



QUICK REFERENCE GUIDE BURSON EZYPARTS INTEGRATION

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USING BURSON EZYPARTS WITH MARLIN GTX



Introduction

Parts and pricing information can be transferred directly from Burson EzyParts to a Marlin GTX work order or invoice, significantly reducing key strokes, data time and errors. This is available from inside and outside the Planner.

The process can be initiated from either the EzyParts side or the Marlin GTX side:

- Starting in Marlin GTX may be preferable when you already have the vehicle details in Tracker as this will automatically select the correct vehicle in EzyParts.
- Starting in EzyParts may be preferable when dealing with enquiries that may or may not lead to a booking.

METHOD 1 - Starting in EzyParts

Step 1 - Create a quote in EzyParts

If EzyParts does not automatically start each time you login to your PC, there will be an **EzyParts** icon on the desktop to start it.

1. In the top section, select your preferred **Search** type then select the vehicle...

The screenshot shows the EzyParts software interface. At the top, there are menu options: Options, Feedback (F1), Save Rego (F2), Help (F3), Adv (F10), VIN (F11), Rego (F12), and Vehicle Filters. On the right, there are three search buttons: Standard Search (highlighted in green), Flexi Search, and Advanced Search. The main area is titled 'SELECT YOUR VEHICLE HERE' and is divided into several columns: MAKE, MODEL, YEAR, SERIES, CHASSIS, ENGINE, and DETAILS. The MAKE column lists various car brands, with HOLDEN selected. The MODEL column lists Holden models, with COMMODORE selected. The YEAR column shows a list of years from 2013 down to 1999, with 1999 selected. The SERIES column shows VS and VT, with VT selected. The CHASSIS column is empty. The ENGINE column lists engine specifications for the selected vehicle. The DETAILS column shows the vehicle's registration details, including the date range 09/1997-10/00, the model name BERLINA, and the body style 4D Sedan AT/MT RWD.

2. In the bottom section, select **Logbook Service** or **Parts Type ...**

3. If prompted, select the **Vehicle Model Variant ...**

Select Model Variant	Holden Berlina (VT) 3.8 Ltr P LN3 (VIN 9 = H) 1997 ~ 1999	147 (197) 5200 (VT)
	Holden Berlina (VT II) 3.8 Ltr P LN3 (VIN 9 = H) 1999 ~ 2000	147 (197) 5200 (VT II)

4. Select **Price All (F9)** to display pricing and order buttons, then enter the **quantity** and click on the **Order** button for each part required. When all parts have been selected, select the **Shop Cart** button...

Part Number	Brand	PCQ	Notes	DAN	NEAR	DC	Retail	Nett Excl	Change
Engine Oil									
Click + to see items, this is a master part									
Click + to see items, this is a master part									
2421001			1 Litre	2	8	0	\$ 12.75	\$ 10.13	1
2421005			5 Litre	10	31	283	\$ 38.35	\$ 31.50	1
2421020			20 Litre	Contact Store	3	22	\$ 129.35	\$ 99.00	1
2421205			205 Litre	Contact Store	0	0	\$ 1185.00	\$ 825.00	1
Click + to see items, this is a master part									
Click + to see items, this is a master part									
Oil Filter									
Z154	Ryco			64	49	3689	\$ 7.15	\$ 4.28	1
WZ154	Wesfil			43	109	0	\$ 7.25	\$ 2.97	1
Primary Service Time									
48 Min			0.8						

- Select **Quote**, enter **Customer Name**, adjust or delete items as required then select **Send to Marlin...**

Account: Nett Excludes GST

ORDER | **QUOTE**

Quote No: ITEMS IN THIS QUOTE

Part Number	Description	Qty	Retail Each	Retail Total	Nett Each	Nett Total	
2421005	CFX 10W-30 5 LITRE	1	38.35	38.35	31.50	31.50	Delete
Z154	OIL FILTER	1	7.15	7.15	4.28	4.28	Delete

Quote Parts Pricing Settings: Use List Price Use Markup 50% Recalculate

Discount 0% Subtotal 35.78
 GST 3.58
Quote Total 45.50 Nett Total 39.36
 GP 5.58
 GP % 13%

SAVE QUOTE NOW (F7) | SAVE & PRINT QUOTE (F8) | NEW QUOTE (F9) | PART SEARCH | CUSTOM ITEMS | **SEND TO MARLIN** | Hide / Show Nett

- Select OK to the prompt ...

