

SnapTracker Webinar Wednesday May 17th 2017

User Setup and Requisition by Condition

Agenda

- Review how to create user in SnapTracker
- Showcase how to setup requisition cart by condition
- Q & A



User Setup

- To start every user needs to have a basic profile created
- A User Profile contains the name, email and password for the user among other things
- Once the profile exists there are 3 important things each profile needs

Typical Dealer
Welcome System Admin.

Select another cart...

BROWSE FOR...

Products

Resource Area
Service Forms
Shop or View Catalogs
Budget Tool
My Requests
Parkland Typicals
Quote Request
Service Reports
Request a Service
Yulio Embed
SHOP FOR MORE...
Access Quotes
Inquiry
Price Requests
Ergonomics
My Account
Accounting
Movements
PDA Processing
Work Orders
Reports and Analysis
Setup
Utilities
Export Sif
Forward Trial Kit
Maintenance

User

Home > User Setup > User

required fields

User Info Profile Shopping Building Sequence Selectable Conditions Condition Sequence

Select a User: Select One...

Enter a User: Get Record

Name:		Password:	
Email Address:		Confirm Password:	
Maximum Tries:	0	Lockout Time: (in mins.)	0
Company Code Access:	☒ Single ☐ Multiple	User Type:	Internet User
Default Company Code:	A - Typical Dealer	Default Start Page:	Home
KITS Password:		Confirm KITS Password:	
Default Building:	Unspecified	Session Timeout:	
Update Profile:	☐ Yes ☒ No	Top Links:	☐ Home ☐ Help ☐ Logout

Reset | Create | Delete | Update

Three Things a Profile Needs to login

1. Building Access

- All profiles must have at least one building to access
- Since building is where all inventory is stored
- The building is accessed through Utilities – User Setup – Building Access

2. Customer Access

- The profile must have at least one customer to access
- Customer represent the unique inventories in SnapTarcker
- The customer is accessed through Utilities – User Setup – Customer Access

3. Menu Access

- In order to login every profile needs at least one Menu to access
- Menus determine what the individual profile can do while they are in SnapTracker
- Do they only see inventory or do they have full admin rights
- To access the Menu go to Utilities – User Setup – Menu Access

Requisition by Condition Codes

- What's the advantage?
- Better accuracy on pulls
- the advantage is that people who have access to product will only view the conditions you want them to see
- prevents un-acceptable (undesirable) conditions from being selected
- Create the right visibility for each user-type
- To enable the request product by condition
- There can be no open work orders or reservations
- Enable at the customer screen
- Select and prioritize all condition codes (condition menu)
- Select and prioritize conditions at the user level

Typical Dealer
Welcome System Admin.

Cart : testing

Items in Cart : 1

Sub-Total : \$0.00

Go to Cart

Select another cart...

Resource Area

Shop or View Catalogs

Budget Tool

My Requests

Parkland Typicals

Quote Request

Service Reports

Request a Service

Yulio Embed

SHOP FOR MORE...

Access Quotes

Inquiry

Price Requests

Ergonomics

My Account

Accounting

Movements

PDA Processing

Work Orders

Condition Setup

Home > Setup > Customer Setup > Condition

Select a Customer

A - AAA001 - ACME Storage Services

required fields

Condition

Selectable Conditions

Condition Sequence

Select a Condition : Select One...

Enter a Condition : Get Record | Copy From

Description 1 :		Description 2 :	
Description 3 :		Description 4 :	
Description 5 :		Description 6 :	
Default Condition : ☐ Yes ☒ No	Acceptable Flag : ☒ Acceptable Required ☐ Non-Acceptable ☐ Service		
Standard Cost flag : ☐ Refurbish ☐ Maintenance ☐ Repair ☒ None	Damage Fix Indicator : ☐ Yes ☒ No		
Selectable : ☐ Yes ☒ No	Sequence No. : 0		

Reset | Create | Delete | Update

Selectability

- All conditions codes must be switched to selectable in order to be viewed why using requisition by condition
- If a condition code that is no selectable is assigned to the product no one will be able to see the item in inventory, this includes system admin



THE POWER TOOL FOR ASSET MANAGEMENT
Home | My Profile | Help | Logout

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Welcome System Admin.

Cart : testing
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Go to Cart

Select another cart...

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Movements

Condition Sequence

Home > Setup > Customer Setup > Condition

Select a Customer

A - AAA001 - ACME Storage Services

required fields

Condition

Selectable Conditions

Condition Sequence

Company:

A - Typical Dealer

Customer:

AAA001 - ACME Storage Services

Assign Condition Sequence

Current Condition Sequence:

BROKER
CLEAN
DISPOSE
DONATE
GOOD
INCOMPLETE
NEW
REFURBISH
REPAIR
SELL

Reset | Update

Condition Sequence

- In situations where the user requesting product doesn't want to select a specific condition code the administrator can determine the order in which conditions are selected
- This is done by the condition code sequence and it sets the priority and eligibility for the user
- If the user does not have access to the specific condition it will not appear in the list of available conditions

Next Week May 31th 2017

SnapTrackerTemplate Customization