

# SD-Dealer Handbook

Historically, the SD-Dealer program has been so simple as to virtually need no manual. Prior to November '08, our recommendation was that users simply watch the little promo video, and proceed from there. Fact is, everyone seemed to get along fine on this basis (at least aside from needing some very basic added instruction on how to integrate with ServiceDesk POS, which is not covered in the video).

But with release of Ver 1.0.24, we added a basic ability—that really should have been there all along. It's to allow you, simply, to make the sale first, and indicate *later* which serial number is actually delivered to the customer.

In the interest of getting this feature (and basic instructions regarding same) into your hands sooner rather than later, we are not presently going to create a full-fledged handbook. For now, it will contain just two chapters: first, on the POS process (again, not covered in the video); and second, on the new *Sell-Now-But-Pull-Serial-Later* feature.

We'll endeavor to turn this into a full-fledged manual at a later date. In the meantime, if you're new user, please consult the video (<http://rossware.net/SD-DealerVideo.exe>) for basics on operation within the program itself.

## ***Chapter 1***

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### **How to Integrate with ServiceDesk POS**

You can use either of two methods for inserting dealer-items, to be sold, into a ServiceDesk POS form. We encourage you to use whichever is most convenient for the circumstances.

#### Older/Traditional Method:

In SD-Dealer, select the item (or items) you're intending to sell to the present customer. You can select a single item by simply clicking on it. You can select additional items (i.e., to *add to* the prior selected item or items) by doing a *Ctrl-Click*. By this means, select all the items involved in the current sale. After selecting the item(s), leave SD-Dealer open, and move your focus to ServiceDesk.\*

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\* If you do not know about a handy little Windows feature for switching between running applications, now is the time to learn. Simply hold down the Alt button on

In ServiceDesk, use any of the standard methods to initiate a POS situation (i.e., within the FinishedForms context).

Though the forms in SD's FinishedForm context are arranged with an array of boxes oriented for parts, the same array works just fine for selling merchandise.

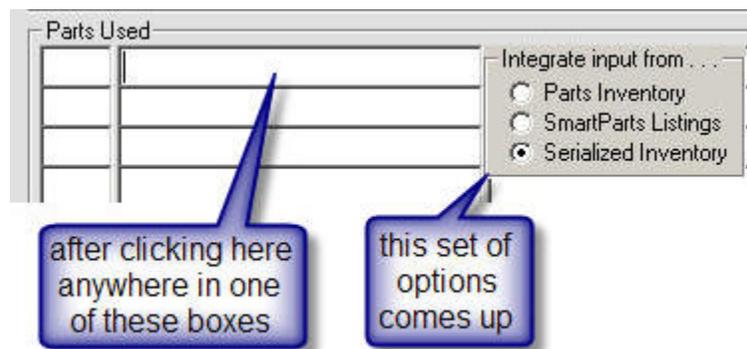
Click in the second column of the line (which would normally contain a part number) where you want ServiceDesk to insert the first item you are selling. Now, hit *Alt-D* on your keyboard (use the mnemonic that 'D' stands for Ddealer).

Now, ServiceDesk inserts, to the form, the items that you selected in SD-Dealer.

#### Newer Method:

This method was added late 2009, based on the feeling among some users that the whole process should be capable of being self-contained with the ServiceDesk POS environment, and not require flopping back and forth between it and the SD-Dealer interface.

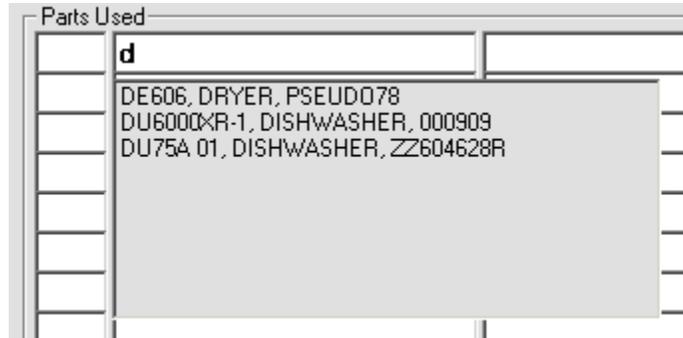
To use this method, begin in any ServiceDesk POS form, and click in any box in the part-number/model-number column. In result, the little '*Integrate input from*' box comes up — from which you should select "Dealer Inventory."



