



**DISTRIBUTION
EXCELLENCE**



Ordering parts

DEALER OPERATIONS GUIDE

STANDARD OPERATING PROCEDURES | ORDERING PARTS

Contents

Parts Ordering Step by Step guide.....	2
Objective	2
Who is involved?.....	2
What do you need?.....	2
What do you do?	2
Step 1	3
Step 2	3
Step 3	3
Step 4	4
Step 5	5
Step 6	6
Step 7	7
Summary of Key Points	8

Parts Ordering Step by Step guide

Objective

A successful JCB dealer will have processes in place to ensure high levels of parts availability whilst minimising obsolete stock. This guide provides comprehensive details on how to place parts orders through the JCB Dealer Portal. As well as providing guidance on types of orders i.e. Stock, Intermediate, and VOR and the timeline expectations for each order type. Prior to placing a parts order it is imperative that the correct approvals have been sought by referring to the Financial Controls SOP. This guide will also outline surcharge fees associated with each order type, to include maximum surcharge fees and minimum order values.

For a best practice guide, covering everything from stock levels, obsolete stock provision to key performance indicators please refer to the JCB Dealer Parts & Attachments Policy which can be found on the JCB Dealer Portal / Dealer Excellence / Parts Management Policy <https://dealerlanding.jcb.com/>

Also attached below:

[JCB Dealer Parts & Attachments Policy](#)

Who is involved?

Parts Manager
Dealer Parts Representative
Financial Controller

What do you need?

- JCB Dealer Portal Access, with parts ordering authorizations
- JCB Parts Policy Manual Current Techweb Bulletin 5512
- Dealer generated Purchase Order number
- Refer to the Financial Controls SOP for guidelines regarding approvals and customer credit limits

What do you do?

Before placing a parts order via the JCB Dealer Portal please ensure that the correct approvals have been sought by referring to the Financial Controls SOP. Clear guidelines for establishing customer credit and credit limits can also be found in the Financial Controls SOP.

Once approvals have been sought you are ready to place your parts order by following the below guidelines:

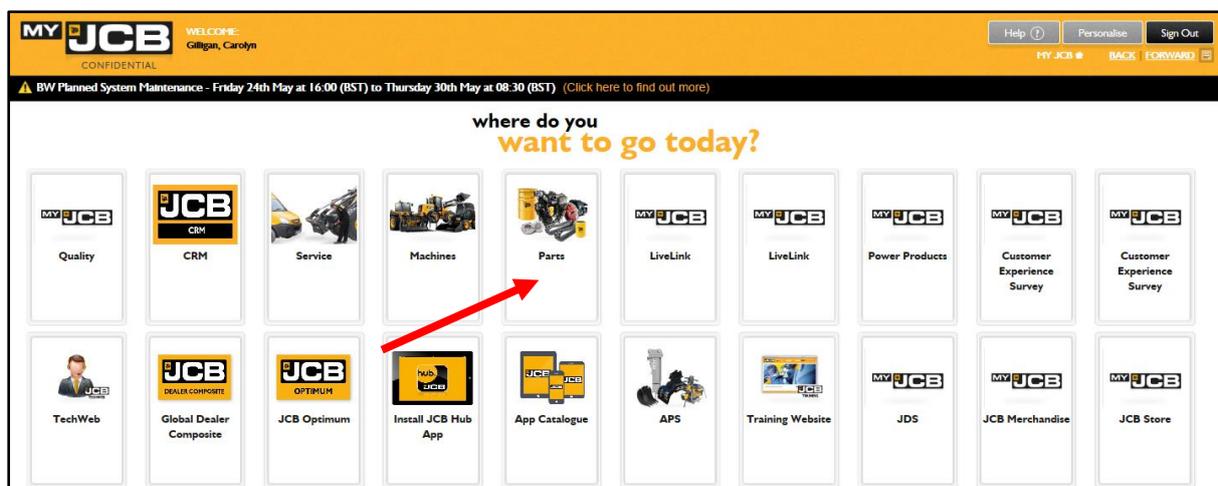
Step 1

Login to the JCB Dealer Portal with your paid JCB user account that has parts ordering authorizations (if you are unsure of your current account authorizations, contact your local DSM for assistance).



