added to a Parts order it will automatically add the default quantity to the order.

Overview

The stock value is calculated using the FIFO (First In First Out) accounting principal. To see a log of the Parts purchases, click on the [Pricing Menu](#) at the top right of the Part Record.

Pricing – Purchases

Purchase Price History

The Purchase History is displayed by Purchase Price Point, showing the total quantity of items ordered, the last date the items were ordered at this price point and the current quantity of those items remaining. The Adjusted Qty column accounts for any items that were set as the opening stock level when the item record was created, or where the stock quantity has been manually adjusted as Part of a stock check.

Pricing – Sales

The Selling Price History works in a similar way to the Purchase History. For each selling price point the total quantity of items sold, the date of the last sale and the cumulative profit are displayed. You may find that you have the same selling price on multiple rows, this occurs where the buying price of the items is different.

				
		Overview	Add Images	Pricing
Purchase	Selling	Write Downs		
Current Selling Prices				
Description			Amount	
Standard			14.00	
			New Selling Price	
Selling Price History				
Date Last Sold	Sold	Buying Price	Selling Price	Profit
10/05/2021	2	10.00	14.00	8.00
10/05/2021	0	12.00	14.00	0.00
06/05/2021	3	10.00	10.00	0.00

Pricing – Selling / Buying

Editing the Standard Selling / Buying Price

On the Part Record, click on the [Edit](#) button next to the Selling or Purchase price.

Pricing					
Net R.R.P	15.00	- VAT	VAT Rate	20.00%	▼
Selling Price	14.00	Edit	Purchase Price	12.00	Edit
Surcharge			Time Limit (days)		

The price can be edited by entering a discount amount from the RRP figure or by entering a figure into the Selling price.

Selling Price		
Save	Cancel	Delete
Please select or add a new selling price description		
Standard ▼		
How would you like to calculate this selling price		
☐ Mark Up ☐ Rate ☒ Amount		
Selling Price based on Recommended Retail Price		
Recommended Retail Price	14.08	
Your Standard Purchase Price	6.95	
Discount Rate	0.71%	
Discount Amount	0.08	
Selling Price	14.00	

Click [Save](#) to save and close the details.

Creating new selling / buying prices

Click on the [Pricing](#) menu from within the Part record and then click on either the [Purchase](#) or [Selling](#) tab. Click on [New Purchase Price](#).

Purchase Price		
Save	Cancel	Delete
Please select or add a new purchase price description		
Warranty ▼		
How would you like to calculate this purchase price		
☐ Code ☐ Rate ☒ Amount		
Purchase Price based on Recommended Retail Price		
Recommended Retail Price	14.08	
Your Standard Selling Price	14.00	
Discount Code	▼	
Discount Rate	10.16%	
Discount Amount	1.43	
Purchase Price	12.65	

Select a description for the new price. Each Part will have a standard price, however you may wish to add a VOR or Warranty price. This allows the Part to be sold at different price points.

Select how you wish to calculate the price. You can add pricing with a calculated Discount Rate, a Discount Code or set a Discount Amount by clicking the relevant Discount Type. Click Save to save and close the details.

Parts Locations

Each Part must be allocated to a [Location](#) and in addition, Parts can be allocated to multiple Locations. On the Overview section of the Part Record, the current locations will be displayed along with the current stock quantities in each location.

Min and Max Stock Levels can also be set allowing you to make the most of the DragonDMS reporting (which can suggest items that may need re-ordering if they are below the Min. Stock Level).

Part Record

Part: 000123456
Oil Filter

Close

Overview Add Images Pricing

Part Information

Branch:
Supplier: EUROCARP
Brand:
Number: 000123456
Display Number: 2468
Description: Oil Filter
Barcode:
Units: Unit Weight:
Dimensions (mm) L: H: W:
OEM Status:
Category:
Price File:

Pricing

Net R.R.P: 18.90 - VAT VAT Rate: 20.00%
Selling Price: 18.90 Purchase Price: 13.50
Surcharge: Time Limit (days):

Stock

Stock Qty: 0 Allocated: 0
Qty Available: 0 Qty On Order: 0
Min. Stock Level: Max. Stock Level:
Default Order Qty:

Nominal Purchase: 5050 Nominal Sales: 1050

Overview Details

Stock Quantity	0	Net RRP	18.90
Date Last Sold		Last Sold Price	0.00
Total Sold	0	Total Purchased	0
Stock Value	0.00	☐ Apply Selling Price Banding	

Locations

Location	Max Stock	Stock Qty
Workshop	0	0

Notes

Adding a Location

To create a second location click on [New Location](#) and the location details form will open allowing you to specify the new location description. Select the location from the dropdown list. If the location is not already in the list, type the location name and you will then be asked if you wish to add this location to the list.

Opening Quantities can be added, but if you want to move existing stock to this location you should do a Stock Transfer. Click [Save](#) to save and close the details.

Transferring stock

The location that you wish to move the stock to must be added as a location on the Part first, then double click on the location that has the stock that you want to move and select [Transfer Stock](#).

Edit Location	
Save	Cancel
How would you like to change this location ☐ Edit details ☒ Transfer Stock ☐ Scrap Stock	
Location: Workshop Quantity: 4 On Order: 0 Allocated: 0 Max Stock: 0	Location: Location 1 Quantity: 0 On Order: 0 Allocated: 0 Max. Stock: 0
Transfer Qty: 2 Transfer	

The details of the selected location will be displayed on the left hand side of the screen. On the right hand side select the location that you wish to transfer the stock to, then enter the quantity that you want to transfer and click [Transfer](#).

Removing a Location

To remove a location that's no longer used, double-click on that location and click on [Delete](#). The system will warn you if you are trying to delete a location that still has stock in it - all stock must be transferred to a new location before you can remove the old location. If you are sure you want to delete the location then click [Yes](#) when prompted.

Stock Adjustments

If stock quantities need adjusting double-click on the location and select [Edit details](#).

Edit Location	
Save	Cancel
How would you like to change this location ☒ Edit details ☐ Transfer Stock ☐ Scrap Stock	
Location: Workshop Quantity: 4 On Order: 0 Allocated: 0 Max Stock: 0	Notes

Amend the quantity and click [Save](#) to save and close the details. If the stock adjustments made increase the quantity of stock, the adjustments will be recorded on the [Usage: In](#) tab of the record. If the stock quantity is decreased, it will be recorded on the [Usage: Out](#) tab record.

Stock Value Write Downs

All stock write downs are logged in the [Pricing](#) section of the Part Record and on the [Write Downs](#) tab. This gives you a complete history of all stock value increases and decreases.

Purchase	Selling	Write Downs			
Stock Write Downs					
Date	Amount	Type	Adjusted By		
06/05/2021 09:25:42	-12.00	Decrease	dragon_2k		

Stock Write Downs are made through the [Stock Value](#) tool in [Utilities](#).

Parts Usage

From within a Parts Record you can view all of the stock that is coming in and out.

Usage: In

Orders and credit notes for the Part will be displayed on this screen in descending date order.

Overview	Usage: Allocations	Usage: In	Usage: Out	Custom Fields	Advertising
Component Usage: In					
Date	Reference	Qty	Received	Unit Price	Employee
23/03/2021	Credit: 251	1	1	18.90	Amy
17/03/2021	Order: 1756	5	5	13.50	Amy

Usage: Out

Parts issued to service jobs, added to parts invoices or returned to Suppliers will be displayed on this screen in descending date order.

Overview	Usage: Allocations	Usage: In	Usage: Out	Custom Fields	Advertising
Component Usage: Out					
Date	Assigned To	Complete	Qty	Unit Price	Employee
23/03/2021	Service: 18182 - KW17YFC	Yes	1	13.50	
23/03/2021	Return: 565	Yes	1	13.50	Amy
17/03/2021	Invoice: 2205	Yes	1	18.90	Amy

Double click on any of the transactions to view the full details of the transaction. If the **Complete** status is **No**, the invoice will have not been printed and the transaction is not yet complete.

Usage: Allocations

Parts Allocations are created when a Part is issued to a Service booking. When an allocation is created the stock quantity of the Part will not be altered, but the available stock will be decreased by the number of items that have been allocated.

When the Service booking is received into the workshop, the allocation will be removed and the Part(s) will be deducted from stock.

Overview	Usage: Allocations	Usage: In	Usage: Out	Custom Fields	Advertising
Allocated					
Date	Assigned To	Qty	Total		
17/03/2021 16:27:14	Service Booking: 19991 - KW17YFC	1	13.50		

Parts Orders

From the Stock module, click on the [Create Orders](#) action button. Search for the Part you wish to add to the order, select and then click on the [Confirm](#) button. This will copy the selected Part to the list on the right hand side.

The 'Create Order' window is shown with the 'Parts Search' section. The search criteria is 'oil filter'. The 'Parts matching search criteria' table lists the following parts:

Part Number	Part Description	Stock Qty
KC1204/5	Oil Filter	77
64539	oil filter	17
5345435435	oil filter	10
000123456	Oil Filter	6
P444666563-2	Oil Filter	3
98r34w	oil filter	1
000998	oil filter	1
9897	oil filter	0
120vg0240	oil filter	0
12342	oil filter	0
546743563	oil filter	0
120vg0010	oil filter	-1
097654534	Oil Filter	-1
98765463	Speical oil filter	0

A 'Confirm' button is located next to the table. The 'Parts to add to order' section on the right shows a table with one item:

Part Number	Part Description	Stock Qty	Location	Qty
000123456	Oil Filter	6	Location1	1

Buttons for 'Deselect All', 'Remove Item', and 'Remove All' are at the bottom right.

Quantities can be adjusted on the right hand side by using the [+/- buttons](#). If you want to do bulk increases, select the Part lines and enter a value into the [Amend Quantity by](#) box.

Once you have selected all of the parts, click on [Create Order](#).

Enter the Supplier details by either clicking on [New](#) to create a new supplier or [Find](#), to search for an existing supplier. Enter the suppliers invoice number into the Reference box.