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your keyboard, and hit Tab. It's called "Alt-Tabbing," and is an extremely handy way to flop back and forth between multiple applications.

Next, just begin typing any model number (as exists within your inventory) into the part-number/model-number column. You'll see a dropdown, as illustrated here.



Select from the dropdown just as you would if picking a part from the internal parts inventory or SmartParts dropdowns. You'll get an insertion, just as nice.

Parts Used			
1	DU6000XR-1	DISHWASHER, WHIRLPOOL, Black [000909]	599.99

After Insertion:

Once the to-be-sold inventory items are in your POS form, you may click on the 'Enter to Inventory' button to have ServiceDesk actually pull the items that you selected from inventory. Or, you can wait for prompting, on the same, as you go to print the ticket, or escape from the form.

When ServiceDesk so "Enters the Inventory," what it's doing, essentially, is to mark within your inventory the fact that the item was sold. It does some other work too, such as attaching the applicable UIS (or UISs) to the JobRecord involved, making an appropriate notation in the narrative JobHistory, and so on. Of course, it also maintains an electronic copy of the ticket.

## ***Chapter 2***

### **Using the *Sell-Now-But-Pull-Serial-Later* feature**

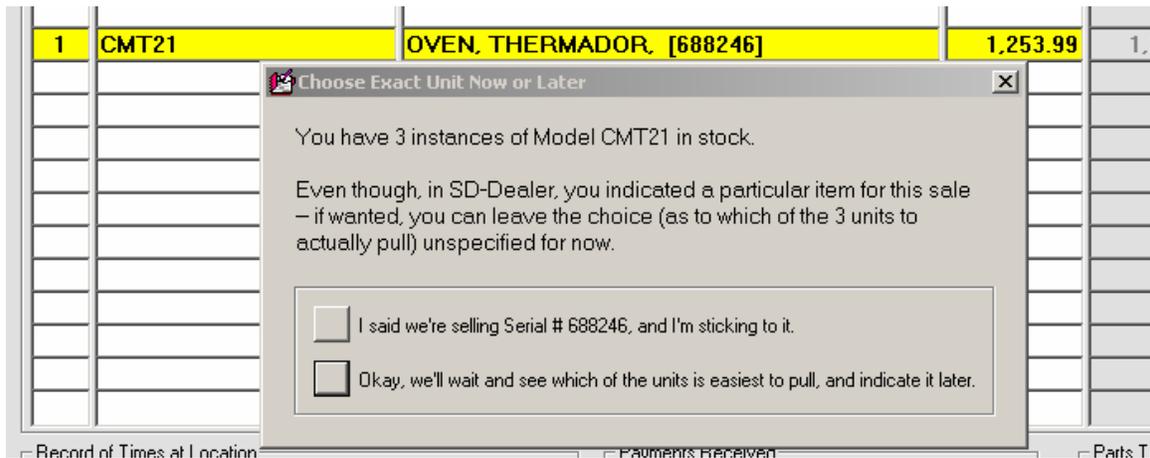
Prior to creation of this feature, ServiceDesk simply pulled the particular instance of an item that you selected in the SD-Dealer program. In other words, even if you possessed multiples of a

particular model, it would pull the particular instance (with particular serial number, etc.) that you'd happened to select.

Now, your method for initiating work in the POS process will be exactly the same—subject to one exception only: where there are multiple instances of a given model, and where you don't want to worry about selecting a *particular one* at the precise time of the sale—make it a point to not concern yourself in the least. Just select *any*, among the multiples, that's handiest.

Here's what will happen.

When, a few moments later, you reach the stage in the POS process where formerly ServiceDesk would have unthinkingly pulled the particular item you'd selected (and its serial number), it will now be considerably more intelligent.



Specifically, it will note the fact that you have multiples of that model, and ask you (as an added part of the dialog that takes place as it's pulling from inventory) if, for the time-being, want to leave open the question as to which particular serial number is being sold. Please note, it also assumes (as the pre-selected default) that this will be what you want to do.\*

Assuming you accept that default response, ServiceDesk will replace, within the electronic ticket, what was formerly an actual serial number with the acronym "TBD" (stands for "To Be Determined").

