

<<This section is an excerpt from Chapter 7 in the main ServiceDesk Manual>>

## B. Managing Special-Order Parts

It may be that some service companies have little burden in regard to ordering non-stock parts. For the rest of us, however, the burden is frequent and substantial. Please be assured, ServiceDesk has a well-polished system to manage this activity.

First, a definitional distinction: *stocking parts* (aka “inventory,” and as specifically discussed in the *next* major sub-chapter section) are items you acquire and hold with the expectation you’ll likely use them on *some future* job (i.e., when first acquired, they are not for any particular job, and you have no specific immediate use for them). By nature, they are speculative. *Special-order* parts, by contrast (and as discussed in *this* major sub-section) are never held as “inventory.” They are acquired for specific jobs (or perhaps to fulfill particular POS requests)—specifically, when it’s realized, on any such particular job (or POS request), that said part is needed, and further realized that, because it’s *not* a stocking item, it must be specifically ordered for immediate need.

### i. Birth of the Internal “PartsRequest”

The first thing that must happen, in managing a special-order part, is for an internal “request” to be generated. This request can be created via any of several mechanisms:

1. A tech in SD-Mobile makes the request, via his Mobile interface;
2. A tech makes the request via a PostVisitReport, as entered (by him) directly within ServiceDesk;
3. An office person creates the request, via a PostVisitReport, as performed on behalf of a tech;
4. An office person creates the request via a POS operation; or
5. An office person creates the request via a button as provided within the JobsCurrent form, and as connected with the job then displayed.

Regardless of how created, each of the parts requests you have *pending*, at any moment in time, are stored in a particular location, and can be accessed via a particular form. Sensibly, this is called the *PartsRequest* form (**Alt-F8** is the shortcut). Besides being a place where requests can be viewed and/or edited, it’s more typically used as the interface (in some but not all of the above-enumerated contexts) where requests are actually created.

So, the simple idea is, before we can manage a special-order part, we first have to have an underlying, internal request to form its basis. This request is an internal record that describes details about the request. It relates only to special-order parts, and not to stocking inventory. It’s an internal record that says, essentially: “Hey, here’s an item we don’t stock that we need to get, because it’s needed on XYZ job.” And, it

provides the underlying, request basis for initiating the processes of making inquiries to suppliers, actually placing an order, keeping track of the order, checking in the part when it arrives, etc.

The request is the foundation. For parts connected with jobs (as opposed to POS-based requests), it's typically created via any of mechanisms 1 through 3, as above-listed (i.e., in a *PostVisitReport* of some kind, whether via Mobile or internal PVR Types I or II). All three PVR contexts have their unique methods to collect what is, ultimately, the same result: an internal parts request, representing an item that needs to be ordered—or, at least, inquired upon.

In regard to this latter, the system recognizes that sometimes an item simply needs to be researched, to determine price and availability, pending a decision as to whether an order is desired, or not. The underlying “request” accommodates this via an option to indicate whether the order is “Definite” (meaning just get it regardless) versus “Tentative” (meaning research-only for now).

## ii. Processing PartsProcess Items—General Concepts

So, you've got several mechanisms to create a *PartsRequest*, plus a form (the Alt-F8 *PartsRequest* form) that holds each such request, reviewable on a page-by-page basis (i.e., each page of display in this form represents a separate underlying request). But, obviously, giving birth to these requests and storing them does not accomplish the ultimate purpose. We also need a basis to perform the underlying, needed work (i.e., looking up the parts, getting them ordered, etc.).

The *PartsRequest* form, in itself, would be a lousy tool for facilitating these further purposes. It's not designed for them.

For perspective, consider an old-fashioned, paper-and-ink managed office. In that “old days” scenarios, it's typical that each part-request is represented on a sheet of paper (often it's the service ticket itself, but some old-method offices use other forms). It was also typical that, at some point in the day, the person responsible for parts-processes would gather each of the slips representing new parts requests, and lay them out on a large flat surface. Essentially, he wanted to get a “feel for the territory,” sort of assembling and re-assembling the slips, saying to himself: “Okay, these three items I'll go to Vendor X for, and these four to Vendor Y,” etc.

In an all-electronic system such as *ServiceDesk*, the same guy (or perhaps gal) is going to want something equivalent to that “large flat surface.”

That equivalent, in *ServiceDesk*, is called the *PartsProcess* form (shortcut is **F8**).

Please notice, between the two shortcuts so far described (Alt-F8 and F8), the *PartsProcess* form has the easier one. We gave it the easier shortcut because it's your main, operative form—the one where you really do the bulk of your parts-process work.

The general idea, in the F8 *PartsProcess* form, again, is to provide the electronic equivalent of that large flat desk—or, actually, *several* of them.

If you're an average size shop, you'll likely have a few scores of parts-request items pending at any moment in time. Some of these requests will be brand new, with no process work (inquiring with vendors, placing orders, etc.) having yet been performed. Others may be in a state where you've made inquiries with particular vendors, and are waiting for a response back. Still others may be in a state where an order has

been placed, and you're waiting for the shipment to arrive. There are still more possibilities—such as that you've looked up and got price and availability, and are waiting for the customer to give you a yea or nea.

What if, in a paper-and-ink system, you had a *separate* large tabletop on which to spread the tickets holding parts requests that fit each such category (i.e., one for requests on which nothing's been done at all, one for requests where you're waiting for a response back from the vendor, and so on)?

That's the general concept behind ServiceDesk's PartsProcess form. It gives you several "virtual" tabletops—one for each category of progress in which your underlying parts request may lie. On its first-display/menu page, you pick the particular "tabletop" you want to work on.

The screenshot shows a web browser window titled "PARTS ORDERING AND INQUIRY (CURRENT FILE)". The main content area displays a "Select Your Display Basis" dialog box. A red speech bubble points to the dialog with the text "Pick the 'TableTop' you want to work on".

The dialog box has two main sections:

- Review by Item Status** (indicated by a red border):
  - no limit, show All
  - items needing inquiry/order
  - Waiting for info from supplier
  - waiting for approval from customer
  - On order, awaiting arrival
  - past due for arrival
  - in need of Pricing by manager
  - Core return items ...
  - all processes Done
- Search on Basis of ...**:
  - customer Name
  - SD Invoice number
  - part number
  - P.O. number

Below these sections, there are four dropdown menus for further filtering, each with a "clear filters" button:

- Applicable Technician: -- SHOW FOR ALL --
- Underlying Machine Make: -- SHOW FOR ALL --
- Applicable Vendor: -- SHOW FOR ALL --
- Underlying High Volume Client: -- SHOW FOR ALL --

In other words, when you pick a particular display category, you get the specific "tabletop" that pertains to the kind of work you're presently interested in performing.

What happens behind the scenes, when you pick a particular "tabletop" (aka "display category") is the system goes through each of the pending requests (again, depending on your size operation, at any time there may be several scores of them), and determines if it should properly be deemed to belong within the category (i.e. upon the "tabletop") you've selected. For any item that's determined should fit that category, it's added to the "tabletop" display.