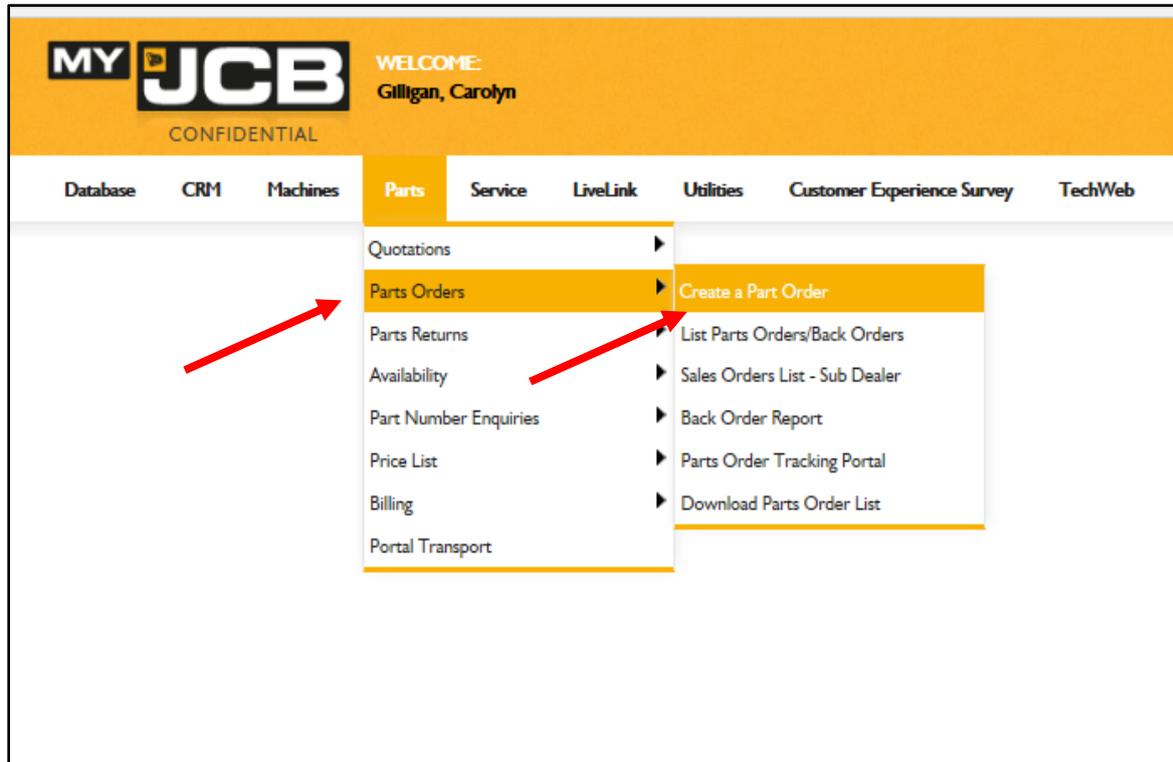
Step 2

Once you've gained access to the JCB Dealer Portal, you will be on the home screen. You will need to select the parts icon.



Step 3

You will now need to hover over the word “Parts” in the top directory, then a drop menu will come up. You will then select “Parts Orders” at which point a side menu will appear. Select “Create a Parts Order”.



Step 4

Populate Dealer information: Ensure that you select the correct SAP account if there are multiple accounts to choose from. You will also want to confirm the “ship to” address in the create order section. You will now need to determine the order type;

- **ZAST – Stock Parts Order**
Stock orders are normally processed by JCB within a maximum of 2 working days from the date the order was received and is expected to ship on the third day, subject to parts being available. (\$100.00 order minimum is required). Orders are shipped via Ground Service. No surcharge applies to this order type.
- **ZAIT – Intermediate Parts Order***
ZAIT orders received before 7:00 PM, dealer’s local time (excluding Alaska & Hawaii - 4:00 pm PST for Fontana), will be dispatched the following working day provided parts are available. This order type can be drop shipped (drop shipping will have an additional \$7 fee applied). Orders are shipped via Ground Service.

