Service Salamander

User Guide

User Guide Revisions

Ver 0.1

- Added
  - Customer Tab – p. 4

Ver 0.2

- Added
  - Parts Tab – p. 4
- Modified
  - Customer Tab – move from p. 4 to p. 10; edit photographs, format text for consistency

Ver 0.3

- Added
  - Parts Tab – Delete Part, p.10
  - Customer Tab – Delete Customer, p. 29
  - Invoicing – p. 11
- Modified
  - Improved Documentation Table of Contents
  - Parts Tab –edit photographs to show new Create Part dialog
  - Customer Tab – move from p. 10 to p. 24; edit photographs to show new Create Customer dialog

Ver 0.5

- Fixes
  - The user can now delete a newly created object
- Added
  - Units tab – p. 31

Contents

Parts Tab

The Parts Tab has three functions. You can manage inventory on the Inventory tab, sell parts to customers with the Invoice tab, or order parts from a supplier using the Order tab.

Inventory Tab

The Inventory tab allows you to Search for a Part, edit a Part, or create a New Part.

You can enter a search query into the search box to find parts by part number, part description, supplier, or category.
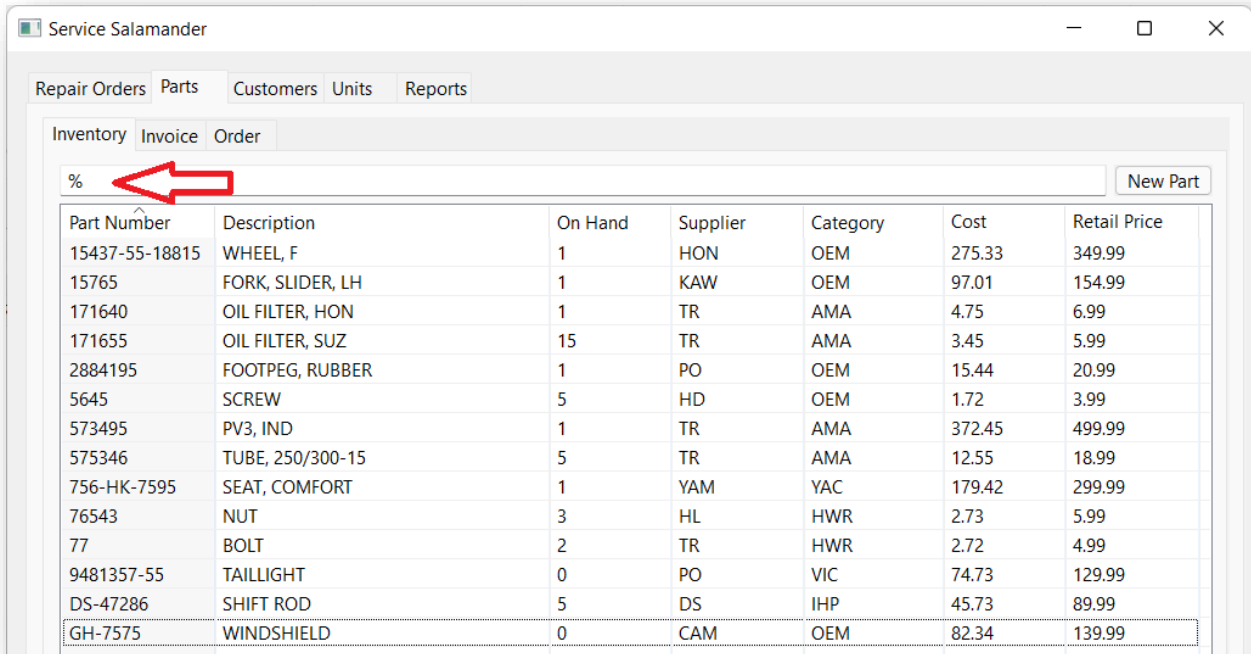
Enter multiple search terms to further refine search results.

You can use the percent sign (%) as a search term wildcard. Enter just the percent sign to show all parts.

You can sort search results by clicking any column header.

To create a new Part, click the New Part button. The Part Number, Supplier, and Part Description are required.

Fill in the relevant part details and click the Save Part button to save the New Part into the inventory.