So, you pick your display category (either mouse-click on the menu item or keyboard-strike the indicated shortcut), and, instantly, ServiceDesk does the behind-the-scenes categorization, and presents you your tabletop.

The surface of this variable “tabletop” is arranged so that up to 18 requests can display within a single page view. If you’ve picked a category that involves more than 18 requests, the ones beyond 18 simply fall to subsequent pages (use your keyboard’s PgUp and PgDn keys to navigate).

So, here’s the concept. Each request appears along and within what we call an info-band. Each info-band stretches horizontally from the left-edge to right, and holds two lines of text:

The screenshot shows a software window titled "ITEMS NEEDING INQUIRY/ORDER (Page 1 of 3)". It features a table with columns: Ref #, ItemTp, ItemMk, Model #, Serial #, Inquiry/Order, Info Provided, and Order Status. The table lists various items, including washers, ovens, and cooktops. A callout box points to the item reference number "72796-10-1" in the table, stating: "right-click on any particular line-item reference to produce its underlying full-request form". Another callout box points to the top of the "Parts Request" form, stating: "right-click anywhere in the colorful label area to produce the contextual 'CheatSheet'". The "Parts Request" form displays details for invoice 72796, request # 10 of 4, dated 7/25/03, for a WASHER (MAYTAG, WA606). A "CheatSheet" context menu is visible, listing various actions like "link to underlying Request", "link to Inventory inquiry", "rotate Request Instrctn", and "show item's DisplayCategory".

The entire left-third of each band (green text) brings in information directly from the underlying PartsRequest form, which serves as its anchor. This request-specific info is somewhat abbreviated—so as to allow space to fit more process-related work-info to its right. If you’re working on an item and need greater detail about the underlying request, a simple right-click on the item’s reference number (top-left textual item in each band) quickly displays the full/underlying PartsRequest form, with applicable record loaded in it.

Please notice the colorful label area at top of this PartsProcess form. It’s intended that the labels there help you identify the information that’s intended, within each actual info-band, for the info that goes into

each equivalent-position space. So, to know what each operative space is for, just line it up visually with the equivalent position label in that colorful section at top. That's what will tell you.<sup>1</sup>

In regard to the remaining right two-thirds of each info-band, they're to fill-in details that pertain to all continuing processes, as performed in conjunction with *fulfilling* the underlying request. If you check the label areas, you'll get some idea of their flavor.

In such regard, the first element of added information may well be the particular part number that's needed, in conjunction with the request. Or, perhaps not. The fact is, some offices have their techs lookup the needed part numbers before creating the underlying requests. Others leave the lookup to someone in the office. For now, let's suppose yours is in the latter camp.

### iii. Managing PartsProcess Items—Specific Operation

So (we'll at least pretend), you're the parts guy. You not only do the ordering; you do the lookup too. You reach the point in your day where it's time to perform the daily ritual. You need to gather up all the requests, as generated by your techs since you last did this task (probably yesterday). There may be other requests, too, such as those from guys at a parts counter. Anyway, instead of gathering paper slips, you instead go to the F8 form. There, you pick the display category "*Items needing inquiry/order*," and see a list of info-bands where only the left-third is filled in. You look at the first, note the type and make of machine, what's wanted, and determine how best to look up the requested part (if you're in appliances, please don't neglect to consider *SmartParts* (Alt-F10) as a good candidate for the easiest and fastest method).

At any rate, using whatever method is easiest, you determine the correct part number. Now, click in the info-band, and type it in the indicated box:

Ref #	ItemTp	ItemMk	Model #	Serial #	Rqst	Vendor	Whom	Mthd	Date/Tm	Confirmed	Expected	Received	Invcnbr	\$ Cost	\$ Sell for
Cstmr Nm	Part Description		Qty	Instr	Part #	Avlbty	\$ whsl	\$ retail	PO Nbr	Notes		BinLoc			
65109-1-1	Refer	U-line	ULN-C029FB-00	Z991407-090107	Ship if 1/S										
U-lin/Arthur	Compressor			1	Definite	5156168									

type the part number in the Part # box

Or, we may suppose your tech already identified the number upon creating the underlying request. If so, you'd of course not need to look it up. Instead, you would have seen it automatically pop into the appropriate box for you, just as soon as you clicked within the info-band to display its editing boxes (pulled for you from the appropriate place in the underlying request).

Another possibility would be that you use your vendors to do the lookups (why expend your labor for the purpose when they're willing to do it for free?). The system accommodates that, as well.

More specifically, it accommodates a plethora of methods for conveying requests to your vendors—whether the requests are for lookup, pricing and availability, or simply to place an order.

<sup>1</sup>There's something else about that colorful label area, too. In other contexts, we've described contextual "Cheat-Sheets" — excerpts from the Command Summary as applicable to a particular work context. Like Callsheets and the DispatchMap, your PartsProcess interface is laden with otherwise hidden commands and tricks — powerful tools that, early-on at least, you'll need as a handy aid to remind you. Since the colorful label area at top is otherwise un-operative (i.e., it's only a label), it fits the rule that, if you right-click within an otherwise un-operative space (and in a context that offers a Cheat-Sheet), it will produce the Cheat-Sheet as applicable there. You can right-click elsewhere within the PartsProcess form too, so long as the spot where you're clicking has no operative purpose otherwise.

The most old-fashioned method of connecting with a vendor, of course, is to simply *call* via telephone, and you can certainly do that here. Suppose, with respect to each item, you call an appropriate vendor. You can ask for the lookup if it was not already done in-house, and upon receiving the part number back, type it into the appropriate space (along with other sensible info into appropriate boxes, such as an indication of availability and quoted price). Or, if you already did the lookup, you can simply ask about price and availability, and type that info into appropriate boxes, as it's provided. Or, maybe you're simply telling your counterpart at the vendor's desk that, in fact, you're placing an order. If so, fill-in the added appropriate boxes to indicate that.

Of course, we all know that, to place inquiries and/or orders via telephone is very inefficient. Instead, you may be going to a vendor's website to perform these functions, and, if so, you can fill-in appropriate boxes to indicate info received (and actions performed)—much the same as if you'd spoken with a human (there's even a box to indicate the particular method used).

Or, you can go for greater automation. Specifically, you can have the system itself generate either a fax or email request for you, one appropriate to each vendor of interest. Here, the general notion (reaching back to sorting slips on a large desk for those requests that will fit best with one vendor, versus those that will fit better for another, etc.), is to eyeball-peruse the current/new requests, and make precisely that kind of evaluation. As you do so, use simple mouse actions to assemble requests as applicable to each vendor.

This process is simple. Begin, for example, by noting that you have one or more items that will best fit for Vendor X. Then tell yourself, "Okay, I'm assembling a request for Vendor X." Now scan down through all the open requests, and for each that should be included in Vendor X's request, do a simple Ctrl/right-click on its info-band. You'll notice, as you do this action, it changes the info-band's background to yellow. That's to designate it's been marked for inclusion in the particular request you're now preparing.