- **ZAVR – Critical Parts Order****

ZAVR orders received before 5:00 pm, dealer’s local time (excluding Alaska & Hawaii - 4:00 pm PST for Fontana), will be dispatched the same day provided parts and a means of shipment are available. Orders received after these times will be dispatched the next business day (overnight shipping is based on the part not exceeding 150 pounds, exceeding carrier dimension requirements, or being hazardous material). This order type can be drop shipped (drop shipping will have an additional \$7 fee applied). Order shipping type can be selected from a drop down menu that will populate if VOR order type is selected. (Overnight shipping by 10:30 am is the default, any other choice would cause the dealer to be responsible for shipping costs. i.e. first overnight by 8:00 am or Saturday delivery)

*Plus 10% for ZAIT (\$300 max per line item)

**Plus 20% for ZAVR (\$300 max per line item)

The screenshot shows a 'Create Order' form with the following fields and annotations:

- Dealer name ***: A dropdown menu with the text 'Select an option'. A red arrow points to it with the label **Select "Dealer Name"**.
- Ship-to address ***: A dropdown menu with a downward arrow. A red arrow points to it with the label **Enter "Ship to Address"**.
- Convert a Quotation to an Order**: A checkbox and a 'View Quotes' button.
- Order Type ***: A dropdown menu with the text 'Select an option'. A red arrow points to it with the label **Enter "Order Type"**.
- Purchase Order No ***: A text input field. A red arrow points to it with the label **Enter "PO#"**.
- Purchase Order Date**: A date field containing '22/05/2019'.

Below the main form is a section titled **Ship-to address** with the following fields:

- Ship to Name ***: Text input field.
- Address ***: Two stacked text input fields.
- City ***: Text input field.
- Country or Region**: Text input field.
- Post Code ***: Text input field.
- Country**: Text input field.
- Total order value**: Text input field.

Step 5

If you are intending to drop ship the part, you will need to select the “one time address” block in the ship-to-address section of the order. You will then be able to put the customers address in the address section. (There is a \$7.00 surcharge for each drop ship order and is only available on ZAIT and ZAVR orders)

Ship-to address

Ship to Name *

Address *

City *

County or Region

Post Code *

Country

One Time Address

Total order value

Step 6

Input part info: You can manually input individual parts, or you can upload a CSV (comma delimited) file that will auto populate parts to your order see Bulletin MII 305 for CSV format instructions.

Order Items

Add New Items
Upload items from CSV file

Delete item

Part number	Description	Order Qty	List Price	Curr	Net Price	Net Value	Warehouse	Message	Reference	Warnings	Quote	Quote Item	Sale Identifier	New-Gen Confirm
No data available in table														

Showing 0 to 0 of 0 entries

Select "Add New Items"

Input "Part No & Order Qty"

Add New Items

Part No *

Order Qty *

Reference

Cancel
Update & Close
Update & Add Another

Step 7

Receive and record order confirmation/JCB Reference number.

Review Order

Dealer 4003714 SCOT JCB LTD - EDINBURGH EDINBURGH EH11 4DT

Ship-to address SCOT JCB LTD - EDINBURGH
94 BANKHEAD CROSSWAY NORTH
EDINBURGH, EH11 4DT
United Kingdom

Order Type ZAVR VOR Parts Order

Method of Dispatch AG, HOME

Purchase Order No test order Purchase Order Date 12/07/2019

Total order value GBP 81.48

Order Items:

Part number	Description	Order Qty	List Price	Curr	Net Price	Net Value	Wareho use	Message	Reference	Warnings	Quote	Quote Item	Sale Identifier	New-Gen Confirm
G65/0	BUSH - BUC012345678901234567890123456789	24	15.00	GBP	3.40	81.48	J.C.B. Service (WPC)	Item in stock	test order	Material G65/0 rounded to 24 EA			R ▼	

< Back
Submit Order >

Order submitted and confirmed

created successfully JCB Reference 31254

Dealer 4003714 SCOT JCB LTD - EDINBURGH EDINBURGH EH11 4DT

Ship-to address SCOT JCB LTD - EDINBURGH
94 BANKHEAD CROSSWAY NORTH
EDINBURGH, EH11 4DT
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Summary of Key Points

1. Ensure that you have:
 - a. JCB Dealer Portal Access, with parts ordering authorizations
 - b. JCB Parts policy Manual Current Techweb Bulletin 5512
 - c. Dealer generated Purchase Order number
2. Before placing a parts order via the JCB Dealer Portal ensure that the correct approvals have been sought by referring to the Financial Controls SOP
3. For guidelines regarding customer credit and credit limit also refer to the Financials Control SOP
4. Follow steps 1-7 to place a parts order via the JCB Dealer Portal.

For further assistance regarding the parts ordering process please contact your local Regional Service Manager.

For a more detailed guide covering everything from stock levels, obsolete stock provision to key performance indicators please refer to the JCB Dealer Parts & Attachments Policy which can be found on the JCB Dealer Portal / Dealer Excellence / Parts Management Policy <https://dealerlanding.jcb.com/>