



VAST POINT OF SALE HOW TO: *SETUP & USE PACKAGES*

INTRODUCTION.....	2
DEFINITIONS	2
BUILDING A PACKAGE	3
I. PLAN YOUR PACKAGE ON PAPER.....	3
II. BUILDING THE PACKAGE.....	3
III. USING THE PACKAGE.....	9
PACKAGES WORKSHEET	10

**If you have any questions or need assistance with these instructions, please contact:
Vast Support at 1-800-803-9762.**

INTRODUCTION

This document will provide you with instructions how to setup and use the Packages feature in Vast. Packages are created to simplify the user placing parts on an estimate. A package usually has one set price with a list of parts or maybe just one part. They typically include bang parts or temporary parts that will be replaced with the correct part from the catalog when the package is built on the estimate.

DEFINITIONS

- **Bang Parts** – A bang part is any part number that has an exclamation point (!) in front of it. Bang parts are a type of a temporary part which are used to make things in VAST universal, so one package will work on every estimate, regardless of the vehicle. It looks at the Year, Make, Model of the customer's vehicle, and it then returns the correct part numbers from the corresponding catalog to fit that car.

For example: Lets say you have a 1996 Chevy Corsica, and you are doing an oil change, the bang part !OIL FILTER would go out to the Tune Up/Filter Catalog automatically, and return only the oil filter part numbers that would fit that car, so you can choose which part you want to use.

- **Package Part** – A package part is the part number that is named after the package, and holds the entire package together. Think about it this way - most of the time, a package is comprised of several parts and or labor services bundled together and sold at a set price, like an oil change. In this oil change, you would get oil, an oil filter, possibly an air filter, etc. If we physically tried to give all these individual parts to a customer, it would be difficult. But, if we were to put all of these items into a box, and hand the entire box to the customer it would be much easier. In this example, the box holds all the parts together and makes it a package. In VAST, the package part is the "box" which holds all the parts together and makes them into a package.

BUILDING A PACKAGE

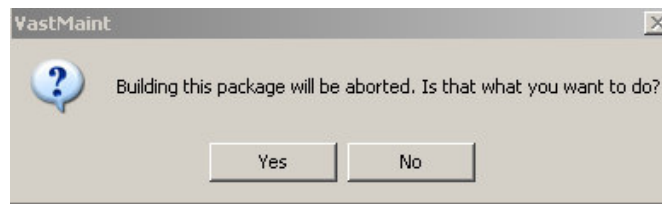
I. PLAN YOUR PACKAGE ON PAPER

When building a package, the first step is to decide what parts and/or services you may want to include. You will want to know what type of package (Brakes, Oil Change, etc), the part numbers you want to include in the package, and whether you want to assign a set price for the entire package, or use the individual part and labor totals. The package worksheet provided at the end of this document can help you in gathering the proper information and preparing to build your packages.

II. BUILDING THE PACKAGE

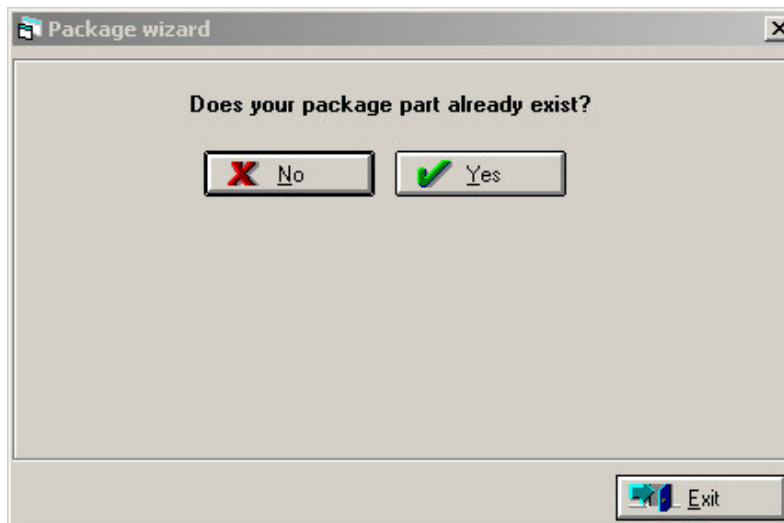
The Package Wizard will guide you step by step through creating your package. As you answer each question, you will automatically be moved to the next step. When the package is completed, you will be required to click finish.

