## OverVUE

The Inventory Management Tool gives you the ability to update, modify, or deactivate Parts Inventory records. Part records can be converted to a new or existing Parts Order or Parts Returns.

The Inventory Management Tool is not a report. It allows you to create queries so you can manipulate the data associated with your parts inventory.

Permissions

The Inventory Management Tool must be enabled to use. Contact VUE Support to have the feature switch enabled and must be assigned to each company separately.

Permissions are included for the role of Parts Manager. Anyone else who needs access to view, edit, or deactivate parts must have permissions manually enabled.
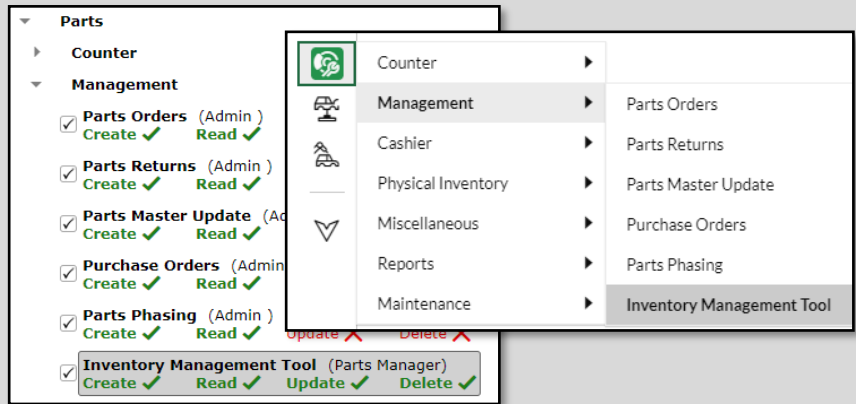
About Queries

Navigate to:
1. Parts > Management > Inventory Management Tool to see the list of all the existing queries or to create a new query.
2. Search and click on the query name hyperlink to open an existing query.
   - Clicking on the "X" in the far right Action column makes the query inactive.
   - The [**Filters**] button allows you to specify a date range to help you narrow your search for an existing query.
3. To create a new query within the Inventory Management Tool screen, click on **+Create New Query** and input a unique alphanumeric query name.
4. **In the Query Criteria** section, use the dropdown fields to filter your custom query. Use the **+ Add Filters** link to add another filter (see the next page for more information).
5. When you are finished, you may:
   - [**Save and Run Query**] - Save the query and generate the list of parts.
   - [**Cancel**] - Returns to the parts grid and no information will be saved.
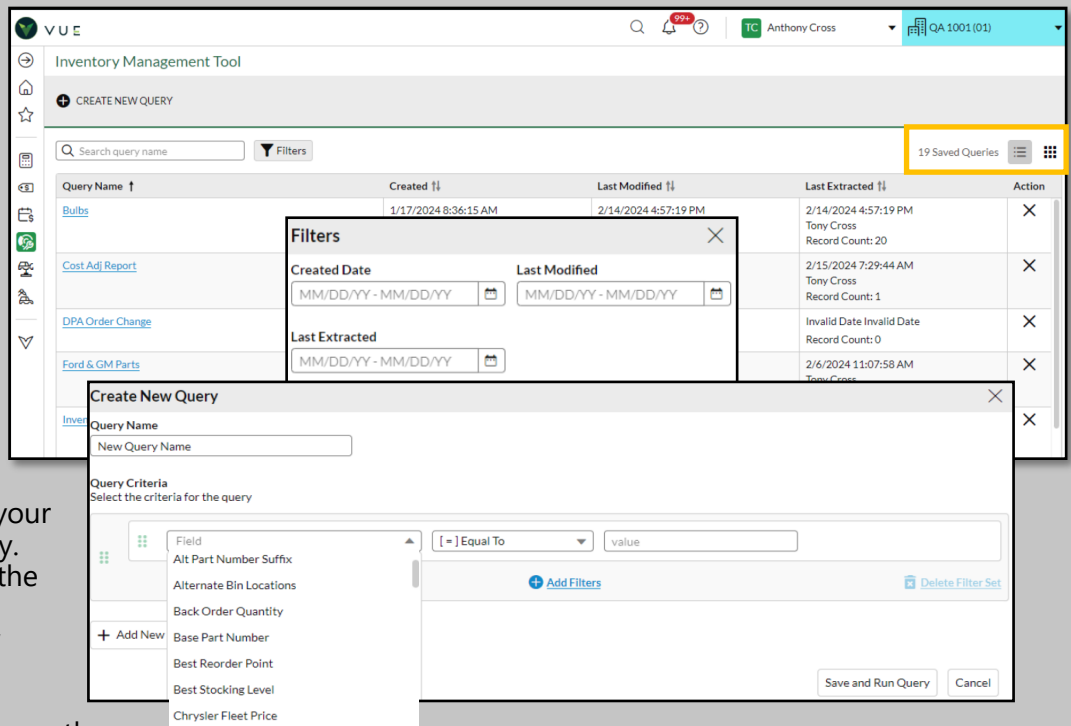
Pro Tip - This indicates the number of queries within the grid, and it changes based on your Filter selections. Selecting the icons to the right, change the display from List view to Tile view.