You can double click on any part in the Parts Inventory Search Results to edit the Part's details.
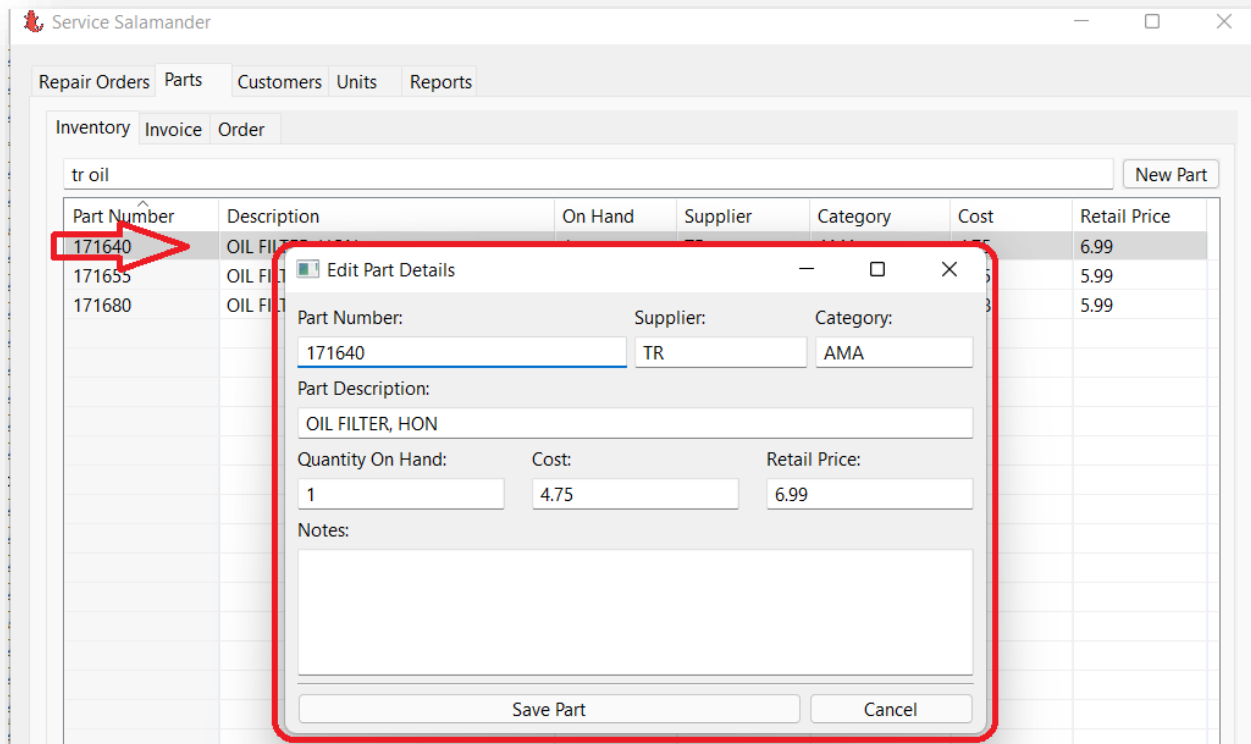
Edit the relevant text boxes and click the Save Part button to save your changes into the Inventory.
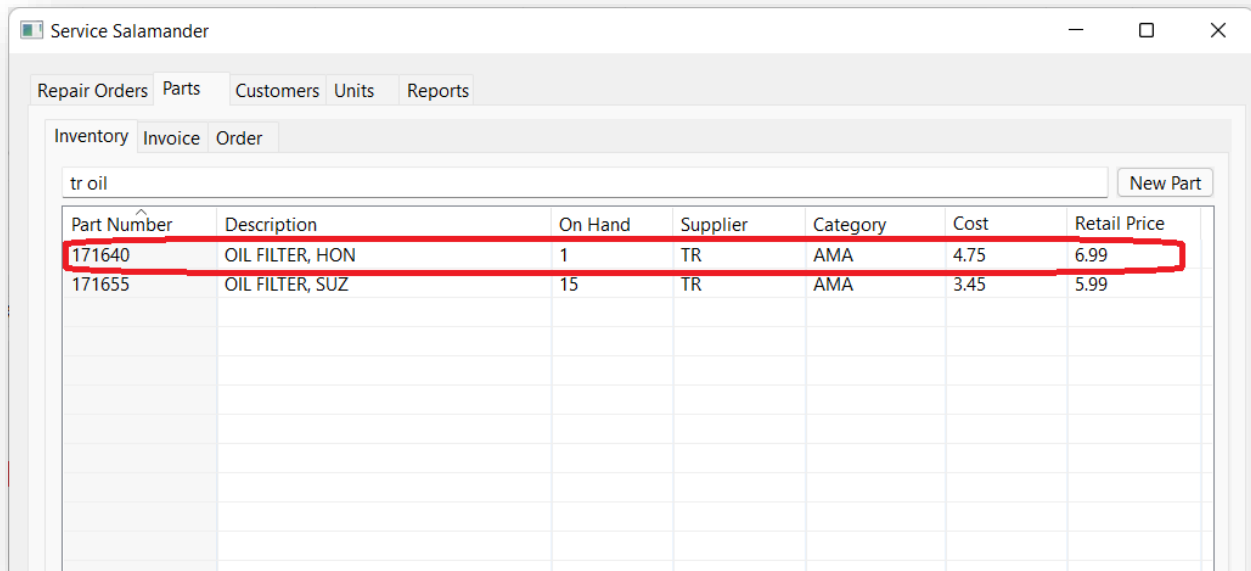
To delete a Part, right click on the Part you want to delete in the search results table and click Delete Part.
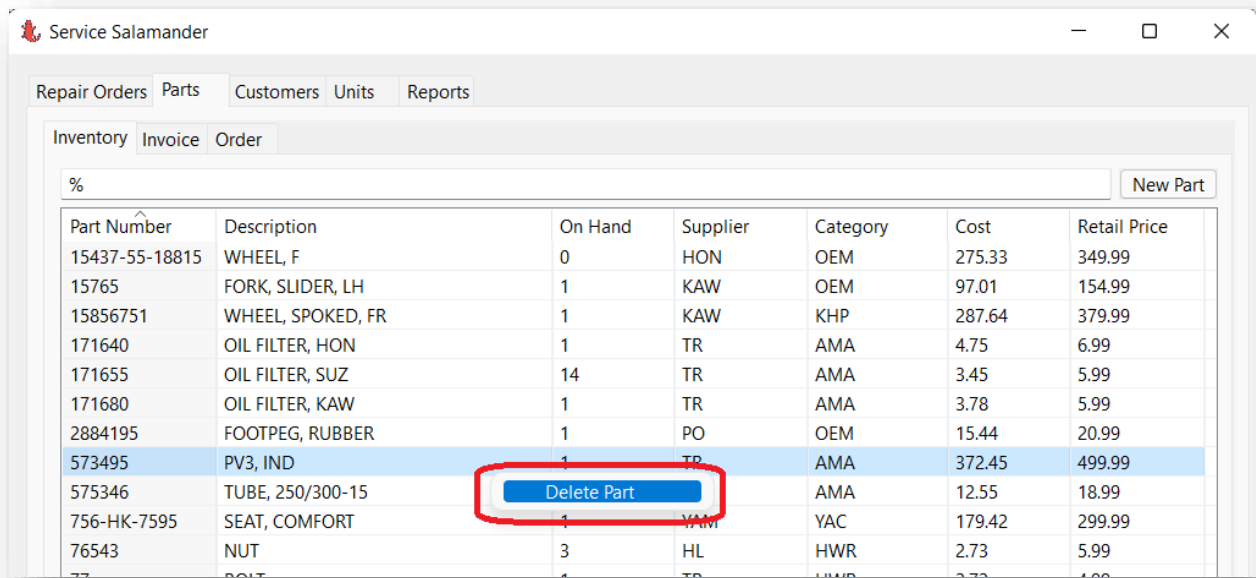
If the selected Part has been sold on an Invoice you will not be able to delete it.
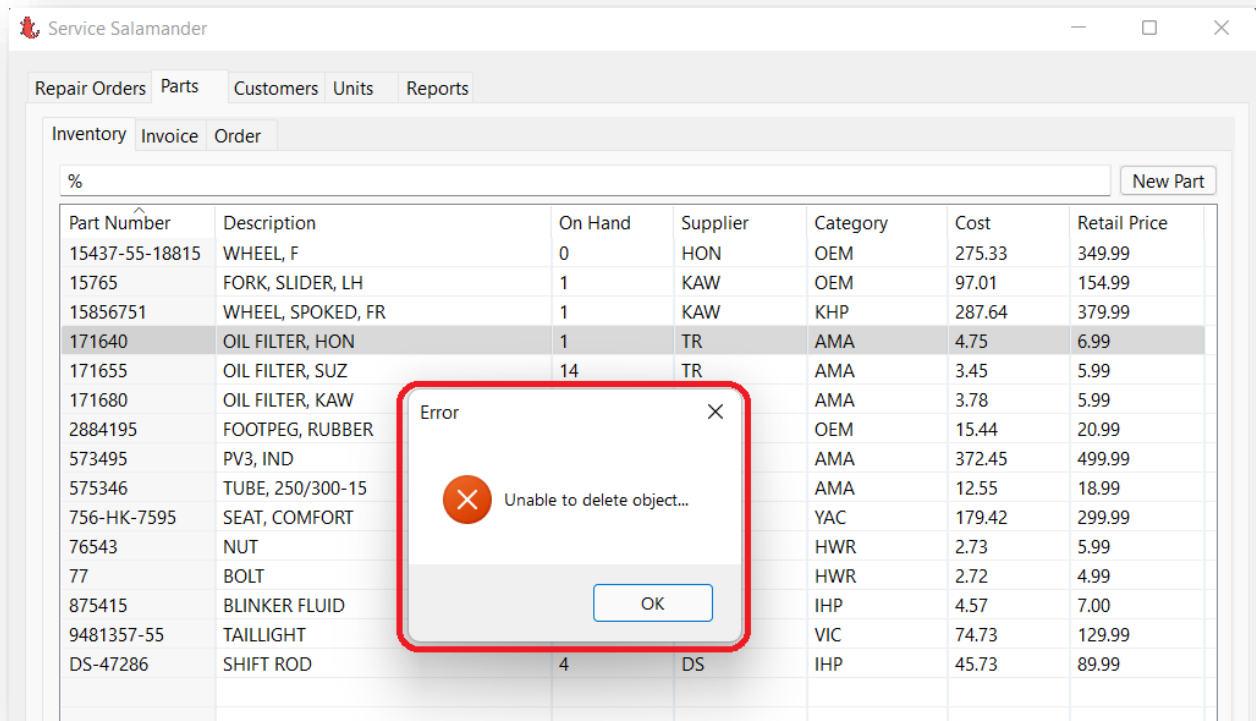
Invoice Tab

