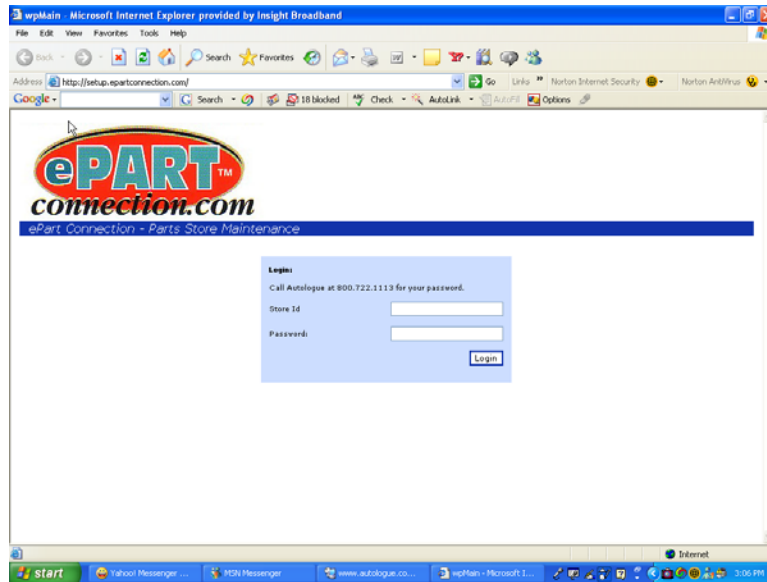# ePartConnection – Maintenance Screen Setup Procedure

Step 1: Log in to The Parts Store Maintenance Screen

- To setup your ePartConnection, you will need to access the following web address http://setup.epartconnection.com using any Internet browser.
- Enter your customer number that was assigned by Autologue into the `Store Id` field.
- Enter the password that was assigned by Autologue into the `Password` field.

Editing the Parts Store Maintenance Screen

Name and Address Section

Information on this screen will affect what is displayed to your customers. Let me explain what each of your entries will do.

The name and address that you enter will be what the customers will see on your ePart Store.

The email address is the mail box where inquires from your customers will be delivered.

If you have a centralized eOffice account enter it in the box labeled ePaperless Office epart id or leave blank if your ePaperless Office will be connected to this account.

If you check the first "Alternates" box, your alternates will not be displayed to your customers when cataloging is used.

If you check the second "Alternates" box, your alternates will not be displayed to your customers when the use "Stock Check".

If you check the third "Alternates" box, you alternates will not be displayed to your customers when accessing your "Parts Categories".

"Part Order Policy" Section

This section determines whether a part can be added to the order or if the word "CALL" is displayed. If your policy is too restrictive, the service dealer will not be able to add parts to the order and will not be able to complete his order. Parts on the order without sufficient quantity will display a "delivery time warning" when the order is submitted.

Let me explain what each of the part policies options do.

By selecting option 1, any part number can be ordered, whether you stock the part or not. Part numbers not in your file will display list price *only*.

By selecting option 2, only part numbers in your inventory will be displayed. This option is recommended for most part stores. Part numbers not in your inventory will display the word "Call" and cannot be sent to the purchase order.

By selecting option 3, the part number must be stocked. Part numbers not in your inventory or that have zero order points will display the word "Call".

By selecting option 4, part numbers must have sufficient quantity on hand, this option is very restrictive be sure this is what you want before selecting it. Part numbers with insufficient quantity on hand will display "Call".

By selecting option 5, part numbers must have sufficient quantity on hand based upon all locations. This option is for multi-stores only. Part numbers with insufficient quantity on hand will display "Call".

By selecting option 5, part numbers must have sufficient quantity on hand based upon all locations or the Independent Warehouse. Part numbers with insufficient quantity on hand will display "Call".

"Always Show Quantity Option" Section

This section determines what your customers will see as the quantity on hand on your ePart Store.

Always show Quantity Option
- ⦿ Show the actual Quantity On Hand (QOH). Option(0)
- ◯ Show actual QOH or vehicle quantity, whichever is greater. Option(1)
- ◯ Show vehicle quantity as your QOH (hides true QOH). Option(2)

Let me explain each option for you.

By selecting option 1, your true actual quantity on hand will be displayed.

