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# How can we help?

parts

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## Parts Overview

🕒 **May 11, 2022** · Knowledge

**PERMISSIONS:** Use [Record Sets \(/s/article/Record-Sets\)](#) to control the Part Locations where a user can adjust inventory.

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Effective parts management is key to running an efficient fleet!

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Fleetio makes it easy to keep track of parts data, including part **Manufacturer**, **Vendor**, and **Location**. You can also track and report parts usage using [Work Orders \(/s/article/Work-Order-Overview\)](/s/article/Work-Order-Overview).

**TIP:** Learn more in the [Parts & Inventory Training Video \(/s/article/Parts-And-Inventory-Training-Video\)](/s/article/Parts-And-Inventory-Training-Video).

## Parts Settings

Fleetio allows you to customize various fields related to parts management.

**TIP:** Learn more in the [Parts Settings \(/s/article/Parts-Settings\)](/s/article/Parts-Settings) article

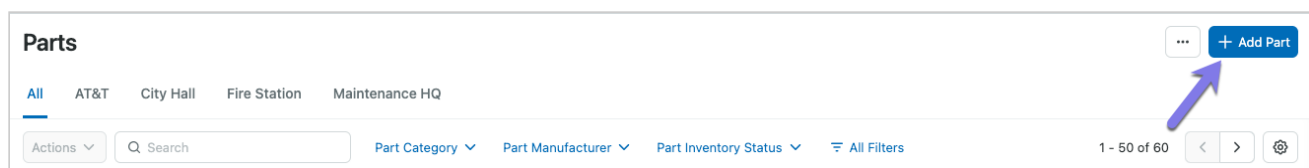
## Add Parts

This section covers adding an individual part to Fleetio.

**TIP:** Want to add parts in bulk? Check out the [Parts Import \(/s/article/Parts-Import-Guide\)](/s/article/Parts-Import-Guide) article to create multiple part records, and the [Parts Inventory Import \(/s/article/Parts-Inventory-Import-Guide\)](/s/article/Parts-Inventory-Import-Guide) article to set part quantities and location details!

**NOTE:** If you are using FIFO or LIFO, reference [Switching to an Advanced Inventory Valuation Method: FIFO or LIFO \(/s/article/Switching-to-an-Advanced-Inventory-Valuation-Method-FIFO-LIFO\)](/s/article/Switching-to-an-Advanced-Inventory-Valuation-Method-FIFO-or-LIFO) to utilize inventory sets for parts.

Select the **Parts List** from the **Parts & Inventory** section of the sidebar menu, then click the **+ Add Part** button.



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## Part Details

The **Details** section includes information that may be displayed in various program screens and reports in Fleetio, so we suggest filling in as much information as possible. These fields can also be helpful when searching for a specific part.

The **Part Number** needs to be a unique number for each part and is the only required field.

This section is also where you can add photos and documents, such as a manual or a label photo.

### Details

Part Number \*

Internal part identifier. Must be unique per part.

Description

Photo

Document

Category

Manufacturer

Manufacturer Part #

UPC

Manufacturer specific part number that can differentiate the part from an internal part number.

Unit Cost

Measurement Unit

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## Locations & Inventory

The **Locations** section lists the locations you have created in [Parts Settings](https://help.fleetio.com/hc/s/article/Parts-Overview#settings) (<https://help.fleetio.com/hc/s/article/Parts-Overview#settings>). Select the checkboxes to make parts **Active** for the location and enable inventory tracking. Locations and Inventory Tracking can also be enabled/disabled and edited from the **Part Overview** page.

Parts which are Active at a Location include additional inventory management details, such as the **Aisle/Row/Bin** for the location. In order to add a part to a Purchase Order, the part must be **Active** at the **Location** on that **Purchase Order**.

When Inventory Tracking is enabled, you may designate a **Reorder Point** and receive notifications for low stock.

If the setting to [Require an Inventory Location for Part Line Items on Work Orders](https://help.fleetio.com/hc/s/article/Maintenance-Settings) (<https://help.fleetio.com/hc/s/article/Maintenance-Settings>) is enabled, a **Location** (with or without inventory tracking) must be designated on the part line item. If the setting is disabled, then Location on the line item may be omitted.