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\* Please note this dialog will *only* be offered when the system notes that you possess more than one of the model in question. If you have just one, it will proceed just as it always has otherwise.

More importantly, it will proceed to keep track, within its underlying data system, of the fact that of the multiples you possess in stock for that model, they are subject to the fact that one of them (at this point an indeterminate one) has been sold (or perhaps more than one, if applicable).

It will then, essentially, go into a mode of waiting for you to eventually inform it of which of the particular items actually get yanked from the warehouse and delivered to the customer.

In the meantime, as you review your inventory within SD-Dealer, you'll see that all instances of that model have their text in the first column rendered in **bold magenta**.

Cndtn	Type	Make	Model	Color	Dt Acquired	From
New	CENT V...	AMANA	JS25500	White	2007-01-19	GE
New	COOKT...	AMERI...	6465498	Copper	2007-06-05	Conso
New	REFER	SUB ZE...	3211RFD	Stainl...	2008-02-06	GE
New	COMPA...	BROAN	BRX5500...	Copper	2008-02-06	GE
<b>New</b>	OVEN	THERM...	CMT21		2008-11-09	Conso
<b>New</b>	OVEN	THERM...	CMT21		2008-11-09	
<b>New</b>	OVEN	THERM...	CMT21		2008-11-09	

This is to signify to you that one or more such items (as so rendered) are subject to one or more already-completed sales. If you desire more information, simply float your mouse pointer over the bold-magenta text. A ToolTip will appear, informing you of how many instances of that model are presently sold (but not yet pulled).

New	COMPA...	BROAN	BRX5500...	Copper	2008-02-06
<b>New</b>	OVEN	THERM...	CMT21		2008-11-09
<b>New</b>	OVEN	THERM...	CMT21		2008-11-09
<b>New</b>	1 of this Model is sold, and is awaiting a physical pull from inventory.				

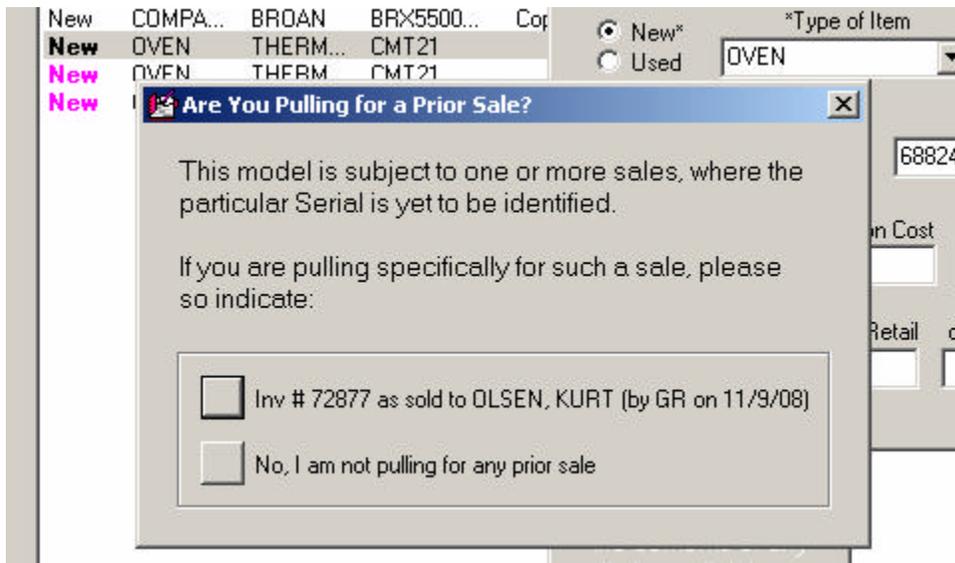
All this raises an obvious question. Once your warehousemen pulls an actual item for delivery (and, presumably, provides information back to you regarding which actual serial was pulled), how do you input that information into SD-Dealer.

It's very simple.

Just use either of the two methods (methods that have been built into SD-Dealer all along) to indicate, via its interface, that an item has been sold. Those methods are either: (a) locate the item in the main listing, and *right-click* on it; or (b) click on the *'pull item as Sold'*

button, and follow the prompts (this method allows you to simply type in a serial number, with drop-down assistance, etc.).