The Invoice tab allows you to sell parts to a Customer.

To add a Customer, double click on the Customer box. This will open a Customer Search dialog box.
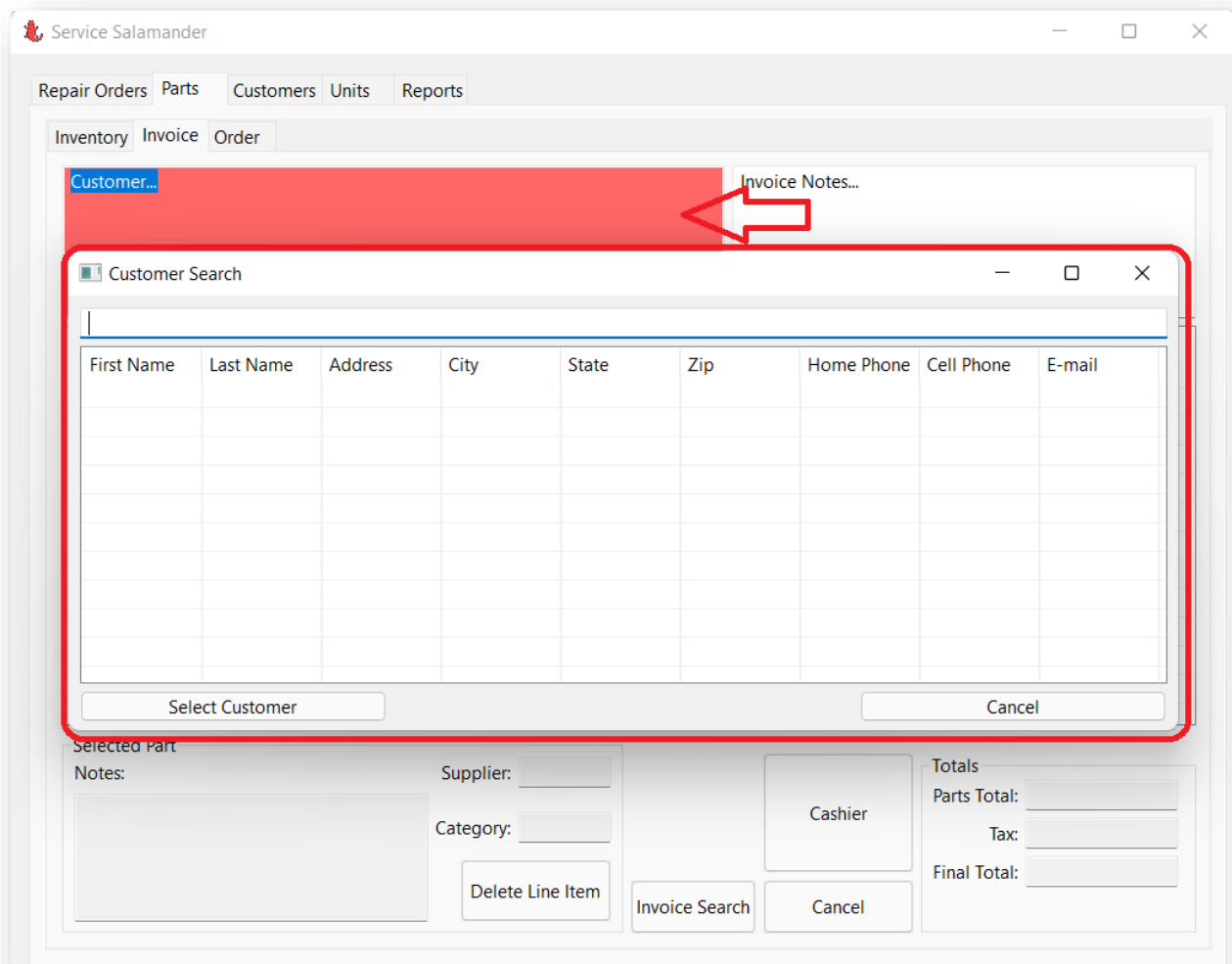
You can search by name, address, or phone number. When you have found the Customer you would like to sell Parts to, you can select their entry in the search results table and click the Select Customer button, or you can double click their entry in the search results table.