72722-1-1	WASHER	MAYTAG	WA606	12345678	3	Definite
AHS/JONES	test item					
72796-1-1	DISHW	KITCH	FE92054978	KUDS220T0	1	Tentative
HENDE/JONES	test item					
72802-1-1	DISHW	GE	SHU2300	1561615	1	Tentative
TEST TICKET	upper rack					
72796-2-1	DISHW	KITCH	FE92054978	KUDS220T0	1	Definite
HENDE/JONES	upper arm					
72791-1-1	Cooktop	Viking	SHU6000	156156156884	1	Definite
Jones	Door Panel					
72791-2-1	Cooktop	Viking	SHU6000	156156156884	1	Definite
Jones	bottom panel					
72807-1-1	washer	maytag	993	990	1	Tentative
Jones	A-20357/347389					
72790-4-1	RANGE	DACOR	XH5000	156156156	1	Definite
AHS/Fierro	test					
72825-1-1	OVEN	GE	SR58J-2CZ	6X716565929	1	Definite
GE/Contract	Display Kit					
72826-1-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative
Test 2	widget 2					
72826-2-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative
Test 2	widget3					

a Ctrl/right-click marks items for inclusion in a request

So you simply look through the list, designating each item you want to include in Vendor X's request. When done, hit Enter on your keyboard. This invokes a dialog whereby you can choose whether to email the request, fax it, etc.

The basic idea is, by this means you can easily create a request for each vendor, and easily convey it to each (at least each that is amenable to receiving requests in this fashion). ServiceDesk will do the underlying work, to formulate the request to fit the circumstances, according to how you've prior filled-in applicable boxes (for example, if you've not done the lookup to provide a part number, it will ask the vendor to

provide that lookup; if the request is tentative, it will ask the vendor for price and availability (P&A-only); if the order is definite, it will be asking the vendor to ship, etc.).

Of course, conveying the request does not complete the process. Each request is formulated in a manner that asks your vendor to respond with appropriate answering information (such as, for example, the part number if the vendor was asked to do the lookup, price and availability in all instances, and whether the part is in fact being shipped, if shipping was requested). The expectation is, once you've made the inquiry/request, the vendor will respond back with these elements of information. And, of course, there's likely to be something of a wait before that happens.

So what do you do during that wait?

Let's go back to considering the paper-and-ink, multiple tabletops notion. When you write on each slip of paper to indicate that at such and such date and time you made a particular kind of inquiry and/or request with a particular vendor, you're not likely to keep those slips on the same work-area/tabletop. No, you'll much more likely move them to another space—a space where you keep slips on which you're waiting for a response back from vendors.

It's the same in ServiceDesk—except ServiceDesk does the moving for you. Once particular boxes for an info-band have been filled-in in a manner that indicates the initial request was made (hint: this is done for you when you go through the above-described process), the band get moved from the “*Items needing inquiry/order*” category of display. Specifically, if the box which indicates order *confirmation* remains blank (while other boxes indicate the inquiry went out), the info-band is moved to the “*Waiting for info from supplier*” category of display.

The idea with this category is simple. In response to your faxed or emailed request, the vendor contacts you back with the requested answers (depending on circumstances, that “contact back” might be by fax, email or even telephone call). Regardless of method, when such info comes back, you need to go to the “*Waiting for info from supplier*” category of display, and fill-in the provided-back data. This fill-in process, properly performed, will take the items out of that category of display (off that tabletop), and move them appropriately to new ones.

As an example of this process, if you'd indicated the order was “Definite,” and if the vendor replied that he was shipping, you'd fill-in the box indicating the order was confirmed. You'd likely also fill-in the box indicating an expected arrival date, based on how long it takes to receive shipments from that vendor (please note that each of these boxes have tricks to make filling-in dates super easy; float your mouse pointer over each for tips). Bottom line is: any fill-in that sensibly indicates an info-band belongs on a different tabletop sensibly moves it to that tabletop.

At least it does so *for the next time* a particular tabletop is loaded. You'll notice the immediate response, however—if you've filled-in boxes in a manner that should remove an item from the current display category—is that the info-band turns grey. This is to prevent you from being worried or confused, as you might otherwise, be if an item that you were working on suddenly disappeared. Don't worry; any item that's turned grey within a particular display category will not appear within that same category next time it's selected.<sup>2</sup>

So (and to take stock of where we are in this discussion), we've discussed how to perform appropriate work on your "nothing-has-yet-been-done-on-these-requests-and-we-need-to-do-it" table (aka "*Items needing inquiry/order*"), We've further discussed how, when you did this first work in a manner that produced the expectation of a later response back from your vendor—and when that response came back—you then moved to a new table, to appropriately type-in the responding-back information.

At this point, all your requests are likely to be in one of three states: (a) the part is on order; (b) you have price and availability info to pass on to the customer (for his yea or nea as to actually placing an order); or (c) the initial vendor's response was not acceptable (e.g., price was too high, part was not in stock, NLA, etc.). Please notice, the system provides further display categories (e.g., tabletops) for items (a) and (b), which we'll discuss shortly.

In respect to item (c), if the initial vendor's response was not acceptable, it's apparent we need to inquire with another vendor, and perhaps even make a succession of other inquiries. We do not want to create a new "Request Item," because it's the same and original underlying request that we're still seeking to fulfill. Nor do we want to replace information, in the first info-band that we've typed regarding the first vendor's response. We need to keep that there, so we know there's no need to inquire from him again. Instead, there's a very handy solution. We call them "*daughter*" bands. From any original info-band, you can make up to seven "daughter" bands—to facilitate further inquiries (and or actual orders), with other vendors, but still as tied to the same and original underlying request. We're not going to tell you here how to create daughter bands

---

<sup>2</sup>Since ServiceDesk is studying how boxes have been filled-in to determine which display category each process item belongs in, it may be helpful to understand the precise criteria it's using for this determination. To the greatest extent possible, we've designed it to closely mirror what human logic would be, as follows:

1. **'All Items In File'**: Obviously, this category selects every item regardless of its content
2. **'Items Needing Inquiry/Order'**: To show in this category, an item's *'Instrctn'* status must be set to other than "Declined" and its *'Request'* status to other than "Dormant," plus its *'Confirmed'* box must be empty. In addition, it must not fit the criteria for Categories 3 or 4, as below described.
3. **'Waiting for Info From Supplier'**: To show in this category, an item must fit the criteria as described in the first sentence under Category 2. Additionally, its *'InquiryDate'* box must be filled-in with a date, while *'Availability'* box remains empty.
4. **'Awaiting Approval From Customer'**: To show in this category, an item must fit the criteria as described in the first sentence under Category 2. Additionally, its *'Instruction'* box must indicate "Tentative," and the *'InquiryDate'*, *'Availability'* and *'\$ Sell for'* boxes must be filled-in.
5. **'On Order, Awaiting Arrival'**: To show in this category, an item's *'Request'* status must be set to other than "Dormant," and its *'Confirmed'* box must be filled-in, while its *'Received'* box remains empty.
6. **'Past-Due for Arrival'**: To show in this category, an item's *'Request'* status must be set to other than "Dormant," and its *'Confirmed'* box must be filled-in while its *'Received'* box remains empty (same as above). In addition, the "Expected" box must be filled in, and the present date must be beyond the expected date.
7. **'In Need of Pricing by Manager'**: To show in this category, an item's *'Request'* status must be set to other than "Dormant," and either: (a) its *'Received'* must be filled-in while its *'\$ Sell for'* box remains empty; or (b) its *'Instruction'* box must indicate "Tentative," while its *'InquiryDate'*, *'Availability'* and *'Wholesale'* boxes are filled-in, with its *'Confirmed'* and *'Wholesale'* boxes remaining empty.
8. **'Part Arrived, Process Complete'**: To show in this category, an item's *'Instruction'* status must equal "Declined," or its *'Request'* status must equal "Dormant," or its *'Received'* and *'Sell-For'* boxes must both be filled-in.

