

# Orders

The **Orders** screen allows you to view orders that are processed through your Dealer Management System (DMS).

## How to view Orders in TargetCRM/Notify360

1. Open the **Orders** screen using the menu on the left side of the screen.
  - a. The last 6 months of **Orders** display, including Invoice#, Status, Date, Type, Customer, Address, Cell, and Email.
2. To adjust which **Orders** display, select the blue Funnel button to open the Orders Filter drawer.
3. Narrow down your **Order** display by selecting from the following filter options:
  - a. *Location*: Which location's **Orders** do you want to see?
  - b. *Transaction Date Between*: Enter a beginning and end date to see all orders in that range.
  - c. *Type*: Open **Orders**, Closed **Orders**, or both?
  - d. *Invoices*: Parts, WholeGoods, Service, or All Invoices?
  - e. *Search by...*: Allows use of the *keywords* field to search for **Orders** by one of the following:
    - i. *Customer name, City, Part#, Model#, Line Code, Line Name, or Serial#.*
  - f. *All Customers*: Filter by customers with contact info (cell, email, or address).
  - g. *Within Miles*: Limits **Orders** displayed to customers within a certain distance of the dealership.
  - h. *Minimum Spent*: Limits **Orders** displayed to customers who have spent a certain amount with the dealership.
4. Select the Apply Filter button to update the **Orders** display.
  - a. Use the blue Down Arrow button to export your current display as a .csv file for use in a spreadsheet.

## How to view Order details

1. When viewing the **Orders** screen, select the line for the **Order** you wish to view.
  - a. The Invoice Details drawer opens.
2. The top two boxes in the Invoice Details drawer will display the dealership location, customer name, address, and phone, **Order** number, and **Order** date.
3. Depending on the **Order** type, you may see:
  - a. Parts, including Line, Part#, Description, Price, and Quantity.
  - b. Miscellaneous, including Description and Price for each miscellaneous charge.
  - c. WholeGoods, including Line, Model, Description, Serial#, and Price.
  - d. Labor, including Description, Time, Rate, and Total.
4. The Order History button will allow you to search and view all previous orders affiliated with this customer.

# Inventory

The **Inventory** screen allows you to view all parts and WholeGoods that are inventoried through your Dealer Management System (DMS). The default view is all available WholeGoods, but can be changed.

## Viewing WholeGoods or Parts in TargetCRM/Notify360

1. Open the **Inventory** screen from the left menu.
  - a. WholeGoods display by default. To view Parts, select the Parts tab at the top.
2. Use the blue Funnel button to open the Filter drawer.
  - a. WholeGoods filters include:
    - i. *Location*: Where is the item stored?
    - ii. *Line*: Product line
    - iii. *Status*: Allocated, Attachment, Available, In Transit, On Order, Sold, Trade In, or All
    - iv. *Condition*: New, Used, or Both
    - v. *Price Range*: Minimum and maximum price
  - b. Parts Filters Include:
    - i. *Location*: Where is the item stored?
    - ii. *Line*: Product line
3. Select **Apply Filter** to update the display.
4. Use the *Search* field to find records:
  - a. WholeGoods: Line, Model, Description, Serial#, Stock#
  - b. Parts: Line, Part#, Description

## How to use Equipment/Parts Locator

The Equipment/Parts Locators are great tools for finding WholeGoods or Parts at nearby dealerships.

1. When searching for WholeGoods, select the blue Equipment Locator button in the top right of the WholeGoods tab. When searching for Parts, select the blue Parts Locator button in the top right of the Parts tab.
  - a. The appropriate locator drawer opens.
2. Specify which dealership *Location* you are searching from using the *Location* drop-down menu.
3. Enter the WholeGood or Part information (including *Model/Part Number*, *Description*, *Manufacturer*, *New/Used*, *Quantity*) and specify the maximum *Distance* from your dealership.
4. Select the blue Search button to display results.