Once selected, the Customer's details will appear in the Invoice Customer box.

Click in the Part Number column to begin adding parts to the Invoice.

Part Number	Description	Quantity	On Har
171640			

If you enter a Part Number, the Part's details will be filled in.

Part Number	Description	Quantity	On Hand	Cost	Part Price	Extended Price
171640	OIL FILTER, HON	1	1	4.75	6.99	6.99

Additional details for the Part will appear in the Selected Part section.

Part Number	Description	Quantity	On Hand	Cost
171640	OIL FILTER, HON	1	1	4.75
171680	OIL FILTER, KAW	1	1	3.78

Selected Part

Notes:

Supplier: TR
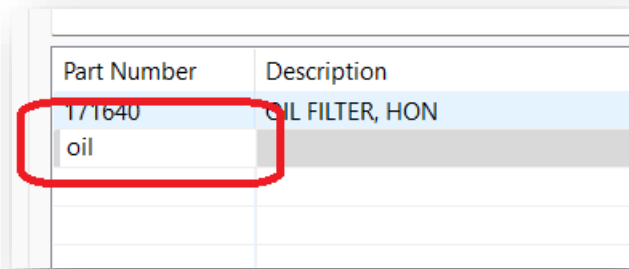
Category: AMA

Delete Line Item

Cashier

Invoice Search

Cancel
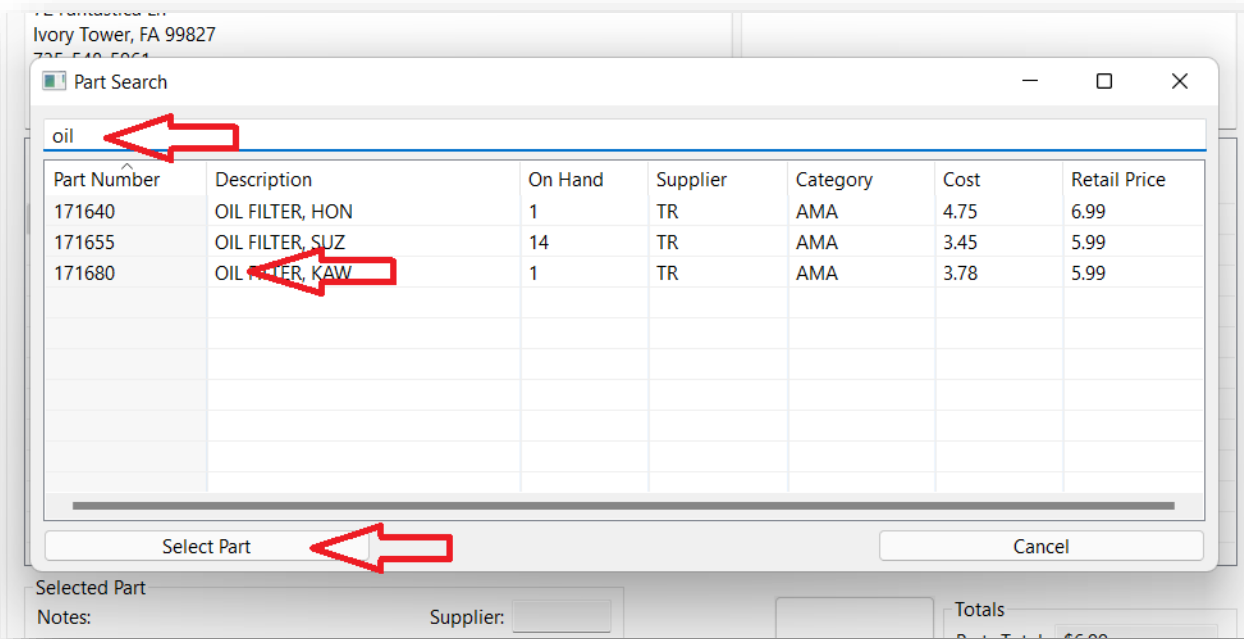
You can also search by part description, supplier, or category.

If your search has more than one result, the Part Search dialog will appear. You can refine the search by typing more into the Search text box. Once you've found the Part you want to sell, you can select its entry in the search results table and click the Select Part button, or you can double click its entry in the search results table.