Please note that items must be in the last category (i.e., # 7) before they will be ready for movement out of the current PartsProcess file and into its archive.

(though we'll reveal it's a simple, modified mouse-click)—because we want you to practice using the PartsProcess form's contextual Cheat-Sheet. You should use it whenever you need to learn (or remind yourself) of specific commands for specific actions. Go ahead: go to the F8 form's Cheat-Sheet (right-click in the colorful label area at top), and look (under "MANIPULATIONS" and "General") for the entry that reads "Request New Info Band." That will tell you how to use this method.

So that's how to deal with the occasional need to make multiple inquiries (or orders) as connected to a single, underlying request.<sup>3</sup> What about dealing with items where the customer wanted you to first acquire price and availability, then call them back?

As a rule, it likely makes most sense for the parts person himself to call the customer back, for a year or near, immediately upon acquiring the information. It's easy to bring up the underlying JobRecord (with all appropriate contact info)—by doing the right-click on any info-band's item reference number (this brings up the underlying request form, where you may then click on its "ShowJob" button). But, of course, sometimes the customer will not be available for immediate discussion. We suggest adding a note to the JobRecord's history indicating the effort was made. Additionally, it makes sense to periodically review the F8 form's "Waiting for approval from customer" tabletop, and, for any items where a year or near has not been received, renew the effort (try, in other words, to keep that "tabletop" cleaned up—just as you do all the others).

When and if you get a year, of course, you can appropriately change applicable boxes to indicate the request is now "Approved," and place the order with a vendor, much as you would have had the request initially been "Definite." If you get a near, you can simply change the request status to "Declined" (at such point, ServiceDesk will figure your work on that item is complete, and once again appropriately move it to a different tabletop). If your customer never responds and you finally tire of the effort, there's another put-this-item-to-bed category called "Dormant" (look for it; you'll see it).

Finally we are left with the general subject of how to deal, after the fact, with items actually ordered.

In terms of immediate response, this is perhaps the most simple. The parts come in, and you fill-in boxes to indicate the circumstances of their arrival. Essentially, you're "checking-in" the parts (bear in mind, we're talking about special-order parts here, and not stocking parts, which are "checked-in" through a totally different process). This is done, obviously, as shipments are received (or any equivalent event).

More specifically, as you open a box of just-received special-order parts, you're going to open your F8 form, and pick the "On order, awaiting arrival" category of display. This will show you all items you're expecting to receive. So, the general idea is, you pull an item from the box, then look within the displayed info-bands (use PgUp and PgDn to move between multiple pages, if applicable) to locate the one that pertains to the item in your hand. Once you've located that info-band, fill-in boxes to indicate date received, the vendor's invoice number, and so on—as applicable to the circumstance.

The above method works just fine if you're handling a relatively small quantity of special-order parts. If you're handling more (so that, for example, at any point in time you have *many* pages in the "On order, awaiting arrival" display), perusing through *so many* items (to find the request that matches an item as just

---

<sup>3</sup>If you happen to be in the appliance repair field (as always, we apologize to our clients in other fields for describing something that, at present at least, can only be used in this one), there is an incredible tool that can fly right past the occasional need to deliberately and separately inquire with a succession of vendors. It's not our tool (it was developed by another company), but we do exclusively link to it. It's called *MyPartsHelp* (<http://mypartshelp.com>). Believe it or not, once you are subscribed to the MyPartsHelp service (with credentials appropriately setup within ServiceDesk), all it takes is a Ctrl/Right-Click on the part number within any info-band, and inside of about one second P&A info for each of your preferred vendors will display. The pricing info is specific, even, to your own account. The availability info is specific to each of the vendors' locations. If you don't see what's wanted among your preferred vendors, one more click and you'll get a nearly instant nationwide search. It's such an incredible tool—you just won't believe its power until trying it.

pulled from the box), is too laborious. For that situation, you can make the display-selected items more specific to what you're likely pulling from a particular shipment. Specifically, you can narrow the selection criteria by applicable vendor, and even PO Number (see the face of the F8 form's first-display/menu page for instructions).

Upon filling-in boxes to indicate an item has been received, you'll often have your work interdicted with a message. The message will indicate that it appears no more parts are on order for the underlying job, and will ask for your consent for the job's status to be changed into "*Working to Schedule.*" This change facilitates other office processes in achieving the re-scheduling purpose (assuming, of course, the job wasn't already scheduled for a return visit in *anticipation* of receiving the part).

The interdicting message may make further offers.

If you have the customer's email address (i.e., within the underlying JobRecord), it will offer send an email to the customer, informing parts have arrived, and requesting a telephone call to book the return visit.

Even better, if you're using SD-CyberOffice, it will offer to make it an email that includes a hyperlink—on which the customer can click, and be taken to an interface on your website to re-book, day or night, and without other human intervention. That's true space-age stuff, and you'd better believe it impresses the customer.

At any rate, once the part is checked in, part-process work on the item (as such) is essentially done.<sup>4</sup> The underlying request and its connected process info-band will be moved to the *PartsProcess archive* (contents accessible via **Ctrl-F8**), thereby leaving the *current* work-area uncluttered by the work that's already one.<sup>5</sup> From here forward, operations in the office (as connected with any job that had one or more special-order parts) resume with job- and schedule-management processes.

—At least, special-order parts-processes are done *for the most part*.

Why the qualifier?

