

ServiceBench Business Management Software

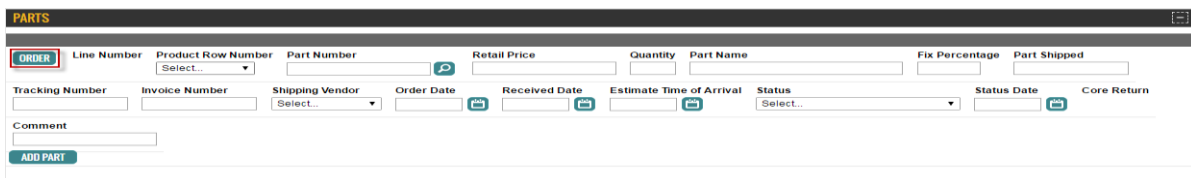
Parts Management Quick Reference Guide

1. Adding a new Parts Distributor

- To set up an account in ServiceBench with a Part Distributor, click on the **“ADMIN”** Tab and then click on **“Parts Distributor Vendor Maintenance”**
- Click on **“CREATE NEW”** button on the bottom of the screen to add a new account
- Select **Encompass** from the Part Distributor drop down menu, then click the **“SELECT”** button at the bottom of the page
- On the following page, fill out the following:**
 - Enter your Encompass **Account Number, User name, Password, Confirm Password.** (Same credentials you use to log into encompass.com).
 - Search Priority** – Enter "1" to select Encompass as your primary service parts source.
 - Make the 'Active' drop down menu is set to **YES**
- Click **SAVE**

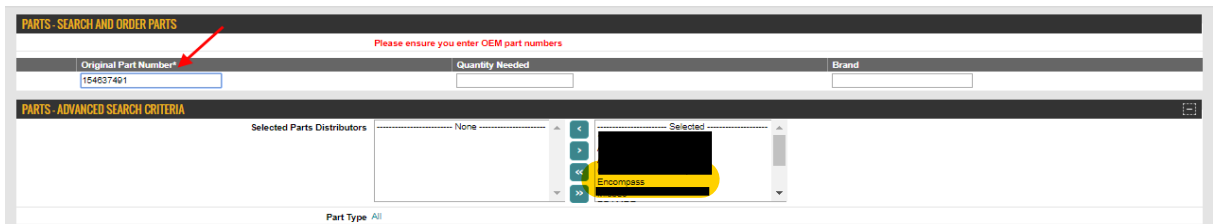
2. Ordering Parts From Service Order/Job

- When viewing a Service Job, scroll down to the **PARTS** Section, then click on the **ORDER** button:



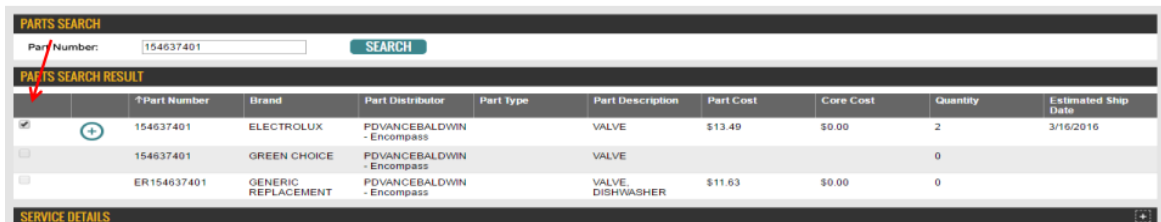
- To search for a specific part, enter the Original Part number that you want, then click **SEARCH** button on bottom of screen