The 'Order' window displays the following details:

Account: EASYSPAR
Name: Easy Spares
Organisation Name: Easy Spares
Email Supplier: [button]

Supplier Address: [fields]
Order No.: [field]
Order Date: 12/02/2025
Due Date: [field]
Reference: [field]
Company: Support
Department: Standard
Branch: Silverstone 12

Number	Display Number	Description	Qty	Good...	Outst...	Net Unit Price	Source	Total	Job/I...	Issue ...
5000208050987		Radiator Cap	40	0	40	4.23	BRO008	203.04		
000123456	2468	Oil Filter	1	0	1	6.95	EASYSPAR	8.34		
898		Washer pump Ford Twin out	1	0	1	14.24		17.09		

Summary:

Net Order Total	190.39
Surcharge	400.00
Postage	0.00
VAT Amount	118.08
Order Total	708.47
Outstanding Qty	42
Net Outstanding Total	190.39

Additional Parts can be added to an Order by clicking [Add Single Item](#). Enter the Part Number by either typing it in or searching in the drop down list.

Add Stock Part					
Save	Cancel		Receive	Add Another	Delete
Stock Part Details					
Part Number	000987654		Location	Location 1	
Description	Air Filter		Actual Stock :	0	
Quantity	1	Net Purchase Price	5.10	Available Stock :	0
		Net Purchase Total	5.10	On Order :	0
		VAT Rate	20.00%	Standard BP :	5.10
				Standard SP :	8.00
		Surcharge	Total Gross Amount	6.12	Edit
				Nominal Code	5050

Enter the Part detail. You can do this by typing the Item Number in the box provided, or by selecting the relevant Description from the Parts Description drop down list. The details for the chosen item will now be displayed and can be edited if required. If the Part number is not recognised, you will have to option to add the Part to the system. Click [Confirm](#) once completed.

To add multiple items to an Order, click the [Add Multiple Items](#). Search for all of the Parts and use the [Confirm](#) button to copy the parts into the right hand list. Quantities can be adjusted on the right hand side by using the [+/- buttons](#) then click on [Add to Order](#). If the Part you would like to add is not in the system, click [Create Part](#) to add it.

Adding Postage

Postage can be added to your Parts Orders for any postage/carriage charges that you incur from your Suppliers. Click on the [+](#) button opposite [Postage](#) and enter the postage details. Click on [Save](#) once completed.

Edit Postage	
Cancel	Save
Postage Details	
Sales Nominal Code	5050
VAT Rate	20.00%
Net Postage Price	5.00
Total Postage	6.00

Emailing an Order to a Supplier

If you use Outlook, you can email the order directly to the supplier. From the order, click the [Email Supplier](#) button. This will open an email addressed to the supplier and will attach a PDF document detailing all of the items on the order but no prices will be included. This can then be emailed to the supplier to place the order. Emailing the Supplier will not confirm the order.

Confirm Order

Pressing the [Confirm Order](#) button will allocate an Order Number and will lock the order. Once the order is locked, no changes can be made.

Print Options

When selecting [Print](#), you will have the option to print the following:

[Order Form](#) – Printing an order form will lock the order and no changes can be made.

[Print Proforma](#) – Printing a Proforma Order will allocate an Order Number but the order will not be locked. These means items can still be added, removed or edited.

[Delivery Note](#) – A print out of the items and quantities that have been ordered.

[Received Summary](#) – A summary of all items on the order that have been received.

Remove Outstanding Items from an Order

This option can be used if, for example, a Supplier has informed you they are unable to supply some of the items on the order. Before removing any outstanding items on the order, you will need to ensure that you receive in any items that have been supplied. Once this has been done, click on [Remove Outstanding Items](#) and this will remove any items from the order that have not been received.

View an Existing Order

Click on [Orders](#) and select either Last 10, All, Incomplete or Outstanding. Use the Search Box to search by Order Number, Supplier or Order Reference.

Order Number	Order Date	Supplier Account	Supplier Name	Suppliers Ref	Memo	Total
566	20/08/2026	BRIDGE0	Mr Oliver Wayne Bridge			31.20
559	12/08/2026	G5F001	G5f		SG20MXX 12/08/2026 13:12	38.23

Creating Parts Orders from a Service Record

From the Service Record, click on [Job Items](#) and [Parts](#). Once Stock Parts are allocated to a Service Job, any Parts that are currently Out of Stock will be displayed in red.

Overview	Customer	Apps	Templates	Job Items	Invoicing	Documents

Job Card	Labour	Parts	Oils	Extras	Costs
----------	--------	-------	------	--------	-------

Non Stock Parts

Part Number	Description	Qty	Item Total	Discount	Total
No non-stock parts to display					
Total					0.00
			Up	Down	Add Non Stock Parts

Parts From Stock

Issue	Part	Description	*	Qty	Item Total	Discount	Total
7845	MZ690150	OIL FILTER		1	17.02	15.00%	14.47
7845	VP1500A086	AIR FILTER		1	20.41	15.00%	17.35
Total					31.82		
			Up	Down	Pick List	Add Stock Parts	

To create an order for these Parts, double click on a Part line to open the Part Issue screen. Select the Parts you would like to order and click onto the [Add to Order](#) button.

Service Issue

Service Number 18173 - PJ04HND

Vehicle Make	Audi	Date Registered	25/03/2004	Issue No.	4326
Vehicle Model	Audi A3 16V Se Hatchback 1.6 Manual Petrol	Chassis Number	WAUZZZ8P94A055241	Issue Date	17/03/2021
				Reference	

Number	Display Number	Description	Qty	Price	Total	Source	Order No
VP356000		OIL FILTER	1	9.19	@ 9.19 CCC		
VP1500A098		AIR FILTER	1	20.41	@ 20.41 CCC		

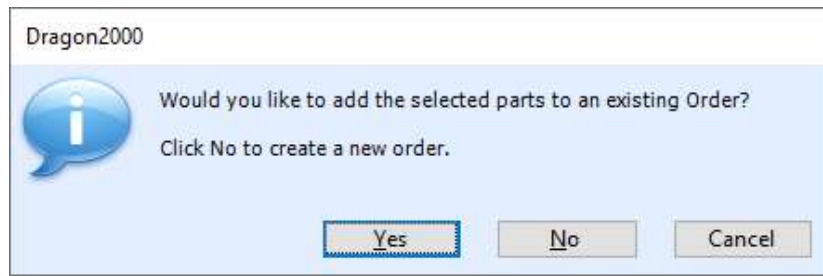
Select All Deselect All Remove Selected Items **Add To Order**

Memo to appear on Issue

Negative Stock Issued.
 Parts already on order for this job (not yet received)

Net Issue Total 29.60
VAT Amount 0.00
Issue Total 29.60

You will be asked if you would like to add the Parts to an existing Parts Order that you already have open, or create a new Parts Order.



The new or existing Parts Order will open (for new orders you will need to select the Supplier). The Job Number that the Parts are on will be listed on the Order along with the Parts issue number.

The Service Record will now show a turquoise Parts status. This indicates that the Parts are not currently in stock but are on Order.

If you are integrating your parts into Sage50 we would recommend that each time parts are added to a job they are put onto a new Parts issue – this will then post the stock journals based on issue date not job date.

In [Settings > Parts > Settings > Stock](#) you can set your default parts issue options

Issue to Service Option	
☐	Use Issue Selector
☒	Create New Issue
☐	Add to Latest Issue

Suggested Orders

Stock Replenishment

If a Part Record contains a minimum or maximum stock quantity and a source, Dragon will create a suggested order once the Part reaches its minimum stock level or a reorder if it needs to be replenished to meet the maximum stock level.

From the Parts Menu, click on [Orders](#) and [Suggested Orders – Stock Replenishment](#). The suggested orders will be grouped by supplier (Source) detailing the reorder limit that has been reached.

This is defaulted to show your reorder limit based on the minimum stock quantity. If you would like to change this to show your suggested restocking limit to match you maximum stock quantity then this can be done in [Settings > Parts > Settings > Stock > Restock to maximum stock level](#).

Tick the items that you would you like to add to an order and then click the [Order](#) button.

Part Number	Description	Last Purchase Price	Reorder Qty	Reason	Branch	Ord...
Source: Euro car parts						
1980	Headlight bulb	4.00	15	Minimum reorder limit reached		☐
Source: Miss Tiffany Case						
P45678912-2	Hand Brake Cable	35.00	8	Minimum reorder limit reached		☐
808-76-08	Ford Fiesta Gear Box	214.08	5	Minimum reorder limit reached		☐
123	Bulb	0.01	2	Minimum reorder limit reached		☐
9574635	clutch kit	67.00	5	Minimum reorder limit reached		☐
P123456789-8	Brake Pads	110.00	5	Minimum reorder limit reached		☐
Source: Tester						
P18A	Vauxhall Insignia Wheel	68.22	6	Minimum reorder limit reached		☐
754466677707	Coil Spring	82.35	13	Minimum reorder limit reached		☐
Source: Vw Auto Supplies						
1234568524	Brake Pads	80.00	9	Minimum reorder limit reached		☐

An order will then be created for that supplier with the items selected added. The order can then be processed as normal and stock quantities adjusted and additional items added if applicable.

Parts issued to Service Jobs

If Parts have been issued to a service booking or service in progress, but they are not currently in stock, Dragon will create a list of these parts so you can clearly see the items that need to be ordered for your upcoming jobs.

From the Parts menu, click on [Orders](#) and [Suggested Orders – Components on Jobs Not in Stock](#).



From here, you will be able to see a list of the all of the parts that are currently out of stock but issued to a booking or service.

To generate an order for your parts out of stock, tick the parts you would like to add to the order and click on the [Order](#) button.

An order will then be created where you can select the relevant supplier that the order is being placed with and continue with the order as normal.

Receiving an Order

From the Parts Menu click on [Orders](#) and [Outstanding Orders](#). A list of all the Orders created that have Parts still outstanding will be displayed.

The list of outstanding Orders can be sorted and searched in the same way as other menus. Once you have found the order that you wish to receive, double click the entry in the list and it will be displayed on screen.

