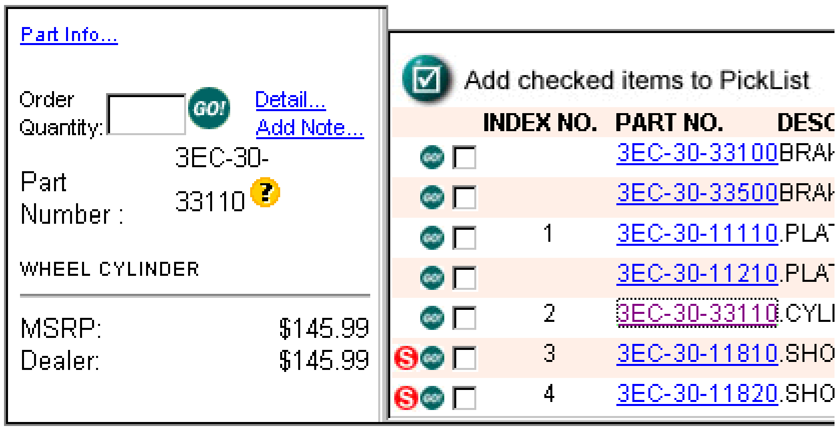
9. Selecting Parts for a Picklist

At a parts page, each part entry in the bill of materials (BOM) corresponds to a callout from the illustration. You can create a Picklist to accumulate part numbers you need for a specific job and save the list for later use.

Viewing Information for a Part

To view information for a part before adding it to your Picklist, click the part number link. Information is displayed in the lower left frame. In this example, clicking part number 3EC-30-33110 displays the following:



To add the part to your Picklist:

Type the quantity you want in the Order Quantity text box and click .

To view additional information for the part:

1. Click Detail… to open the Detail Information window. For example:

2. To list all models in all catalogs that contain this part number, click (in the upper left portion of the window).

3. When you finish viewing information, click **Close**.

To attach a note to the part number:

1. Click Add Note... to open the Notes Viewer window.

2. Type your note in the Note Text box.

3. Click **Save**.

4. Click **Close** to close the window.

To list models containing the part number:

1. Click to open an index of links to all models in all catalogs containing the part number you selected. For example:

Note: The number in parentheses after each link indicates how many matches were found for your search.

Result Indexes

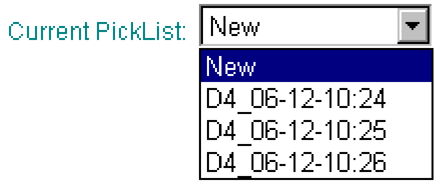
FG(D)35,40,45S (T) -7	(1)
FG(D)35,45BCS -7	(1)
FG(D)40,45 (C) (T) (Z) -7	(1)
Price File	(1)

2. Click a link to display the corresponding parts page.

Creating, Viewing, and Saving a Picklist

1. Specify the list to which you want to add the parts.

   - Click the Current Picklist list box arrow to open a list of options for creating a new list or adding parts to an existing list. For example:

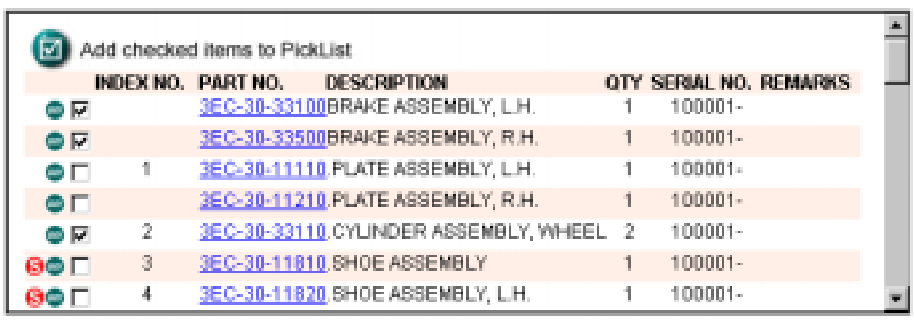


   - If you are creating a new list, select **New**. If you are adding one or more parts to an existing list, select the name of the list you want to add the parts to.

Note: You can also select a part by clicking preceding the part entry.

2. In the bill of materials (BOM), select the check box preceding a part number you want to add. For example, select part number [3EC-30-33100](), the left-hand brake assembly.

3. Select any additional parts you need from this listing. For example:

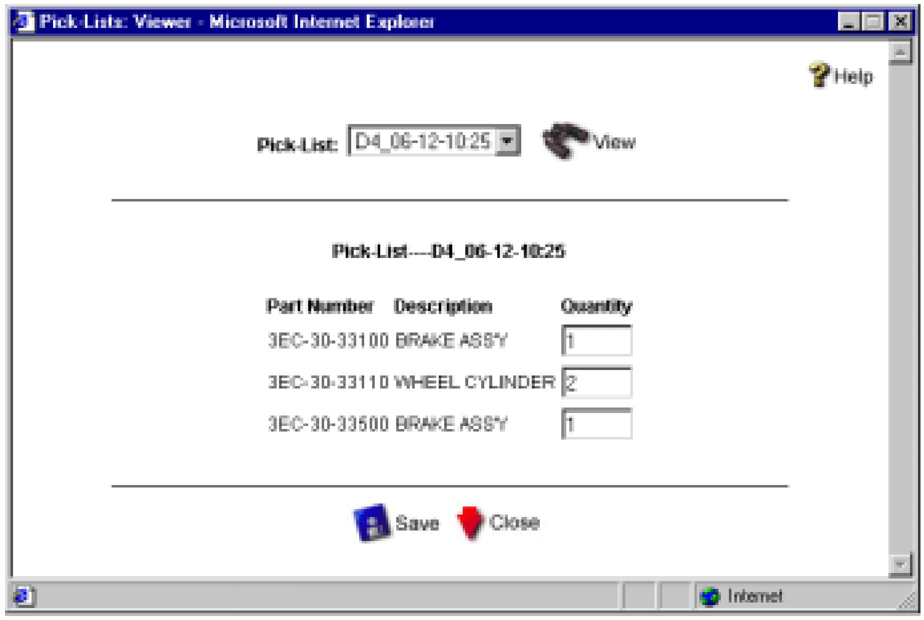


Note: See "Viewing Supersession Information" in chapter 8 for details.

When a supersession icon precedes a part entry (as in this example), the part has supersession.

4. When you finish selecting parts, click **Add checked items to Picklist** to add the part(s) you selected to your list. The check marks are cleared and the name of your list is displayed in the Current Picklist list box.

5. To view your list, click **View** (above the illustration) to open the Picklists Viewer.



6. To change a part quantity shown in this window, type the new quantity in the Quantity text box following the part name.

Note: To print your list, see the next section, "Printing a Picklist", for the procedure.

7. Click **Save** to save your list of parts.
8. Click **Close** to close the Picklists Viewer.

Printing a Picklist

1. With the Picklists Viewer open, right-click directly in the window to display a shortcut menu.
2. Select **Print** from the shortcut menu to open the Print dialog box.
3. Click **OK** to print the list.

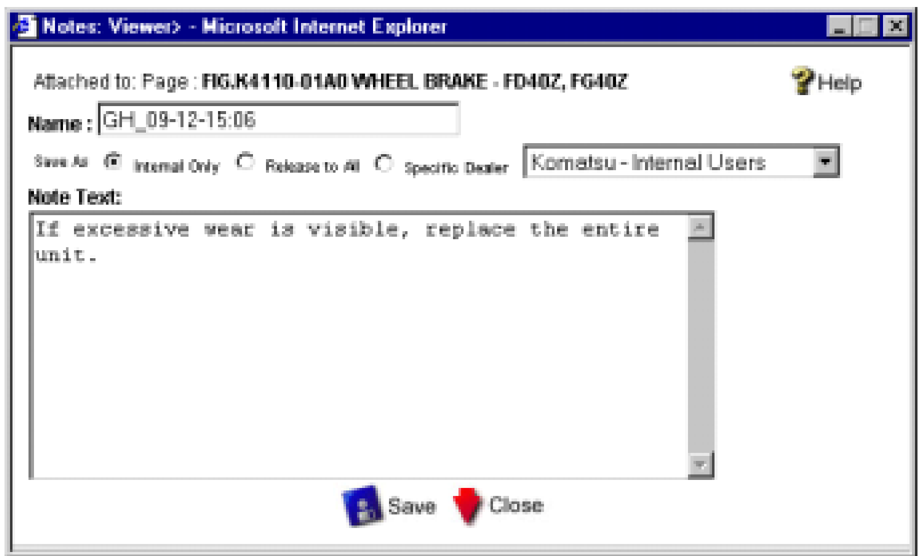
10. Adding Notes to Parts Pages

You can create your own notes and attach them to parts pages to supplement information from Komatsu. This chapter explains how to create, view, and delete user notes.