About Filters

- "**Field**" refers to the field in the parts record screen.
- A *Filter Statement* lets you choose to include or exclude data that matches your "**Field**" criteria.
- A *Filter Set* is a string of Filter Statements connected with an "And" or an "Or" criteria, and is used when an additional set of rules are applied to a single query. *Example - The user wants to see all Ford parts with an Order Source of "F" and/or (Add New Filter Set) GM parts with a Group Number of 5.880.*
- You may restrict the filtered data with a mathematical operator:
  - **=** (Equals)
  - **<>** (Not equal To)
  - **>** (Greater Than)
  - **<** (Less Than)
  - **>=** (Greater Than or Equal To)
  - **<=** (Less Than or Equal To)
  - Contains
  - Does Not Contain
  - In
  - Not In
  - Empty
  - Is Not Empty
- "**Value**" varies with the "Field" source you have selected. This may be a free form alphanumeric entry or a dropdown menu of available data. The Value may also be a Date or Number.
- Use the "**Add Filters**" link to add a *Filter Statement*.

EXAMPLE: *In the this example, the user has specified that they want to find all Kia parts that are located in bin location "Bulb" and have zero (0) pieces on hand.*

1. Name the query *BULB*
2. Select *Part Description* from the Field dropdown.
3. Select the *[.*..]Contains* operator.
4. Type in the Value of *Bulb*.
5. Select the *And* bullet and click on the **Add Filters** link.
6. Select *Manufacturer* from the Field dropdown.
7. Select *Equals* as the operator.
8. Select *Kia* for the Value field and click on the **Add Filters** link.
9. Select *Quantity on Hand* from the dropdown.
10. Select *Equals* for the operator.
11. Enter 0 (zero) as the Value and click on the **Add Filters** link.
12. Select *Cost* from the dropdown.
13. Select *[>] Greater Than a*s the operator.
14. Enter 0 (zero) as the Value.
15. Click on [**Save and Run Query**].

