

Turn Special Orders from Liability into Cash Flow



Your Monday Morning Outcome

By following this guide, you will have SOR visibility configured for every persona, the prepaid workflow in place, notifications and flags set up for cross-department communication, and reports bookmarked – so special order parts convert to completed transactions, cash flow is protected, and no part sits on a shelf without someone knowing it's there.

Before You Start

Pre-Implementation Checklist

✓ Capture Your Baseline

Run the SOR List View (Status = Received, sorted by Receipt Age) and pull the Parts Performance Report. Note your Special Order Conversion Rate – that's your baseline to beat.

✓ Access & Permissions

Confirm your team has the correct access before you begin. Service Advisors, BDC, and Service Managers need Special Order Request View. Counter personnel need SO/RO Sales application access. Parts Managers and Directors need Parts Settings Create, Parts Reports View All, Parts Performance Report View, and All Reports (Reporting permissions). Costing columns on the Receipt History tab should be restricted to Parts Management roles only.

✓ Prepaid Policy Decision

Decide which parts your dealership will require prepayment for before you reach Step 2. Minimum recommendation: VIN-specific parts, programmed electronics (ECM, TCM), pre-cut keys, and SRS components.

✓ Notification Preferences

You will configure notifications at two levels in Step 3 – store-level in Parts Settings and personal in each user's Profile Settings. Store-level notifications fire when ALL parts on an order are received, not per individual part.

✓ Settings & Configuration

Several Parts Settings decisions need to be made before going live – discuss with your Parts Director before enabling. Key settings: On Hold Settings → SOR, SOR Flags (Parts Settings → SOR Flag), Fulfilment Logic for both SO and RO, and SOR Auto Fill if your dealership has it enabled (dealer property – contact Tekion Support to request).



Give Your Team Visibility

Navigation: App Grid > Parts > Special Order Request

Goal: Every person who touches a special order – from the advisor who requested it to the parts counter who receives it – can see what’s happening without picking up the phone.

Tab 1 — SORs

This is the master list of all special order requests. Each SOR shows status, customer name, reference type, aging, and other key fields. Users can filter, sort, and save custom filter views.

Action items:

- Build saved filter views for each persona:
 - Service Advisor: Created By = [advisor name], Status = Requested + Ordered + Received
 - BDC: Reference Type = Customer SOR, Status = Received, Receipt Age > 2 days
 - Parts Manager: All statuses, sorted by aging (oldest first)
- Train each user on their saved filters – filters are the daily working view

Tab 2 — Receipt History

Shows received SOR parts by part number. Filterable by date range and searchable by: All, Part Number, Part Name, SOR Number, Reference Number, Customer, Control Number. Downloadable to Excel and printable.

- Show your team this tab exists – many users don’t know about it
- Use for end-of-day receiving verification: “Did everything we received today get matched to the right SOR?”

Individual SOR Detail View

Click into any SOR for full detail. Two tabs:

- **SOR Details** – Part lines, customer info, communication history (all notifications sent and delivery status)
- **Activity History** – Chronological transaction log: Part Number, Date, Reference Number, User, Transaction Type, Quantity. Use for accountability – who did what, when.

STEP 02/04

Implement the Prepaid Workflow

Goal: Collect cash before the part is ordered, not after. This is the single biggest change you can make to protect your dealership's cash flow on special orders.

Why it matters: Industry average special order conversion rate is 60–70%. With a prepayment workflow, the target is 90%+ and best-in-class dealers achieve 95%+. (Source: KEA; NADA/WANADA)

Sales Order (SO) Prepaid Flow

- Create the Sales Order with the special order part(s)
- Mark parts as prepaid:
 - Single part: Action column → “Mark Prepay” (or keyboard shortcut P + P)
 - Multiple parts: Select parts using checkboxes → Bulk Actions dropdown → “Prepay”
- Cashier the SO – customer pays for the part(s)
- Close the SO – this triggers PO creation
- Part is ordered via PO → received → placed in SOR Hold (not general on-hand inventory)
- Mark Customer Received when customer picks up the part – can be done from the closed prepaid Sales Order or the Special Order Request application

Repair Order (RO) Prepaid Flow

- On Parts RO Sales, click Fulfill or Order / Fill. In the Order/Fill Modal:
 - Fill out Special Order Quantity
 - Fill out Special Order Priority
 - Toggle on Prepaid
 - Click Submit
- Close the RO – vehicle leaves, customer has paid for the part
- PO is created for the special order part
- Part is ordered via PO → received → placed in SOR Hold
- When customer returns, complete the SOR by either:
 - Option A: Create a new RO and import the prepaid part(s) at \$0 cost to the customer
 - Option B: If no RO is required (e.g., floor mats, touch-up paint), mark Customer Received in the Special Order Request application

SOR Hold — How Tekion Protects Your Parts

When a special order part is received, Tekion does NOT place it in general on-hand inventory. The system automatically places it in the appropriate hold type:

Hold Type	When it Applies
SOR Hold	Part received against a closed SO or closed RO job – sits in SOR Hold until imported to a new document or marked Customer Received
SO Hold	Part received while the Sales Order is still open – part is held against the SO, pending fulfillment
RO Hold	Part received while the RO job is still open – part is held against the RO job, pending fulfillment

On Hold Settings → SOR (configured in Pre-Implementation Checklist) Control how long parts remain on hold before the system automatically returns them to on-hand inventory. This is your safety net for no-show customers.

SOR Auto Fill and Hold Types: If SOR Auto Fill is enabled (dealer property feature – see Pre-Implementation Checklist), received parts matching open SOR documents can automatically fill on the originating SO or RO. Auto Fill applies to open documents only. Prepaid parts are always received into SOR Hold and require manual completion.