SEARCH FOR PARTS - ORDER BY MY ACCOUNT



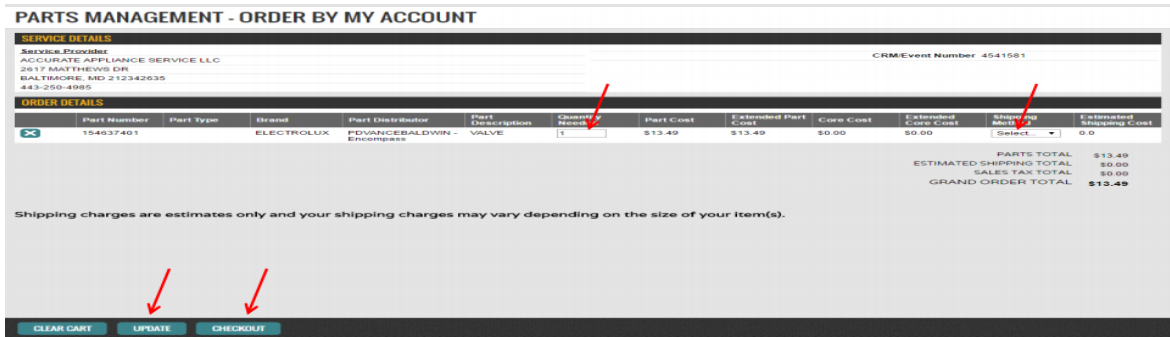
- From the search results, click on the checkbox to select which part you want

SELECT PARTS - ORDER BY MY ACCOUNT



	Part Number	Brand	Part Distributor	Part Type	Part Description	Part Cost	Core Cost	Quantity	Estimated Ship Date
<input checked="" type="checkbox"/>	154637401	ELECTROLUX	PDVANCEBALDWIN - Encompass		VALVE	\$13.49	\$0.00	2	3/16/2016
<input type="checkbox"/>	154637401	GREEN CHOICE	PDVANCEBALDWIN - Encompass		VALVE			0	
<input type="checkbox"/>	ER154637401	GENERIC REPLACEMENT	PDVANCEBALDWIN - Encompass		VALVE, DISHWASHER	\$11.63	\$0.00	0	

- Click on **ADD TO CART** button
- Select **Quantity Needed, Shipping Method**, Click on **UPDATE** button, Click **CHECKOUT** button



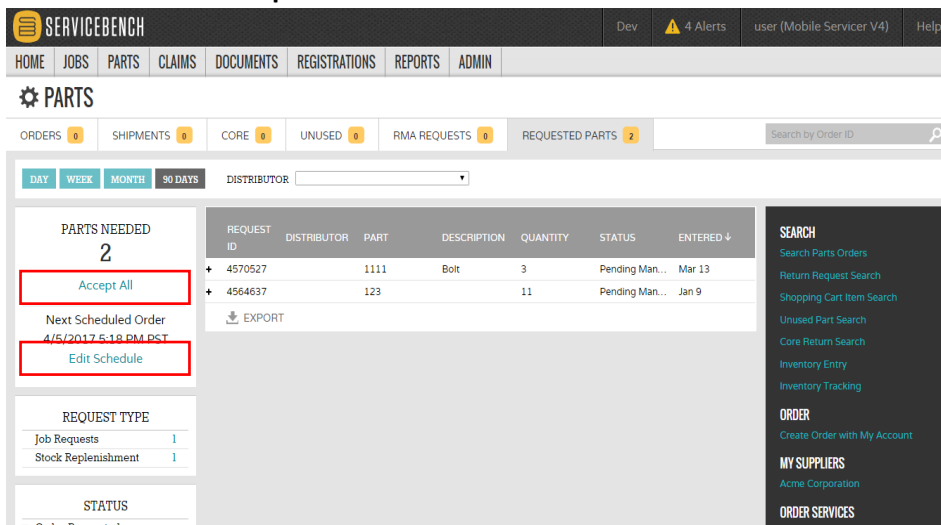
- f. Verify your Shopping Cart and Shipping Information Details; if everything looks right, click on **CONTINUE CHECKOUT**
- g. Fill in SERVICE PROVIDER NOTES (if needed), Click on **SELECT PAYMENT**
- h. Choose payment method, Click **PLACE ORDER**
- i. You will get an Order Confirmation Page that states that you have successfully made an order
- j. Click **PRINT** for a physical copy else click on **HOME** to go back to the main screen

3. Creating Part Orders

- a. Hover on the **PARTS** Tab
- b. Under ORDER section Click on **“Create Order with My Account”** Tab
- c. Follow the same steps as above for searching and ordering parts

4. Batch Ordering

- a. For Batch Ordering/ Bulk Ordering, Click on **PARTS**.
- b. If you have parts requested, click on **REQUESTED PARTS**
 - a. You can click on **“Accept All”** or select on **“Edit Schedule”** and schedule an order.



- b. On the Edit Schedule screen, enter time in Military time, select which days you want to run it from, and click the **“Schedule”** button