Working with Existing Queries
Navigate to Parts > Management > Inventory Management Tool - Filter/Sort the grid search to locate the query.
- All saved queries have read/write access by any user who has those permissions.
- Within this grid, you can sort each column (Query Name, Created, Last Modified, and Last Extracted). The column arrangement may not be edited. The single arrow in the column header indicates the column that is currently being sorted by.
- The [**Filters**] button allows you to specify a date range to help you narrow your search.
- In the Action column, clicking on the **X** will delete a query. *Once the query has been deleted, there is not a way to recover it.*
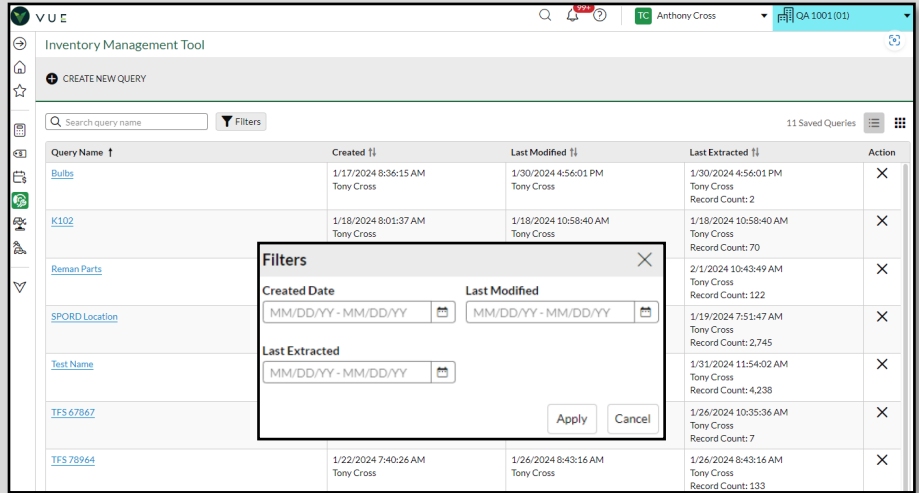
Within each Query screen
- **< ALL QUERIES** - This will return the user to the query browse screen.
- **Create New Query (+ icon)** - To start a new query.
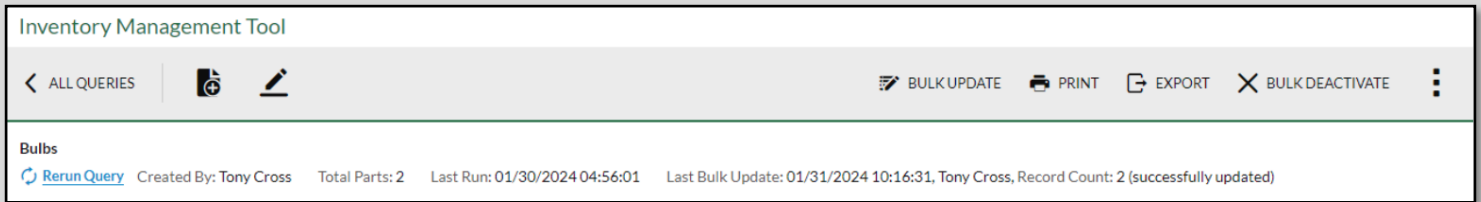
- **Edit Query (Edit icon)** - To make changes to an existing query.
- **BULK UPDATE** - Allows you to perform mass updates to the parts inventory table. (Active when at least one (1) part has been selected within the grid.)
- **PRINT** - Opens a new tab and Prints the query. The part number appears as a hyperlink to simplify editing.
- **EXPORT** - Downloads the list of parts into an Excel spreadsheet.
- **BULK DEACTIVATE** - Deactivate all parts that are in the query. (Available when at least one (1) part has been selected within the grid.)
  NOTE: *Once the deactivation is performed, it call not be reversed.*

The ellipse icon (three dots) to the right, displays two options.
- For Parts Orders
  -Import to New - Allows the user to move a part or parts to a new Parts Order.
  -Import to Existing - Allows the user to move a part or parts to an Entered Parts Order only.
- For Parts Returns
  -Import to New - Allows the user to move a part or parts to a new Parts Return.
  -Import to Existing - Allows the user to move a part or parts to an Entered Parts Order only.

Rerun Query - This function will extract the data again based on the query filter applied.
Created By - User that built the query.
Total Parts - Number of parts that were pulled during the Last Run.
Last Run - The date and time of the last data extraction for the query.
Last Bulk Update - The date and time of the most recent Bulk Update or Bulk Deactivate.
Record Count - The count of parts in the most recent Bulk Update or Bulk Deactivate process.

Edit an Existing Query

Navigate to Parts > Management > Inventory Management Tool

1. Filter/Sort the grid search to locate the query.
2. Click on the blue query hyperlink to open the query.
3. Click on the edit icon to open the Edit Query window.
   In this edit mode you may:
   - Modify existing filter fields.
   - Click *Add Filter* to add a new filter option.
   - Click the **X** to delete a filter.
   - Drag and drop a filter using the six ellipsis icon to the left of each filter.
4. Click on [**Save and Run Query**].

Bulk Update

1. Clicking on the checkbox to the left selects that part. Bulk Update and Bulk Deactivate button are available once parts are selected.
2. Click the **BULK UPDATE** icon.
3. Select the Field(s) and Values that you want to update in the Parts records.
   - Clicking on the Add Field link allows you to update multiple fields at once.
4. Click [**Update Parts**]. *This action cannot be undone.*

When the Bulk Update is complete, the Last Updated Date, Time, User, and the number of successfully updated records are updated.