A user with restricted Part [Record Sets](/s/article/Record-Sets) (</s/article/Record-Sets>) can view all Parts in the database, but can only view inventory details and make inventory adjustments for parts that are active in the locations to which they have access.

**NOTE:** An active Part Location **cannot be deactivated** if a part is included on any open or closed **Purchase Order** at this location, or if a part from this location is on an incomplete **Work Order**. If the [Inventory Valuation Method](https://help.fleetio.com/hc/s/article/Switching-to-an-Advanced-Inventory-Valuation-Method-FIFO-LIFO) (<https://help.fleetio.com/hc/s/article/Switching-to-an-Advanced-Inventory-Valuation-Method-FIFO-LIFO>) on your account is FIFO or LIFO, the location cannot be deactivated unless the available quantity is 0.

**TIP:** Learn more in the [Inventory Overview](/s/article/Inventory-Overview) (</s/article/Inventory-Overview>) and [Purchase Orders Overview](/s/article/Purchase-Orders-Overview) (</s/article/Purchase-Orders-Overview>) articles

## Locations

Activate for any location to set Aisle/Row/Bin information and enable inventory. Active parts can also be added to Purchase Orders. Locations are managed in [Part Settings](#) 

AT&T

City Hall

Fire Station

Maintenance HQ

Parks and Rec

Police Station

Public Works

### TIPS:

- A **Parts by Location Report** is also available; learn more in the [Reporting on Parts and Purchase Orders \(/s/article/Reporting-On-Parts-And-Purchase-Orders\)](/s/article/Reporting-On-Parts-And-Purchase-Orders) article.
- Your **Inventory Quantities** can be adjusted once you have established Locations for your parts; learn more in the [Inventory Overview \(/s/article/Inventory-Overview\)](/s/article/Inventory-Overview) article.

## Purchasing History

The **Purchasing History** section helps your organization track the source, price, and order dates.

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### Purchase History

Vendor	Price	Date Ordered	
THE TIRE CHOICE #... <span style="float: right;">× ↕</span>	\$ 134	📅 2021-05-12	<span style="border: 1px solid #ccc; padding: 2px 5px;">🗑️</span>
<a href="#">+ Add Vendor</a>			

Vendors will be available to associate with parts as long as they are designated with **Parts Classification**.

**TIP:** Learn more in the [Vendor Classification \(/s/article/Vendor-Classification\)](/s/article/Vendor-Classification) article.

## Custom Fields

If you have created any [Custom Fields \(/s/article/Custom-Fields-Overview\)](/s/article/Custom-Fields-Overview) for parts, they will show up in this section.

## Parts List Overview

Get to your **Parts** list by selecting it from the **Parts & Inventory** section of the left sidebar menu.

### Parts ⋮ + Add Part

All
Birmingham
Boston
Chicago
Dallas
Archived a

Q Search

Part Category

Part Manufacturer

Part Inventory Status

Filters b

1 - 50 of 110
⏪ ⏩ ⚙️ c

	Total Quantity	Out of Stock	Low Stock	Total Inventory Value
<span style="border: 1px solid #007bff; border-radius: 50%; padding: 2px;">d</span>	1,540.4	13	8	\$114,394.79
<span style="border: 1px solid #007bff; border-radius: 50%; padding: 2px;">e</span>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
<input type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>

From the Parts list, you can:

- a. View parts filtered by location, or view which parts have been archived.
- b. Select a quick filter or open the full **Filters** menu to refine the list.

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c. Manage the columns that are displayed so you only see what's relevant to your organization.

d. View high-level data, such as your total quantity and which parts are out of stock. Select the **Out of Stock** or **Low Stock** blocks to see just those parts.

e. Select checkboxes for multiple parts and use the **Actions** drop-down menu to add or remove parts from a location, print parts labels, or archive them.

Hovering over a record reveals a **More Options** menu to view, edit, update the quantity, or archive the selected part.

## View a Part

Click the row for any part to view its details and edit it.