By selecting option 2, the vehicle quantity per Triad catalog as the minimum quantity on hand or the actual quantity on hand, whichever is greater.

By selecting option 3, the vehicle quantity per Triad catalog will be displayed as the quantity on hand. This option will hide the true quantity on hand in your inventory.

"Multi Store other location QOH display Option

This section gives you an additional heading that you can have displayed if you are a Multi Store.

Multi Store other location QOH display Option
Notice: The independent Warehouse (auto ordering) in not involved with this option.
- ⦿ The header is (WHSE QOH).
The QOH is the total of all locations EXCEPT the one you are logged into.
This is the default.
- ◯ The header is (QOH Other Locations).
The QOH is the total of all locations EXCEPT the one you are logged into.
This is the same as WHSE QOH with a different label.
- ◯ The header is (QOH All Locations).
The QOH is the total of all locations INCLUDING the one you are logged into.
- ◯ Do not display this Column.
Use this selection for Single Store systems.
- ◯ The header is (WHSE QTY).
The QOH is the total of all locations INCLUDING the one you are logged into.

Let me explain each option to you.

By selecting option 1, you will have an additional column with the heading WHSE QOH, which means the WHSE QOH will be the total of all locations except the store that the customer is logged into.

By selecting option 2, you will have an additional column with the heading QOH Other Locations, this is the same as option 1 but with a different heading.

By selecting option 3, you will have an additional column with the heading QOH All Locations, which means the QOH All Locations will be the total of all locations including the store that the customer is logged into.

By selecting option 4, you can eliminate the extra column heading. This option should be used when you are a single parts store.

By selecting option 5, you will have an additional column with the heading WHSE QTY, this is the same as option 3 but with a different heading.

"AConneX Purchase Order Release Code" Section

This section is for A-DIS customers only. It tells the system where to print the purchase order according to the release code.

Let me explain each option for you.

Option 1, will direct the purchase order to print on your Stocking Order Printer when you have your release code set to "Regular".

Option 2, will direct the purchase order to print on your Special Order Printer when you have your release code set to "Expedite".

Option 3, will direct the purchase order to print on your Stocking Order Printer. When you have your release code set to "Will Call".

After you have selected your desired options don't forget to click on the **Save Changes** button.

Delivery Options

Delivery Options Table

Default Table:

- ASAP 30 minutes or less
- 1 to 2 Hours
- Will Call
- Stock Order

Custom Options Table

Leave the table below completely blank
to use the default table.

1:
2:
3:
4:
5:
6:
7:
8:
9:

Submit

On this screen, you may customize the delivery options that will be displayed for your customers. You can use the defaults or create your own. Be sure to click on **Submit** to apply your changes.

Manage MCL

On this screen you can either upload your current MCL Table or you may create one if you currently do not have Activate Catalog on your main system.

Please take note that AConneX users must add at least one trading partner before you can upload your MCL table. You can do this by clicking on the **Trading Partners** button to add a customer. Use CAPITAL LETTERS when adding the customer number. Be sure to verify the customer number and password to your systems A/R number and password.

To upload your current MCL table, click on Upload MCL Table. You will get a message when it has been uploaded successfully.

Remember that should you change the MCL table on your system you must upload the changed one onto your ePart Store.

If you are not currently a PartExpert™ customer, you must MANUALLY edit or create your manufacturer's table.

Click on **Edit MCL** in the center of the screen.

Using the underlined alphabet, select each of your Manufacturers (both for *STOCKED* and *NON-STOCKED* lines), and enter YOUR manufacturer prefix code, as well as the priority you wish to assign that line (higher numbers are lower priority, this is the display order)

The **Summary** button will show you exactly what you have set up, after you finish. You can also edit selected lines from this screen (Line Code and Priority only. You can't add more lines from there)

Note the directions on the first screen. Web Only customers are those with *NO* management system at all.

Catalog Manufacturer Names

On this screen you have the ability to change the description of a line. For example if your manufacture code is BCA and in catalog look up the description is BCA Bearings you can have the system put in the description National Bearings when it sees the manufacture code of BCA.

Catalog Part Number Prefix/Suffix

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Add a Prefix or a Suffix to all Part Numbers in a Product Line
Applies to Catalog lookups only

This table is normally blank.