Pro Tip - If you Bulk Update a COST field, the transactions are written to the Parts Adjustment Report. See it at Parts > Reports > Audit > Parts Adjustment Report.
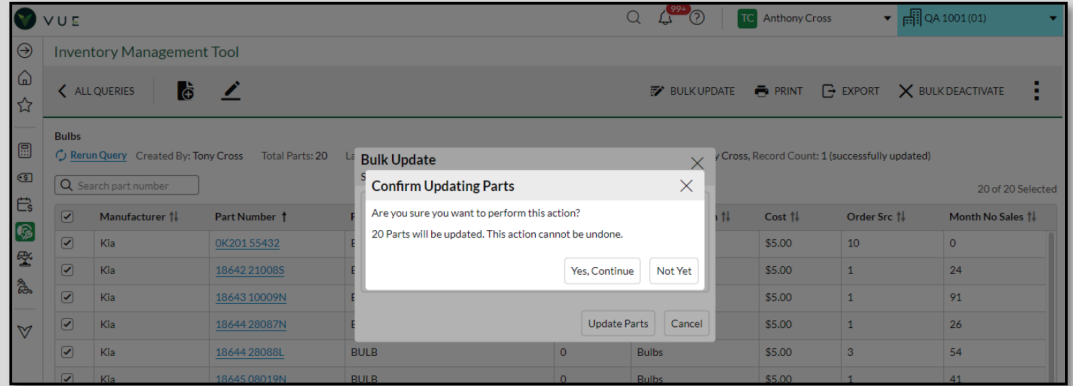
Bulk Deactivate

Deactivating a part does not delete the part, but rather sets the Active Part status in the Part Record to "No Status" and renders it inactive. Deactivated Parts records may be reactivated, but this action must be carried out one record at a time from the parts inventory screen.

Be aware that Deactivated Parts cannot be on any of the following:

- Open parts invoices or open repair orders.
- On active parts order, parts return, or parts core return.
- Part(s) cannot have an On Hand Qty greater than or less than 0.

When the user clicks Bulk Deactivate, the system displays a confirmation message.

[**Yes, Continue**]- This action will deactivate the selected parts. *This action cannot be undone.*

[**Not Yet**]- This will return you to the query results screen.

When the Deactivate Parts Update is complete, the Last Updated Date, Time, and User are updated and display a Bulk Update Successful message including the number of Parts that were successfully updated with a list of the Fields and Values that were updated, and the number of Parts that failed to update.

Important

Know that the query results will not automatically change on screen. If you want to see up-to-date results that match your query criteria, you will need to rerun the query after closing this window.

↻ Rerun Query
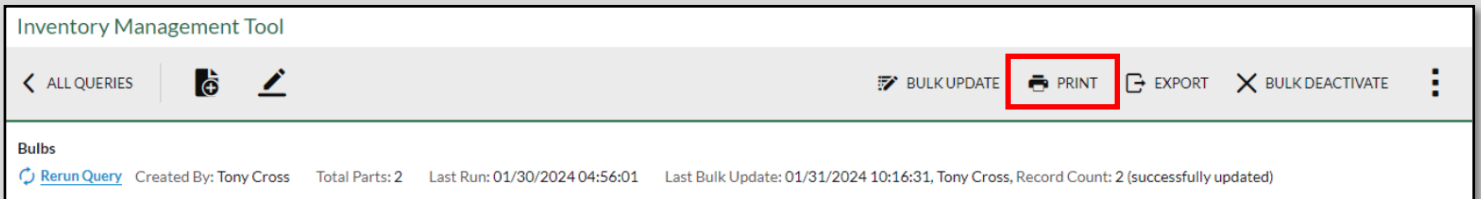
Print

Clicking the Print button prints the list of parts from selected criteria to the screen in a separate tab with the following columns:

- MFG - Manufacturer
- Part Number
- Part Description
- Bin (Primary)
- Additional Bins
- QOH - Quantity On Hand
- Cost
- Activity (Number of Months since last activity).

Import Parts to an Existing Parts Order or Parts Return.

In the top right of the screen, clicking on the three ellipse icon (three dots) reveal the following options:

- **Parts Order**
  - **Import to New** - Allows you to import the list of parts from a query into a new parts order. You will be prompted for a parts vendor where the part will be ordered. Once a vendor has been selected, the "Create Parts Order" button will be enabled and the Create Parts Order button will import the parts onto a new parts order in a new tab.