Creating a Note

1. From the parts page, click Add Note... to open the Notes Viewer.

2. Type your note in the Note Text box. For example:



3. In the “Save As” area, select the distribution level for the note.

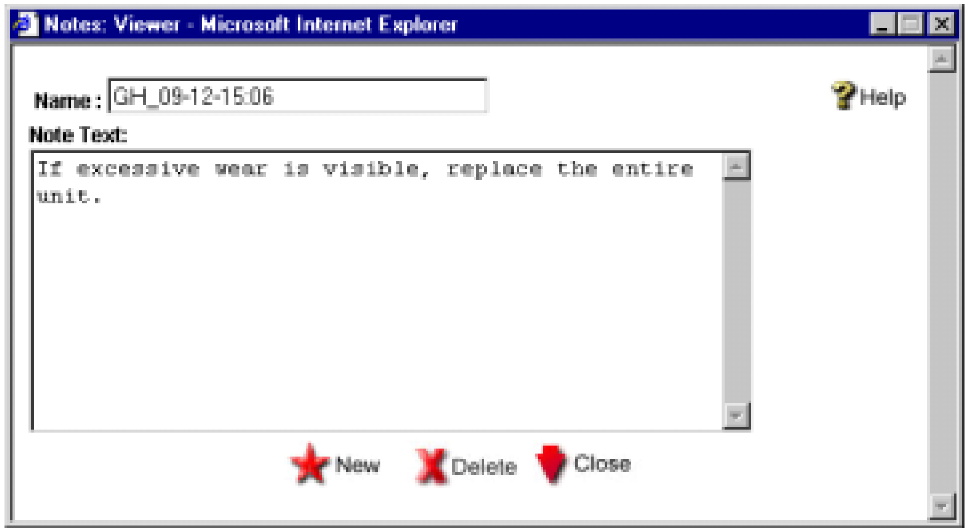
   - If the note is for internal use, select **Internal Only**.
   - If the note can be viewed by all users, select **Release to All**.
   - If the note is for a particular dealer, select **Specific Dealer** and select the dealer’s name from the list box.

4. Click **Save** to attach your note to the parts page. A blinking icon appears to the right of Add Note, indicating that a note is available.

5. Click **Close** to close the Notes Viewer.

Displaying the Note with the Parts Page

Each time you display this parts page, your note os attached. Click to view the note. For example:



From this window you can do the following:

- Click **New** to create an additional note for the parts page.
- Click **Delete** to delete the note.
- Click **Close** to close the window.

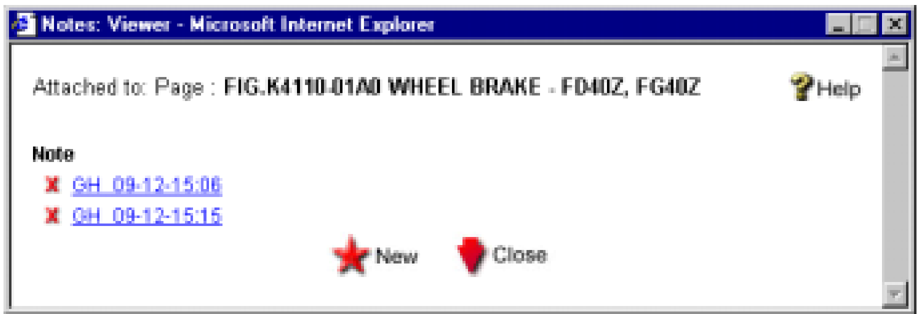
Attaching Multiple Notes

1. Create your new note using one of the following methods.

   - From the parts page, click Add Note..., type your note in the Notes dialog box, and click **Save**.

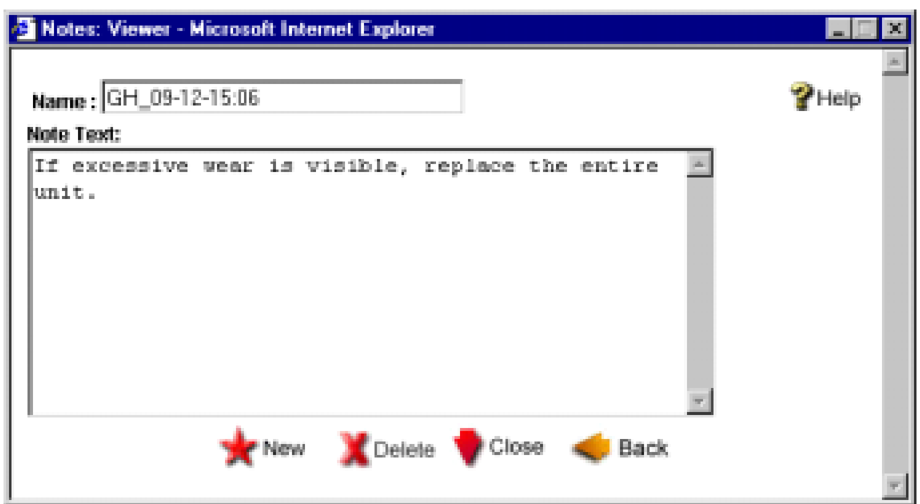
   - In the Notes Viewer, click **New** to open the Notes dialog box, type your new note, and click **Save**.

2. Click to open the Notes Viewer with links to the notes attached to the parts page. For example:



   From this window you can click **New** to create an additional note or click **Close** to close the window.

3. To view one of these notes, click the corresponding link. The note is displayed in the Notes Viewer. For example:



   From this window you can click **New** to create an additional note or click **Delete** to delete the current note.

4. Click **Close** to close the Notes Viewer or click **Back** to return to the previous Notes Viewer.

Deleting Notes

Deleting a Note

1. At a parts page showing  to the right of Add Note, click  to open the Notes Viewer.
2. Click **Delete** to display a prompt.

   Are you sure you want to delete this note?

3. Click **OK** to delete the note and .

Deleting Multiple Notes

1. At an parts page showing  to the right of Add Note, click  to open a Note List window.
2. Click the **X** preceding the note you want to delete to display a prompt.

   Are you sure you want to delete this note?

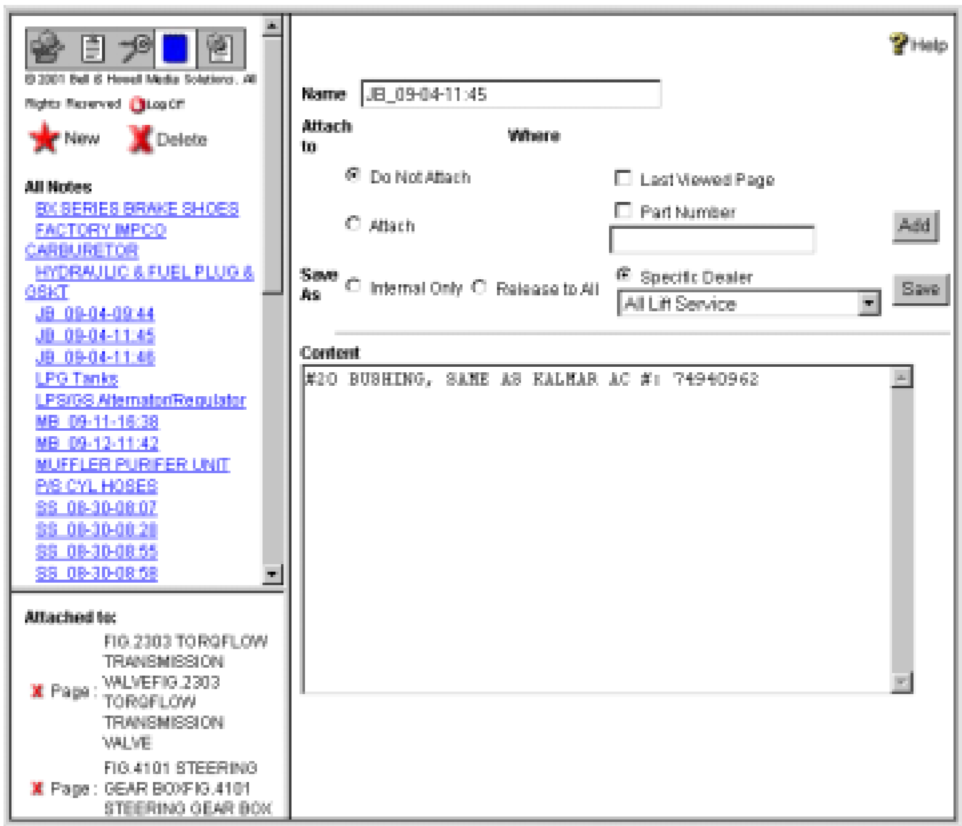
3. Click **OK**.

Maintaining User Notes from the Notes Window

Opening the Notes Window and Displaying All Notes

From the button bar, click the **Notes** button to open the Notes window. When you open this window, links to all notes in the system are listed by name in the top left frame.

When you click a link, information for that note is displayed in the right frame. For example, clicking JB_09-04-11:45 displays the following information.



Note: To detach a page, see the next section, "Detaching a Note from a Part Number at the Notes Window".

Pages to which the note is attached are listed in the lower left frame under “Attached to”.

The name of the note, how it was attached and saved, and the content of the note appear in the right frame.

Detaching a Note from a Part Number at the Notes Window

You can detach a note from a part number at the Notes window.

1. Click the note you want to detach. The status of the note is displayed in the “Attached to” (lower left) frame. For example:

   X Page: GEAR BOXFIG.4101
   STEERING GEAR BOX

2. Click the **X** preceding the entry. The following confirmation prompt appears.

   Are you sure you want to delete this attachment?

3. Click **OK**.

Attaching a Note to a Part Number from the Notes Window

You can attach a note directly to a part number from the Notes window.

1. Click the note you want to attach.
2. Select the **Attach** radio button in the top portion of the right frame.
3. Select the check box preceding “Part Number”.
4. Type the part number to which you want to attach the note.
5. Click **Add**. Then click **Save**.

Creating a Note from the Notes Window

1. Click **New**.
2. Type your note.
3. Make the applicable selections from the right frame.
4. Click **Add**. Then click **Save**.

Deleting a Note from the Notes Window

1. Click the note to select it.
2. Click **Delete**.

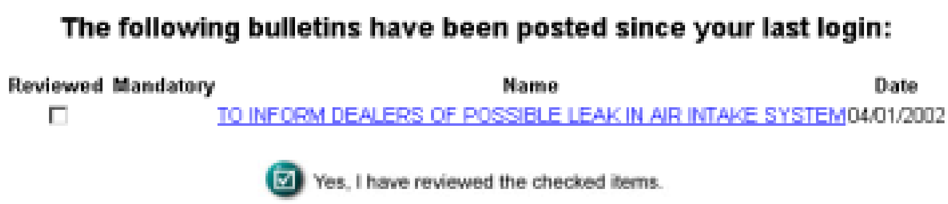
11. Viewing and Searching for Bulletins

Use the procedures in this chapter to review new bulletins, to locate all bulletins stored in the system, and to search for a specific bulletin by number or description. You can narrow a search by the bulletin type and date and by model.