EzyParts

You do not have a current request:
 Click OK to create one now
 Click Cancel to return

OK Cancel

Step 2 - Import the EzyParts quote into Marlin GTX

- In Marlin GTX, open a new work order or invoice.
- Select the customer and add/select the AutoTracker details.
- Select the salesperson.
- From the Import External Data icon, select **EzyParts Quotes...**

Line Details

Product Description

PRODUCT

Service Jobs Shift+F8
EzyParts Quotes

- Select the relevant quote and select **Import...**

EzyParts Pending Quotes

Request No	Date Served	Customer	Vehicle	Rego	Lines	Units	Total
241	16/10/2013 14:45	Dan Jacobs	HOLDEN BERLINA		2	2	45.50

New Request Import Cancel

- The items from the EzyParts quote will be added to the work order or invoice. Any items not found in your stock file will be shown as **ZNOMATCH** (or similar per your system setup) and you will need to manually select an appropriate product code.

Line Details				
Product	Description	Quantity	(Inc) Sell	Amount
ZNOMATCH	2421005 CFX 10W-30 5 LITRE	1	38.35	38.35
Z154	FILTER-OIL SPIN ON	1	7.15	7.15
PRODUCT		0	0.00	0.00

- Add any other products or changes as normal then **Save** the work order or invoice.

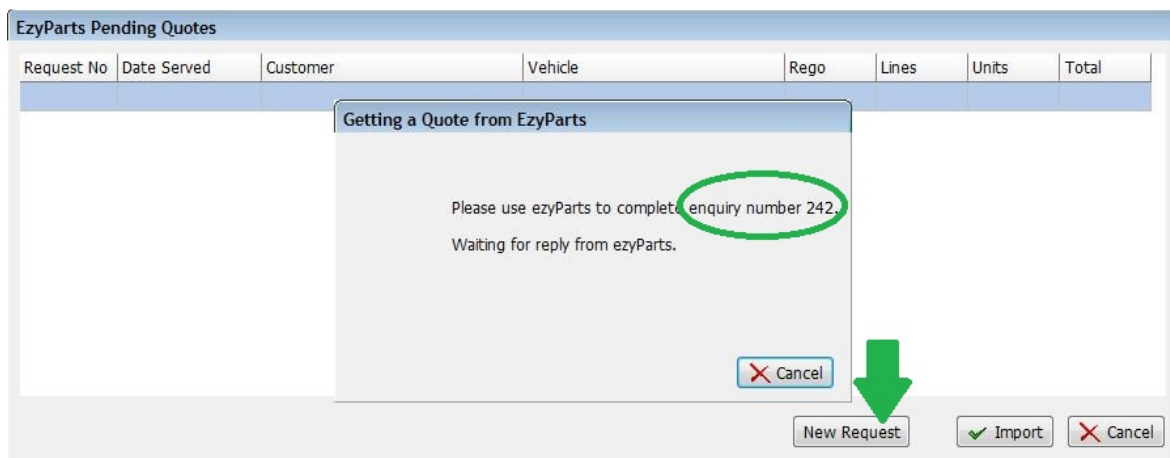
METHOD 2 - Starting in Marlin GTX

Step 1 – Open Work Order or Invoice

- Open a work order or invoice and select the Customer and Salesperson.
- Add/select the AutoTracker details (be sure to enter as much detail as possible on the Vehicle tab to help EzyParts select the right vehicle for you).
- From the Import External Data icon, select **EzyParts Quotes...**



- Select **New Request** and take note of the **enquiry number...**



Step 2 - Create a quote in EzyParts

- Open your EzyParts screen and click on **View...**



- If there are multiple requests, select the appropriate one from the drop down list ...

Details recieved from Marlin
Request Reference: 240

Registration: ABC123
Vehicle Make: HOLDEN
Model: STATESMAN
Sub Model:
Year:
VIN:
Chassis:
Engine No:
Body Style:
CC Rating:
Country of Origin:
Fuel:
Transmission:
Used Import:
Vehicle ID:

There are multiple Requests

Select Correct Vehicle here

Search 240 : HOLDEN STATESMAN
242 : HOLDEN COMMODORE

2 Requests View H/S Shop Cart

- Select **Search Parts**
- Follow the same procedure as detailed in '**Step 1 - Create a quote in EzyParts**' in METHOD 1 except:
 - Step 1 (select the vehicle) will already be done if there was sufficient information in AutoTracker or your Planner.
 - Step 6 (select OK to the prompt) will not appear

Step 3 – Complete the Work Order or Invoice

Upon returning to your work order or invoice you will see that the items from EzyParts have already been added automatically. There is no need to manually select and import the quote.

- Any items not found in your stock file will be shown as **ZNOMATCH** (or similar per your system setup) and you will need to manually select an appropriate product code.

Line Details			
Product	Description	Quantity	(Inc) Sell Amount
ZNOMATCH	2421005 CFX 10W-30 5 LITRE	1	38.35 38.35
Z154	FILTER-OIL SPIN ON	1	7.15 7.15
PRODUCT		0	0.00 0.00

- Add any other products or changes as normal then **Save** the work order or invoice.

Please visit eLearning.megabus.com.au for step by step guidance on how to use Marlin GTX and Marlin HR.