****NOTE:** Clicking the **EXIT** button during this process will display the following message box:



If you click **YES**, all of your information will be lost and you will be required to start over. If you click **NO**, you will return to the screen you were on so you can continue with the process.

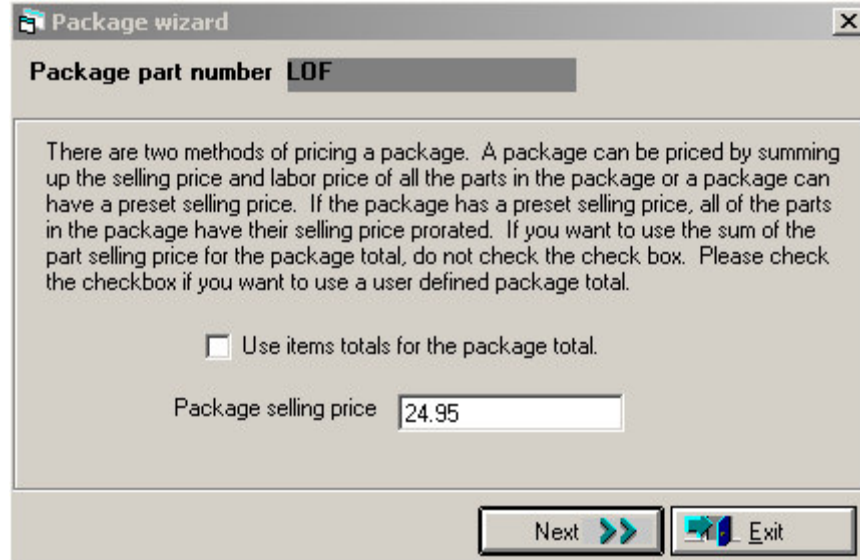
1. Open **VAST MAINTENANCE** and click on **PACKAGE PARTS**.
2. Click on **ADD**, and the **PACKAGE WIZARD** window will open, as pictured below.



3. Click **NO**. You will be taken to the **MASTER TABLE** automatically so you can create your **PACKAGE PART**. This is the part number that our package will be linked to, and also gives the package its name.
4. Enter the information for your part number. The guide below will give you a basic overview of the required fields you need to complete.

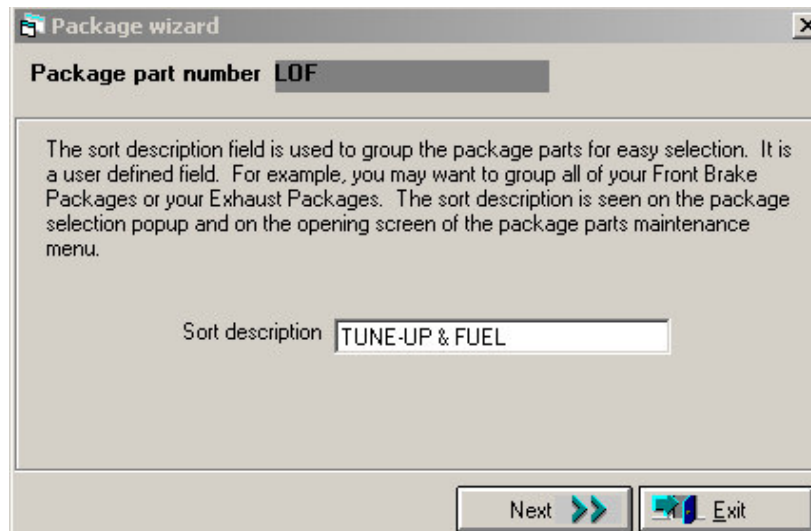
- a. **PART NUMBER:** Type the appropriate part number. **TAB** to the next field. **NOTE:** Please make sure to **ALWAYS USE CAPITOL LETTERS** in this window.
- b. **ACCOUNT CODE:** If you know which account code you want to use for this part, you can type it in the window. Otherwise, click the ellipsis button [...] and select the appropriate account code from the list provided.
- c. **ITEM DESCRIPTION:** Enter the package name (Ex. Lube Oil Filter Package)
- d. **BUYERS DESCRIPTION:** Enter the package name (same as above)
- e. **MFG CODE:** Enter **OTHER** or **ABDG**
- f. Make sure the check boxes are like shown below. You will need to be sure that **“PACKAGE PART”** is checked, and you will need to **UNCHECK “INVENTORYABLE”**.