To edit a Part already entered into the Invoice, double click the Part Number.

Part Number	Description	Quantity	On Hand
171640	OIL FILTER, HON	1	1
171680	OIL FILTER, KAW	1	1

The Part Search dialog will appear again, allowing you to select another Part.

To delete a Part from the Invoice select the Part in the Invoice's Part list, then click the Delete Line Item button.

Service Salamander

Repair Orders Parts Customers Units Reports

Inventory Invoice Order

Bux, Bastian
72 Fantastica Ln
Ivory Tower, FA 99827
735-548-5961

Invoice Notes...

Part Number	Description	Quantity	On Hand	Cost	Part Price	Extended Price
171640	OIL FILTER, HON	1	1	4.75	6.99	6.99
171680	OIL FILTER, KAW	1	1	3.78	5.99	5.99

Selected Part

Notes:

Supplier: TR

Category: AMA

Cashier

Delete Line Item

Invoice Search

Cancel

Totals

Parts Total: $12.98

Tax: $0.85

Final Total: $13.83

You can edit the quantity you are selling of each Part. Click in the Quantity column and type the new sell quantity.

If you enter a Sell Quantity greater than the On Hand inventory for that Part, Service Salamander will warn you of such, and set the Sell Quantity to the On Hand amount.

You can also change the individual Part Sell Price.

Part Number	Description	Quantity	On Hand	Cost	Part Price	Extended Price
171640	OIL FILTER, HON	1	1	4.75	6.99	6.99
171680	OIL FILTER, KAW	1	1	3.78	4.99	4.99
171655	OIL FILTER, SUZ	2	14	3.45	5.99	11.98

You can enter addition details about the Invoice in the Invoice Notes.

Invoice Notes...

uantity	On Hand	Cost	Part Price	Extended Price
	1	4.75	6.99	6.99
	1	3.78	5.99	5.99

Ship to customer

ty	On Hand	Cost	Part Price	Extended Price
	1	4.75	6.99	6.99
	1	3.78	5.99	5.99

When you have entered all the Parts you would like to sell to the Customer, you can review the total price, including tax, in the Totals section.

Click the Cashier button to take payment from the Customer.

Enter the total payment amount the Customer provides you, click the Cashier button, and return their change.

To clear the Invoice at any time, click the Cancel button.

To perform a simple Invoice Search, click the Invoice Search Button. This can show basic details of the Invoices you have cashiered.

You can search by Invoice Number, Customer Name. You can use the percent sign (%) as a wildcard, or to show all Invoices.

To return a Part, start an Invoice as normal, select the Customer and add the Part to be returned. Set its Sell Quantity to a negative number representing the quantity of the Part to be returned. The Invoice Totals will show a negative amount, indicating money is due back to the Customer. Click the Cashier button.

The Cashier Invoice dialog will appear with $0 already in the Amount Tendered text box. Click Cashier again to finalize the Invoice and return payment to the Customer.
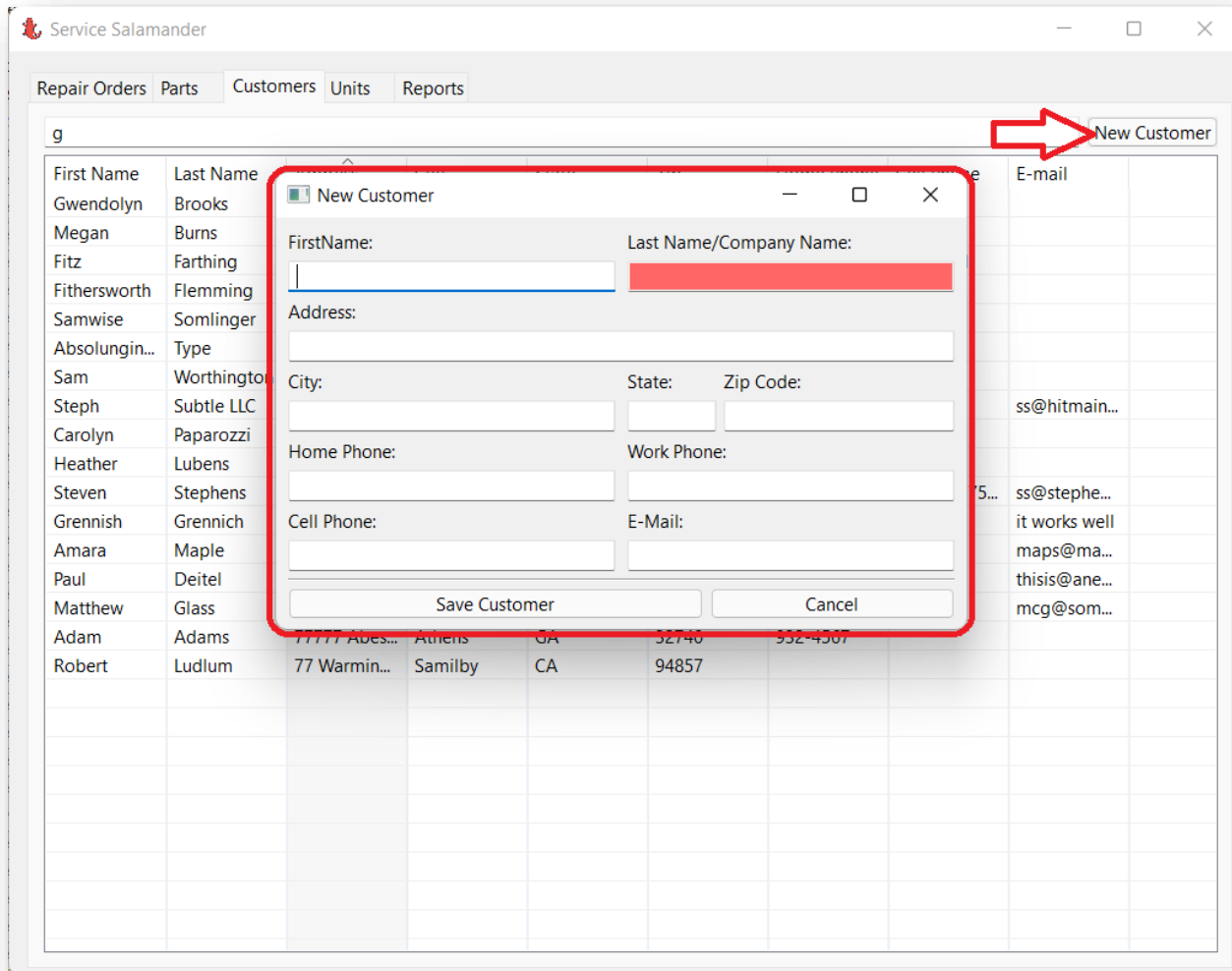
Customer Tab