Reviewing New Bulletins

Opening the Bulletin Window

You can review new bulletins from the Bulletin window. To display this window, click the **Bulletins** button from the button bar. If any new bulletins have been posted since the last time you displayed the Bulletin window, information similar to the following appears in the main portion of the window.



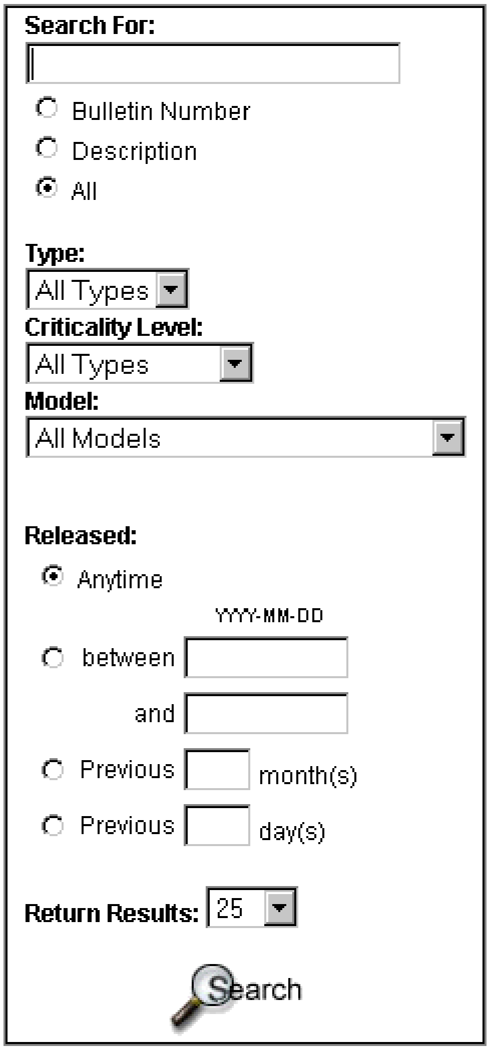
To review new bulletins:

1. Click a link in the Name column to view the corresponding bulletin.
2. When you finish viewing the bulletin, select the check box in the Reviewed column.
3. Repeat steps 1 and 2 for each new bulletin.
4. When you finish reviewing all new bulletins, click the icon that precedes "Yes, I have reviewed the checked items".

Viewing Bulletins

Opening the Bulletin Window

You can view and search for bulletins from the Bulletin window. To display this window, click the **Bulletins** button from the button bar.



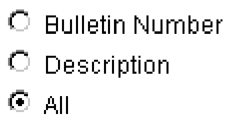
Listing All Bulletins

Use this procedure to access all bulletins stored in the system.

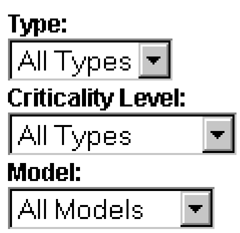
1. From the button bar, click the **Bulletins** button to open the Bulletin window.

2. Leave the Search For text box empty. If any information appears in the text box, delete it.

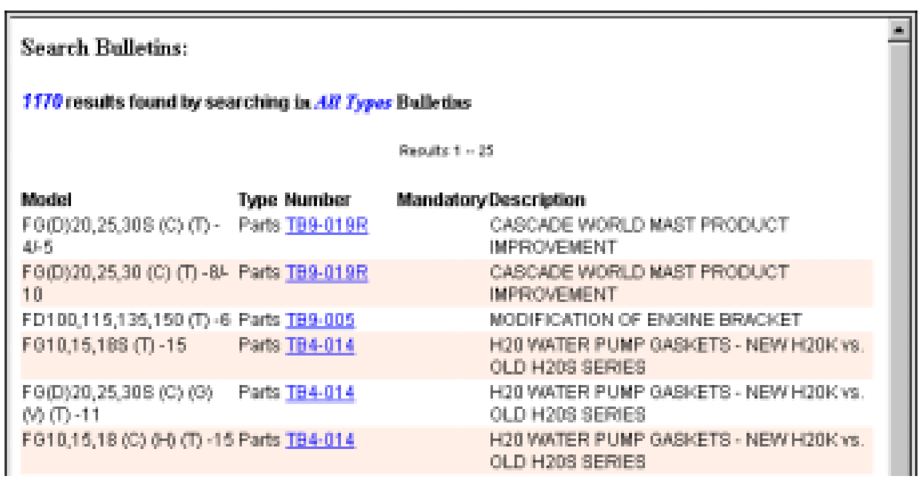
3. Click the **All** radio button to select it.



4. Set the "All" options from the Type, Criticality Level, and Model list boxes.



5. Click **Search** to display a list of all current bulletins. For example:


Search Bulletins:

1170 results found by searching in *All Types* Bulletins

Results 1 – 25

Model	Type	Number	Mandatory	Description
FG(D)20,25,30S (C) (T) - 4/-5	Parts	TB9-019R		CASCADE WORLD MAST PRODUCT IMPROVEMENT
FG(D)20,25,30 (C) (T) -8/- 10	Parts	TB9-019R		CASCADE WORLD MAST PRODUCT IMPROVEMENT
FD100,115,135,150 (T) -6	Parts	TB9-005		MODIFICATION OF ENGINE BRACKET
FG10,15,18S (T) -15	Parts	TB4-014		H20 WATER PUMP GASKETS - NEW H20K vs. OLD H20S SERIES
FG(D)20,25,30S (C) (G) (V) (T) -11	Parts	TB4-014		H20 WATER PUMP GASKETS - NEW H20K vs. OLD H20S SERIES
FG10,15,18 (C) (H) (T) -15	Parts	TB4-014		H20 WATER PUMP GASKETS - NEW H20K vs. OLD H20S SERIES

6. If necessary, scroll to the bottom of the list and click Next 25 > until you find the page that lists the bulletin you want.

Viewing and Printing a Bulletin

Note: You can also click the **Page: 1 of 2** button.

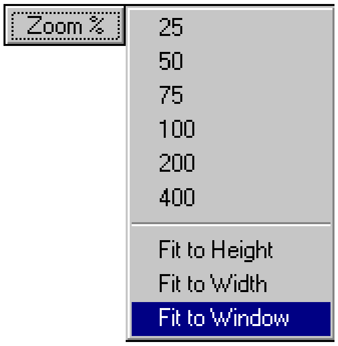
1. Using the procedure in the previous section, display the list of all current bulletins.

2. If necessary, scroll to the bottom of the list and click Next 25 > until you find the page that lists the bulletin you want.

3. Click a bulletin number link in the Number column to view the bulletin.

4. When a bulletin contains more than one page, click **Next** and **Prev** to page between screens.

5. To zoom in and out, click **Zoom%** to open a window. Make a selection to change the setting.



6. To print a bulletin, click **Print**.

Searching for Bulletins

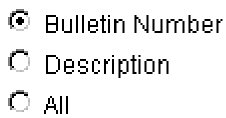
Searching for a Bulletin by Number

Use the following guidelines to find a bulletin by typing a bulletin number.

1. From the button bar, click the **Bulletins** button to open the Bulletin window.

2. Type the bulletin number you want in the Search For text box. For example, type **TB2000-017**.

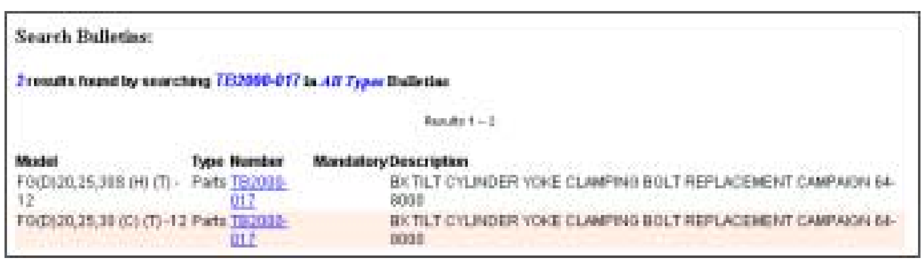
3. Select the **Bulletin Number** radio button.



Note: See "Narrowing a Bulletin Search" for details on using these criteria.

4. If applicable, enter additional search criteria: the bulletin type, its criticality level, the applicable model, release date information, and number of bulletin records to display.

5. Click **Search** to display a list of bulletins that meet your search criteria.



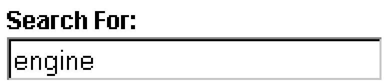
6. Click the bulletin number link in the Number column to display the bulletin.

Searching for a Bulletin by Description

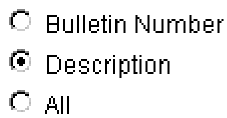
Use the following guidelines to find a bulletin by typing a bulletin description.