In answer, read the next section

---

<sup>4</sup>Actually, there is a potential further stage. Some service company owners (yours truly being among them) feel that pricing on special-order parts cannot be optimized via any formulaic solution—that, essentially, human judgment is needed on a case-by-case basis. This is because sometimes cost on a part is very low, such that if typical markup was used the ultimate retail would be much lower than anyone would likely guess as normal. Some owners feel they should take advantage of this, and profit by pricing the part more in the region where a layman would guess it should be. Contrariwise, sometimes a part comes in with a cost far higher than any consumer would expect to pay, even at retail, and some owners feel it's best in those situations to apply little if any markup. There is no way to assess these situations except with human judgment, and it's not typical that the same person who does the parts check-in is simultaneously adept at exercising this judgment. If wanted, you can structure the PartsProcess system so, once actual received-cost information is put in on an item (but still without sell-for pricing), it's automatically moved to a tabletop titled "*In need of pricing by manager.*" It's a simple task for the "manager" to review that tabletop (at least daily), and type in pricing as applicable. If this is your preference, you'll need to open the PartsProcess form's *CheatSheet*, and click on the selection labeled "*Set whether sell-for price required prior to archive.*"

<sup>5</sup>As an adjunct to checking in these special-order parts, you may want to create labels for them (much as when checking in stock parts, see page 165). In this case, however, since the entire checking-in process is rather less formalized (e.g., in the case of checking in stock parts there's almost a dialog you must go through), there's no concrete inquiry prompting you to do so. Instead, it's up to you. At any time you want (and in regard to any info-bands as displayed in the PartsProcess form, whether newly checked-in or not), you can simply do a **Alt/Rt-Click** on an item (or any set of items). In response, the info-band will turn blue, which indicates it's designated for inclusion in a label print (distinguish this from marking items for fax transmission, where a **Ctrl/Rt-Click** turns an info-band yellow). After each of the items you want are so marked, just hit **Enter**—which begins a dialog for printing your labels.

#### iv. Taking PartsProcess Items “To the Grave”

Until approximately the 2006 to 2008 era of development, there was very little further done with PartsProcess items, beyond what’s been described. Basically, if you checked in a special-order part, ServiceDesk *assumed* it was used on the underlying job. It simply *assumed* so. There was no mechanism to assure it actually happened. There was no mechanism to verify *if* it happened. There were no mechanisms to assure, if the part was *not* used at all, some other appropriate action was taken—such as returning to the vendor for credit, or a deliberate decision to move the item into stock, etc.

To use a metaphor, we were good at giving birth to special-order requests, and at managing their matriculation through to graduation from normal finishing school (assuming normal graduation occurred). But we had no mechanisms for dealing with (or even counting) dropouts.

#### Documenting Usage of S/O Parts, When Usage Occurs:

The first element of change involved creating a method to check-off, when a special-order part is actually used on a job, that it was used. We added a box in the Type-II PostVisitReport form that displays items prior-ordered for the job, and invites the reporting person to indicate (via a simple checking action) whether each such item was in fact used.

PostVisitReport (reporting on Invoice # 73029)

Date & Time of Visit

Tech: CB Date: 8/11 THU

Describe What the Tech Did

Machine Info (UIS)

Type: REFER Make: WHIRLPOOL

Model: 1561566 Serial: 4545566

E-Mail waiting for this Tech  when job is done, link automatically to post-completion tasks

Were these prior-ordered items used?

<input type="checkbox"/>	259551	(Cold Control)
--------------------------	--------	----------------

Is this job done?  Yes  No

Is autho req'd to proceed?  Yes  No

Cancel/Exit

Okay/Save

**For the internal-to-ServiceDesk PVR-Typell Report, the system lists any parts as special-order received here, with request that operator check box to indicate if the part was indeed used on the job**

When creating SD-Mobile’s PVR interface, we provided a nearly identical function there.



Given this structure, the parts-counter/POS guy has a simple task to perform when either the customer comes in to pickup a POS/special-ordered part, or if he ships it. He needs to do a double-click on the part number that has the double-caret. <sup>6</sup> This tells the system the item was placed with the customer (i.e., “used”). In response, the system inserts similar text (as described above for special-order items being used on the job) in the underlying PartsProcess item’s BinLoc box. Plus, it changes text within the FinishedForm/POS interface to show usage (i.e., it removes the double-caret).

With the above explanation, we’ve described how special-order items get checked-off as having been used. That’s all well and good, but what happens if a parts does not get used? That is the subject to which we now turn.

### Documenting any Other Final Disposition:

The primary question in this segment is: How do you document any non-usage, final disposition of a special/ordered part (such as, for example, returning to the vendor for credit)?

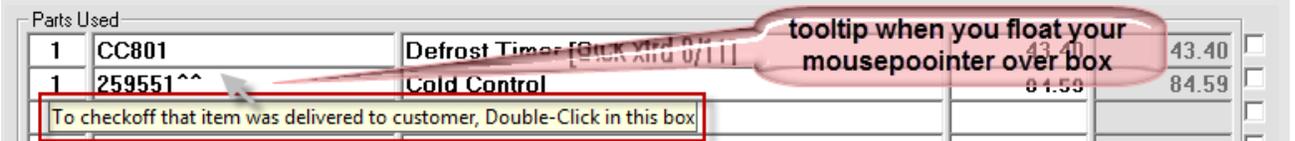
The *simple* answer is, much as each PartsProcess item’s BinLoc box is used to indicate actual usage (when such occurs), you’ll use precisely the same box to indicate any other particular disposition.

More specifically, when you are working directly in the PartsProcess form (regardless of whether in its F8/Current or Ctrl-F8/Archived mode), you’ll use a built-in dropdown from the BinLoc box to pick one of the dispositions offered:

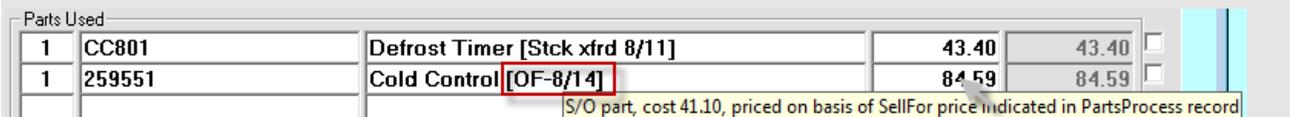


As you can see, there are six options to choose from. The first is the same as is inserted by the system for you when, from any of the applicable contexts, you simply tell it the parts used as per original intent. You could select it here manually, if in fact the part was used, but the insertion had not been made via normally-intended means. The other’s speak somewhat for themselves:

<sup>6</sup>The system provides many contextual tooltips to remind you of what are underlying circumstances, potential actions, etc. These arise when you float your mousepointer over an applicable location:



In the next image you can see how the double-caret goes away after the double-click, and how text fills-in following the description to show the item was passed to the customer (additionally, this image shows a tooltip that comes up when floating over the pricing box, to inform you on what is the basis for the auto fill-in there):



**RARqstd** (to signify you've requested Return-Authorization from your vendor)

**RtToVndr** (to signify you've returned it, with expectation of receiving credit)

**CrdtRcvd** (to signify credit was in fact received)

**MvdToStk** (to signify a deliberate decision was made to move the item into stocking inventory)

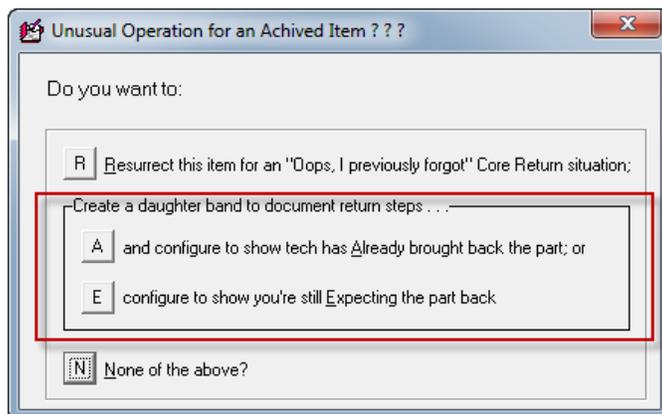
**WriteOff** (to signify a deliberate decision was made to count the item as a loss)

You might notice that placing an otherwise unused part into these other disposition categories is a hand-on process. There are some things that, simply, humans must do.