Receive all Ordered Items

Open the relevant order and if all items have been received and there have been no alterations to the pricing, click [Select Outstanding Items](#) to highlight all items with outstanding quantities and then click [Receive Selection](#). DragonDMS will bring the items selected into Stock and the outstanding column will now be 0, showing that all the items have been received.

When all the Parts on an order have been fully received the order will no longer show on the Outstanding Orders list.

Receive Some of the Ordered Items

If you have received Part of an Order, select the lines of the items received and check that the quantity matches the number of items received. Click [Receive Selection](#). DragonDMS will bring the items selected into stock and the outstanding column will now be 0, showing that all items have been received.

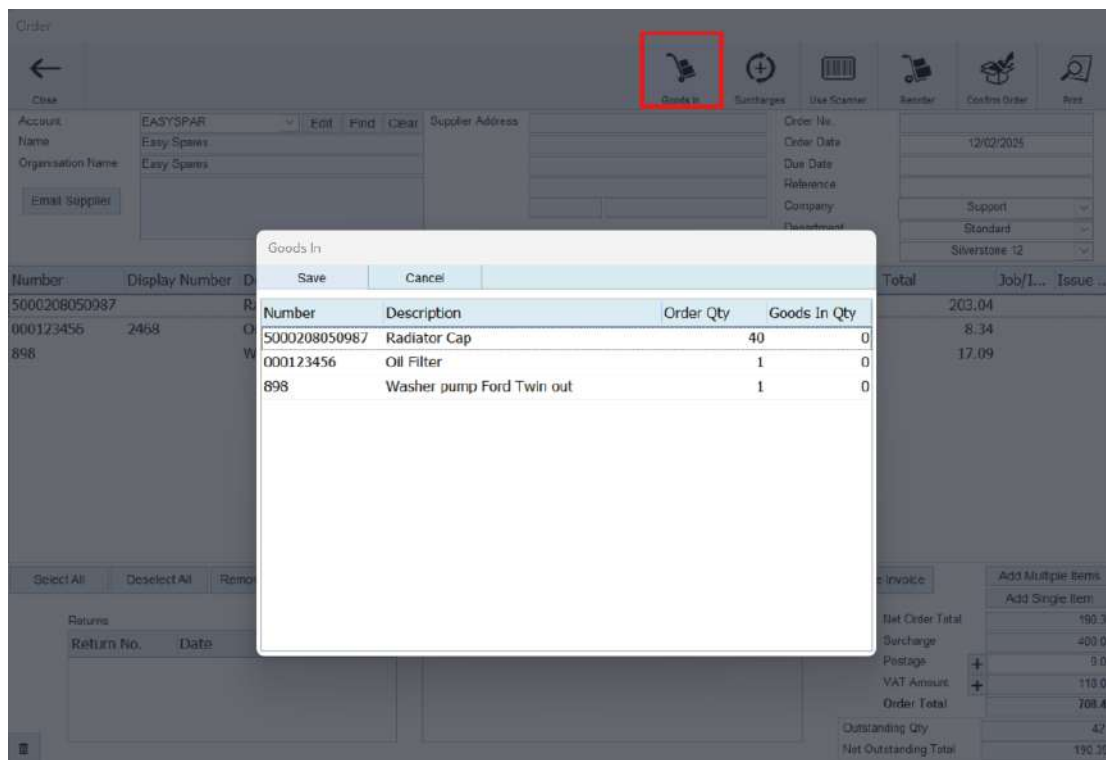
This order will still be displayed in Outstanding Orders until all of the outstanding items arrive. When they do arrive you will need to repeat the above process for the relevant items.

If you have ordered an item that has arrived at a different quantity than you have ordered, double click the relevant Part line on the Order. Click [Receive](#) and you can enter the actual received quantity and/or received price. Click [OK](#) to save and close the record. The outstanding items will remain on the order.

Marking Goods onsite

Often the goods will arrive, but it may be a couple of days before the invoice is received. This causes an issue for the workshop, as they want to know which parts are onsite, but can't receive them into stock as the final price is not yet known.

Within a parts order there is a [Goods In](#) button along the top. When the parts arrive onsite, they can be marked as goods in by entering the quantity of parts that have been delivered.



Entering the goods in quantities doesn't receive the order, and therefore the pricing can still be edited when the invoice is received.

When the supplier's invoice is received, users can go into the part order and edit the unit prices to match the supplier's invoice. Then, as before, highlight all the lines on the order and click on the [Receive Selected](#) button.

Issuing Parts to a Service Job from an Order

Once Parts on an Order have been received, there is an option to add the Parts directly onto Service Bookings/ Jobs or to a Parts Invoice.

Order

Close

Goods In Surcharges Use Scanner Reorder Confirm Order Print...

Account Name: EASYSAPAR Edit Find Clear Supplier Address

Organisation Name: Easy Spares

Email Supplier

Order No. Order Date: 12/02/2025 Due Date Reference Company: Support Department: Standard Branch: Silverstone 12

Number	Display Number	Description	Qty	Good...	Outst...	Net Unit Price	Source	Total	Job/I...	Issue ...
5000208050987		Radiator Cap	40	0	40	4.23	BRO008	203.04		
000123456	2468	Oil Filter	1	0	1	6.95	EASYSAPAR	8.34		
898		Washer pump Ford Twin out	1	0	1	14.24		17.09		

Select All Deselect All Remove Selected Items Select Outstanding Receive Selection Return Selected **Issue To Job** Create Invoice Add Multiple Items Add Single Item

Returns

Return No.	Date	Status
------------	------	--------

Memo to appear on Order

Net Order Total: 190.39 Surcharge: 400.00 Postage: 0.00 VAT Amount: 118.08 Order Total: 708.47 Outstanding Qty: 42 Net Outstanding Total: 190.39

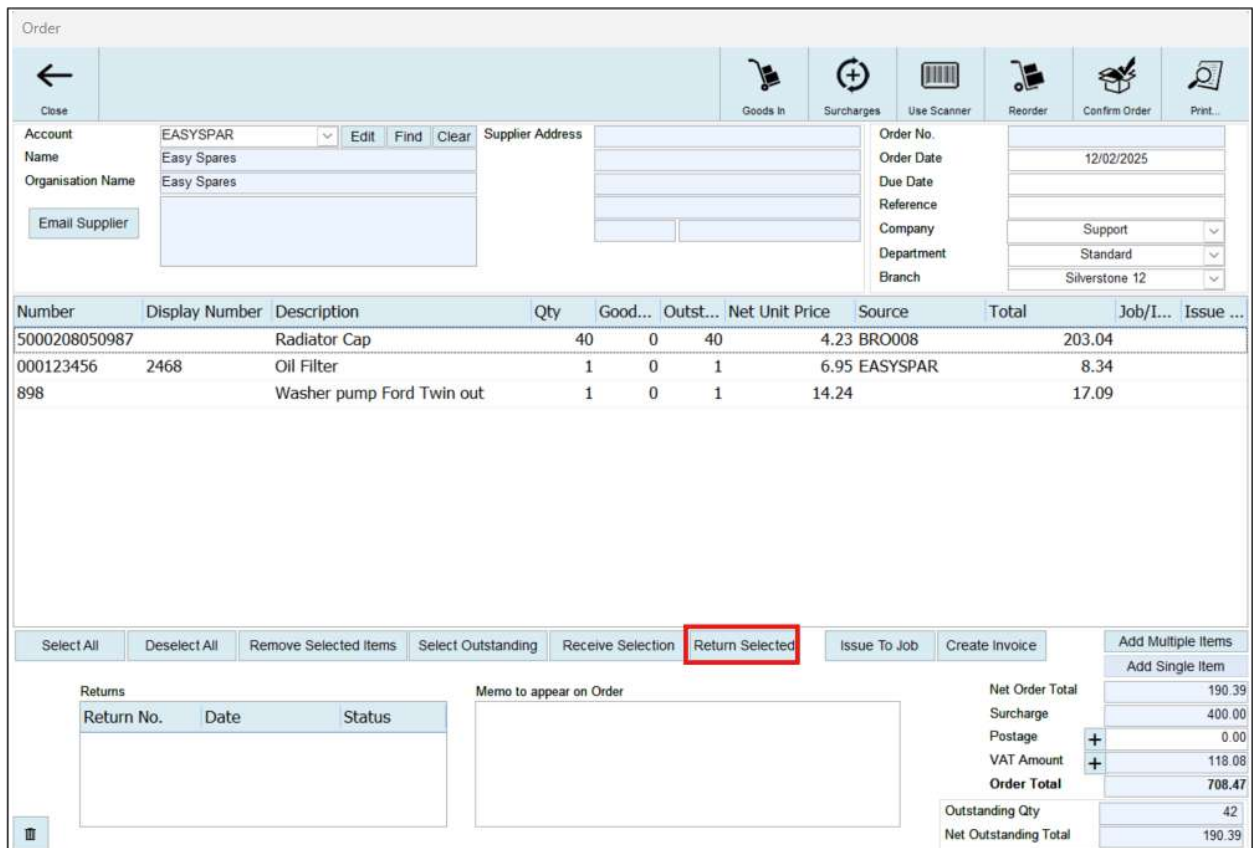
To add Parts to a Service Booking or Job, highlight the relevant Parts on the order and click the [Issue to Job](#) button.

The Parts selected (along with the order quantity) will show in the right hand list. Click on the [Issue to Job](#) button to select the job. You can select from a list of Services in Progress, Service Bookings or Service Estimates.

To create a Parts Invoice, highlight the relevant Parts and click the [Create Invoice](#) button from the Order.

Returning Parts

Parts can only be returned to the original supplier via the original Order. To find the original Order for a specific Part go to the Part Record. Click on [Usage: In](#), then double click on the Order Number to view the original Order.



Number	Display Number	Description	Qty	Good...	Outst...	Net Unit Price	Source	Total	Job/I...	Issue ...
5000208050987		Radiator Cap	40	0	40	4.23	BRO008	203.04		
000123456	2468	Oil Filter	1	0	1	6.95	EASYS PAR	8.34		
898		Washer pump Ford Twin out	1	0	1	14.24		17.09		

Net Order Total	190.39
Surcharge	400.00
Postage	0.00
VAT Amount	118.08
Order Total	708.47
Outstanding Qty	42
Net Outstanding Total	190.39

Highlight the Part line that you wish to return and click on the [Return Selected](#) button. If you are not returning all parts on the order, a partial return will be created.