1. From the button bar, click the **Bulletins** button to open the Bulletin window.

2. Type a word from a bulletin title in the Search For text box. For example, type **engine**.



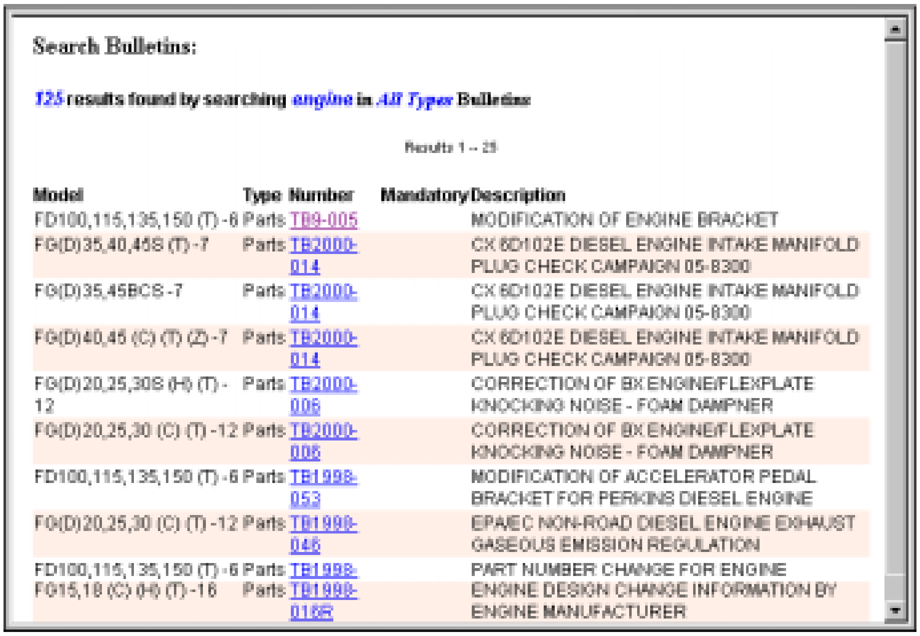
3. Select the **Description** radio button.



Note: See "Narrowing a Bulletin Search" for details on using these criteria.

4. If applicable, enter additional search criteria: the bulletin type, its criticality level, the applicable model, release date information, and number of bulletin records to display.

5. Click **Search** to display a list of bulletins that meet your search criteria.


Search Bulletins:

125 results found by searching engine in All Types Bulletins

Results 1 – 25

Model	Type	Number	Mandatory	Description
FD100,115,135,150 (T) -6	Parts	TB9-005		MODIFICATION OF ENGINE BRACKET
FG(D)35,40,45S (T) -7	Parts	TB2000-014		CX 6D102E DIESEL ENGINE INTAKE MANIFOLD PLUG CHECK CAMPAIGN 05-8300
FG(D)35,45BCS -7	Parts	TB2000-014		CX 6D102E DIESEL ENGINE INTAKE MANIFOLD PLUG CHECK CAMPAIGN 05-8300
FG(D)40,45 (C) (T) (Z) -7	Parts	TB2000-014		CX 6D102E DIESEL ENGINE INTAKE MANIFOLD PLUG CHECK CAMPAIGN 05-8300
FG(D)20,25,30S (H) (T) -12	Parts	TB2000-006		CORRECTION OF BX ENGINE/FLEXPLATE KNOCKING NOISE - FOAM DAMPNER
FG(D)20,25,30 (C) (T) -12	Parts	TB2000-006		CORRECTION OF BX ENGINE/FLEXPLATE KNOCKING NOISE - FOAM DAMPNER
FD100,115,135,150 (T) -6	Parts	TB1998-053		MODIFICATION OF ACCELERATOR PEDAL BRACKET FOR PERKINS DIESEL ENGINE
FG(D)20,25,30 (C) (T) -12	Parts	TB1998-046		EPA/EC NON-ROAD DIESEL ENGINE EXHAUST GASEOUS EMISSION REGULATION
FD100,115,135,150 (T) -6	Parts	TB1998-		PART NUMBER CHANGE FOR ENGINE
FG15,18 (C) (H) (T) -16	Parts	TB1998-016R		ENGINE DESIGN CHANGE INFORMATION BY ENGINE MANUFACTURER

6. If necessary, scroll to the bottom of the list and click Next 25 > to find the page that includes the bulletin you want.

7. Click the bulletin number link in the Number column to display the bulletin.

Narrowing a Bulletin Search

Use any or all of the following methods to limit a search for a bulletin.

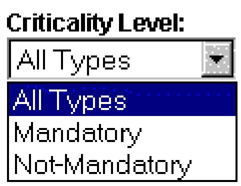
“Type” List Box

Select a type of bulletin from the Type list box.

You can select “Parts” bulletins or “All Types” of bulletins.

“Criticality Level” List Box

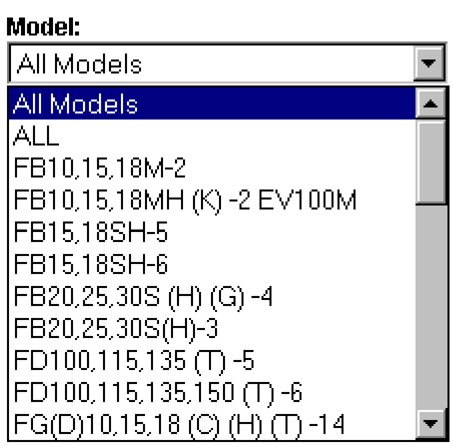
Select a level to indicate the criticality of a bulletin. For example:



You can select a level of “Mandatory” or “Not Mandatory” or “All Types” (all levels) for your search.

“Model” List Box

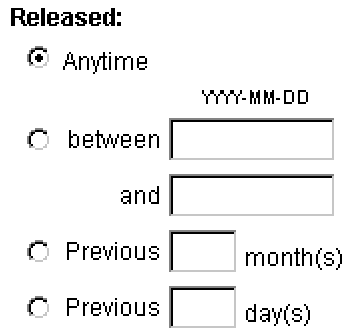
Select a model from the Model list box. For example:



You can select a specific model or “All Models” for your search.

“Released” Options

Select a radio button under "Released" and type the applicable date(s).



To set the release date(s) for your bulletin search, select the applicable radio button and type the appropriate numbers.

“Anytime” defines no restriction for the bulletin release date.

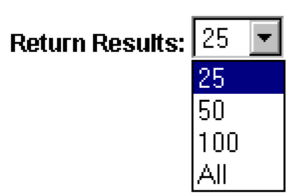
“Between” allows you to set a range of bulletin release dates. Type the first date of the range in the “between” text box and the last date of the range in the “and” text box. Type dates in the format YYYY-MM-DD. For example, if you wanted to find all bulletins released between December 1, 2000 and June 1, 2001 you would type **2000-12-01** in the “between” text box and **2001-06-01** in the “and” text box.

“Previous _ month(s)” allows you to find all bulletins released within a specific number of months prior to the current date. For example, if today’s date is June 1, 2001, and you want to display all bulletins released for the year to date, type **5** in the text box (January through May).

“Previous _ day(s)” allows you to find all bulletins released within a specific number of days prior to the current date. For example, if today is Friday, June 1, 2001, and you want to display all bulletins released since Monday, type **4** (Monday through Thursday).

“Return Results” List Box

Select a number from the Return Results list box to specify how many bulletin records you want to display at a time.



In the Return Results number list box, select a different number only if you want to list more than the default number of 25 bulletin records.

12. Working With Orders

Important Information About Ordering

This chapter explains how to use all available Ordering features. However, Ordering is not enabled for all users. And even if Ordering has been enabled for you, you can submit orders only if you have been granted the necessary permission to do so.

If you have not been granted full Ordering permissions, you will not be able to do the following:

- Submit orders.
- Change a Picklist to an OEM order or a split order.
- View OEM orders or split orders.

Overview

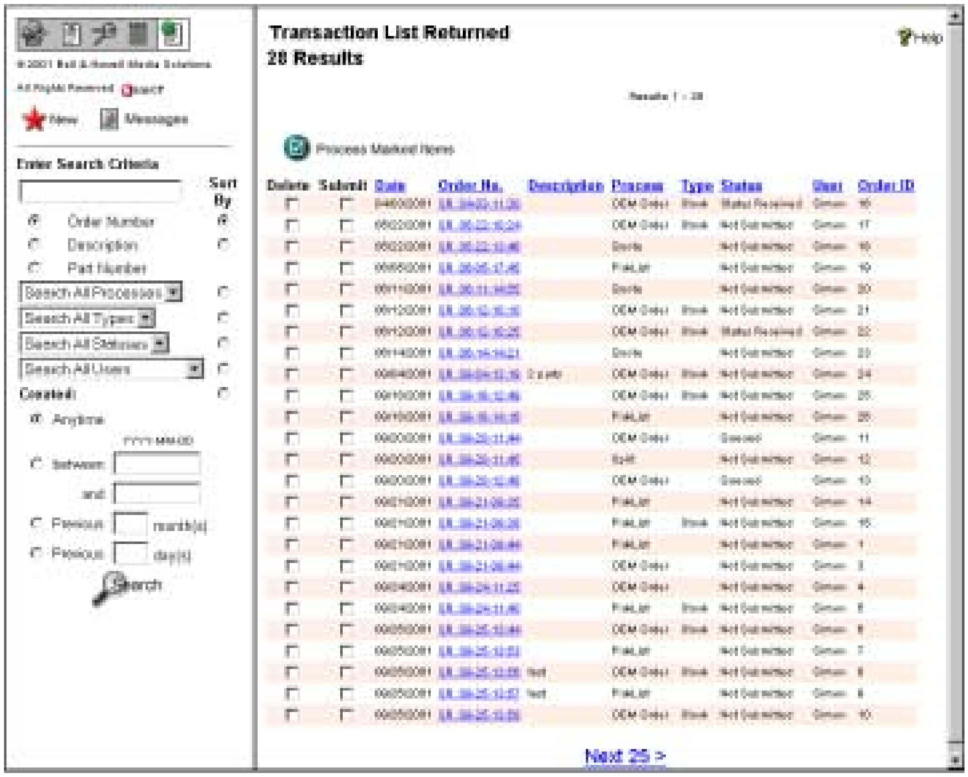
The Ordering portion of the parts and service application allows you to create orders from your Picklists and include them in the Komatsu Ordering process. The application allows you to do the following:

- Search for specific orders.
- Create new orders.
- View individual orders.
- View the status of orders.
- Submit individual or multiple orders to Komatsu.
- Modify and delete orders that have not yet been submitted.
- Request on-hand part quantities with up-to-date price information from Komatsu.