You might also notice, if you use the system as above-described in a very simple manner (e.g., you simply select "*RtToVndr*" when you've returned the item, and change to "*CrdtRcvd*" when that event occurs, etc.), there is no inherent documentation as to *when* such events occurred. The only indication of such fact is a single, naked status indicator. This may be fine for some operations, but others will want more explicit documentation of what's involved in the sequence of events. This is where you'll want to take a further step.

We prior discussed "*daughter-bands*," as adjunct info/process-bands that may be created to underlie a primary PartsProcess item request. In that discussion, added daughter-bands were described as useful when on the basis of a single request you need to place inquiries (or actual orders) with more than one vendor. For the present context, we're revealing another use. Specifically, from the Ctrl-F8 *Archived-PartsProcess* window, it's possible to create a special variety of daughter-band, configured for the particular purpose of managing return of the primary underlying part (i.e., as received within the main band). The idea is that this special variety gives you added places to put in dates, and such, as applicable to particular return effort (and credit received) events.

To create this special "*manage-return*" specie of daughter-band, just **right-click** on the primary item of interest (i.e., the info-band for the item you want to return), from within the Ctrl-F8 window. In response, you'll get an option box:



As you can see, in regard to creating the wanted new info-band, you have two options: one is obviously applicable if the part has already been retrieved from the tech; the other if it has not. Make the appropriate selection, and you'll instantly see a new daughter-band appear under the primary item, with some boxes already appropriately filled-in for you:

Archived Parts Request and Process Files (Page 684 of 684)

Description of items needed				Inquiry/Order			Info Provided			Order Status				Import Shopping Cart		
Ref #	ItemTp	ItemMk	Model #	Serial #	Rqst	Vendor	Whom	Mthd	Date/Tm	Confirmed	Expected	Received	InvncNmbr	\$ Cost	\$ Sell fo	
Cstmr Nm	Part Description			Qty	Instr	Part #	Avlbty		\$ whsl	\$ retail	PO Nmbr	Notes		BinLoc		
72960-2	WASHE	WHIRL	WTW5100SQ0	CU0520799	1	Definite	Will Call	ma	2/24/11 10:31 am	2/23/11	2/23/11	2/23/11	63092885	31.6		
Porter	lid switch					3761959						done direct by tech, Pre diagnosis w		DF		
														0.00	0.00	
														DF-8/13		
72498	Bege			604	1	Definite	Ship # I/S	DAC	Voice	6/23/11 8:05 am	6/23/11	6/24/11	6/23/11	54682	15.54	40.4
							D007004113									
72908-1	REPEN	LU	test	999	1	Declined	Dormant	CST	tim	Voice	7/19/11 12:40 pm	7/19/11	7/20/11	9908	12.00	32.9
Bhw/Spaet	BDX						5-4686DV									

This is the new "manage-return" daughter-band

So now you have spaces where, much as you filled-dates on the parent band to indicate when you'd ordered a part, when you expected its arrival, when it arrived, invoice number on which it arrived and price on the invoice, you can use equivalent-position boxes to indicate then the part was returned, date by which you're expecting credit, date credit was actually received, invoice number and amount of credit, etc. (Just as in any other context, of course, you'll see such editing boxes actually displayed when you click on the item for editing.)

So mechanisms exist to enable meticulous documentation of what happens on every special-ordered part, whether used, returned or otherwise. But such mechanisms are worthless if not used. Indeed, even if there's an *effort* to use them, they remain nearly worthless if not combined with a system that allows you to review and police, to assure all items eventually reach a proper end-disposition. This is our next topic.

### Assuring All Corpses Are Buried:

Again, our overriding concept is "cradle-to-grave" management of special-order parts. In the prior two segments, we discussed how items ultimately go into the grave (i.e., either by *use* or some other deliberated end-disposition). The problem is, service offices are extremely busy places, and even well-meaning employees may, if not well-policed, let at least some parts fall-through-the-cracks, never appropriately being used or brought to other appropriate disposition. It's not as though, after all, (like real corpses) they emit a nauseating stench that advertises their need to be buried. Instead, they sit quietly on a shelf (or kicking around in a technician's truck), costing the business serious money.

What you need, therefore, is some mechanism via which you can regularly canvass the field, illuminating such corpses as need to be buried. And, of course, once they are illuminated, each needs to be buried (as per descriptions in the prior segment). That canvassing method is the subject of this segment.

In a nutshell, the Initial-Menu in the PartsProcess form's *Archived* mode (Ctrl-F8) has a section listing particular functions designed for this canvassing:

PARTS ORDERING AND INQUIRY (ARCHIVED FILE)

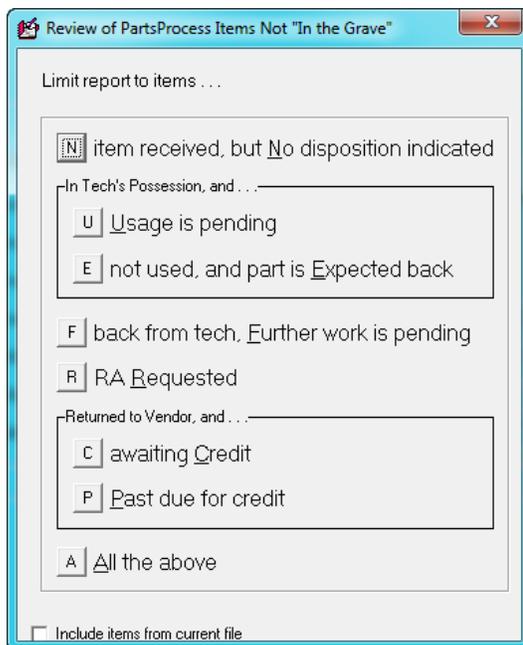
Mini-Manual		Description of items needed			Inquiry/Order		Info Provided			Order Status				Import Shopping Cart	
Ref #	ItemTp	ItemMk	Model #	Serial #	Rqst	Vendor	Whom	Mthd	Date/Tm	Confirmed	Expected	Received	Invcnbr	\$ Cost	\$ Sell fo
Cstmr Nm	Part Description			Qty	Instr	Part #	Avlbty	\$ whisl	\$ retail	PO Nbr	Notes		BinLoc		

Use selections here to canvass for items that need to be put in the grave, but have not been

Select Your Function

- Show Pages
  - begin First
  - begin middle
  - begin Last
- OR
- Search on Basis of ...
  - customer Name
  - SD Invoice Number
  - part nuMber
  - PO numBer
  - Vendor
  - vEndor invoice number
  - mOdel number
- OR
- Manage 'To-the-Grave'
  - SHOW items Received but not disposed of
  - CREATE DOCUMENT regarding above
 filter first by ... 
 Technician: [- SHOW FOR ALL -]
 Vendor: [- SHOW FOR ALL -]
- OR
- Run a Report
  - Usage analysis
  - reW data
  - non-usage Analysis
  - raw daTa

The main options, as you can see, are either to examine the items on-screen in their native/actual context, or to create a separate document that contains the information. You're likely to also notice there are filtering options (i.e., so you can limit your canvassing to items that apply to a particular tech and/or to a particular vendor). Regardless of which option you pick, you'll be presented with a set of sub-options, as follows:



As you can see, the options allow you to get rather specific. The main idea is you need to regularly open the review in particular *sensitive* above categories, to assure there are no rotting corpses there.