The Customer Tab allows you to Search for a Customer, edit a Customer, or create a New Customer.

Enter text into the search box to find a customer. You can search by name, address, or phone number.

First Name	Last Name	Address	City	State	Zip	Home Phone	Cell Phone	E-mail
Adam	Adams	77777 Abes...	Athens	GA	32740	932-4567		
Gwendolyn	Brooks							
Megan	Burns							grrr@rrrarg...
Paul	Deitel	75 Newingt...	Springfield	PA	01101	876-5135		thisis@ane...
Fitz	Farthing							
Fithersworth	Flemming							
Matthew	Glass	75 N Salen...	Washington	D.C.	99999	123-456-78...	7	mcg@som...
Grennish	Grennich	38 Doodle ...						it works well
Heather	Lubens	243 Deling...	Cincinnati	OH	43851	531-516-75...		
Robert	Ludlum	77 Warmin...	Samilby	CA	94857			
Amara	Maple	576 Worthi...	Hamilton	SD				maps@ma...
Carolyn	Paparozzi	1600 Penns...	Washington	D.C.	20500			
Samwise	Somlinger							
Steven	Stephens	255 South ...	Adolay	OH	45030	763-1567	519-135-75...	ss@stephe...
Steph	Subtle	1234 Worsh...	Orlando	WA	98734	757-615-43...	98	ss@hitmain...
Absolungin...	Type							
Sam	Worthington							

You can click on any column header to sort the search results.

First Name	Last Name	Address	City	State	Zip	Home Phone	Cell Phone	E-mail
Gwendolyn	Brooks							
Megan	Burns							grrr@rrrarg...
Fitz	Farthing							
Fithersworth	Flemming							
Samwise	Somlinger							
Absolungin...	Type							
Sam	Worthington							
Steph	Subtle	1234 Worsh...	Orlando	WA	98734	757-615-43...	98	ss@hitmain...
Carolyn	Paparozzi	1600 Penns...	Washington	D.C.	20500			
Heather	Lubens	243 Deling...	Cincinnati	OH	43851	531-516-75...		
Steven	Stephens	255 South ...	Adolay	OH	45030	763-1567	519-135-75...	ss@stephe...
Grennish	Grennich	38 Doodle ...						it works well
Amara	Maple	576 Worthi...	Hamilton	SD				maps@ma...
Paul	Deitel	75 Newingt...	Springfield	PA	01101	876-5135		thisis@ane...
Matthew	Glass	75 N Salen...	Washington	D.C.	99999	123-456-78...	7	mcg@som...
Adam	Adams	77777 Abes...	Athens	GA	32740	932-4567		
Robert	Ludlum	77 Warmin...	Samilby	CA	94857			

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New Customer

To create a new Customer, click the New Customer button.

The Last Name/Company Name is a required field. You must type something into the Last Name/Company Name field to save a new Customer.

The phone number fields will only accept numbers. Dashes will automatically be added where required for 7-digit, 10-digit, or international phone numbers.

After filling out the new Customer details, click the Save Customer button to save the new Customer into the program.

You can double click on any customer in the Customer Search Results to edit the Customer's details.

