

**Release 57.3 PWS PartsWatch
PWMobile
User Guide R1.2**

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1. DOCUMENT INFORMATION

1.1. Publication Record

Revision 1.2 is the current version of the *57.3 PWS PartsWatch PWMobile User Guide*.

Rev.	Publication Date	Author Name	Description of Revisions
1.0	10/19/2016	Cathy Kuhlmann	Initial Publication
1.1	10/27/2016	Eric Grau	Changes to reflect code.
1.2	08/16/2018	Jay Altman	Changes to add Privacy Policy.

The graphics illustrated in this document represent a sample design.

Numbers, currency, dates, and times in this document are written in English (United States) format; however, the application supports other languages and formats for numbers, times, and dates.

2. OVERVIEW

2.1. Purpose

This document describes the PWMobile functionality as of the PartsWatch Release 57.3.

3. PWMOBILE

3.1. Overview

PWMobile provides PartsWatch functionality on a mobile device.

The available PWMobile (PartsWatch) functions:

1. Enables store employees to scan VIN bar codes off of vehicles parked outside the store in the parking lot, and transmit the VIN to PartsWatch using a mobile device. The employee can then select the scanned VIN in PartsWatch, so that when the ACES CATALOG screen is opened, the scanned vehicle's Year, Make, Model and Engine are already displayed.
2. Enables store owners and managers to graphically view their store sales or number of transactions in total and by hour for any date range and any Store Group using their mobile device. **Note:** The store sales and transactional information displayed on the mobile device is similar to the Transactions By Hour Report.
3. Enables store owners and managers to scroll through a list of their customer account sales (ranked in descending order) for any date range and any Store Group. **Note:** The sales information displayed on the mobile device is similar to, but not the same as, the Account Ranking Report within the Sales Analysis suite of reports.
4. Enables store owners and managers to scroll through a list of their mfg line sales (ranked in descending order) for any date range and any Store Group. **Note:** The sales information displayed on the mobile device is not similar to any PartsWatch report but could be thought as an extension of the Line Sales Report.

PWMobile is available for use by both Android and iOS devices. An Android device is a mobile device using the Google® Android Operating System. Any mobile application that runs on an Android device can only be installed by downloading the application from Google's Play store. This device is typically a smart phone or a tablet. An iOS device is a mobile device using the Apple® iOS Operating System. Any mobile application that runs on an iOS device can only be installed by downloading the application from Apple's App store. This device is a smart phone (also called an iPhone) or a tablet (also called an iPad).

Unlike using a mouse on a PC desktop, a 'tap' selects a button, menu or other icon on a mobile device. A tap can be performed with one's finger, a 'tapping' stick or pen.

Also, a 'swipe' refers to scrolling through a list of items or selecting from a rotating circular list of options. A swipe also allows hidden panels to display. For example, swipe from left to right to open the menu screen and right to left to close the menu screen, or right to left to open the Report Options settings and left to right to close the Report Options settings.

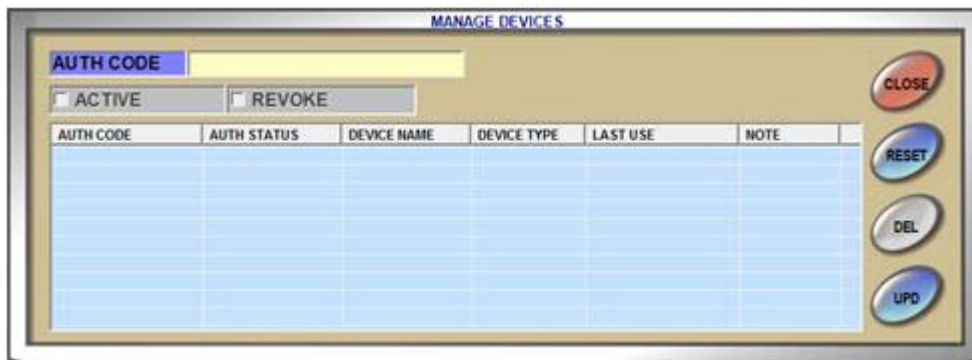
Unlike using PartsWatch on a PC desktop, should the PartsWatch database be unavailable due to network issues or the database is down, the PWMobile application is not available. There is no concept of Mode 2 on the PWMobile device.