And, of course, you'll use your native intelligence in doing so.

For example, parts in the "Usage Pending" and "Awaiting Credit" categories are generally of much less concern (and hence merit less frequent and concerned canvassing) than parts in the "Expected Back" and "Past-due for Credit" categories. Regardless, it should be a daily ritual for someone in the operation to canvass at least most of the categories, to assure none has members that are due to be moved to the next station (and, of course, to invoke appropriate underlying work to assure that it happens).

By using these tools, you will reduce your "parts-leakage" cost (referring specifically to special-order parts that fail to reach a proper end-destination) to near zero. It's important. Most service company owners have little idea how much they are losing via such leakage. Most lose a lot. And, it's a double-edged sword. You not only lose via the direct money-outgo from never used parts, you also lose via the burden they then impose by taking up space in your building and trucks (where they also add weight, fuel expense, etc.). By harnessing just these tools alone, you'll make significantly more money.<sup>7</sup>

## v. Managing Core Returns

Sometimes you order a part on which there is a "Core Charge" — meaning, besides the direct-quoted price on the part, you're also required to pay a temporary fee that's designed to assure you return the old part that's being replaced. If you don't return that old part (i.e., the "core"), you won't receive any refund on the extra charge. Instead, you're out of pocket for it, and sometimes core charges are very substantial (in the

<sup>7</sup>I'll venture a "soapbox" point at this juncture. It's that most service company owners are far too prone, when they've special-ordered a part then find they can't use it, to figuring: "Ahh, I'll just put it into stock." I believe that sentiment is almost always a mistake. Parts that are put into stock in such circumstances are almost never used — making the decision to throw into stock tantamount to throwing away money, but worse, because now there's the burden of storing the junk (it's how most service company offices fill up with tons of stuff that's never used). Please don't do it. The reason you were in the position of special-ordering the part, in the first place, is because you'd prior not deemed it worthy of stocking. The fact that you now have the part should not change your judgment.

Consumer Electronics industry in particular, they are often hundreds of dollars). Given this, proper management of core charges and credits can make the difference between business success versus failure – making it imperative to assure that, for each “core” that should be returned for credit, the needed return in fact occurs (plus verify appropriate credit is received, etc.).

ServiceDesk’s system for managing this relies on a feature that will now be discussed for the third time: Daughter Bands. As you may recall, these are *generally* designed to deal with situations where the vendor that you initially check with, on an underlying F8 request, either does not have the part in sufficient quantity, can’t ship soon enough, or if his price seems too high (i.e., you need to shop elsewhere). In such a case, you simply open new info/process bands (daughter bands), and use them to document other inquiries and/or orders as placed with other vendors (yet still pursuant to the same underlying request). In all, you are permitted to use up to eight info bands as connected with a single request (the parent plus seven daughters).

Our strategy for managing cores mainly depends on using — in respect to any part that’s ordered and which involves a core — one such daughter band, but in a special way.

Specifically, when ordering and/or receiving the part (it can be done at any point, really), you should create a daughter band in the normal fashion (right-click within the right two-thirds of a parent that’s not enclosed within editing boxes). Once this daughter band is created, click in the *Rqst* box to expose its dropdown, then select the bottom listing, labeled “CORE.” Upon such selection, ServiceDesk will insert that word to the *Rqst* box, and insert the word “RETURN” in the *Avlblty* box. This serves to setup the daughter in a manner that makes it so: (a) it’s visibly apparent (to you as the user) that its purpose is to manage the core return, and (b) ServiceDesk itself can treat that as its purpose.

Once this *special* variety of daughter band is created, you should use its boxes in a manner that is *analogous* to what you do with a part that’s ordered (i.e., filling-in particular boxes as applicable to various progress events). But here, of course, the meaning of the boxes as filled-in will be changed — to fit the actual and specific circumstances as applicable to getting a core sent back to the vendor. In other words, the meaning of the fill-ins will be different for this context: somewhat similar, but not the same.

On the following page, we provide an illustration with notations to show, specifically, how we believe boxes should be differently used in a Core-Return situation (again, via a “daughter band,” as applicable to a parent via which the replacement part was actually ordered and received).

Please notice that items 1 and 2 (as labeled in the illustration) fill-in for you, on the basis of your selection of “CORE” from the *Rqst* box dropdown.

Item 3 will also auto-fill for you — specifically, when you “check-in” the part to which the Core-Return daughter-band applies.

Item 4 will auto-fill (for ModeA, as there labeled) *if* your tech is using SD-Mobile, and if when queried via Mobile he confirms having retrieved the old part, upon replacing with new.<sup>8</sup> By contrast, your parts management person should manually change to the ModeB designation upon receiving the underlying core from the tech.

---

<sup>8</sup>An important element in the overall scheme involves the fact that SD-Mobile will be programmed to remind the tech, as he begins any repair involving a core, of the fact he’ll be needing to retrieve the older part. It further reminds, as he concludes the job, and requests his confirmation that he has retrieved the old part and is properly in-process to transport it back to the office.

Items 5 through 10 should each be manually filled-in by your parts management person, at appropriate steps in the return process. By such filling-in, you may easily keep track of each element in the process, to assure ultimate and timely completion.

But the above is not all.