To delete a Customer, right click on the Customer you want to delete in the search results table and click Delete Customer.
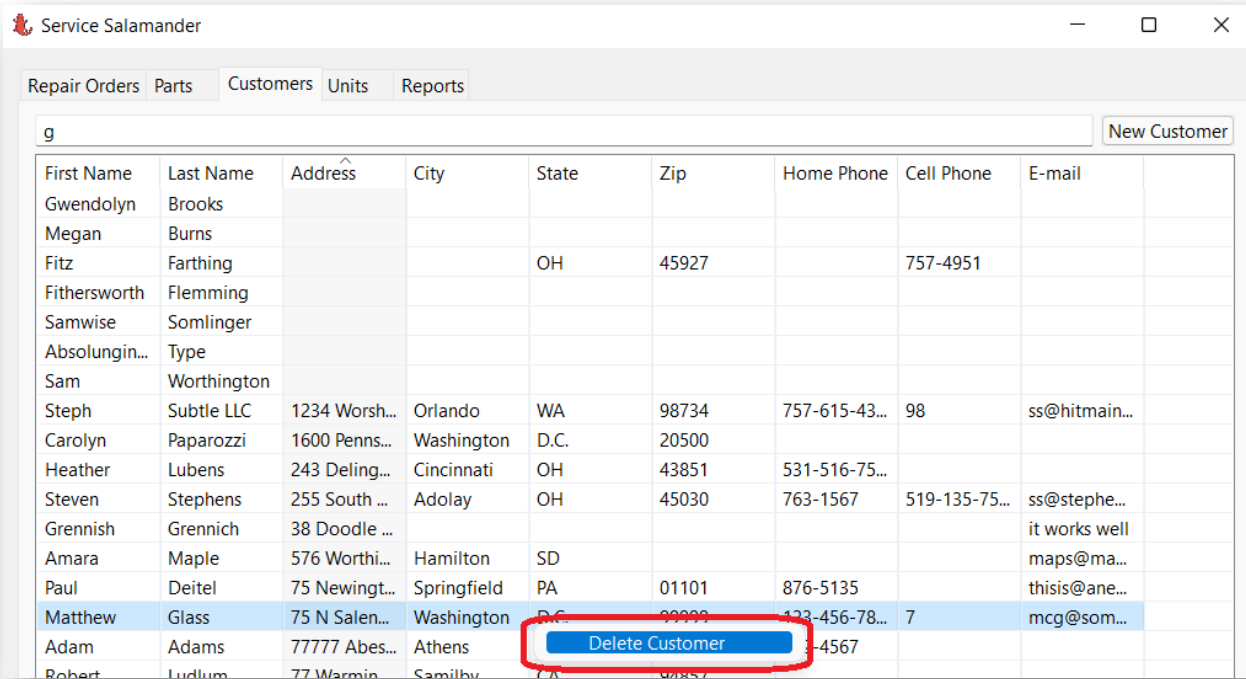
If the selected Customer has been used on an Invoice you will not be able to delete it.
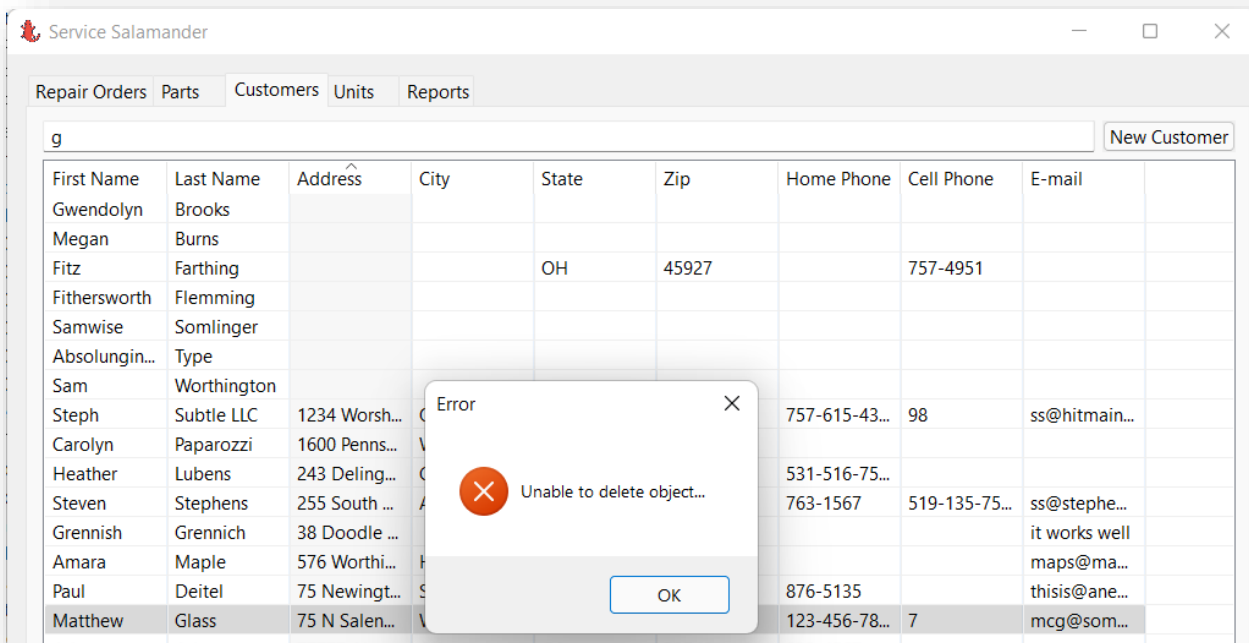
Units Tab

The Units Tab allows you to Search for a Units, edit a Units, or create a New Units.

Enter text into the search box to find a unit. You can search by owner name, VIN number, year, make, or model.

Owner	Make	Model	Model Name	Year	Mileage	Color	VIN
Burns, Megan	BMW	R1200GS		2016	48357	BLK	
Farnsworth, Newton	Honda	VFR750R		1987	17425		
Glass, Matthew	Kaw	KLT650	KLT	2011	17	Blk	56FFFFF
Glass, Matthew	Honda	RC116		1966	428		
Glass, Matthew	Honda	CBX1100	CBX	1978	11028	Silver	
Glass, Matthew	Rickman		Metisse 650	1971	760		
Hayes, Kelsey	Yamaha	YZF-R1	R1	1999	32951	Blue	
Neeson, Liam	KTM	Duke 890		2021	7002	Orange	
Olsen, Elizabeth	Indian	Pursuit			5468		12345678901234567
Simpson, Sampson	KAW		MEAN STREAK	2014	28028	GOLD/RED	
Subtle LLC, Steph	Triumph		Tiger		14728		

You can click on any column header to sort the search results.

Owner	Make	Model	Model Name	Year	Mileage	Color	VIN
Olsen, Elizabeth	Indian	Pursuit			5468		12345678901234567
Subtle LLC, Steph	Triumph		Tiger		14728		
Glass, Matthew	Honda	RC116		1966	428		
Glass, Matthew	Rickman		Metisse 650	1971	760		
Glass, Matthew	Honda	CBX1100	CBX	1978	11028	Silver	
Farnsworth, Newton	Honda	VFR750R		1987	17425		
Hayes, Kelsey	Yamaha	YZF-R1	R1	1999	32951	Blue	
Glass, Matthew	Kaw	KLT650	KLT	2011	17	Blk	56FFFFF
Simpson, Sampson	KAW		MEAN STREAK	2014	28028	GOLD/RED	
Burns, Megan	BMW	R1200GS		2016	48357	BLK	
Neeson, Liam	KTM	Duke 890		2021	7002	Orange	

To create a new Unit, click the New Unit button.