With use of either method (and in an applicable circumstance), SD-Dealer will note that one or more sales, on the model in question, are waiting to be pulled, and so will ask you which particular sale you want the pull connected to.



Simply click appropriately, and you're done.

Very likely, you'll sometimes forget to do this after-the-fact process. Given that probability, we suggest you make it a matter of routine housekeeping to periodically page through your SD-Dealer listings, looking for items in **bold magenta** that, perhaps, should have had this second stage in the process performed, but did not. If you find such items, take care of them.

A simple trick, if you want to know what particular sale (or sales) are waiting to have specific serials pulled, is to right-click *as though intending* to do the pull. This will give you a message conveying the information. It's the same message (as illustrated above) that you'd get if actually intending to do the pull, but in the case of simply wanting information, you'll just escape back out of the process.

Please bear in mind, this new facility (new as of November '08) involves changes in both SD-Dealer and ServiceDesk. Thus, you may need updates in both (at least Ver 4.3.110 in ServiceDesk).

## Chapter 3

### Handling 'Pending Sale' and 'On Order' Situations

In April '09 we added a couple of new fields, as shown below:

The screenshot shows a software window titled "Dealer Info Sheet (6th of 23 items currently in file)". The window contains several input fields and checkboxes. The "Status Exceptions (check only if applicable)" section is circled in red and contains two checkboxes: "On Order" (checked) and "Pending Sale" (unchecked). Other fields include "Condition" (radio buttons for "New\*" and "Used"), "\*Type of Item" (dropdown menu with "COMPACTOR"), "\*Make of Item" (dropdown menu with "GIBSON"), "Color" (dropdown menu with "White"), "\*Model Number" (text box with "XK3750"), "\*Serial Number" (text box with "PSEUD082"), "Other Number" (text box), "\*When acquired" (text box with "9/3/2003"), "Acquisition Cost" (text box with "510.00"), "Vendor from whom acquired" (dropdown menu with "Donnelley Brothers"), "Location" (dropdown menu with "Warehouse"), "Sggstd Retail" (text box with "629.99"), "Minimum Retail" (text box with "599.99"), "days flooring included" (text box), and "Flooring Company" (dropdown menu with "Pranco"). There is also a "Date Sold" text box, a "Notes" text area with "small scratch on front panel", and a link "To learn how to edit the contents of any listbox, click here". At the bottom are buttons for "Create New", "Remove from Inventory", "Find then Build on Existing UIS", "Exit/Cancel", and "Okay/Save".

This was on the basis of feedback from:

- (a) A new user, who explained that he likes to create Dealer Info Sheets when items are on-order, and prior to actually receiving them. There's now a checkbox where he can explicitly indicate such status.
- (b) Another user explained that he often gets calls from long-time customers—telling him they want to buy a certain unit, and won't he please mark it as "sold." Note that at such point he's not yet done the POS process, which would otherwise serve to provide documentation of the fact the item is no longer available for sale to another party. So, we provide this other means—on the basis of simply checking the applicable box.

Please note that, besides providing checkboxes for these new status indications within each applicable Dealer Info Sheet, the main display has two added columns, used to indicate (in respect to each line-item listing) whether such boxes are checked:

The screenshot shows the 'SD-Dealer (Version 1.0.28)' window. The main area contains a table with columns: Cntrl, Status, Type, Make, Model, Color, Dt Acquired, From Whom, Location, Sug Ret., Min Retail, Cost, Flooring, DaysR, Serial, and Notes. The first two columns after 'Cntrl' contain status indicators: '?' and 'X'. A red circle highlights the first two columns. The table lists various appliances like WASHER, DRYER, RANGE, DISHWASHER, etc., with their respective details. At the bottom, there are controls for 'Show items' (radio buttons for 'Now in inventory' and 'Formerly in inventory, but now sold'), and buttons for 'check for Update', 'pull item as Sold', 'Preferences', 'Handbook', 'add New item(s)', and 'Report'.