When the return is displayed, you can edit the quantity of Parts that are being returned by double clicking on the Part line.

When you are happy that the return details are correct click [Print](#). A Return Number will be allocated and the Part(s) will then be removed from stock.

To View all Returns

From the Parts Menu click on [Returns](#). A list of all complete and incomplete returns will be displayed. Incomplete returns will not have removed the items from stock.

Creating a Part Estimate

Creating an Estimate

Creating a Parts Estimate will allocate the Part to the Customer, but will not remove the Part(s) from stock. To create a new Estimate click [Create Estimate](#). You can then create a new estimate using the same methods as creating a new Invoice ([see section above](#)).

Sales Estimate

Close

Open

Analysis

Approve

Decline

Payment

Print...

Account

DRA001

Edit

Find

Clear

Invoice Address

The Old Mill Business Park

Blisworth Road

Northampton

NN7 3BD

Estimate No.

Estimate Date

Reference

Company

Department

Branch

Name

Dragon2000

Organisation Name

Dragon2000

Email

support@dragon2000.co.uk

31/03/2021

Retail

Branch A

Number	Display Number	Description	Qty	Price	Source	Total
000123456	2468	Oil Filter	1	18.90	EUROCARP	22.68

Select All

Deselect All

Remove Selected Items

Memo to appear on Estimate

Estimate Valid Until 05/06/2021

Net Estimate Total

Surcharge

Postage

VAT Amount

Estimate Total

Add Multiple Items

Add Single Item

18.90

0.00

0.00

3.78

22.68

In the [Memo to Appear on Estimate](#) box, text will display to say that the Estimate is valid for a month from the date of creation. This date can be easily amended.

If you click the Close button, the Estimate will remain as an [Open Estimate](#). This means that you can add/ remove items, edit prices, edit Customer details etc.

When you print an Estimate, the Estimate details become locked and can't be edited. The item(s) on the Estimate will not be allocated at this point.

Payments

In the [Payment Amount](#) column, enter the amount the customer is paying or if they are paying the full amount, click [Pay All](#). Once all of the amounts have been entered, Click [Add Payment](#).

Take Payment

Cancel

Options

Customer

Customer Details:

Account

DRA001

▼

Edit

Find

Clear

Name

Dragon2000

Organisation Name

Dragon2000

Method:

☒ Credit Card

☐ Debit Card

☐ Other...

☐ Use Card Machine:

▼

Payments Made

Date	Notes	Method	Amount
No Payments Made			

Invoice Balance

Date	Reference	Outstanding	Payment Amount
31/03/2021	Est No. 127	22.68	0.00
Totals		22.68	0.00

Vehicle Deposit...

Remove Deposit

Pay All

Pay Selected

Add Payment

Select the payment method that is being used and enter a reference number if applicable. A receipt of the payment can be printed by clicking on [Print Receipt](#). Click [Save](#) once completed.

Payment Details

Save

Cancel

Print Receipt

Payment Details

Payment Amount

22.68

Payment Method

Cash

▼

Payment Date

31/03/2021

Reference

Nominal Code

Bank Nominal

1230

▼

Select Artwork

Support

▼

A log of any payments made will then be recorded under [Payments Made](#) and also in the [Transaction Log](#) of the Customer Record.

Once a payment has been taken against an estimate, the estimate cannot be deleted or declined.

To refund a payment, click on the [Payment](#) button from the estimate and double click on the payment that has been taken. You will then have the option to [Refund Deposit](#). A payment can be refunded regardless of whether or not the estimate has been printed.

Approving an Estimate

If the Customer wants to go ahead and purchase the Parts you can approve the estimate. This will then create a new Invoice. The Parts Estimate Number will appear on the new Invoice. The item(s) will then be allocated to the Invoice and reduced from stock.

Any payments that have been taken against the estimate will be transferred onto the invoice record with the correct outstanding amount showing on the invoice.

Declining an Estimate

If the Customer does not want to proceed with the Parts Purchase you can mark the Estimate as Declined. If the Customer subsequently wants to purchase the Parts you will need to create a new Estimate / Invoice for them. Declined Estimates cannot be revised.

Customer Parts Invoices

Parts Invoices are used to sell Parts directly to Customers rather than issuing Parts to a Service Job. To create a new Invoice, click on the [Create Invoice](#) tab.

Creating a New Invoice

Select the Parts from the list on the left hand side and click [Confirm](#) to move the selected Parts to the right hand list. Once all the items have been selected for the Invoice, click on the [Create Invoice](#) button at the top right of the screen to view the Invoice.

Part Number	Part Description	Stock Qty
KC1204/5	Oil Filter	77
64539	oil filter	17
000123456	Oil Filter	16
5345435435	oil filter	10
P444666563-2	Oil Filter	3
98r34w	oil filter	1
000998	oil filter	1
0011223344	Oil Filter	0
9897	oil filter	0
120vg0240	oil filter	0
12342	oil filter	0
546743563	oil filter	0
120vg0010	oil filter	-1
097654534	Oil Filter	-1
98765463	Speical oil filter	0

Part Number	Part Description	Stock Qty	Location	Qty
000123456	Oil Filter	16	Location1	1

Select a Customer from the list or create a new Customer by clicking the [New](#) button. Part quantities and selling prices can be amended on the Invoice by double clicking the Part line.

Parts Stock

As soon as a Part has been added to an Invoice it will be removed from stock, regardless of whether the Invoice has been printed or not

Parts Discounts and VAT Codes

Standard Parts Discount can be added to a Customer Record. This will only affect stock Parts sold on Parts Invoices. This is a useful tool if you have trade Customers who always get x % discount on Parts.

Parts VAT rates can be added to a Customer Record. This will only affect Parts Invoices. This is a useful tool if you have regular overseas Customers that you ship Parts to.

When you add a Customer to a Parts Invoice, DragonDMS will automatically apply the Parts Discount and Parts VAT to the Invoice.

Mr Gulam Mughal (MUGHALG)

Close

Contact Details Additional Addresses

Source Walk In

Category

Fax

Website

EORI Number

Parts Defaults

Sales Discount 0.00%

Sales VAT 20.00%

Purchase VAT 20.00%

Show contact as:

☒ Customer ☐ Warranty Company

☐ Supplier ☐ Finance Company

☒ Prospect ☐ Insurance Company

Adding Postage

Postage can be added to your Parts Invoicing for postage/carriage charges that you are charging your Customers; you can also log the cost of that postage/carriage to your business.

Click on the + button opposite postage at the bottom right of the screen. You can then select the postage type that you wish to apply. Postage details need to be setup in settings ([Settings > Parts > Sales & Purchase > General > Postage Defaults](#)). Click on the – button to hide the postage details.

Edit Postage

Cancel Save

Description: Standard Postage

Postage Details

Sales Nominal Code 4050

VAT Rate 20.00%

Net Postage Price 6.50

Total Postage 7.80

Postage Cost

Supplier POSTOFF

Purchase Nominal Code 4050

VAT Rate 20.00%

Net Postage Cost 5.65

Total Postage Cost 6.78

Cost Date 25/03/2021

If you are using the Sage50 Integration and want the postage charges and costs to get posted to Sage, then you need to ensure that you have [Parts & Postage Out and Postage In](#) selected in the Sage Integration setup

Proforma Invoice

Printing a Proforma Invoice will allow you to print a copy but will not lock the Invoice. The Proforma Invoice looks exactly the same as the Parts Invoice but does not have an Invoice Number and states that it is a Proforma Invoice. The Invoice will not be locked which allows any changes to be made if required.

Recording a Payment

Once an Invoice has been created you can record when payments have been made by the Customer, regardless of whether or not the invoice has been printed. This can be done as one bulk entry, or if they are paying in installments, you can detail each payment.

To record payments click the [Payment](#) button in the top right hand corner of the Invoice and a screen will open allowing you to enter the payment details.

In the [Payment Amount](#) column, enter the amount the customer is paying or if they are paying the full amount, click [Pay All](#). Once all of the amounts have been entered, Click [Add Payment](#).

Select the payment method that is being used and enter a reference number if applicable. A receipt of the payment can be printed by clicking on [Print Receipt](#). Click [Save](#) once completed.

A log of any payments made will then be recorded under [Payments Made](#) and also in the [Transaction Log](#) of the Customer Record.

Crediting a Parts Invoice

Parts Invoices can only be credited to the original Customer via the original Invoice. To find the original Invoice for a specific Part go to the Part Record, click on [Overview](#) and then on [Parts Out](#). You will be able to see the Customer account name, then double click on the Invoice number for the Customer you wish to credit and you will then be able to view the original Invoice.

The screenshot shows a 'Sales Invoice' window. At the top, there's a navigation bar with icons for Surcharges, Analysis, Use Scanner, Payment, and Print. Below this, the 'Account' section shows 'DRA001' with 'Edit', 'Find', and 'Clear' buttons. The 'Name' is 'Dragon2000' and 'Organisation Name' is 'Dragon2000'. The 'Email' is 'support@dragon2000.co.uk'. The 'Invoice Address' is 'The Old Mill Business Park, Blisworth Road, Northampton, NN7 3BD'. The 'Delivery Address' is 'Same as invoice address'. The 'Invoice No.' is '2209', 'Invoice Date' is '31/03/2021', and 'Reference' is empty. The 'Consignment Number' is empty. The 'Company' is 'Support', 'Department' is 'Retail', and 'Branch' is 'Branch A'. Below this is a table with columns: Number, Display Number, Description, Qty, Price, Total, and Source. The table contains one row: 000123456, 2468, Oil Filter, 1, 18.90, 22.68, EUROCARP. At the bottom, there's a 'Credit Invoice' button highlighted with a red box. Below the button, there's a 'Credit Notes' section with a table showing 'Credit No.', 'Date', and 'Status'. The table is empty with the text 'No Credit Notes Raised'. To the right of the credit notes is a 'Memo to appear on Invoice' text area. On the far right, there's a summary section with 'Net Invoice Total' (18.90), 'Surcharge' (0.00), 'Postage' (0.00 with a '+' button), 'VAT Amount' (3.78), and 'Invoice Total' (22.68).