Do not enter duplicate Product Linecodes.
Do not use single or double quotes.
Blank the Product Linecode to remove from the table.

Press 'Submit' to save changes.

Submit

Your Linecode	Prefix	Suffix

Submit

On this screen you can add alpha or numeric characters to the beginning or the end of a part number. Incase the catalog part numbers very form you part numbers. For example if your part number in your inventory is WAG-2365, you can have ePart add an F to the beginning of the part number to change the part to WAF-F2365.

Manage Logo Button

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LOGO Upload

If you upload an image whose height is less than or equal to 125 pixels, No resizing is necessary.
Some images may not resize with clarity, in this case, use a program like 'Paint' to resizing yourself.
Set the height to 125 pixels or less.
To view an uploaded image, close this browser and open a new browser before navigating to the ePartConnection website.

[   ] [Browse...]
[Upload Image File]

This screen gives you the ability to upload your company logo image file into your web page. Follow the directions exactly with regards to sizing.

Customer Options

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Customer Options

Use this screen to enable Labor Guide lookups for your Customers in the catalog.
Access to the Labor Guide is billed $20/month ($25 Canadian) to the Parts store for each enabled customer.
Customers are added to this screen the first time they login.
The default setting for a Customer is 'disable'.

The QOH Option is normally blank and the default from the main screen is used.
Valid values are:

Blank = Use default from main screen.
0 = Show the actual Quantity On Hand (QOH). Option(0)
1 = Show actual QOH or vehicle quantity, whichever is greater. Option(1)
2 = Show vehicle quantity as your QOH (hides true QOH). Option(2)

Remove Customer checkbox:
You can remove any unwanted customer from this list using the checkbox.
The customer is only removed from this list.
Customers are added to this table whenever they login.

Use must press the 'Submit' button to save changes.

[Submit]

This screen gives you the ability to set up different criteria for individual customers.

Let me explain these options.

You can enable the Labor Guide lookups for your Customers in the catalog.

You can enter the labor rate that you want specified for an individual customer.

You can create an exception for a customer previously set up on the "Always Show Quantity Option" on the Main Maintenance screen.

You can require that a PO number is used for a customer.

Or you can create or view a promo previously set up. Let me expand on how to set up promos and what will be displayed on your ePart Store.

A promo is based upon a customer's sales during a specified period of time.

Enter the name of the promo.

Enter a description of the promo.

Enter specific product line Manufacturer Codes if promo only applies to them.

Choose whether the promo applies to ALL sales, or just Internet sales, and select.

Enter the target dollars, or target units.

Choose a beginning date and ending date. Keep in mind that date can not be the same date.

On the date the promo starts a thermometer will be displayed on the screen when the customer logs in to your ePart Store. Your customer can then monitor his sales for the promo.

Multiple promos can be set up, each with their own thermometer when the promo becomes active.

Retail ePart Options

This option, when set, will prompt the customer for shipping information at the time they finalize the order. It is designed for use when ePartConnection is accessed through a website, and login information can be provided beforehand, giving the Cash Customer number and password.

Independent Warehouse Stock Check

When activated, this program allows your customers to view your quantity on hand and your warehouse's quantity on hand, provided your warehouse is also on ePartConnection.

You can also give your customers the ability to automatically order the part from the warehouse and ship it to you. An invoice will print at your location letting you know that the part is coming in from the warehouse for that particular customer.

Parts Categories

On this screen you can add a Special Sale that you are currently running in your Auto Parts Store, display a list of Accessories that you have or even items that are on the kiosks in the front of the store.

Manage Your Hot Links

Use this screen to setup you Hot Links buttons that will be displayed on your ePart Store.

Long Location Names

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Multi-store Long Location Names

Most Systems display friendly names and this table can be left blank.

If this table is blank, then the MCL account will be checked for long names.

Do not enter duplicate System Names
Do not use single or double quotes in the names.
Blank the name to remove from the table.

Press 'Submit' to save changes.

[Submit]

System Location Name	Display Location Name

[Submit]

This screen gives you the ability to use more descriptive locations names.

Multi-Location Ordering

This screen gives you the ability to order from alternate locations within your main system.