Cntrl	Status	Type	Make	Model	Color	Dt Acquired	From Whom	Location	Sug Ret.	Min Retail	Cost	Flooring	DaysR	Serial	Notes
New	?	WASHER	MAYTAG	WA606	Avoc...	2003-11-15	Capitol City...	Wareh...	499.99	459.99	398.00	ABC Fina...		PSEU...	
Used		DRYER	MAYTAG	DE606	Avoc...	2003-12-31	Capitol City...	Show...	399.99	359.99	298.00		n/a	PSEU...	picked up via buyout fi
New	X	WASHER	MAYTAG	A712	White	2004-01-01	Capitol City...	Wareh...	499.99	449.99	398.00	GE Capitol		00259...	
New		RANGE	THERM...	XJ67Y	Teal	2003-12-31	Donnelley ...	Show...	999.99	899.99	750.00	GE Capitol		PSEU...	
Used		DISHW...	WHIRL...	DU6000K...	Black	2003-09-10		Show...	59.99	49.99	0.00		n/a	000909	taken in trade
New	X	COMPA...	GIBSON	XK3750	White	2003-09-03	Donnelley ...	Wareh...	629.99	599.99	510.00	Pramco		PSEU...	small scratch on front p
Used		DRYER	ASKO	SXU5500	Black	2003-06-10		Show...	119.99	99.99	0.00		n/a	PSEU...	taken in trade from Mo
Used		FREEZ...	COLDS...	5564444	White	2003-10-14		Wareh...	159.99	129.99	0.00		n/a	PSEU...	taken in trade from Lau
New		COMPA...	BROAN	XH750	Almond	2003-01-01	Donnelley ...	Show...	395.99	329.99	275.00	ABC Fina...		PSEU...	
New		OVEN	GE	JBE7500	White	2003-11-15	Capitol City...	Show...	799.85	759.85	650.00	GE Capitol		45615...	
New		RANGE	O&M	12-6359-10	Copp...	2004-01-01	Donnelley ...	Show...	299.15	279.99	199.00	Pramco		03009-3	
New		WASHER	MAYTAG	A612	Almond	2003-11-22	Donnelley ...	Show...	699.15	629.99	562.00	Pramco		03518...	
New		REFER	U-LINE	75R55-00	White	2003-11-17	Capitol City...	Show...	479.88	459.99	397.00	ABC Fina...		01338...	
New		REFER	U-LINE	ULN-75RB...	White	2003-12-02	Donnelley ...	Wareh...	659.99	599.99	380.00	ABC Fina...		00239...	
New		REFER	WHIRL...	EHD261S...	Almond	2003-05-02	General EL...	Wareh...	559.99	559.99	510.00	GE Capitol		S1211...	
New		REFER	SUB ZE...	561	Stainl...	2003-11-20	Capitol City...	Show...	2,199.00	1,999.00	1,450.00	ABC Fina...		P1000...	
New		WASHER	RCA	YEXR106...	White	2003-10-02	General EL...	Wareh...	329.99	309.99	293.00	GE Capitol		TM16...	
New		DRYER	KENMD...	417.99570...	Almond	2003-11-02	Capitol City...	Wareh...	299.99	279.99	235.00	ABC Fina...		W637...	
New		REFER	HOTPD...	CSX24DJC	Almond	2001-12-02	Capitol City...	Show...	679.99	629.99	490.00	GE Capitol		SV230...	
New		MICRO...	KITCHE...	KEMS376...	n/a	2004-01-01	Donnelley ...	Wareh...	159.99	139.99	105.00	Pramco		X7450...	
New		DISHW...	MAGIC...	DU75A 01	Black	2003-09-17	Donnelley ...	Wareh...	219.99	199.99	175.00	ABC Fina...		ZZ604...	
New		WASHER	WHIRL...	LA7680XP...	Almond	2003-11-03	Capitol City...	Show...	239.19	209.99	180.00	ABC Fina...		C6062...	
New		OVEN	THERM...	TDF75	White	2004-01-02	Donnelley ...	Wareh...	1,299.99	1,279.99	960.00	ABC Fina...		45616...	

As you'll note, the columns don't have any explicit labeling (it's a tight space in which to fit a real label). You'll just have to train yourself (and employees) to remember, an "X" in the first such column means "On Order." An "X" in the second means "Pending Sale."

It will be important, of course (and is solely up to your careful management) to assure that boxes are appropriately unchecked as statuses change (e.g., items arrive and thus are no longer "on order," or a customer changes his mind about a promised purchase).