  - **Import To Existing** - This option allows you to import the list of parts from a query onto an existing parts order. The system will display the list of existing parts orders with an "Entered" status. Mark the checkbox of the parts orders to select them. If a part is on a existing order and the part is imported again from the Inventory Management Tool, the part will be added on a separate line. The Order Qty will default to a quantity of 1 for each part imported onto the order.
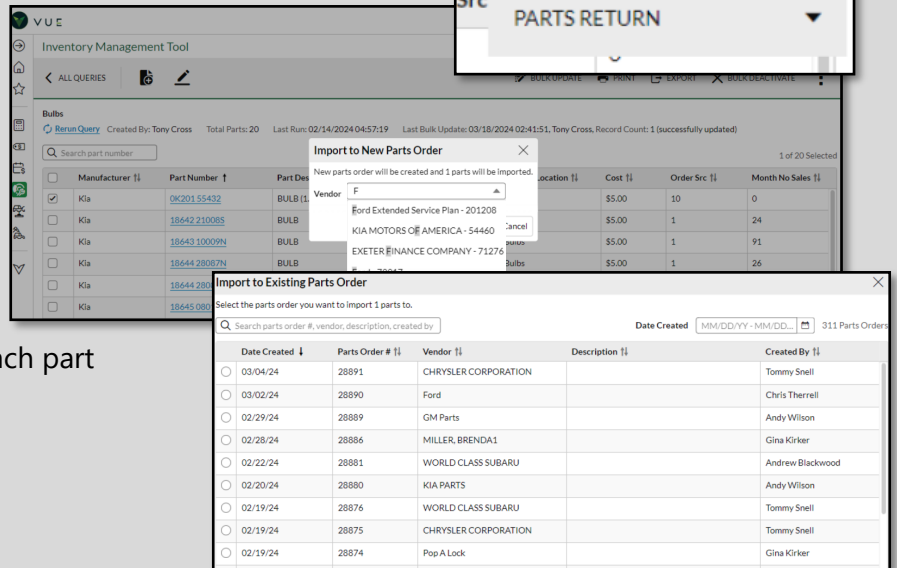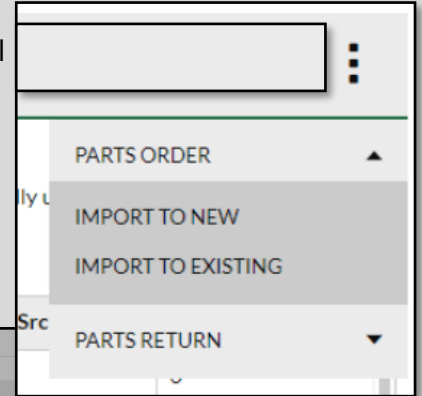
- **Parts Return**
  - **Import to New** - Allows you to import selected parts from the query onto a new parts return. When you click [**New Import**], you are prompted for a parts vendor where the part will be returned. Once a vendor has been selected, the selected part(s) will be imported onto a new parts return in a new tab.

  - **Import To Existing** - Allows you to import the list of parts from the query into an existing parts return. *Parts Returns must have a status of "Entered".* The list of existing parts returns are in the "Entered" status. Choose one part return to add the selected parts from the query. *If the part(s) are already on the existing return, the part(s) quantities will be replaced ONLY if the quantity being returned is less than the quantity on hand.* If the quantities are equal to or more than the quantity being returned, it will not be updated. When a part is added to a return, those parts will be added with a source of "Manual" in the table. The source options are Manual, Generated, or Special Order.

Export

Click on Export to create an Excel spreadsheet with predefined columns.
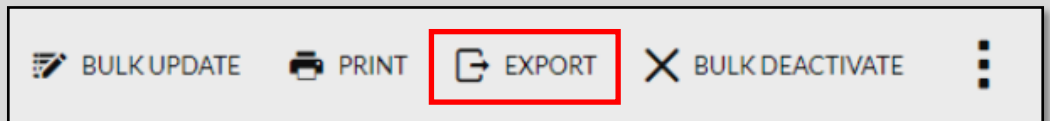
- **MFG - Manufacturer**
- **Part Number**
- **Part Description**
- **Bin (P) - Primary**
- **Additional Bins - Non-primary bins**
- **QOH - Quantity On Hand**
- **Cost - Current parts cost from inventory**
- **Activity - Number of Months since last activity**