You may then further define what locations an individual customer can view when they click on the binoculars on your ePart Store.

Sales Report

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Sales Report

Autologue Billing Dates
Select Billing Period End Date

End of Month Dates
Select End of Month Date

Start Date

End Date

Display Store Summary Report

Display Multi-Store Summary Report

With this screen, you can print a report displaying a list of your customers and their sales for a specified month.

Open Order Reports

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Open Order Report

Customer	Number	Extension	
JAIME - TEST STR40	1000	$47.86	Select
STEVE PILCHER	2000	$461.62	Select

On this screen you can create a report showing the sales dollars for all open orders currently on each individual customer's account.

You can then select to view an individual accounts open orders.

Open Order Report
Customer: STEVE PILCHER (2000)

Last Update	Ticket	Mfg	Part Number	Description	Cost	Core	Qty	Available	Vehicle
9/5/2007	1671410	FEL	HS9915PT1	HEAD SET	$116.99	$0.00	1	10	1996; HONDA; CIVIC; 4-1590 1.6L
9/5/2007	1671410	FEL	MS91485	INT MANIFOLD SET	$6.99	$0.00	1	10	1996; HONDA; CIVIC; 4-1590 1.6L
9/5/2007	1671417	CAR	13300	F DISC HARDWARE KIT	$21.24	$0.00	1	0	1998; ISUZU TRUCK; RODEO; V6-3165 3.2L DOHC
9/5/2007	1671417	CEN	117.43006	F DISC HARDWARE KIT	$16.07	$0.00	1	20	1998; ISUZU TRUCK; RODEO; V6-3165 3.2L DOHC
9/5/2007	1671424	D01	E529	IGNITION COIL	$100.11	$0.00	3	0	1981; RENAULT; R5-LeCAR; 4-1397 1.4L

Show Summary

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Customer Remote IP

Customer IP analysis for the last 30 days

Customer Number	Customer Name	Remote IP	Count
2000		192.168.2.243	2
251	ALEX'S GARAGE	192.168.2.107	46
251	ALEX'S GARAGE	192.168.2.145	4
251	ALEX'S GARAGE	192.168.2.243	146
251	ALEX'S GARAGE	71.110.90.211	5
251	ALEX'S GARAGE	74.142.59.83	11
252	CHUCKS AUTOMOTIVE REPAIR	192.168.2.138	3
252	CHUCKS AUTOMOTIVE REPAIR	192.168.2.141	1

This screen will display information about who has connected to your ePart Store in the last 30 days.

Notice you will see each store number, store name, IP address used and how many times that IP address has logged on.

Connection Analysis

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Customer Connection Analysis for the last 30 days

Store Id	Customer Number	Customer Name	Count	
ACSSALES	2000		2	Select
ACSSALES	251	ALEX'S GARAGE	212	Select
ACSSALES	252	CHUCKS AUTOMOTIVE REPAIR	4	Select

This screen displays your customer's connection analysis for the last 30 days.

Let me explain why you would use this report.

By clicking on the **Select** button, next to a customer's name, crucial information about your customers will be displayed.

At a glance, you will know the date, time, type of request, the response time it took for ePart to respond, and the IP address that accessed your ePart Store.

ePart Messages

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To send a message to a group of your customers, create a new group and then add all of the customer numbers you would like to that group. Only customers who have logged in to your epart before will be allowed in a group list. You can add or remove customers from a group any time you would like to.

You can send a message to a single customer by selecting "send message" when looking at the customers in a given group. If you would like to send a message to a customer not assigned to a group, you can use the "View All Customers" listing to do so.

Your customers will be able to see messages for them when they log in to epartconnection.com and if they choose to reply to your message, you will receive their reply as an email to you.

View All Customers

New Group to Add: [   ]   Add Group

Use Groups from Store id: [   ]   Update

Here you have the ability to send messages to an individual customer or group of customers.

Help and Suggestions

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Fast service - Direct to our technical staff - Use this email link to:

- Report an error, Paste a copy of the error message if you can.
- Have a great IDEA? Send it!

Be sure your email, phone and store name are included.

<u>Click Here to send an email.</u>

<u>Click here to view recent changes to epart</u>

Send an email to our support staff for assistance or a suggestion that would improve ePartConnection! We welcome your input.