Mini-Manual		Description of items needed			Inquiry/Order		Info Provided			Order Status				Import Shopping Cart	
Ref #	ItemTp	ItemMk	Model #	Serial #	Rqst	Vendor	Whom	Mthd	Date/Tm	Confirmed	Expected	Received	Invcnbr	\$ Cost	\$ Sell fo
Cstmr Nm	Part Description			Qty	Instr	Part #	Avlbty	\$ whsl	\$ retail	PO Nbr	Notes			BinLoc	
65168-3-1	Refer	Grindeman	Parts		infinite	Ship if I/S	SCD		156161						
72688-1-1	Refer	Hernandez	Test I			Ship or b/o	Sears				7/28/10	8/1/10			
72694-9-1	WASHER	MAYTAG	WA606	123456	1	Tentative									
			WA606		4	Tentative	P&A Only	marcone		Fax	12/9/09 12:00 pm			12909-0	
			WA606	123457	1	Definite	Ship if I/S	coast		Fax	9/12/06 3:18 pm				
						5-200-2									
72698-3-1	Plasma	Samsung	Picture Board	KZ7244XKE	156189333891	1	Definite	Ship if I/S	CST	Web	7/28/10 9:05 am	7/28/10	8/1/10		
								8821838118	i/s		349.18 5:43:25				
72698-3-2	Plasma	Samsung	Picture Board	KZ7244XKE	156189333891			<b>CORE</b>	CST		8/1/10 5:12 pm				
					1	Definite	8821838118	RETURN			150.00				
			WA606	123457	3	Definite	Ship or b/o	marcone		Fax	11/11/03 2:43 pm				
			WA606	123457						Fax	11/11/03 2:43 pm				
			WA606	123457							11/11/03 2:43 pm				
			WA606	123457							2/11/09 10:57 am				
															pending request for pull from Warehouse
72694-3-1	WASHER	MAYTAG	WA606	123456	1	Definite									
			LATINI												
72694-4-1	WASHER	MAYTAG	WA606	123456	1	Tentative	P&A Only	Coast		Email	11/9/06 3:52 pm				
			LATINI				W/10240004								
72680-6-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative	P&A Only	CST		Email	11/9/06 3:52 pm			10.00	15.00
			HERNANDEZ	PART 6					5 wd b/o		10.00 15.00				
72680-7-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative	P&A Only	CST		Email	10/27/06 5:32 pm				
			HERNANDEZ	test 7											
72680-8-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative	P&A Only	CST		Email	11/9/06 3:52 pm				
			HERNANDEZ	TEST 8											
72687-3-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative	P&A Only	marcone		Fax	12/9/09 12:49 pm			12909-0	
			TANCAS	Test 3											
72687-5-1	REFER	GE	ZISB48DSS	DH035126	1	Tentative	P&A Only	CST		Fax	10/31/08 1:57 pm			103108-0	
			TANCAS	Test 3				8581							

1. Designates that this infoband is to manage *outgoing* return of a "CORE", rather than the *incoming* reception of a part.

2. This is also part of the "core return" designation -- though it's only the above (keyword "CORE") that has operative effect (here the word "RETURN" simply provides added visibility to user).

3. Indicates date when the parent part (item on which the core fee was incurred, and which will replace the "core" to be retrieved) was received.

5. Use to indicate the date you shipped the core to vendor for credit.

7. Use to indicate the date by which you expect to receive credit.

8. Use to indicate the date when credit is actually received.

9. Use to indicate the vendor ticket number on which credit is received.

10. Use to indicate the actual amount of credit received.

4. Kept as blank until tech has installed the replacement part. In ModeA, changes to "XX-m/dd" format (where XX is the tech's abbreviation) when tech has installed the replacement and taken possession of the old-part/core. In ModeB, user should change to "OF-m/dd" format when the tech has returned the core to the office.

6. Use to record shipping or tracking number.

The PartsProcess form also possesses a viewing/filter option designed specifically to assist in monitoring Core-Return items in each of several categories.

If you look at the illustration of the F8 form's MainMenu display as shown on Page 3 (near this chapter section's introduction), you should notice that, compared to the actual menu as currently offered, it's out of date. The current menu features an option — not shown there — labeled "Core return items."

Select Your Display Basis

Review by Item Status — OR — Search on Basis of ...

no limit, show All

items needing inQuiry/order

Waiting for info from supplier

waiting for approval from cUstomer

On order, awaiting arrival

paSt due for arrival

in need of Pricing by manager

Core return items ...

all processes Done

customer Name

SD Invoice number

part nuMber

P.O. numBer

To further filter showings, select first for clear filters

Applicable Technician: -- SHOW FOR ALL --

Underlying Machine Make: -- SHOW FOR ALL --

Applicable Vendor: -- SHOW FOR ALL --

Underlying High Volume Client: -- SHOW FOR ALL --

If you select that option, you'll next be presented with the following dialog box:

Display Core-Return Items

Which sub-category do you wish to view:

N underlying replacement Not yet received;

E return of core Expected from tech;

R core in office, pending Return to vendor;

W returned to vendor, Waiting for credit;

P Past due for credit;

D credit recieved and process Done; or

A All the above?

In some respects, these options parallel the operative purposes as existing for reviewing actual parts as not yet placed in-the-grave, reviewed (with a somewhat similar-looking options box displayed) a few pages back). Just as there, there are choices to allow your parts operations person to review particular

categories, for the sake of review/policing, and assuring that all items keep moving appropriate toward their proper end destination. The difference: there we were referring to actual *new* parts, as purchased but not used, being returned, and here we were talking about the old replaced-parts/cores going back to a vendor. Regardless, the similarity is there are display categories<sup>9</sup> to aid the review/policing process, and they should be used on a regular (likely daily) basis.

To summarize, the general strategy for managing cores is as follows:

1. Create an appropriate CORE-RETURN daughter band for any/every part that involves a core charge;
2. Periodically review the above-shown categories, to assure that items within each are being expeditiously processed from one stage to the next; and
3. As items move from one stage to another, document such movements by appropriately filling in applicable boxes.

Security is ultimately found in the fact that, once a Core-Return daughter band is duly attached to a parent PartsProcess request, the entire request bundle will refuse movement to the archive until the Core-Return daughter band is appropriately marked to show proper membership in Category 6 (“*credit received and process Done*”). In fact, it will pester you by virtue of its very, not-yet-processed-as-it-should-be-presence within your current work area, until and unless you certify that the ultimate step (receiving credit after return) has been accomplished.

We believe, by following the above prescriptions, you can easily assure proper processing on 100 percent of your core charges. We further believe it’s absolutely what you *should* do. If your operation involves cores at all, please figure implementation is an essential necessity.

---

<sup>9</sup>A footnote on Page 146 provides details as to the criteria as used by ServiceDesk to determine which display category any *normal* parts process item belongs in. In a parallel fashion, we here provide a description of the criteria it uses to decide which of the above Core-Return sub-categories an item belongs in:

1. **‘underlying replacement Not yet received’**: The *Received Date/Tm* box on the parent item is empty.
2. **‘Replacement for core Not yet installed’**: The *Inquiry Date/Tm* box is empty.
3. **‘return of core Expected from tech’**: The *Inquiry Date/Tm* box has a date, and the *BinLoc* box does not have text in the “*OF-m/dd*” format.
4. **‘core in office, pending Return to vendor’**: The *BinLoc* box has text in the “*OF-m/dd*” format, while the *Confirmed* box is empty.
5. **‘returned to vendor, Waiting for credit’**: The *Confirmed* box has a date, but the *Received* box does not.
6. **‘credit received and process Done’**: The *Received* box has a date.
7. **‘All the above’**: Any item where text in the *Rqst* box consists of the word “Core”.

Please note that once any item is in Category 6, the parent request with it’s daughters will likely be ready for movement to the Archive — meaning that the quantity of items you’re able to view in this category, at any time, will be limited.