Number	Display Number	Description	Qty	Price	Total	Source
000123456	2468	Oil Filter	1	18.90	22.68	EUROCARP

Credit No.	Date	Status
No Credit Notes Raised		

Net Invoice Total	18.90
Surcharge	0.00
Postage	0.00
VAT Amount	3.78
Invoice Total	22.68

Select the Part(s) that you wish to credit and click on the [Credit Invoice](#) button.

Once you have continued you can reduce the quantity of Parts that wish to credit by double clicking on the part line, but you cannot credit more Parts than were originally sold.

If the original Invoice had postage the credit will also have the postage to be credited. If you do not want to credit the postage, click on the + button next to postage and delete the postage details.

Click [Print](#) to print and allocate a Credit Number. Once the credit has been printed the Parts will automatically be added back into Stock.

Refunding a Part Invoice

Refunds on Parts Invoices can only be entered after a credit note has been printed. From the credit note click on the [Refunds](#) button, select the payment method, payment date and enter the payment amount and click [Save](#).

Refunds for Parts Credit																				
Save	Cancel			Payment	Refund	Add Another														
		AMOUNT PAID = 19.32																		
Payment Method	Debit Card	Bank Nominal	1260																	
Payment Date	16/01/2018	Payment Amount	19.32																	
		Full Refund																		
		Notes																		
		Payments																		
		<table border="1"><thead><tr><th>Date</th><th>Amount</th><th>Payment Type</th><th>Bank Nominal</th><th>Notes</th></tr></thead><tbody><tr><td>16/01/2018</td><td>10.00</td><td>Debit Card</td><td>1260</td><td></td></tr><tr><td>16/01/2018</td><td>16.82</td><td>Debit Card</td><td>1260</td><td></td></tr></tbody></table>				Date	Amount	Payment Type	Bank Nominal	Notes	16/01/2018	10.00	Debit Card	1260		16/01/2018	16.82	Debit Card	1260	
Date	Amount	Payment Type	Bank Nominal	Notes																
16/01/2018	10.00	Debit Card	1260																	
16/01/2018	16.82	Debit Card	1260																	
		Refunds																		
		<table border="1"><thead><tr><th>Date</th><th>Amount</th><th>Payment Type</th><th>Bank Nominal</th><th>Notes</th></tr></thead><tbody><tr><td colspan="5">No Refunds to Display</td></tr></tbody></table>				Date	Amount	Payment Type	Bank Nominal	Notes	No Refunds to Display									
Date	Amount	Payment Type	Bank Nominal	Notes																
No Refunds to Display																				

Issuing Parts from within a Service Record

To issue a Part directly onto a Service Job, a Service Booking or a Service Estimate, go to the Service Module and search for the relevant Record and double click to view. Click on [Job Items](#), and then on [Parts](#), then [Add Stock Parts](#).

The option to add Stock Parts directly to a Service Job can be restricted by user ([Settings > System > Employees > Access Rights > Service > Can issue Parts from Stock](#)).

Select the Parts you wish to add to the job, either by searching by Part number / description or using a barcode scanner and press [Confirm](#). Edit the Part quantities and click on [Issue to Job](#).

The screenshot shows a software interface for issuing parts to a service record. The window title is "Issue to Service No: 18178". At the top, there are buttons for "Close", "Create Part", and "Issue to job" (the latter is highlighted with a red box). Below the title bar, there is a "Parts Search" section with a dropdown menu, a text input field containing "oil filter", and "Search" and "Advanced..." buttons. A table titled "Parts matching search criteria" lists parts with columns for "Number", "Description", and "Stock Qty". The parts listed are VP1230A045 (OIL FILTER, Stock Qty 4), MR984204 (OIL FILTER, Stock Qty 6), MN980125 (OIL FILTER, Stock Qty 0), VP980125 (OIL FILTER, Stock Qty 11), and MN960320 (OIL FILTER, Stock Qty 2). A "Confirm" button is located below this table. To the right, there is a table for issuing parts to the job, titled "Issue to Service No: 18178". It has columns for "Number", "Description", "Stock Qty", "Location", and "Qty". The first row shows VP1230A045, OIL FILTER, 4, 1, and 1. Above this table is a label "Amend quantity by" with a value of 1 and plus/minus buttons. At the bottom of the window, there is a message: "You can drag and drop one or more parts, or just scan barcodes to select." and buttons for "Deselect All", "Deselect All", "Remove Item", and "Remove All".

Number	Description	Stock Qty
VP1230A045	OIL FILTER	4
MR984204	OIL FILTER	6
MN980125	OIL FILTER	0
VP980125	OIL FILTER	11
MN960320	OIL FILTER	2

Number	Description	Stock Qty	Location	Qty
VP1230A045	OIL FILTER	4	1	1

Parts issued to a Service Estimate are not allocated and have not been taken out of stock. The Issue number will be displayed as [N/A](#).

Parts issued to a Service Booking will show with an issue number of [Pending](#) and will show on the Part Record as allocated but not will not be taken out of stock.

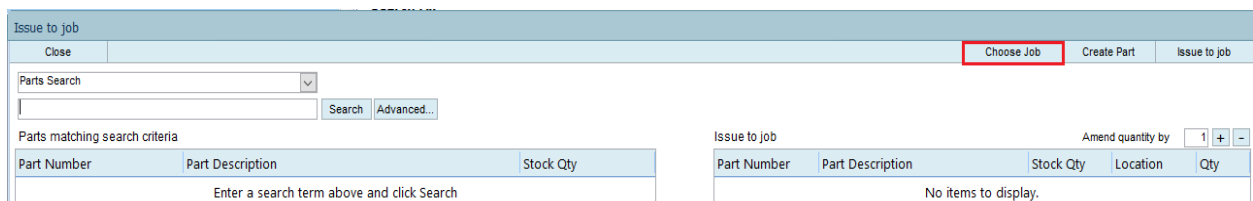
Parts issued to a Service Job will show with an issue number and the Part will have been taken out of stock.

Issuing Parts from the Parts Module

From within the Parts Module click on the [Issue to Job](#) tab along the top of the page.



Next you will need to select the Job that you want to issue the Part to. Click the [Choose Job](#) button.



Select the relevant option to issue the Part to; [Service in Progress](#), [Bookings](#) or [Estimate](#). Once selected, you can search and find the correct Job. Then select the Parts you wish to add to the job either by searching for it by Part Number or Description or by using the Barcode Scanner. Once completed, click on [Issue to Job](#).

Surcharges

Parts with a Surcharge need to have the Surcharge details entered against the Part Record. This will enable DragonDMS to alert users of the Surcharge at the point of Ordering and Invoicing.

Open the Part Record - you will find the Surcharge amount detailed on the left hand side of the screen in the Pricing section. Enter the Surcharge value and time limit (this is the number of days that you have to return the Part to receive the Surcharge back).

Part Record

←

Part: 000123456
Oil Filter

Close

[Click to view on Website](#)

Overview

Stock Check

Add Images

£

Part Information

BranchLeicester 1

SupplierEASYS PAR

Brand

Number000123456

Display Number2468

DescriptionOil Filter

Barcode

UnitsEachUnit Weight0

Dimensions (mm) L: H: W:

OEM Status

Category

Price File

Pricing

Net R.R.P.14.08VAT20.00%

Selling Price14.00Purchase Price6.95

Surcharge0.00

Time Limit (days)

Stock

Stock Qty307.00Allocated3.00

Qty Available304.00Qty On Order224.00

Min. Stock Level51.00Max. Stock Level199.00

Default Order Qty75.00

Shipping

Country of OriginUnited Kingdom

HSC Code8888.22556.25

Overview

Usage: Allocations

Usage: In

Usage: Out

Custom Fields

Advertising

Overview Details

Stock Quantity307.00Net RRP14.08

Date Last Sold24/03/2026Last Sold Price16.80

Total Sold22.00Total Purchased382.00

Stock Value2,208.65

☐ Apply Selling Price Banding

Locations

LocationMax StockStock Qty

Location 10.00148.00

1250.00159.00

Nominal Codes

Parts

Nominal Sales Code4050

Nominal Purchase Code5050

Used Vehicles

Nominal Sales Code4050

New Vehicles

Nominal Sales Code4906

Notes

New Location

Ordering in Parts with Surcharges

When you create a Parts Order for a Part that has been setup with a Surcharge, the Part name will show on the Order with the prefix **# SURCHARGEABLE ITEM #**.

Order GSF Linked: Order Placed

Close

Goods In Surcharges Use Scanner Reorder Confirm Order Print...

Account: EASYSAPAR Edit Find Clear Supplier Address

Name: Easy Spares

Organisation Name: Easy Spares

Email Supplier

Order No.: 570

Order Date: 22/10/2024

Due Date:

Reference:

Company: Support

Department: Standard

Branch: Livingstone

Number	Display Number	Description	Qty	Good...	Outst...	Net Unit Price	Source	Total	Job/I...	Issue ...
007007		# SURCHARGEABLE ITEM # - [...	1	0	1	850.00		1,020.00		

Select All Deselect All Remove Selected Items Select Outstanding Receive Selection Return Selected Issue To Job Create Invoice Add Multiple Items Add Single Item

Returns

Return No.	Date	Status
------------	------	--------

Memo to appear on Order

Net Order Total: 850.00

Surcharge: 0.00

Postage: + 0.00

VAT Amount: + 170.00

Order Total: 1,020.00

Outstanding Qty: 1

Net Outstanding Total: 850.00

To add the Surcharge value double click on the item, and click on the **Surcharge** button.

Here you can enter the quantity of Surcharges that you will be charged (if you are Ordering 3 Parts you will probably be charged 3 Surcharges). Then click on the **Save** button to save and close this window.

Processing Credited Surcharge for Old Parts Returned

When you return old Parts to your Supplier, they will then give you a credit note for the value of the Surcharge, so long as the Part is in suitable condition.