All of this starts at the Orders window. To find out how to display the Orders window and begin working with orders, proceed to the next section, "Getting Started at the Orders Window".

Getting Started at the Orders Window

From the button bar, click the **Orders** button to open the Orders window.



The left frame of the window allows you to search for orders. The right frame shows all open orders you have created or the results of a search. In this example, 28 orders are listed, 25 of which are currently displayed. To view the other three orders, you would click Next 25 >.

Features Available from the Left Frame of the Orders Window

“New” Icon

Click this icon to open the New Orders window. You can create a new order from the New Orders window.

“Messages” Icon

Click this icon to open the Order Confirmation window.

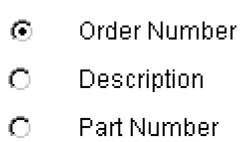
“Enter Search Criteria” Text Box

Type the order number, order description, or part number you are searching for in this text box.

“Sort By” Radio Buttons

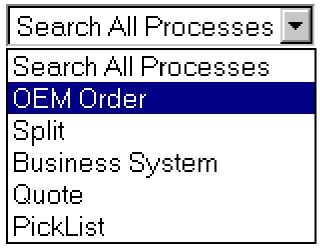
Use these radio buttons to sort the order in which entries appear in the right frame of the window. For example, to sort orders by order number, select the “Sort By” radio button that follows “Order Number”. To sort orders by order description, select the “Sort By” radio button that follows “Description”. To sort orders by status, select the “Sort By” radio button that follows the Status list box.

“Order Number”, “Description”, and “Part Number” Radio Buttons



Select a radio button to identify the search criteria you typed in the Enter Search Criteria text box. Your selection must match the type of criteria you entered.

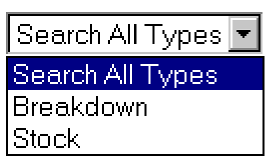
“Order Process” List Box



From this list box, select one of the following options.

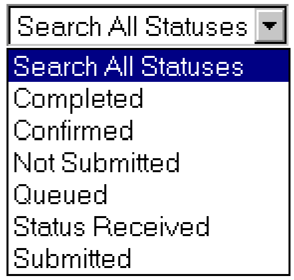
Option	Description
Search All Processes	Any type of available order
OEM Order	An order placed with Komatsu
Split	An order partially from stock and partially from Komatsu
Business System	An available business system list
Quote	An available quote
Picklist	An available Picklist

“Order Type” List Box



From this list box, select “Search All Types”, “Breakdown”, or “Stock”.

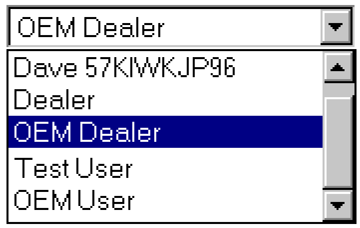
“Order Status” List Box



From this list box, select one of the following options.

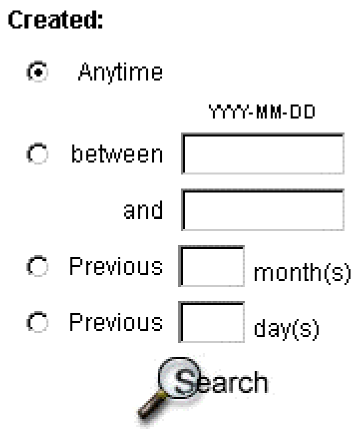
Option	Description
Search All Statuses	Search for all orders regardless of status.
Completed	Search for all completed orders. When an order shows “Completed”, all items in the order have been shipped and the order is closed.
Confirmed	Search for all orders that have been confirmed. When an order shows “Confirmed”, Komatsu has sent a confirmation that the order was received and read.
Not Submitted	Search for all orders that have not yet been submitted. When an order shows “Not Submitted”, you can still view, modify, or delete it.
Queued	Search for all orders that are in the queue. When an order shows “Queued”, a request has been made that the order be submitted and it is “in line” for submission.
Status Received	Search for all orders for which a status update has been received. When an order shows “Status Received”, a status request has been answered.
Submitted	Search for all orders that have been submitted. When an order shows “Submitted”, it has been transmitted successfully to the Komatsu system.

“Order Source” List Box



From this list box, select the user that is the source of the order. Your choices are “Search All Users” or any specific users listed in the box.

“Created” Radio Buttons and Text Boxes



To set the creation date(s) for your order search, select the applicable radio button and type the appropriate numbers.

“Anytime” defines no restriction for the order creation date.

“Between” allows you to set a range of order creation dates. Type the first date of the range in the “between” text box and the last date of the range in the “and” text box. Type dates in the format YYYY-MM-DD. For example, if you wanted to find all orders created between December 1, 2000 and June 1, 2001 you would type **2000-12-01** in the “between” text box and **2001-06-01** in the “and” text box.

“Previous _ month(s)” allows you to find all orders created within a specific number of months prior to the current date. For example, if today’s date is June 1, 2001, and you want to display all orders created for the year to date, type **5** in the text box (January through May).

“Previous _ day(s)” allows you to find all orders created within a specific number of days prior to the current date. For example, if today is Friday, June 1, 2001, and you want to display all orders created since Monday, type **4** (Monday through Thursday).

Features Available from the Right Frame of the Orders Window

"Process Marked Items" Icon

Click this icon to process each order in the Orders window that is preceded by a check mark in the Delete or Submit column. Each order selected in the Delete column is deleted. Each order selected in the Submit column is submitted.

"Delete" and "Submit" Check Boxes

Select the check box preceding each order you want to delete or submit. Then click the **Process Marked Items** icon to delete or submit the selected order(s).

Next 25 > Link

The Orders window displays a maximum of 25 orders at a time. When more than 25 are available, click this link to view the additional orders.

Sorting Orders

You can sort the order in which entries appear in the Orders window by either of these methods.

Method #1: In the left frame, select a radio button in the Sort By column.

Method #2: In the right frame, click a column header according to the following guidelines.

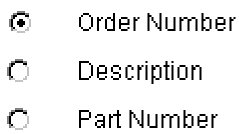
- To sort orders by date, click Date.
- To sort orders by order number, click Order No.
- To sort orders by description, click Description.
- To sort orders by process, click Process.
- To sort orders by type, click Type.
- To sort orders by status, click Status.
- To sort orders by user, click User.
- To sort orders by order ID, click Order ID.

Searching for Orders

Use the following procedure to search for an order by number or description or by a part number contained in the order.

1. From the Orders window, type the order number, description, or part number in the Enter Search Criteria text box.

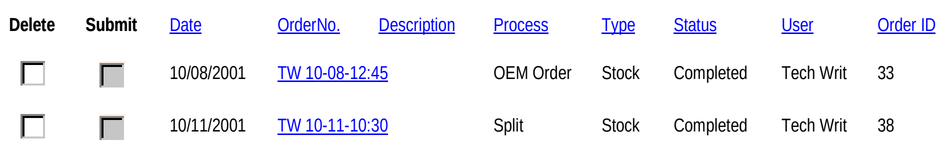
2. Select the Order Number, Description, or Part Number radio button. Your selection should identify the search criteria you typed in the Enter Search Criteria text box.



3. If applicable, change additional search criteria in the Order Process, Order Type, Order Status, and Order Source list boxes and the “Created” radio buttons and text boxes.

4. Click **Search**. The results of your search are displayed in the right frame.

   For example, type **3EB-63-16560**, click the **Part Number** radio button, and click **Search** to list the orders that include this part number.



Delete	Submit	Date	OrderNo.	Description	Process	Type	Status	User	Order ID
		10/08/2001	TW 10-08-12:45		OEM Order	Stock	Completed	Tech Writ	33
		10/11/2001	TW 10-11-10:30		Split	Stock	Completed	Tech Writ	38

Note: See "Viewing the Status of an Order" for details.

5. Click the appropriate order number link to open the order or a status window for the order.

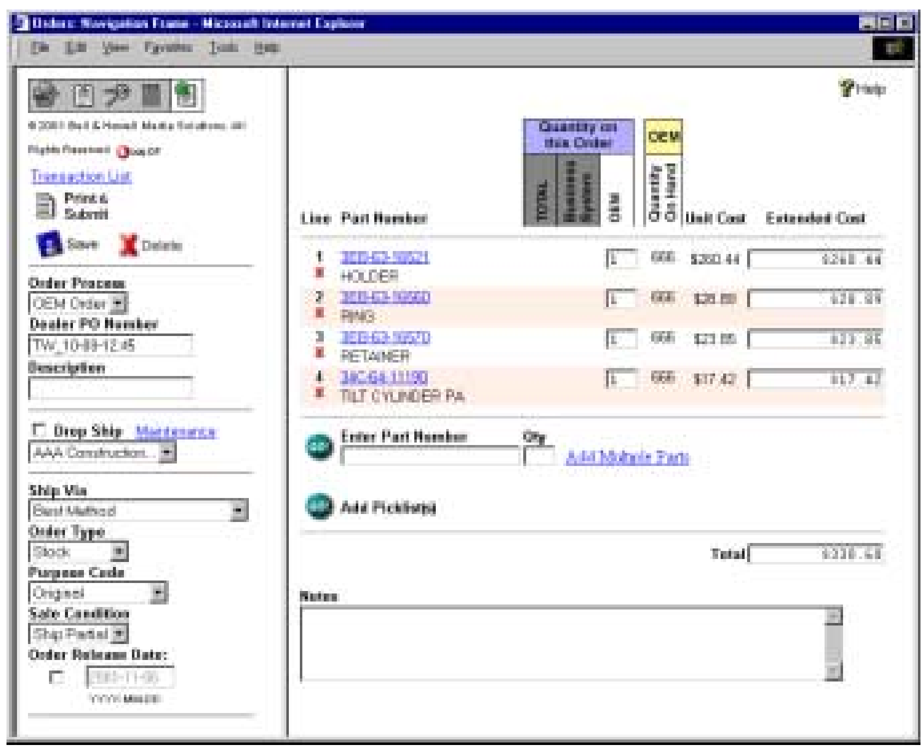
   - When an order shows “Not Submitted” in the Status column, clicking a link in the Order No. column opens the order.
   - After you submit an order and “Queued”, “Submitted”, or “Completed” appears in the Status column, clicking that order’s link in the Order No. column opens a Status window for the order instead of the order itself.