Since the mobile app needs to obtain and send information to PartsWatch, a QR Code has been added to the SYSTEM INFORMATION screen, accessed from Controls, System, System Info. Once the

PartsWatch Mobile App has been installed, this QR code can be scanned from the SYSTEM INFORMATION screen to enable the mobile device to be connected to the PartsWatch database for sending information back and forth.



Click the MANAGE DEVICES button to access the MANAGE DEVICES window that enables the user to authorize or de-authorize mobile devices.



Once the app is installed and setups are complete, the user may click on the PartsWatch icon on the mobile device to access the login screen.

3.2. Install PartsWatch Application on Mobile Device

Search for the application called 'PartsWatch' in either Google's Play store or Apple's App Store and download and install the application using the same method that all mobile device applications are downloaded and installed.

If required, contact the mobile device vendor, use the Internet for assistance or contact Customer Support to assist with installing the application on a mobile device.

The following screen is an example of an Android mobile device that has the PWMobile application called PartsWatch (circled in red) already loaded. The Play Store application (circled in red) must be used to find and download the PWMobile application.



The following screen is an example of an iOS mobile device (e.g., iPhone) that has the PWMobile application (circled in red) already loaded. The App Store application (circled in red) must be used to find and download the PWMobile application.



3.3. PWMobile Icons

Icons used within the PWMobile application include the following:

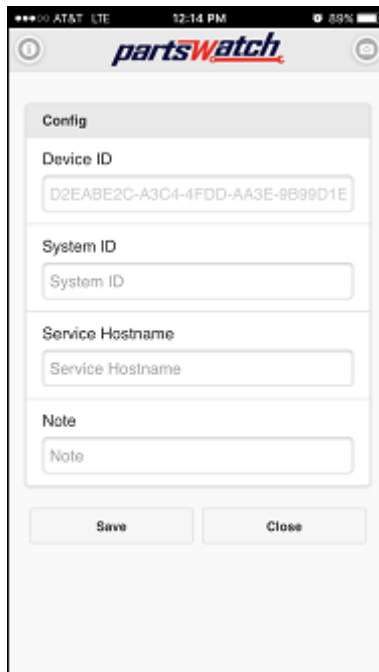
Icon	Description
	Menu
	Close / Delete / Cancel
	Settings (Report and Config Settings)
	Camera (for Config and VIN Scan functions)

3.4. Start PartsWatch and Log In

1. Tap the **PartsWatch** icon to briefly display the following splash screen.



The Config screen displays the first time the user taps on the PartsWatch application, as seen in this sample image.

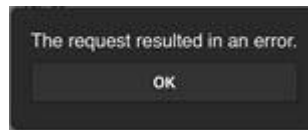


Similar to the PW DATABASE CONFIGURATION screen, the Config screen connects the mobile device to a PartsWatch application database.

Note: A user can connect his mobile device to multiple PartsWatch databases but only one PartsWatch database at a time.

2. The **Device ID** automatically populates and is not editable.
3. Enter the **System ID** (required).
4. Enter the **Service Hostname** (required).
5. Enter an optional **Note** about the mobile device. (For example: Steve Smith – tablet.)
6. Tap the **Save** button to connect the mobile device to the PartsWatch database.

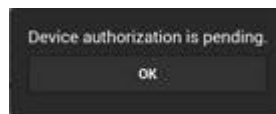
Note: After approximately 10 seconds of an unsuccessful connection, a ‘communication time-out’ error may occur between the PWMobile application and its attempt to access the PartsWatch database.



Tap **OK** and contact PartsWatch Customer Support for assistance. (The **System ID** and/or **Service Hostname** may be incorrect or misspelled.)

This communication error may occur at any time on any screen when running the PartsWatch application. Tapping the **OK** button may result in the PWMobile application resuming a function being performed if the communication issue is immediately resolved.

On the initial attempt to access a PartsWatch database with a mobile device, a pop-up message displays stating ‘Device authorization is pending’ when the PartsWatch database connection is successful. The mobile device still cannot access any information within the PartsWatch database until someone using the PartsWatch application within the same PartsWatch database authorizes the specific mobile device. **Note:** This authorization is only required once within a PartsWatch database for as long as the mobile device is used. However, if someone using the PartsWatch application within the same database revokes access from that specific mobile device, the mobile device needs to be authorized again within that same PartsWatch database.