To process this in DragonDMS, find the original Order for the Parts which has the Surcharge. Click on the **Surcharge** button in the top right hand corner of the order. Select the relevant part and then click on **Credit Selected**.

RETURN SURCHARGE TO				SURCHARGE RETURN		
Bca Nottingham Victoria Business Park Netherfield Nottongham				Credit No.	2	
				Return Date	10/05/2021	
				Original Invoice No.	4	
				Original Invoice Date	10/05/2021	
				Reference		
				A/C Name	BCA	

Item Number	Description	Surcharge Qty	Unit Price	VAT Amount	Rate %	Total
123241	Oil filter	3.00	10.00	6.00	20.00%	36.00
Sub Total						30.00
VAT						6.00
Total						36.00

Print the surcharge credit.

Surcharges						
Save		Cancel				
Number	Description	Qty	Surcharge Qty	Surcharge Price	Nominal	
☒ 123241	Oil filter	4.00	3.00	10.00	5890	
└ Credit: 2 Credit Date: 10/05/2021 Status: Pending (Double Click to view)						
☒ 4654654	Pollen filter	2.00	2.00	15.00	5890	
└ Credit: 3 Credit Date: 10/05/2021 Status: Pending (Double Click to view)						
Total						60.00
Credit Selected						

Parts with Negative Stock

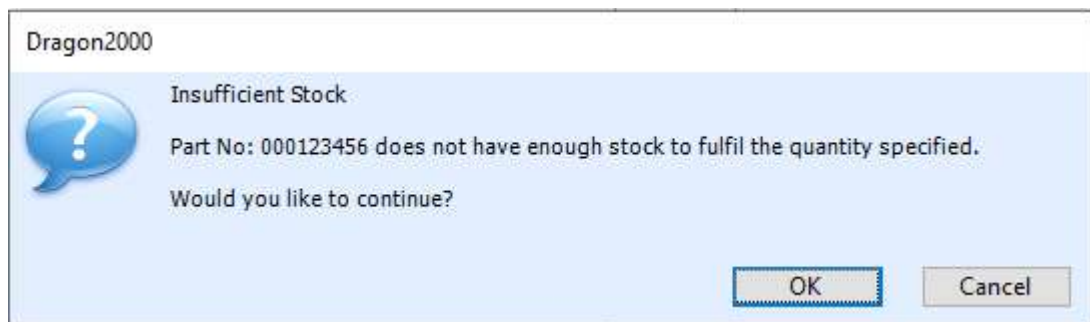
Why Do Parts Go into Negative Stock?

The most common reasons for Parts going into negative stock are:

1. Parts issued to a job that are physically onsite, but the order has not been received / added in DragonDMS
2. Incorrect stock levels in DragonDMS

Invoicing or Issuing Parts That Take You into Negative Stock

When you add Parts to a Parts Invoice, or issue Parts to a service job that results in that Part going into negative stock the following message is displayed:



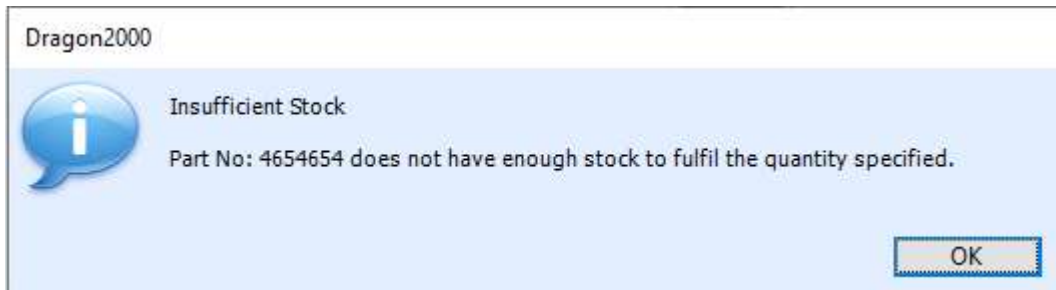
These Parts will be denoted on the Invoice / Issue with an @ symbol to the left of the total price value. This indicates that DragonDMS does not have a buying price for some or all of the Parts on that Particular Part Line.

Part Number	Display Part Number	Part Description	Qty	Price	Source	Total
000123456	2468	# SURCHARGEABLE ITEM # - Oil Filter	30	17.89	CAR002	@ 644.04

You can still complete the Parts Issue or Parts Invoice, however DragonDMS will need to know the buying price of the Parts in Order to work out the true profit, and to make the correct Stock Value Adjustments. **Please refer to the 'How do you Resolve your Outstanding Parts' section on Page 41 for more information.**

If you integrate to Sage, Parts with no buying price will not be posted to Sage and will appear on your Transactions not Posted Report.

To prevent your Parts going into negative stock, you can adjust your Parts Settings so anything with a zero or negative stock quantity will not be able to be added to a Parts Invoice or Issue. To do this go to [Settings > Parts > Settings > Stock > Prevent Negative Stock](#). When this setting is applied, the following message will be displayed if you try to allocate Parts that do not meet the quantity needed:



How Do You Resolve Your Outstanding Parts?

1. [Best Practice: Create an Order to Receive in the Parts](#)
Create an Order for the Parts that have gone into negative stock and receive the Parts In. This will adjust your stock quantity accordingly and will provide a full audit trail of your parts in and out.
2. [Manually Enter the Stock Value for Outstanding Parts](#)
If you do not intend to create an Order for the outstanding Parts, either because you have already received another Order that has these Parts on, or your stock quantities in DragonDMS were incorrect, then you have the option to enter the stock value of the Part(s) directly against the Part on your Parts Invoice / Parts Issue.

Manually Entering the Stock Value for Outstanding Parts

Find and open the relevant Parts Invoice or Parts Issues. Double click on the Part(s) that have an @ symbol next to the total price and click on the [Set Buying Price](#) button. You will see the following screen:

Buying Price	
Cancel	OK
Select stock value for outstanding quantity	
Quantity Outstanding: 1	
<i>*Selecting a buying price will also create a stock adjustment on the part record for the quantity shown above.</i>	
Value	1.50 1.06 Standard Price Last Used Price

Using the dropdown list, select the stock value for the Parts that are outstanding. There are two options:

Standard Price – this displays the standard buying price as set on the Parts record.

Last used Price – this displays the buying price used on the last Order for this Part.

Having selected a stock value, the Part will no longer show in the list of outstanding Parts, and the stock value will then be sent to Sage50 to adjust your Parts Stock Nominal Code the next time the Sage Integration is run.

Adjusting the Buying Price of a negative stock part will create a stock adjustment for that part record for the quantity that has been added to the invoice or issue. This means that the part will no longer show as negative stock. You can restrict users from being able to adjust the Buying Price by going to [Settings > Employees > Double click on the relevant employee > Access Rights > Parts > Can set prices for negative issued stock](#).

How to View your Negative Stock

To get a list of all of your outstanding Parts you can run the following reports:

Parts Analysis – Retail - Negative - This will show all Over the Counter sales for which the profit cannot be calculated until the stock quantity is positive.

Parts Analysis – Service - Negative - Shows all Parts issued to services for which the profit cannot be calculated until the stock quantity is positive.

Negative Stock Parts Issues -Displays all Parts issued to invoices/services where there is no quantity in stock.

Negative Stock Report – Shows parts whose current stock (stock qty + qty on order) is less than zero.

Superseding a Part Record

If you have a Part that has been discontinued and replaced by a new Part then you will need to 'supersede' the old Part Record.

To supersede an old Part Record, click on [Utilities](#) on the Parts Menu, and [Supersession](#), then choose [Supersede](#). Search for the Part you wish to supersede and then click [Supersede](#).

Utilities

Close Stock **Supersession** Location Stock Value

☒ Supersede ☐ Unsupersede

Select the component you want to supersede

+ 000123456 Clear

Item Number	Description	Stock Qty
000123456	Oil Filter	0.00

Supersede

Select All Deselect All

You will then be asked if the Part you wish to supersede with is already created. If you click 'Yes' you will be able to search for the existing Part Record and then click [Supersede](#).

If the new item doesn't yet exist in DragonDMS select 'No'.

You will see the [Create Part](#) screen and you can enter the new Part details. The description and location will be populated with the same details as the Part that is to be superseded. Once all the information has been entered click on [Save and Close](#). The new Part will be created and the old Part is now superseded to the new Part.

Once a Part has been superseded, if you try to Order or sell it then the system will warn you that you are Ordering a Superseded Part and will suggest you use the new Part.

Manufacturer Parts Price List

If your Manufacturer provides you with a Parts Price List then DragonDMS is able to provide updates for you. Call our Support Team to find out if we have already got the Parts Price List you require.

If we do not currently have your Manufacturer's Price List then we will require you to request that the Manufacturer sends it to us on a regular basis and we will endeavor to make it compatible with the DragonDMS. We will need written confirmation from Manufacturers that you are eligible to receive the price files.

We do not import all items from the Manufacturer's Price File by default as most price files contain tens of thousands of Part lines. Instead, we allow you to add in only those Parts that you actually use.

To create a new Parts record from a manufacturers price list click on [Create Part](#) as normal from the Parts Main Menu, enter the Part Number and click on the [Price File](#) button.

The Part description, RRP, Selling Price and Purchase Price will be populated from the Manufacturers Parts price file.

In order for the price file to calculate the purchase price you must setup your manufacturer discount codes in settings ([Settings > Parts > Settings > Prices > Discount Codes](#)).

Utility Menu

There are a number of tools for managing your Parts Records within the Parts Utility Menu. To view the Parts Utility Menu, click [Utilities](#) from the Parts Main Menu.

Deleting Part Records

For your stock, you have the following options:

No longer Available – This is for items that your Supplier is no longer stocking but rather than deleting the stock and losing the history, you can mark it as No longer Available. Once a Part has been marked as No longer Available, you will be unable to order this Part. Only Parts with a zero stock quantity and no outstanding orders can be marked as Not Available.

Delete - Once items have been deleted they will no longer appear anywhere in the system. They will show on historic transactions but they will no longer have a Parts Record. You can only delete Part Records that have zero stock and have no outstanding transactions against them

Revive – If a Part has been marked as No Longer Available or Deleted, you can Revive the record. Once an item has been revived it will behave as a normal Part and there will be no record of any deletions etc.