Creating an OEM Order from a Picklist

An OEM order is an order that is submitted to and filled by Komatsu. To submit the items in a Picklist as an OEM order, you must first change the Picklist to an OEM order.

1. Click a link to a Picklist from your search results.
2. If applicable, change the Order Type from "Breakdown" to "Stock".
3. Select **OEM Order** from the Order Process list box.

4. The Picklist changes to an order that appears similar to the following:



Features Available from the Left Frame of the OEM Order Window

Transaction List **Link**

Click this link to return to the Orders window.

"Print & Submit" Icon

Click this icon to open the order Status window and Print dialog box. Click **OK** in the dialog box to print the contents of the window. Then you can click the **Submit** icon in the Status window to submit the order.

"Save" Icon

Click this icon to save any changes you make to the current order.

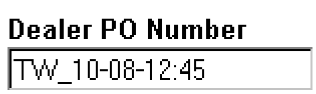
"Delete" Icon

Click this icon to delete the current order.

"Order Process" List Box

From this list box you can change the current order to "Split", Quote", or "Picklist".

"Dealer PO Number" Text Box

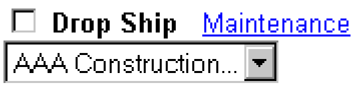


The application automatically displays the purchase order number for the current order. If you want to change the number, type the new number over the older number.

“Description” Text Box

Type a description for the order in this text box. To change an existing description, type the new description over the old description.

“Customer Name” List Box



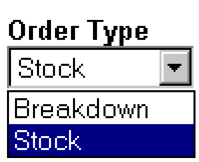
Note: See "Placing a Drop Ship Order" for details.

The Drop Ship check box indicates whether an order is to be shipped to a dealer or a customer. When no check mark appears, the order is shipped to the dealer. When a check mark appears, the order is shipped to the customer, which means that the customer’s shipping information must be forwarded with the order. To access this information, click Maintenance and use the Drop Ship Maintenance Customer Address Book.

“Ship Via” List Box

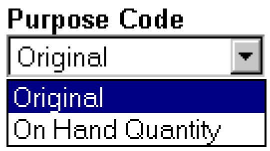
From this list box select “Best Method” or a specific delivery service.

“Order Type” List Box



From this list box select “Breakdown” or “Stock”.

“Purpose Code” List Box



From this list box select “Original” or “On Hand Quantity”.

“Sale Condition” List Box

“Ship Partial” is the only option.

“Order Release Date” Text Box

Indicates the release date of the order. If you need to change the date displayed, select the check box; then type a date using the four-digit year, the two-digit month, and the two-digit day.

Features Available from the Right Frame of the OEM Order Window

“Line” Column

A line item number is assigned to each item in the order. An S icon (when a part number has supersession) and an **X** icon (for deleting items from the order) are displayed in this column. For example:

Line	Part Number
1	3EC-30-33110
X	WHEEL CYLINDER
S 2	3EC-30-11810
X	SHOE & LINING A

Note: See "Viewing Supersession Information" in chapter 8 for details on using a supersession window.

To view supersession information:

Click S preceding the line number to display a supersession window.

To delete a part number:

1. Click **X** preceding the part description to display a message similar to the following:

   Are you sure you want to delete 3EC-30-11810 from current order?

2. Click **OK** to delete the part number from the order.

“Part Number” Column

Part numbers included in the order are listed in this column. For example:

Line	Part Number
1	3EC-30-33110
X	WHEEL CYLINDER
S 2	3EC-30-11810
X	SHOE & LINING A

Clicking a part number link opens a price and availability window for that part. The window displays the part number, MSRP, dealer price, and Komatsu’s quantity on hand.

“Quantity On This Order” Columns

Quantities are displayed in text boxes in the applicable columns, in this case, the OEM column. If you want to change a quantity, type the new quantity over the old one. The Unit Cost, Extended Cost, and Total fields update automatically.

Notes:

See also "Requesting On-Hand Quantities" for information about requesting Komatsu’s on-hand quantity for a part.

For information about entering and trying to submit invalid part numbers, see "Entering Invalid Part Numbers" at the end of this chapter.

“OEM Quantity On Hand” Column

This column displays Komatsu’s on-hand quantity for each part.

The “Enter Part Number” Text Box and Add Multiple Parts Link

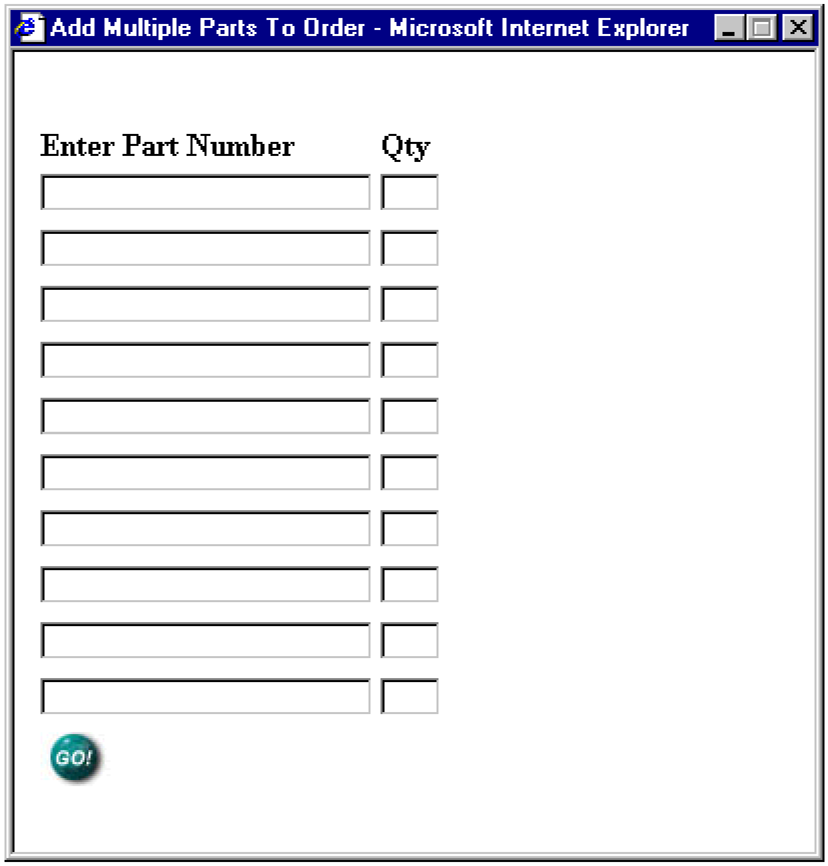
Add Multiple Parts

To add one part number to the order:

1. Type the number in the larger text box.
2. Type a quantity in the smaller text box.
3. Click .

To add multiple numbers to the order:

1. Click Add Multiple Parts to open the Add Multiple Parts to Order window.



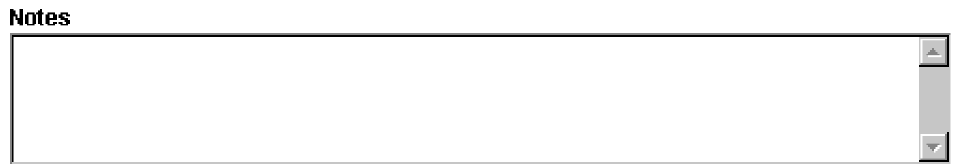
2. Type the first part number in the larger text box.
3. Type a quantity in the smaller text box.
4. Repeat steps 2 and 3 for each additional part number you want to add to the order.
5. Click .

“Add Picklist(s)” Icon

Note: See "Creating a Batch Picklist" for details.

The Add Picklist(s) icon allows you to batch (merge) Picklists before submitting them. Click to open a window that lists the available Picklists.

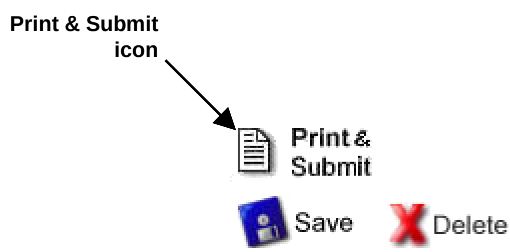
“Notes” Text Box



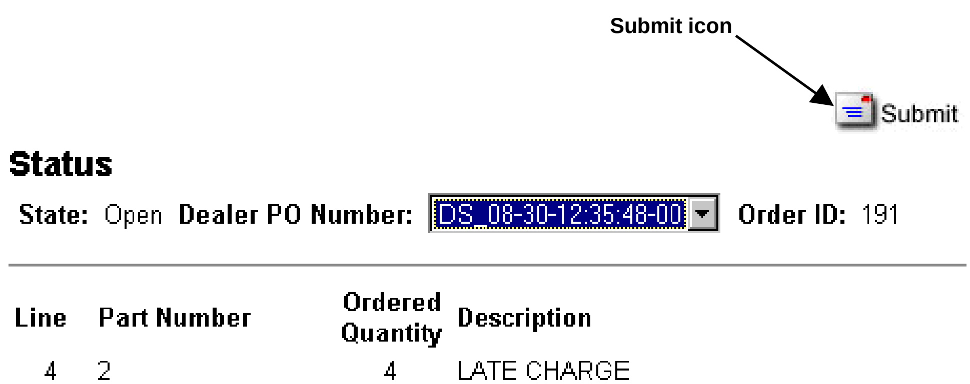
Type any notes you want to attach to the order in this text box.