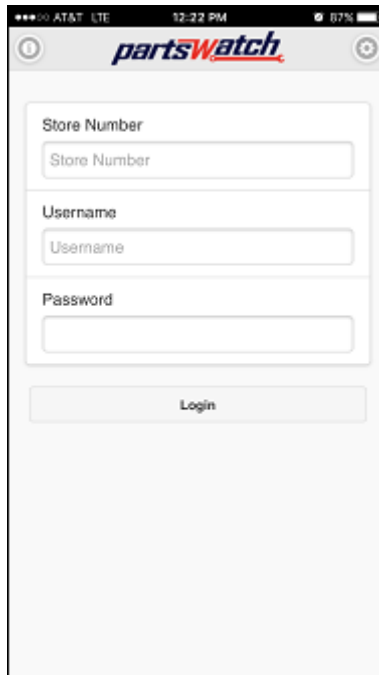


7. Tap the **OK** button on the pop-up.
The **Config** screen redisplay with two additional fields, **Authorization Code** and **Authorization Status**. The **Authorization Code** can be provided to the store manager to help authorize the device. The **Authorization Status** remains in Pending status until someone using the PartsWatch application within the same PartsWatch database authorizes this specific mobile device.

Note: An alternate method to connect to a PartsWatch database using a mobile device is through

the SYSTEM INFORMATION screen, accessed from Controls, System, System Info, in the PartsWatch application. Refer to the SYSTEM INFORMATION Help for additional details.

8. Tap the **Close** button when the device is authorized.
*The **Login** screen displays.*



9. Enter the 'current store' number within the PWMobile application in the **Store Number** field.
This number can be changed if the user has access to multiple stores in that PartsWatch database.
The Store Number can only be changed on the PWMobile **Login** screen.
10. Enter a username in the **Username** field.
Note: Use the same username used to log into the PartsWatch application on a PC desktop.
11. Enter a password in the **Password** field.
Note: Use the same password used to log into the PartsWatch application on a PC desktop.
12. **Optional:** Tap the **Settings** icon in the upper right corner of the **Login** screen.
*The **Config** screen displays to update configuration settings, if needed.*
13. Tap the **Login** button.
The user is logged into the PWMobile application. The user's PWMobile 'Home' screen displays. (The VIN Scan screen displays as the default 'Home' screen on the initial login to the PWMobile application. However, the user can change this to the screen of his choice.)

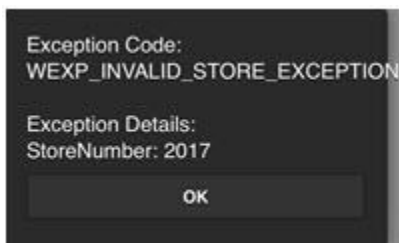
Note: Once logged in, the user does not need to log in again (even if he closes the PWMobile application) unless:

- The user taps the **Logout** menu item on the **Menu** screen.

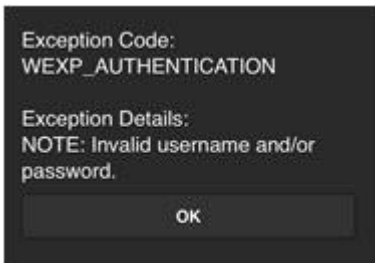
- The user's PWMobile application session expires on the mobile device. **Note:** The Default expiration is set to 'never'.
- The user's mobile device authorization status is set to REVOKE.
- The user's mobile device authorization record is deleted in the MANAGE DEVICES pop-up, accessed from the STORE INFORMATION screen, accessed from Controls, System, Store Info, in the PartsWatch application.

Note: The following pop-ups display when:

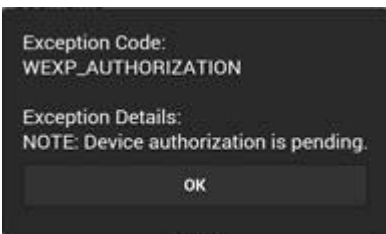
- The Store Number is changed by the user and the Store Number entered does not exist in the PartsWatch database.