Select **Not Available**, **Delete** or **Revive**. Select the relevant items from the list on the left hand side and **Confirm Selected**. The item number and description will then display on the right hand side. Depending on the option selected you will then click Set Selection as No Longer Available, Deleted all items in the selection or Revive all items in the selection.

The screenshot shows the 'Utilities' window with the 'Not Available' radio button selected. A list of items is displayed on the left, and the 'Items Currently Selected' panel on the right is empty. The 'Confirm Selected' and 'Set selection as No Longer Available' buttons are highlighted with a red box.

Item Number	Description	Stock Qty
000123456	Oil Filter	0.00
DSR013307	DSR OIL FILTER	0.00
MD197080	GASKET,OIL FILTER BRACKET	0.00
MD322522	GASKET,OIL FILTER BRACKET	0.00
MD343112	BRACKET ASSY,OIL FILTER	0.00
MD752072	OIL FILTER ASSY,AUTO T/M	0.00
MN980125	OIL FILTER	0.00
MR528836	OIL FILTER,A/T VALVE BODY	0.00
MZ690115	WSE OIL FILTER	0.00
VP690071	ELEMENT,OIL FILTER	0.00

Buttons: **Confirm Selected**, **Set selection as No Longer Available**, **Select All**, **Deselect All**, **Remove**, **Remove All**

Deleting & Reviving Locations

Locations can only be deleted if they are not currently in use. Once a Location has been deleted, you will be able to revive it.

Select the location(s) you wish to delete or revive on the left hand side of the screen and click [Confirm Selected](#).

The location(s) will then display on the right hand list. Once you have finished making your selection that need deleting, click on [Delete all Items in the Selection](#) or [Revive all items in the Selection](#).

The screenshot shows a software interface titled "Utilities" with a tabbed header containing "Close", "Stock", "Supersession", "Location" (which is selected and highlighted with a red box), and "Stock Value". Below the header, there are two radio buttons: "Delete" (selected) and "Revive", both enclosed in a red box. The main area is divided into two panels. The left panel, titled "Select locations you want to delete", contains a search bar with a magnifying glass icon and the text "Search...", a "Clear" button, and a list box labeled "Location" containing the item "Bin 19". At the bottom of this panel are "Select All" and "Deselect All" buttons. The right panel, titled "Items Currently Selected", has a header "Location" and displays the text "No Items to display". Between the two panels, there are two buttons: "Confirm Selected" and "Delete all items in the selection", both enclosed in a red box. At the bottom of the right panel are "Remove" and "Remove All" buttons.

Adjusting the Stock Value

Use the Stock Value Utility to write down single Part Records or make adjustments to multiple Part Records by increasing or decreasing the Stock Value by a set percentage.

Individual Parts

For Individual Parts there are three ways to change the Stock Value:

1. [Percentage](#) - You can increase or decrease the total Stock Value of the Part Line by a percentage value
2. [Update Stock Value Total](#) - You can enter a new total Stock Value
3. [Update Per Unit Value](#) - You can enter a new unit Stock Value

Utilities

Close Stock Supersession Location **Stock Value**

☒ Stock Value ☐ Standard Selling Price ☐ Multiple Components ☒ Individual Component

☒ Percentage ☐ Update Stock Value Total ☐ Update Per Unit Value

Select the components you want to change the value for

+ 00012578 Clear

Item Number	Description	Stock Value
00012578	Oil Filter	1,293.69

Select All Deselect All

Enter the adjustment percentage.

0.00 Increase

Update

Multiple Parts

Changing the Stock Value for multiple Parts can only be done by either increasing or decreasing by a percentage.

Select all of the Parts that you want to increase or decrease by the same percentage, enter the percentage value and click on [Update](#). The value of the Parts will now show with the updated value in the list on the left hand side of the screen.

When you adjust the Stock Values, a log of the changes shows in the [Parts Record](#) for each affected Part. This information is displayed on the [Pricing](#) menu on the [Write Downs](#) tab. In addition to this, the Stock Value shown on the Parts Record overview will be adjusted.

Stock Checking Parts

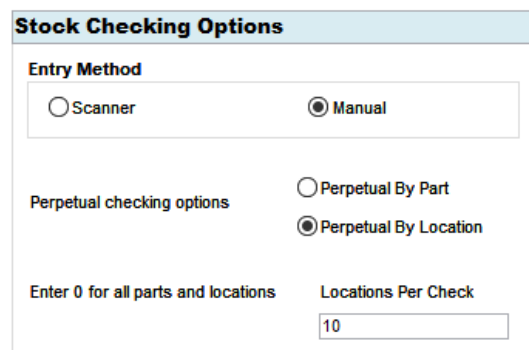
The Stock Check Control interface allows stock checks to be entered into DragonDMS and stock discrepancies to be managed easily from the Stock Check Control screen.

The Stock Check Control screen will allow Part stock quantities to be adjusted based on the data gathered during a Stock Check. Part re-checks can also be requested if you do not wish to apply the adjustment.

The system provides [Perpetual Stock Checking](#) – a regular check of small quantities of Parts, or of a selection of Locations.

Stock Checking – Initial Setup

To setup the Stock Check Options go to [Settings > Parts > Settings > Stock > Stock Checking Options](#).



The screenshot shows the 'Stock Checking Options' configuration window. It has a title bar 'Stock Checking Options'. Inside, there's a section 'Entry Method' with two radio buttons: 'Scanner' (unselected) and 'Manual' (selected). Below that is a section 'Perpetual checking options' with two radio buttons: 'Perpetual By Part' (unselected) and 'Perpetual By Location' (selected). At the bottom, there's a label 'Enter 0 for all parts and locations' and a label 'Locations Per Check' next to a text input field containing the number '10'.

Stock Check Entry Method

A stock check can be carried out manually or by using a hand held scanner. This setting selects the method for entering the stock check data into DragonDMS. The default setting for this option is Manual.

Perpetual Stock Checks

The Stock Control interface records when each Location and Part was last checked. The Stock Check Reports will provide a different selection of Locations or Parts on each check in the order of when it was last checked. The stock checked least recently will be checked first.

Perpetual Checking Options

This option enables you to select whether the Perpetual Stock Check Reports will list the predefined number of Parts or Locations on each Stock Check Report.

Parts/Locations per Check

The Parts / Locations per Check setting controls the quantity of Parts or Locations which are to be listed on the Stock Check Reports. The default setting for this option is 50 Parts / Locations. Changing this setting to 0 will disable the perpetual stock check routine and will list all Parts on the Stock Check Reports.

Performing a Stock Check

To perform a stock check go to the [Parts](#) module and click the [Stock Checking](#) option, then select [Stock Check Entry](#). To print a Stock Check Report, click the [Stock Check Report](#) button along the top of the Stock Check Control screen.

Dragon2000 - Stock Check Control

Cancel Stock Check Entry **Stock Check Report** Discrepancy Report

Item Number	Description	Location	Stock Qty	Check Qty	Checked By	Check Date	Comments
There are no items to show.							

Remove Selected Checks Deselect All Select All

If a recheck has been requested for a Part, this will be displayed at the top of the report in the [Priority Checks](#) section.

18 January 2

Perpetual Parts Stock Check

Listed below are the part lines which have been identified for today's stock check

Priority Checks	
Part Details	Location
 12233131 filter	 99

Main Check	
Part Details	Location
 090058 mug	 135
 1223426152 Nissan Micra 1996-1998 suspension Strut	 135
 1231231 starter suzuki carny	 135
 30-32-004 CORTINA MK2 66-70 SILL RH	 Bin 23

The last page of a Stock Check Report will contain a space in which you can record Parts not currently listed in DragonDMS.

Entering the Stock Check Data into DragonDMS

The Stock Check data can be entered into DragonDMS using two different methods; Manual Method and Scanner Method.

Manual Method:

- Click the [Stock Check Entry](#) button.
- Enter the [Part Number](#), [Location](#) and [Check Quantity](#) from the Stock Check Report and press [Enter](#) on your keyboard. Enter the next stock check Part details.
- The list will display a full list of the Stock Check data entered into DragonDMS.
- Once all of the checked Parts have been entered, click the [Stock Check Entry](#) button again.

Item Number	Description	Location	Stock Qty	Check Qty	Checked By	Check Date	Comments
4654654	Pollen filter	test	0	0	dragon_2k	10/05/2021...	
123241	Oil filter	Default	0	2	dragon_2k	10/05/2021...	New location for part line
4654654	Pollen filter	stores	0	2	dragon_2k	10/05/2021...	New location for part line
123241	Oil filter	stores	12	5	dragon_2k	10/05/2021...	Stock discrepancy

Scanner Method:

- Click the [Stock Check Entry](#) button.
- Scan the Part Barcode and Location from the Stock Check Report.
- Enter the [Part Quantity](#) recorded onto the Stock Check Report.
- The list will display a full list of the Stock Check data entered into DragonDMS.
- Once all of the checked Parts have been entered, click the [Stock Check Entry](#) button again.

Managing Stock Check Data

Training - Stock Check Control							
Cancel				Stock Check Entry	Stock Check Report	Discrepancy Report	
All stock check records - (5 Records)							
Stock discrepancies - (1 Record)							
Part lines not recognised - (1 Record)							
New locations for existing part lines - (3 Records)							
Part Number	Description	Location	Stock Qty	Check Qty	Checked By	Check Date	Comments
000369852		Location 3		25		18/01/2018	Part line NOT recognised
120vg0010	oil filter	bin 3		10		18/01/2018	New location for part line
012345678	gasket	Location 2		5		18/01/2018	New location for part line
000000000002	Spark Plug	Bin 23		1		18/01/2018	New location for part line
0011223344	Oil Filter	Location 2	0	5		18/01/2018	Stock discrepancy
						Deselect All	Select All

Stock Discrepancies

The Stock Quantity entered into DragonDMS from the Stock Check Reports does not automatically alter the existing stock information. You will have to authorise these changes.