5. Click **SAVE** to save your changes.
6. You will then be taken to the screen shown on the following page.



7. **PRICE:** You have 2 options when it comes to pricing your packages. You can either determine a pre-set amount to charge the customer for the entire package, or you can use the individual part and labor prices for all parts within the package.
 - If you are going to use a pre-set package amount, you can type that amount into the “Package Selling Price” field shown above.
 - If you are using the second option, where you will allow the parts to determine the price of the package (it will be different every time depending on which parts are used), put a check mark in the “**USE ITEMS TOTALS FOR THE PACKAGE TOTAL**” checkbox. Leave the “Package Selling Price” field blank.
8. Then click **NEXT**.

The next screen that appears is the **SORT DESCRIPTION SCREEN**, shown below. This screen will be pre-filled for you, based on the **SALES CLASS** that the **PACKAGE PART** was built under. If you would like to change this, click inside the box and enter the description you would like to use. Then click **NEXT**.



9. You will then be taken to the **PACKAGE TYPE** screen, as shown below. This is also pre-filled for you, based off of the **SALES CLASS** that the **PACKAGE PART** was built under. If you would like, you can change the sales class by **CLICKING** on the **DROP DOWN ARROW** and selecting a different **SALES CLASS**. When you are finished, click **NEXT**

Package wizard

Package part number **LOF**

The package type is defaulted to the class of the account code that was assigned to the package part itself. For example, if the package part is found in an account code that is part of the exhaust sales class, then the package type for the package will be exhaust. When you are satisfied with the package type, press "next"

TUNE-UP & FUEL

Next >> Exit

10. You will be taken to the **NOTES** screen, as shown below. This is a description of the package that the technician will see when opening the package window. You can also make this a package description, which will print on the customer's estimate and invoice. If you want these notes printed on the customer's estimate and invoice, put a checkmark in the "**PRINT NOTES WITH THE FIRST PACKAGE PART**" checkbox. If you do **NOT** want these notes to print, make sure that this box is unchecked - this will make the notes visible to the technician only. When you are finished, click **NEXT**.

Package wizard

Package part number **LOF**

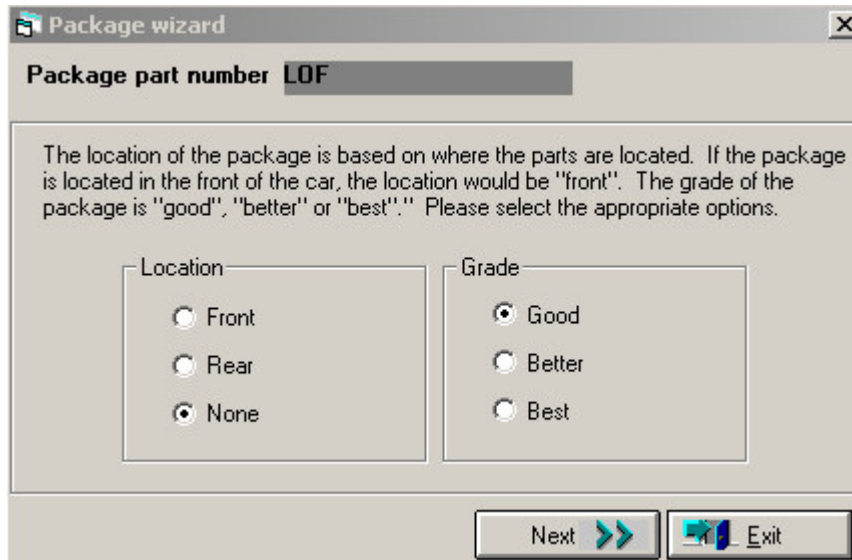
This is a user defined explanation of what is included in the package. It is used as a sales tool to inform the customer what is included in the package. This information is viewed when the user opens the packages window.