← Parts

**6PK1540X** ... Edit

Category: Belts | Manufacturer: Bando | Mfr. Part Number: asi09fn1kl239 | UPC: 96220019000027621056007819... | Unit Cost: \$16.69 / gal

**Overview** | Inventory Activity | Work Order Activity | Purchase History

### Details

Part Number	6PK1540X
Category	Belts
Manufacturer	Bando
Manufacturer Part Number	asi09fn1kl239
UPC	9622001900002762105600781915340712
Unit Cost	\$16.69
Measurement Unit	Gallon

### Locations

**Birmingham** Manage ...

Part Qty	0	<span>⌵</span> <span>↺</span> <span>+</span>
Aisle / Row / Bin	27 / 1 / 1	
Reorder Point	10	
Work Order Current Qty	1	

**Chicago** ...

Part Qty	51	<span>⌵</span> <span>↺</span> <span>+</span>
Aisle / Row / Bin	1 / 2 / 3	
Reorder Point	—	
Work Order Current Qty	0	

### Purchase History

+ Add Vendor View All

Line graph showing purchase price from 2015 to 2019. Y-axis: \$0 to \$60. X-axis: 2015 to 2019. Data points: 2015 (~\$25), 2016 (~\$20), 2017 (~\$20), 2018 (~\$20), 2019 (~\$50).

## Part Activity

Part activity is divided between **Inventory Activity** and **Work Order Activity**. There are preview tiles for each of the tabs on the Overview. Go to a tab to view the full list of activity. **Contact Us**

← Parts

**6PK1540X** ... Edit

Category: Belts, Manufacturer: Bando, Mfr. Part Number: asi09fn1kl239, UPC: 96220019000027621056007819..., Unit Cost: \$16.69 / gal

**Overview** | Inventory Activity | Work Order Activity | Purchase History

**Details**

Part Number	6PK1540X
Category	Belts
Manufacturer	Bando
Manufacturer Part Number	asi09fn1kl239
UPC	9622001900002762105600781915340712
Unit Cost	\$16.69

**Locations** Manage

**Birmingham** ...

Part Qty	0	<span>↔</span> <span>↺</span> <span>↻</span> <span>+</span>
Aisle / Row / Bin	27 / 1 / 1	
Reorder Point	10	
Work Order Current Qty	1	

## Archive Parts

If a Part is no longer in use, but you wish to retain historical records of Part usage, you may **Archive** the Part. This removes it from the **Active** list, and it can no longer be selected for Work Orders.

**IMPORTANT:** Parts used in incomplete Work Orders *cannot* be Archived. Parts used in completed Work Orders may be archived, but re-opening the Work Order will automatically *restore* the archived Part.

### Method 1: More Actions Menu

Select **Archive** from the **More Options** menu. You'll be prompted to confirm the action.

<input type="checkbox"/>	1A7 1A76878930-7683	Electrical	Anco	NOT UNIQUE	\$20.00	25	<span>...</span>
<input type="checkbox"/>	26A Icon-NEW	Wiper Blades	Bosch	26A	\$20.00		<ul style="list-style-type: none"> <li>View <span>→</span></li> <li>Edit <span>✎</span></li> <li>Update Quantity <span>↔</span></li> <li><b>Archive</b> <span>🗑️</span></li> </ul>

### Method 2: Bulk Select Parts

Multi-select records using the checkboxes, then select **Archive** from the **Actions** drop-down menu. You'll be prompted to confirm the action.

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		Category	Manufacturer	Unit Cost
<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <span style="background-color: #007bff; color: white; border-radius: 50%; padding: 2px 5px;">2</span> Actions ▾ <span style="color: #007bff; text-decoration: underline;">Clear selection</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between; padding: 2px 5px;"> <span>Add Location(s)</span> <span>+</span> </div> <div style="display: flex; justify-content: space-between; padding: 2px 5px;"> <span>Remove Location(s)</span> <span>⊖</span> </div> <div style="border: 2px solid #007bff; display: flex; justify-content: space-between; padding: 2px 5px; margin: 2px 0;"> <span>Archive</span> <span>🗑️</span> </div> <div style="display: flex; justify-content: space-between; padding: 2px 5px;"> <span>Print Labels</span> <span>🖨️</span> </div> </div>				\$12.33
<input checked="" type="checkbox"/>	13131444			
<input checked="" type="checkbox"/>	15-22124	AC	ACDelco	\$5.88

## Restore or Delete Parts

Once a Part has been archived, it's possible to bring the Part back into Fleetio or remove it from the system entirely.