Training - Stock Check Control							
Cancel				Stock Check Entry	Stock Check Report	Discrepancy Report	
All stock check records - (5 Records)							
Stock discrepancies - (1 Record)							
Part lines not recognised - (1 Record)							
New locations for existing part lines - (3 Records)							
Part Number	Description	Location	Stock Qty	Check Qty	Checked By	Check Date	Comments
0011223344	Oil Filter	Location 2	0	5		18/01/2018	Stock discrepancy
Authorise Selected Adjustments		Request Recheck for Selected Parts		Remove Selected Adjustments		Deselect All	Select All

Authorising Stock Adjustments

Authorising a Stock Adjustment will replace the current stock quantity recorded for the location with the quantity recorded from the Stock Check.

In order to authorise adjustments for multiple Parts:

- Select the adjustments that you wish to authorise from the list. You can also select all adjustments by clicking the [Select All](#) button at the bottom of the screen.
- Click the [Authorise Selected Adjustments](#) button, located at the bottom of the screen.

Requesting a Part Recheck

Requesting a Recheck for a Part will remove the Stock Check information for the selected adjustments without adjusting the existing stock quantity. The Part will also be displayed as a [Priority Check](#) on the next stock check report that is printed.

In order to request a recheck for multiple Parts:

- Select the Parts that you wish to request a recheck for from the list. You can also select all adjustments by clicking the [Select All](#) button.
- Click the [Request Recheck for Selected Parts](#) button.

Removing Stock Check Records

If you do not wish to apply a stock adjustment or request a recheck for a Stock Check Record, you can remove the Stock Check Record.

In order to remove multiple stock check records:

- Select the adjustments that you wish to remove from the list. You can also select all adjustments by clicking the [Select All](#) button.
- Click the [Remove Selected Adjustments](#) button.

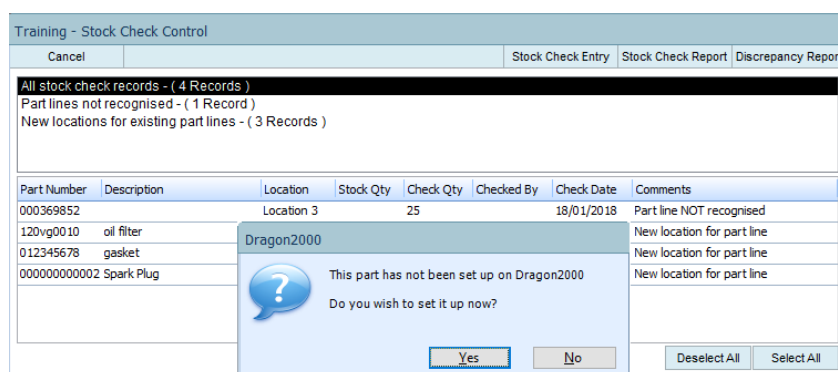
Part Lines not Recognised

If a Part has been entered into DragonDMS that has not previously been set up, the Part will be displayed on the Stock Check listing with no Part description and with a comment stating that the [Part Line is NOT Recognised](#).

You have the options of either removing the selected Part (if it had been entered in error) or creating the Part in DragonDMS.

To create the Part Record:

- Double-click on the Stock Check Record.
- You will be asked if you wish to set up the new Part click [Yes](#).
- The Create Part Record form will open and allow you to enter the details for the new Part.

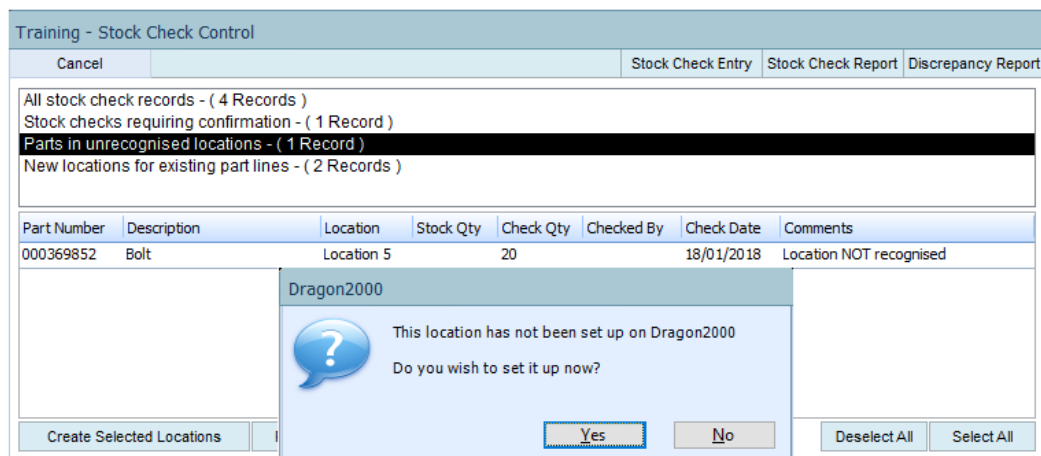


Part in an Unrecognised Location

If a Part has been entered into DragonDMS that has been recorded against a Location that has not previously been set up, the Part will be displayed on the Stock Check listing with a comment stating that the [Location NOT recognised](#).

In order to set up the new location:

- Double-click on the Stock Check Record.
- You will be asked if you wish to set up the new Location, click [Yes](#).
- The new Location will now automatically be added to the system and set up for this Part.

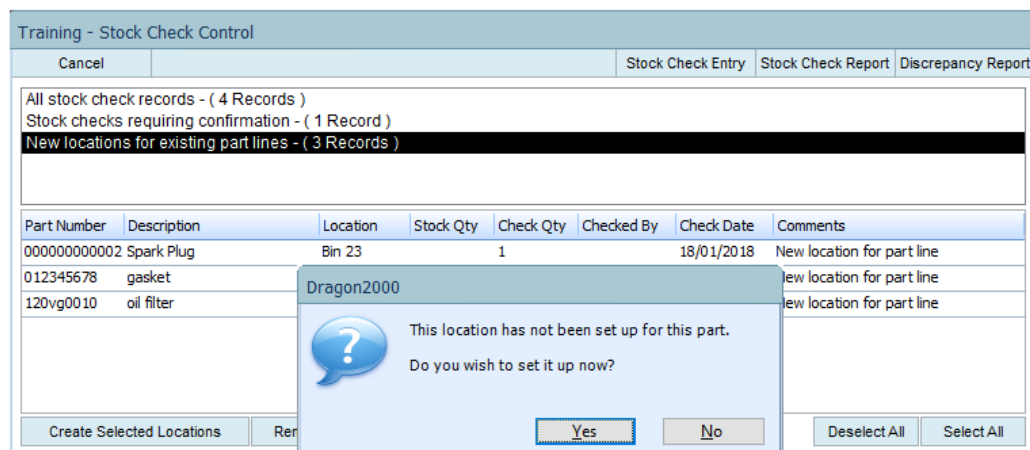


New Locations for Existing Part Line

If a Part has been entered into DragonDMS that has been recorded against a Location which has not been assigned to the Part, the Part will be displayed on the Stock Check listing with a comment [New location for Part Line](#).

In order to set up the new Part Location:

- Double-click on the stock check record.
- You will be asked if you wish to set up the new location click [Yes](#).
- The new location will now automatically be added to the system and set up for this Part.



Stock Checks Requiring Confirmation

Stock Check Records that do not contain any discrepancies with the Stock information on DragonDMS still need to be confirmed in order to provide historical traceability for all Stock Check information.

In order to confirm stock check records:

- Select the Part Lines that you wish to confirm. You can also select all Parts in the list by clicking the [Select All](#) button.
- Click the [Confirm Selected Checks](#) button.

Reports Module

The Reports that are displayed are controlled by the level of access given to the user. To view all reports the user must have access to Management Reports.

Favourite Reports

Reports that you run frequently can be added to your Favorites. Select the Report and click on the [Add to Favourites](#) button at the bottom right of the screen. The Report will then show in your list of favourite reports which you can view by clicking on the top [Favourites](#) report category.

Report Filters

Select the Report you want to run and double click. The Report Criteria will be displayed. The details on this screen will change depending on which Report you are running, generally you can enter the date range that you wish to report on.

The Fields options allows you to add Criteria to filter the Report Data. You can add more filters by clicking on the [Add Criteria Row](#) button. You can also decide if you wish the additional filters to be 'AND' (a filter in addition to the other filters) or an 'OR' (a filter that either meets one of the filters or the others).

Filters can be saved and reused, for commonly filtered reports this is a very useful tool. Add your filters and then click on [Save](#). Enter a name that describes your filters. The next time you run the Report you can select your saved filters from the drop down list.

Viewing a Report

To view your report click [Preview](#). Once the Report is on the screen you can view each of the pages (if there are more than one) by clicking on the arrow next to the page number at the bottom left of the screen.

All report can be saved as a CSV file by clicking on CSV.

Printing Reports

To print the Report click the [Print](#) Options button at the top left of the screen. You can choose to Print, Email (If you use Microsoft Outlook) or PDF the Report. If you do not wish to print the Report at this time then click the [Close Print Preview](#) button to return to the Reports Menu.

Most Popular Reports

Parts Stock

- [Parts Current Stock](#) – A list of all parts currently in stock along with pricing and quantity.
- [Stock Value Report](#) – This will show all of your current parts stock and value.
- [Parts Profit Summary](#) – Displays the opening and closing stock values for a given date range, as well as the profit of parts sold.

Parts Sales

- [Parts Issued to Workshop](#) – All parts that have been issued to Service jobs which have not yet been invoiced.

Parts Purchases

- [Parts Orders – Received in Full](#) – A breakdown of parts ordered and received from suppliers, where the order have been received in full

Parts Profit

- [Parts Profit Summary](#) – Displays the opening and closing stock values for a given date range, as well as the profit of parts sold.
- [Parts Sales Profit](#) – Shows all parts sold between two given dates and the average profit for each part.
- [Parts Analysis Retail](#) – Provides a breakdown of sales and profit on over the counter parts sales between two given dates.
- [Parts Analysis Service](#) – All parts issued to service jobs between given dates regardless if the job is open or has been invoiced.