- The Username and/or Password do not match the values within the PartsWatch database.

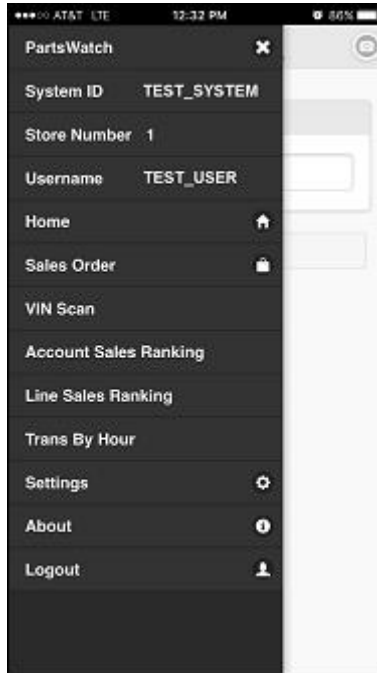


- The Username and Password match the values with the PartsWatch database but the mobile device is not yet authorized by the PartsWatch application in the PartsWatch database.



3.5. Menu Panel

Tap the **Menu** icon in the upper left corner of the screen or swipe the menu panel.
The PWMobile menu screen displays. Make the appropriate selection to continue.



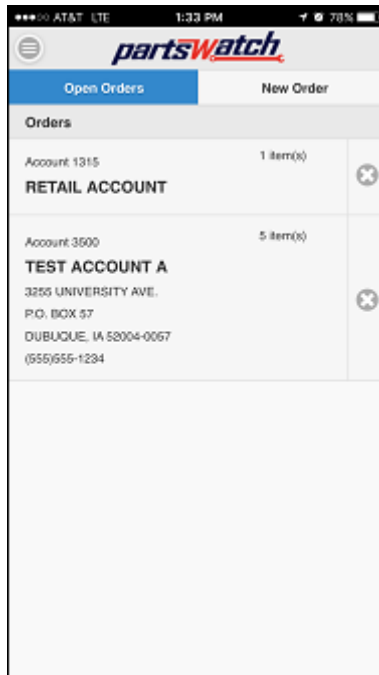
Item	Description
PartsWatch	Displays the application name.
System ID	Displays the system identifier.
Store Number	Displays the location number.
Username	Displays the user's name.
Home	Navigates to either the default Home page or the screen selected by the user as his preferred Home screen.
Sales Order	Used to create a sales order on their mobile device and submit it to the PartsWatch desktop application.
VIN Scan	Used to scan a VIN number off a vehicle and transmit the information to the PartsWatch ACES Catalog. Available to all PWMobile users.
Account Sales Ranking	Displays the Account Sales Ranking report. Available to only those PWMobile users with User Security permission to access the PartsWatch application's Sales Analysis suite of reports.
Line Sales Ranking	Displays the Line Sales Ranking report. Available to only those PWMobile users with User Security permission to access the PartsWatch application's Line Sales Report.
Trans By Hour	Displays the Trans By Hour report. Available to only those PWMobile users with User Security permission to access the PartsWatch application's Transaction By Hour Report.
Settings	Navigates to the Settings screen for selecting user preferences. Use this screen to select a preferred 'Home' screen.
About	Displays the About pop-up used to identify the version of the application and the

Item	Description
	Privacy Policy.
Logout	Exits the application.

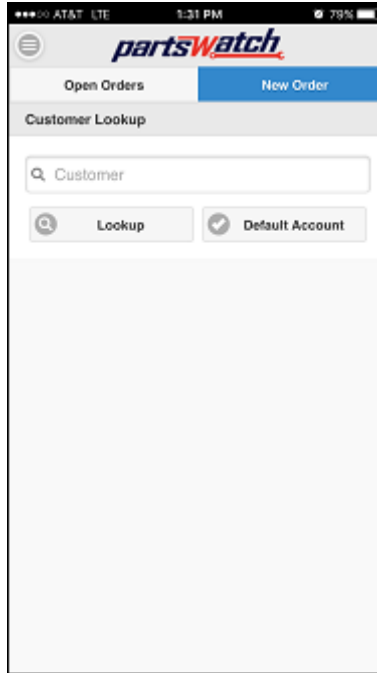
3.6. Sales Order

The **Sales Order** screens allow the user to create a sales order on their mobile device and submit it to the PartsWatch desktop application.