Special Order Statuses

Status	When It Appears
Requested	SOR has been created but not yet submitted to a Purchase Order
Ordered	SOR part has been placed on a Purchase Order
Partially Received	Some but not all quantity on the SOR has been received
Received	All quantity received but not yet picked up by the customer
Customer Received	Customer has picked up the part – SOR lifecycle complete

Prepaid Status Icons

Separate from special order statuses, prepaid status icons show where the prepaid is in the process:

Icon	When It Appears
Prepaid (hand with coin icon)	Part is marked as prepaid. Persists when PO is created, partially received, and partially marked Customer Received.
Received (truck icon)	All prepaid parts fully received but not yet marked Customer Received
Customer Delivered (checkbox icon)	All prepaid parts delivered to the customer / marked Customer Received

Action Items

- ✓ Walk your parts counter team through both SO and RO prepaid flows
- ✓ Verify On Hold Settings → SOR are configured with appropriate timeframes for your store
- ✓ Post a quick-reference card at the parts counter showing the status icon progression

Keep Everyone Informed

Goal: The right people get the right notification at the right time – automatically. No more phone tag, no more “did you know Maria’s part came in?”

Level 1 — Store-Level (Parts Manager configures once)

Navigation: Parts Settings → Default Settings for Customer Notification on SORs

Configure which automatic notifications fire when SOR status changes. These apply store-wide. Notifications go out when all parts on the order are received.

Level 2 — Personal (Each user configures for themselves)

Navigation: Profile Settings → Notification Settings → Parts

Each user controls their own notification preferences. Two SOR-relevant notification types:

Notification	What it Does	Available Via	Recommended For
SOR parts received by Part	Fires when an individual SOR part is received	Web only	Use case dependent
SOR parts received by Job	Fires when ALL parts for a job on an RO are received	Web, Mobile App, Text, Email	Service Advisor (auto-assigned), Parts Director, Parts Manager, Parts RO Sales Counter

Also relevant: P&A Approved notification – when a customer approves a recommendation, Parts Director, counter person, and Parts Manager get notified. This feeds the SOR pipeline – an approved recommendation may require a part or parts to be special ordered.

SOR Flags as Communication

Flags configured in the Pre-Implementation Checklist aren't just organizational – they're a communication tool. When Parts sets a flag like "Part Received but Damaged," every user with SOR visibility sees it instantly. No meeting required, no phone call, no sticky note.

Action Items

- ✓ Configure store-level notifications in Parts Settings
- ✓ Walk each persona through their personal notification settings – show advisors and BDC exactly which toggles to turn on
- ✓ Build your SOR flag taxonomy – what flags does your store need?

Measure What Matters

Goal: Track the metrics that tell you whether your SOR workflow is working – and catch problems before they become liabilities.

Industry benchmarks (sourced from NADA 2025 Slide Guide, KEA Advisors, and DealersEdge):

KPI	Industry Avg	Target	Best-in-Class	Why it Matters
Special Order Conversion Rate	60-70%	90%+ (with prepayment)	95%+	The headline metric. If you're below 90% with prepaid workflow in place, something is breaking down. (KEA; NADA/WANADA)
Lost Sales %	15-20%	<10% of demand	5-8%	A customer who never gets their special order part is a lost sale. Poor SOR management feeds this number directly. (KEA Advisors)
Obsolescence Rate	7-10%	<5% of total inventory	<3%	Prepaid workflow dramatically reduces no-show risk. Fewer unclaimed SOR parts means fewer parts aging into obsolescence. (NADA 2025; DealersEdge)
Parts Gross Profit %	35-38%	40%	42%+	Efficient SOR management protects margin by preventing lost sales, reducing obsolescence, and ensuring prepaid parts convert to completed transactions. (NADA 2025 Slide Guide)

Reports — Verified Navigation Paths

Report	Navigation	What It Tells You
Parts Performance Report	App Grid → Parts → Reports → Parts Performance Report	Conversion rates, aging, SOR performance trends
Prepaid Parts Report	App Grid → Parts → Reports → Prepaid Parts Report	Prepaid parts status, fulfillment tracking, outstanding prepaid exposure
Part Hold Movement	App Grid → Parts → Reports → Part Hold Movement	Parts moved between hold types and auto-released from hold to on-hand inventory
On Hold by Part	App Grid → Parts → Reports → On Hold by Part	Current snapshot of all parts on hold by part number

Also relevant: P&A Approved notification – when a customer approves a recommendation, Parts Director, counter person, and Parts Manager get notified. This feeds the SOR pipeline – an approved recommendation may require a part or parts to be special ordered.

Action Items

- ✓ Bookmark the Parts Performance Report – review weekly at minimum
- ✓ Set up a Monday morning routine: open the SOR list view with your “oldest first” filter and work the aging queue
- ✓ Review Prepaid Parts Report monthly to identify fulfillment gaps
- ✓ Track your Special Order Conversion Rate monthly – this is the number that tells the whole story



Best Practices

✓ **Prepay everything you can.**

A customer who has already paid for a part picks it up. This single workflow change moves conversion rate from the 60–70% industry average toward 90%+.

✓ **Build filters before you train.**

Every persona should have a saved filter view ready before they're expected to use the SOR application. Don't rely on training alone – give them a view that shows exactly what they need to see.

✓ **Use flags as communication, not decoration.**

Every flag should answer a question someone would otherwise need to call or walk over to ask. “Backordered - No ETA” tells the advisor everything they need to know without a phone call.

✓ **Review aging weekly, not monthly.**

A part that sits in Received status for 30 days is a part that should have been flagged at day 3. The Monday morning aging queue routine catches problems while they're still small.