Printing and Submitting an Order

You can print an order before submitting it by clicking the Print & Submit icon in the upper left portion of the Orders window.



When you click the icon, a Status window opens with the Print dialog box. Click **OK** in the dialog box to print the contents of the Status window.



You can then submit the order by clicking the **Submit** icon in the Status window.

Submitting Orders

You can submit an order by using either of the following methods.

Submitting a Displayed Order

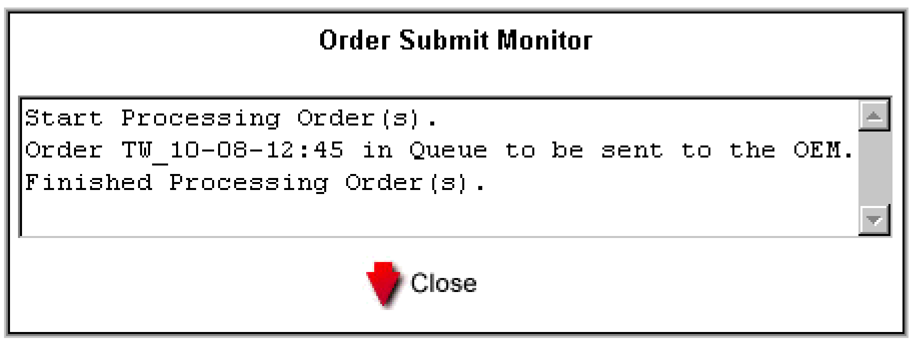
1. With the order displayed, click the **Print & Submit** icon in the top left portion of the Orders window.

2. Do one of the following:

   - If you want to print the order, click **OK** in the Print dialog box to print the contents of the Status window. Then click the **Submit** icon in the Status window.

   - If you do not want to print the order, click **Cancel** in the Print dialog box. Then click the **Submit** icon in the Status window.

3. The Order Submit Monitor is displayed. This window displays messages as your order is processed.



4. Click **Close** to close the Order Submit Monitor.

Submitting One or More Orders from the Orders Window

Note: See "Searching for Orders" to view the full procedure.

1. If the order you want to submit is not displayed in the Transaction List (the right frame of the Orders window), search for it by doing the following:

   - Type the order number in the Enter Search Criteria text box.

   - Select the Order Number radio button.

   - Select your user name from the Order Source list box.

   - Click **Search**.

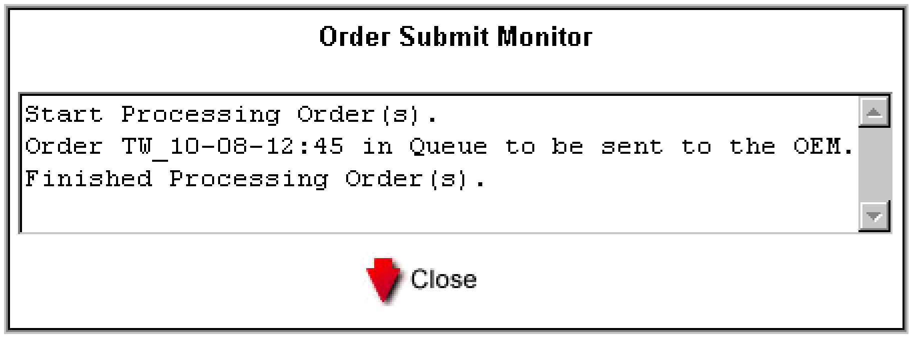
2. When your order appears in the Transaction List, select the check box in the Submit column that precedes each order you want to submit. For example:

Delete	Submit	Date	Order No.
☐	☐	10/10/2001	TW_10-10-13:25
☐	☐	10/10/2001	TW_10-10-13:31
☐	☑	10/08/2001	TW_10-08-12:45

Note: If you select more than one order, clicking the **Process Marked Items** icon will submit all the orders you selected.

3. Click **Process Marked Items**.

4. The Order Submit Monitor is displayed. This window displays messages as your order is processed.



5. Click **Close** to close the Order Submit Monitor.

Creating a Split Order from a Picklist

A split order is an order that is filled partially from stock and partially from Komatsu. To submit the items in a Picklist as a split order, you must first change the Picklist to a split order.

Using the sample order from the section "Searching for Orders", select **Split** from the Order Process list box.

Requesting On-Hand Quantities

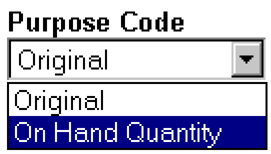
Note: See "Creating an OEM Order from a Picklist" for details on selecting order options.

Use this procedure to request an on-hand quantity for a part from Komatsu.

1. From the Order Process list box select **OEM Order** or **Split**.

2. Type the number of the order in the Order Number text box.

3. From the Purpose Code list box select **On Hand Quantity**.



4. Click **Submit**. A confirmation message window displays the on-hand quantity information you requested.

Viewing the Status of an Order

When an order shows "Not Submitted" in the Transaction List window's Status column, clicking a link in the Order No. column opens the order.

After you submit an order and "Queued", "Submitted", or "Completed" appears in the Transaction List window's Status column, clicking that order's link in the Order No. column opens a Status window for the order instead of the order itself. For example:

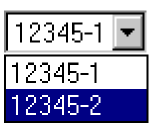
Notes:

When an order or partial order has been shipped (as in this example), the tracking number appears in the Status window.

See the next section to see how to print from the Status window.

The order suffix determines whether the Status window displays the entire order or a portion of the order. In this example, the order suffix "-1" indicates that a portion of the order is displayed and that this portion was shipped ("Shipped" appears after "State:" in the upper left corner of the window).

To view the status of the other portion of the order, click the Order Number list box arrow and make a selection (the order number with the suffix "-2" in this example).



The Status window now shows that the remaining portion of the order was back-ordered (“Back Ordered” appears after “State:” in the upper left corner of the window).

Note: Because this portion of the order has not been shipped, no tracking number is available.

Click **Close** to close the Status window.

Printing from the Status Window

When you display the Status window for an order, a Print icon appears in the upper right corner of the window. For example:

Click the **Print** icon to open the Print dialog box. Then click **OK** to print the contents of the window.

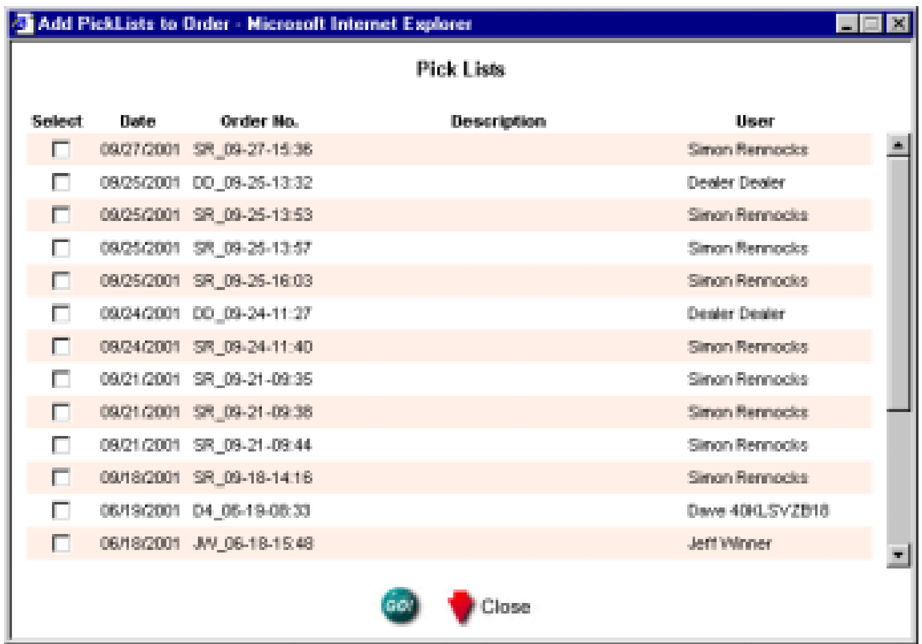
Creating a Batch Picklist

Use the following procedure to merge multiple transactions into a batch transaction to submit as an OEM order.

1. Create a new Picklist or open an existing Picklist.

2. Select **OEM Order** from the Process Type list box.

3. After the screen refreshes, click  preceding "Add Picklist(s)" to open a window that lists the available Picklists. For example:



4. Select the check box preceding each Picklist you want to add.

5. Click  to add the selected lists to the order.

6. Click **Close** to close the window.

7. The order shows the data from all the merged Picklists.

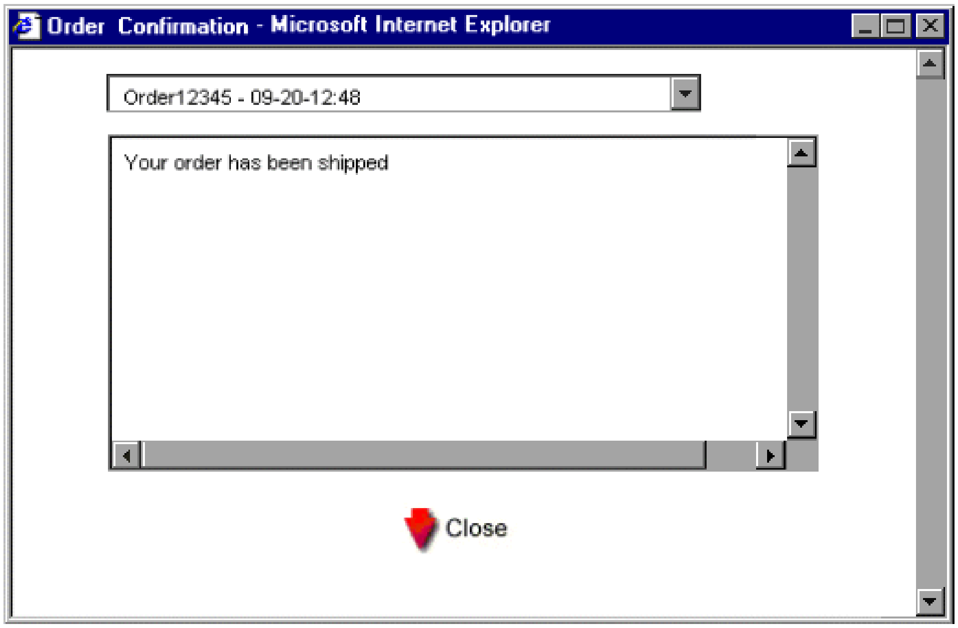
Viewing Order Confirmations

When you submit an order or on-hand quantity request to Komatsu, the Order Confirmation window displays messages related to the order or request.