Notes

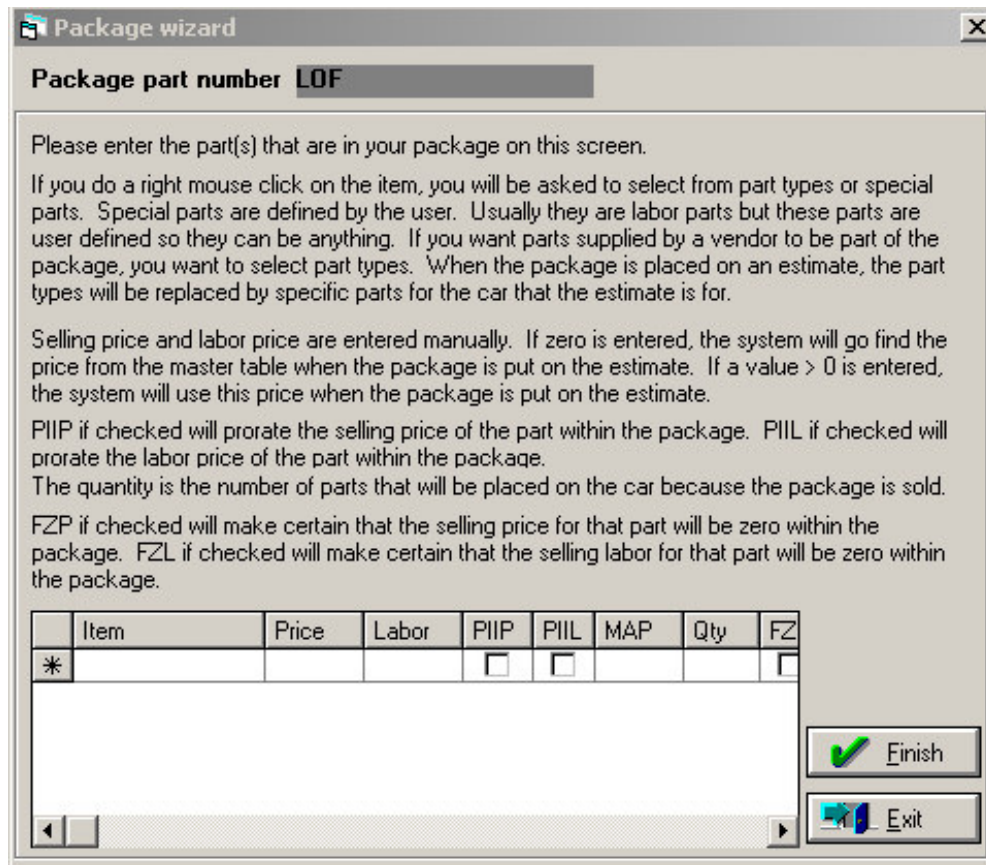
Print Notes with the first package part

Next >> Exit

11. You will be taken to the **LOCATION** screen, seen below. Click on the appropriate **RADIO** button for both “Location” and “Grade”. Then click **NEXT**.



12. You will then be taken to the **PACKAGE BUILDING SCREEN**, where you can enter all the parts that you want included in your package:



The **ITEM GRID**, in the lower portion of the screen (shown below) is where you enter all the parts that will make up your package. The following descriptions explain each field of the Item Grid in detail:

	Item	Price	Labor	PIIP	PIIL	MAP	LOC	Qty	FZP	FZL
*				<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>

- a) **ITEM:** The part number of a part you want to include in the package.
- b) **PRICE:** You can enter a specific part “sell price” if you wish. If you leave this blank, the price will be pulled from your **MASTER/ITEM TABLE**.
- c) **LABOR:** You can enter a specific part “labor price” if you wish. If you leave this blank, the price will be pulled from your **MASTER/ITEM TABLE**.
- d) **PIIP:** Put a checkmark in this box to prorate the part price across all parts in the package
- e) **PIIL:** Put a checkmark in this box to prorate the labor price across all parts in the package
- f) **MAP:** If you want to include a **RFR** (Reason for Replacement code) for the part, select it here. This will put the selected **RFR** code in for the part every time that this package is built.
- g) **LOC:** You can pre-assign the location if needed. The location will pre-fill each time the package is built. Enter the desired location. EX. F for Front, B for BACK.
- h) **QTY:** Enter the quantity of this part number you want to use for your package. You must enter something in this field. (EX. For a Lube Oil Filter package, your oil filter part number would be entered with a quantity of “1”, however your oil part might be entered with a quantity of “4” for 4 quarts.)
- i) **PZP and PZL:** If you only wish to see the package price, and not each individual part and labor price displayed next to each part number you will use these check boxes.
 - **PZP** – will zero out the part price.
 - **PZL** – will zero out the labor price.