The Owner field and the Unit Make field are required.

To select a Unit's Owner double click in the Owner field. The Customer search box will appear.
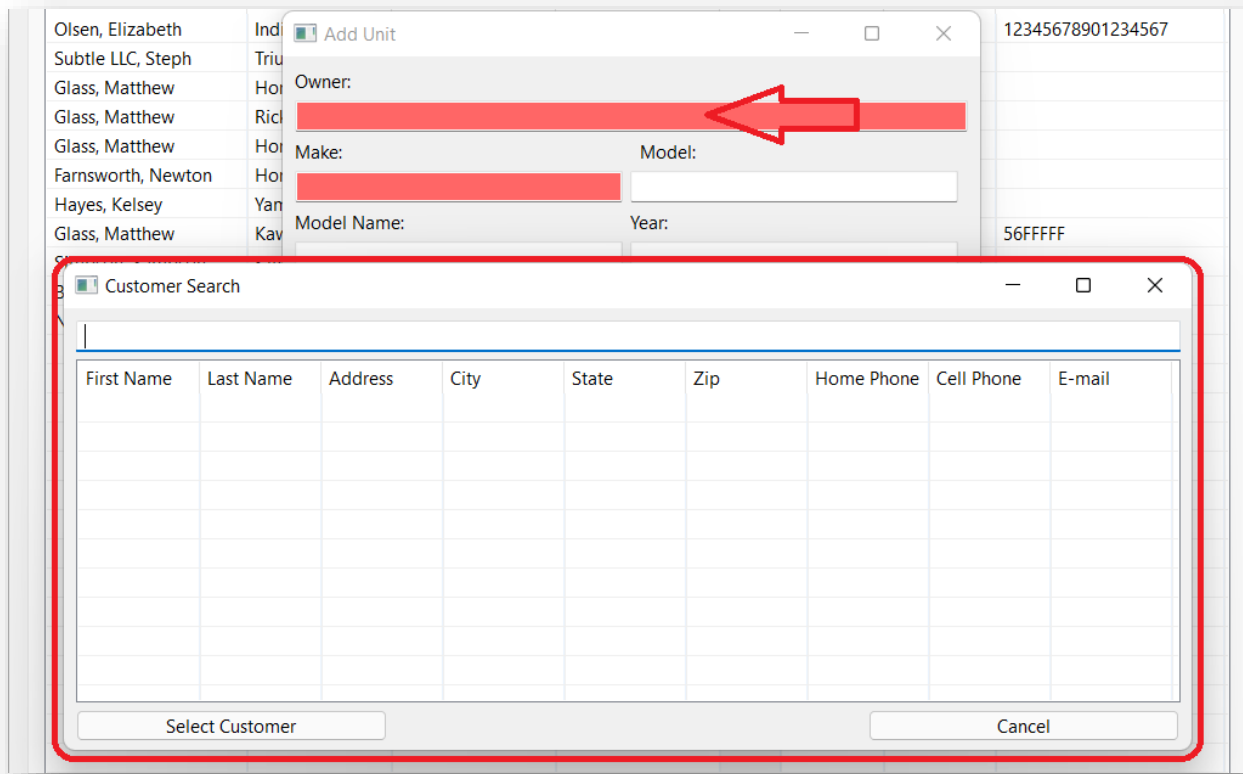
Type in a customer name in the Customer Search box to find the desired Customer. To select a Customer, double click the desired result, or click the desired result and then click Select Customer.
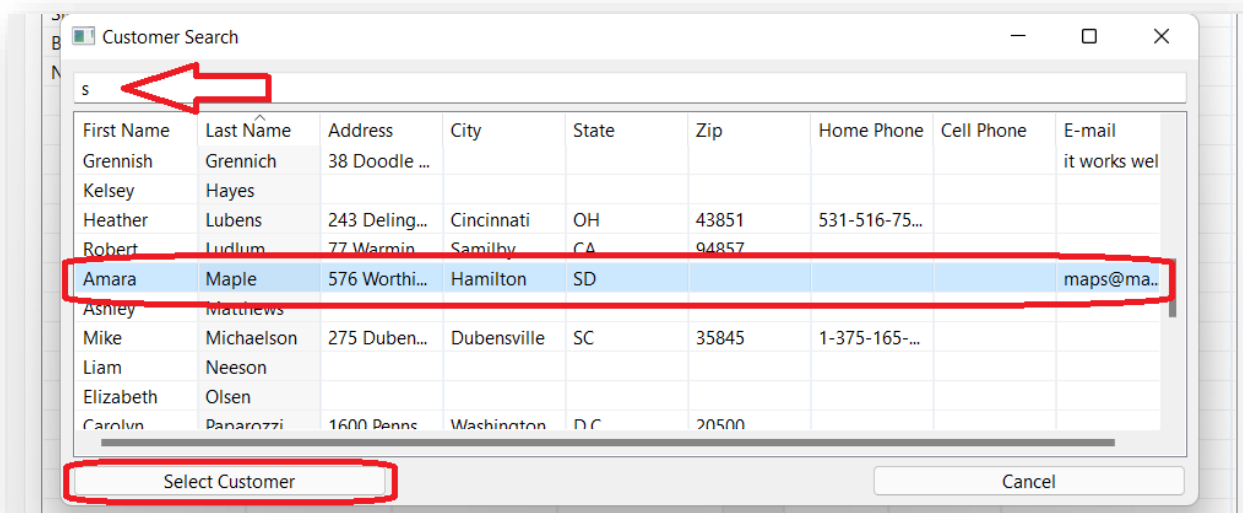
After filling out the new Unit details, click the Save Unit button to save the new Unit into the program.

You can double click on any unit in the Unit Search Results to edit the Unit's details.

To delete a Unit, right click on the Unit you want to delete in the search results table and click Delete Unit.