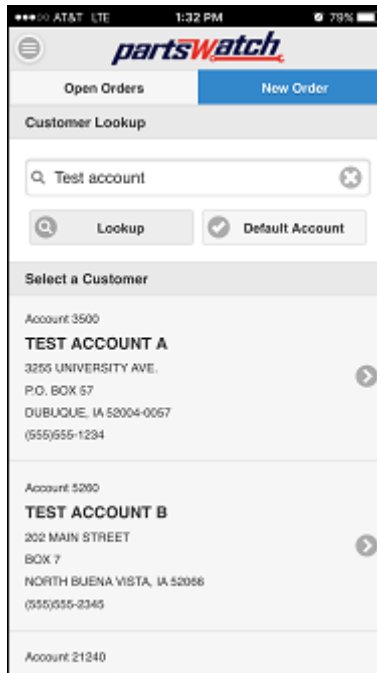
When the Sales Order option is selected from the menu, PWMobile will display the list of open orders (if any exist). The Open Orders screen will include the customer information and the number of items on each order. Tab on an open order to continue working on it or tap the delete icon to remove the open order (a confirmation prompt will display before the order is removed). Tap New Order in the navigation bar to start a new order.



On the New Order screen, tap Default Account to use the store’s default account from the Controls > Store > Invoice Options > INVOICE OPTIONS screen in the PartsWatch desktop application or type in a customer and tap Lookup. You can search for a customer by name (full or partial), account number, account code or phone number. Tap Open Orders in the navigation bar to return to the list of open orders.

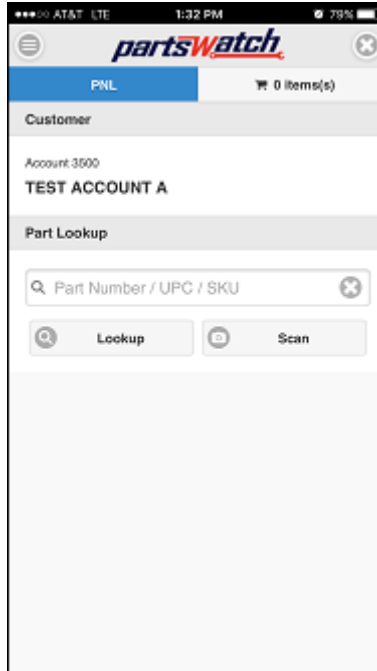


After tapping the Lookup button, if there are multiple matches found, a customer list will display. Tap on the correct customer or lookup another customer. A “No matches found” message will display if no customers are found matching the search criteria.

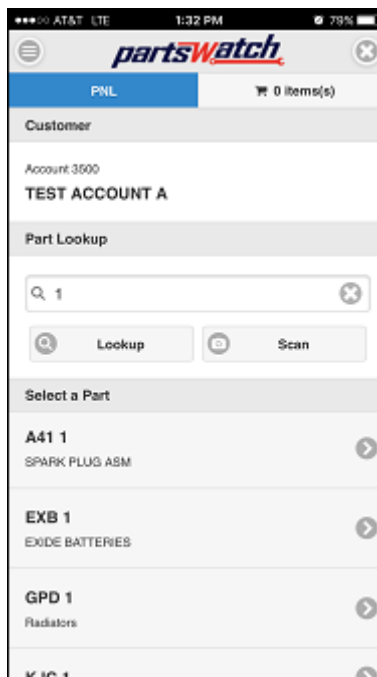


After a selecting a customer from the list of matches, the Part Number Lookup (PNL) screen will display. If Default Account is tapped or only one matching customer is found when Lookup is tapped, the PNL screen will display immediately.

On the PNL screen, tap the Scan button to scan a barcode to look up a part or type in a part to look up. You can search for a part by part number, UPC, SKU, product, alias or OEM number.