### Restore Parts

To restore a Part:

1. Select the **Parts List** from the **Parts & Inventory** section of the sidebar menu.
2. Select the **Archived** tab.
3. Hover over the row to select the **More Options** menu.
4. Select **Restore**.

<input type="checkbox"/>	Brake Pads	Brakes	Hawk	11/18/2015	02/28/2021	⋮
<input type="checkbox"/>	LWS lwsg21	VAC PUMP SYSTEM	Conde	\$5.00	07/07/20	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="display: flex; justify-content: space-between; padding: 2px 5px;"> <span>View</span> <span>→</span> </div> <div style="border: 2px solid #007bff; display: flex; justify-content: space-between; padding: 2px 5px; margin: 2px 0;"> <span>Restore</span> <span>↺</span> </div> <div style="display: flex; justify-content: space-between; padding: 2px 5px;"> <span>Delete</span> <span>🗑️</span> </div> </div>

### Delete Parts

If you wish to remove **ALL** traces of a Part, the part can be deleted. Be aware that this also removes associated historical records and open Work Order line items.



Unlike archiving, this is a *permanent* action, and cannot be reversed.

**NOTE:** Parts used in completed Work Orders *cannot* be Deleted.

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To delete a Part:

1. Select the **Parts List** from the **Parts & Inventory** section of the sidebar menu.
2. Select the **Archived** tab.
3. Hover over the row to select the **More Options** menu.
4. Select **Delete**.
5. Confirm the action.

<input type="checkbox"/>	 Brake Pads	Brakes	Hawk	11/18/2015	02/28/2021	...
<input type="checkbox"/>	 lwsg21	VAC PUMP SYSTEM	Conde	\$5.00	07/07/20	View → Restore ↻ <b>Delete</b> 🗑️

Alternatively, Account Owners can bulk delete Parts. To bulk delete Parts:

1. Select the checkboxes for the Parts you want to delete or select the checkbox next to the **Name** column header to select all Parts on the page.
2. Select the **Actions** drop-down menu and select **Delete**.

[Parts and Inventory](#)

[\(/s/topic/OTO5G0000010yIQWA...]((/s/topic/OTO5G0000010yIQWA...)

## Related Articles

Work Order Line Items: Service Tasks, Labor, Parts ([/s/article/Work-Order-Line-Items-Service-Tasks-Labor-Parts]((/s/article/Work-Order-Line-Items-Service-Tasks-Labor-Parts))

Parts Import Guide ([/s/article/Parts-Import-Guide]((/s/article/Parts-Import-Guide))

Manage Parts and Inventory in Fleetio Go ([/s/article/Manage-Parts-And-Inventory-In-Fleetio-Go]((/s/article/Manage-Parts-And-Inventory-In-Fleetio-Go))

Parts Inventory Import Guide ([/s/article/Parts-Inventory-Import-Guide]((/s/article/Parts-Inventory-Import-Guide))

Parts & Inventory Training Video ([/s/article/Parts-And-Inventory-Training-Video]((/s/article/Parts-And-Inventory-Training-Video))

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[Parts Settings \(/s/article/Parts-Settings\)](/s/article/Parts-Settings)

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[Purchase Orders Overview \(/s/article/Purchase-Orders-Overview\)](/s/article/Purchase-Orders-Overview)

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[Inventory Overview \(/s/article/Inventory-Overview\)](/s/article/Inventory-Overview)

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[Service Entry Overview \(/s/article/Service-Entry-Overview\)](/s/article/Service-Entry-Overview)

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[Work Order Overview \(/s/article/Work-Order-Overview\)](/s/article/Work-Order-Overview)

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## Still need help?

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