You can use these check boxes, to manipulate where and how your pricing will appear.

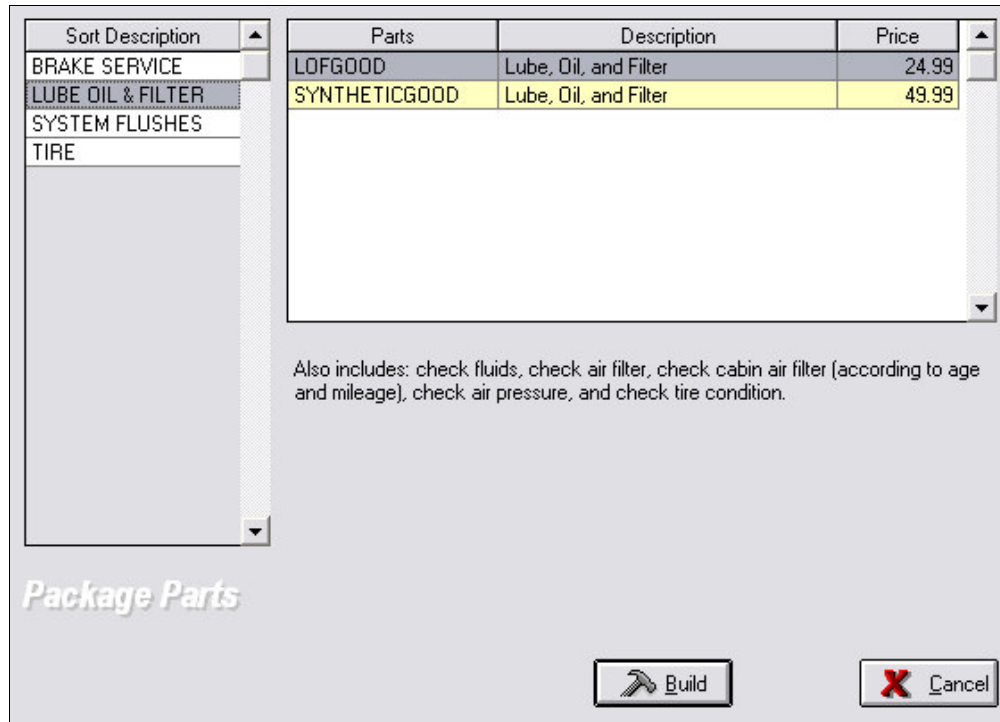
13. Repeat the above steps until all the parts that you wish to include are entered. If you want to use **BANG PARTS** to make your package universal, and you don’t know what the correct **BANG PART** is, you can search for it. To do this:
 - a. Click in the **ITEM** field. When you see the little gray button with the 3 dots, click on it. You will see **SEARCH BY SPECIAL PART** or **SEARCH BY PART TYPE**.
 - b. To find the **BANG PARTS**, select **SEARCH BY PART TYPE**. This will give you a list of part types.
 - c. Click on the + symbol next to the part type you want and all the available bang parts will be listed. Select the one that you want to use. This will put the **BANG PART** on the item grid for you, and you can continue with the above steps from there.

14. When you are finished adding all the items to your package, click **FINISH** to save it. This will take you back to the Package Parts window, and you have completed building your package. Click **DONE** to leave the screen.

III. USING THE PACKAGE

You can now use your new package in the VAST Point of Sale application. To do this, please follow the steps below.

1. Open the **VAST POINT OF SALE** application and either create a new estimate, or select an existing estimate and go to the lineitem screen.
2. Click on the **PACKAGE** button near the bottom of the screen. You will see a screen similar to the one below, which lists all of your packages grouped by sort description.



3. Click on a sort description. The associated packages will appear inside the window on the right.
4. Select the package you want to use from list on the right, and then click **BUILD**. You will be taken back to the lineitem screen, where you will see the package parts being built on your estimate automatically.
5. You can then complete the estimate as you normally would.