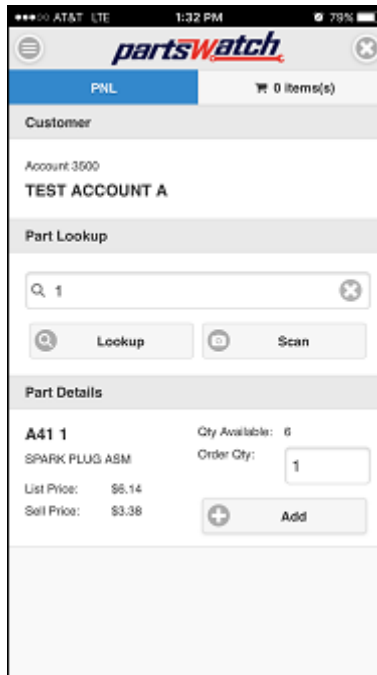


After tapping the Lookup button, if there are multiple matches are found, a part list will display. Tap on the correct part or look up another part. A “No matches found” message will display if no parts are found matching the search criteria.

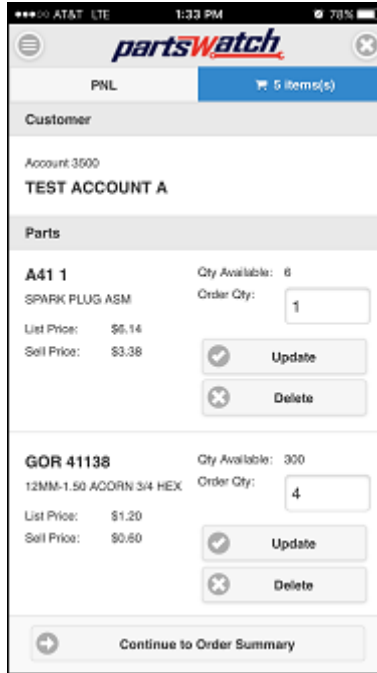


After selecting a part from the list of matches, additional part details will display. If only one matching part was found when Lookup is tapped, the part details will display immediately.

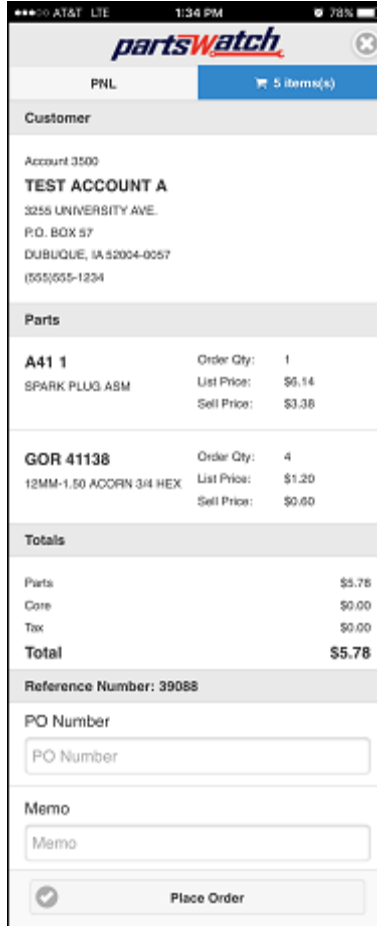
Change the Order Qty value (if necessary) and tap the Add button. The shopping cart summary in the navigation bar will be updated and a message will display confirming that the part was added to the order. Tap the shopping cart summary in the navigation bar to view all of the parts on the order.



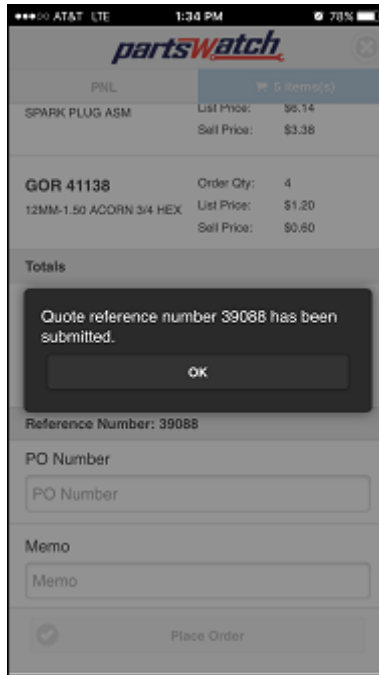
The Shopping Cart screen will display the list of parts on the order. The user can change the Order Qty and tap Update or tap Delete to remove the part from the order (a confirmation prompt will display before the part is removed). Tap PNL in the navigation bar to add more parts to the order. Tap Continue to Order Summary to review the order.