Notes:

You can also view older messages from this window by selecting a message from the list box.

An e-mail confirmation is transmitted to the user who submitted the order. The confirmation is sent to the e-mail address set up for that user in the Administration module.

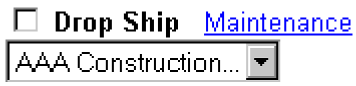


When you are finished viewing messages, click **Close**.

You can also view messages by returning to the Orders window and clicking the **Messages** icon in the top left corner of the window.

Placing a Drop Ship Order

The Drop Ship check box indicates whether an order is to be shipped to a dealer or a customer.



When no check mark appears, the order is shipped to the dealer. If you select the check box, the order is shipped to the customer, which means that the customer's shipping information must be forwarded with the order.

To access this customer information, do the following:

1. Click Maintenance to open the Customer Address Book.

2. Type your search criteria in the Enter Search Criteria text box.
3. Click "Customer Name", "Contact Person", or "Zip Code/Postal Code".
4. Click **Search** to display a list of matches for your search criteria.
5. Click  preceding the customer name you want. That name appears in the Customer Name list box.
6. Click **Close** to close Customer Address Book.

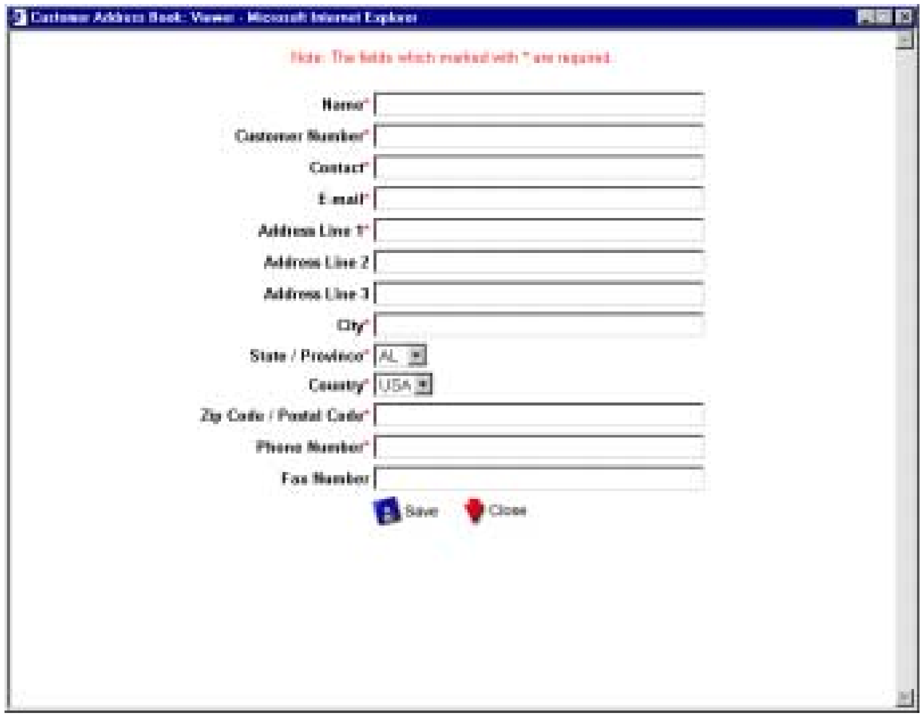
Alternative Method of Locating Customer Information

You can also click any letter that appears as a link below “Drop Ship Maintenance” in the Customer Address Book to list customers filed under that letter. Using the sample address book on the previous page, clicking **M** displays the following:

Click preceding the customer name you want. That name appears in the Customer Name list box.

Adding a Customer to the Address Book

1. Click **New** (in the upper left corner of the Customer Address Book) to open the following window.



2. Type the appropriate information in the text boxes.
3. Select the two-letter state abbreviation from the State/Province list box.
4. If necessary, make a selection from the Country list box.
5. Click **Save**.

Notes:

You must enter information in all fields marked with an asterisk (*).

Click the Close icon only if you want to close the window without creating a new customer entry.

Creating New Orders

Opening the New Order Window

Use the following information to help you create a new order from the Orders window.

1. Click **New**. The following message appears.

   I'm getting ready to produce a Picklist.

2. Click **OK**. The New Order window is displayed.

Note: Once an order has been submitted, it cannot be deleted until it is complete. The "Delete" check box for a submitted order is "grayed out" so you cannot select it. In the example above, you would not be able to delete the second order because the "Delete" check box is grayed out.

Deleting Orders

Use the following procedure to delete unsubmitted and completed orders.

1. In the right frame, select the Delete check box that precedes each order you want to delete. For example:

Delete	Submit	Date	Order No.
☐	☐	09/14/2001	GH 09-14-08:12
☐	☐	08/17/2001	GH 08-17-15:28
☑	☐	08/17/2001	GH 08-17-15:29

2. Click **Process Marked Items**.

3. To delete all the orders listed, click **Delete All**.

Note: Once an order has been submitted, you can only view its status, not the order itself.

Viewing Unsubmitted Orders

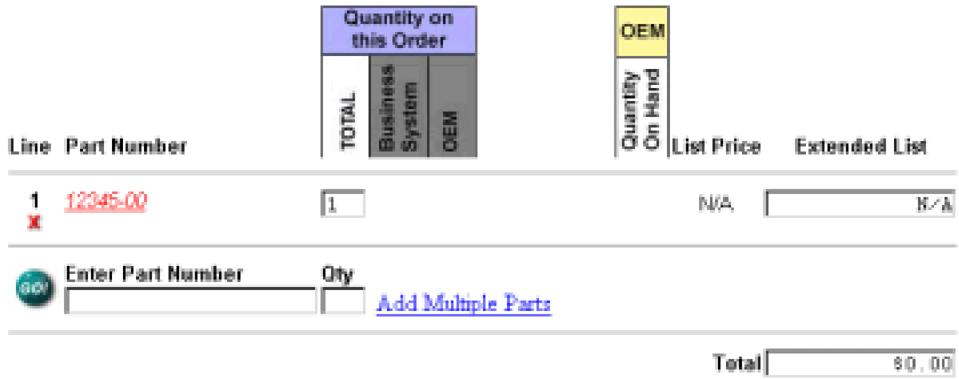
Use the following procedure to view an unsubmitted order.

Delete	Submit	Date	Order No.
☐	☐	09/14/2001	GH 09-14-08:12
☐	☐	08/17/2001	GH 08-17-15:28
☐	☐	08/17/2001	GH 08-17-15:29

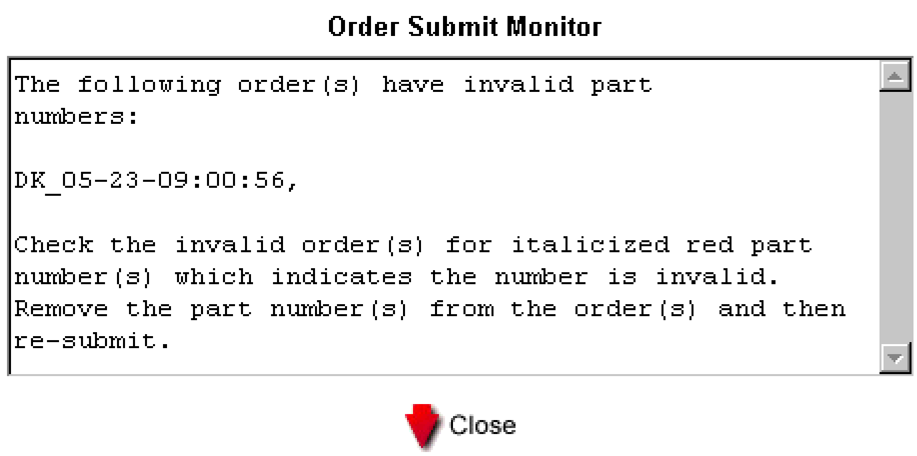
To open an order for viewing, click the entry's order number link. In the example above, clicking GH 08-17-15:28 displays the corresponding order.

Entering Invalid Part Numbers

If you type an invalid part number in the Enter Part Number text box from a Picklist or Order, the number is displayed in red, italicized text and no pricing information is available. In the following example, a user typed the invalid part number **12345-00**, which appears as a red, italicized link in the Part Number column.



If you try to submit an order that includes an invalid part number, a message similar to the following is displayed.



If a message similar to this appears, do the following:

1. Click **Close** to close the Order Submit Monitor message.
2. Delete the invalid part number from the order (click **X** in the Line column).
3. Type the correct part number in the Enter Part Number text box.
4. Resubmit the order.