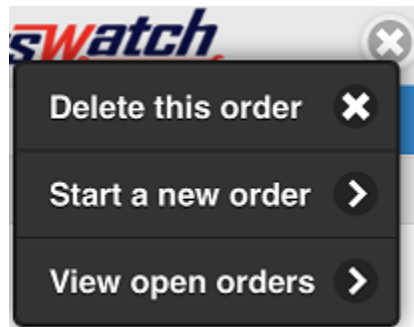
The Order Summary screen will display the customer, parts, totals and the reference number. The user can optionally enter a PO Number or Memo. Tap Place Order and the Background Processor running in the PartsWatch desktop application will print the order in the store. Tap PNL in the navigation bar to add more parts to the order. Tap shopping cart summary in the navigation bar to return to the Shopping Cart screen.



After the order has been placed, a confirmation message will display with the reference number of the sales order that was created in the PartsWatch desktop application.

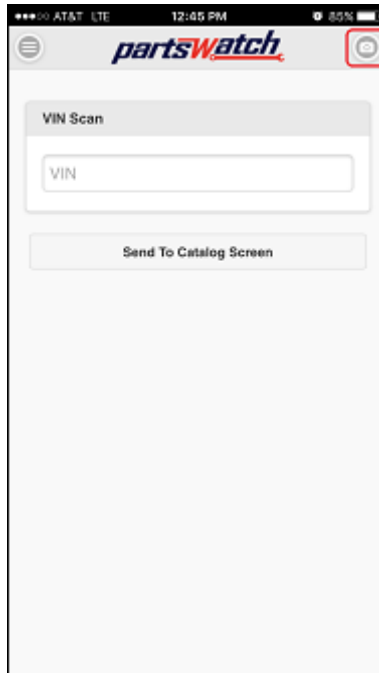


When working on a sales order, tap the cancel icon in the upper right corner of any of the screens to view the following list options:



3.7. VIN Scan

The **VIN Scan** screen enables the user to take scan a VIN bar code by tapping the **Camera** icon, or type the VIN directly into the edit box.

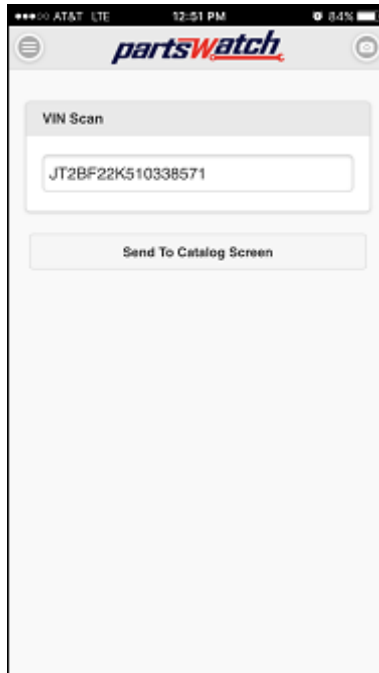


When using the **Camera** icon, hold the mobile device over a VIN bar code on a vehicle and scan the VIN bar code. The mobile device's camera performs the scan.

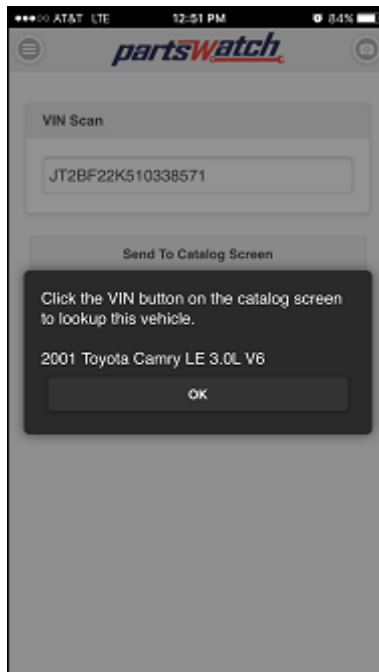
For most vehicles, the VIN number bar code is located on the inside of the driver's side door. The user must align the mobile device directly over the VIN number bar code and hold the mobile device very steady in order for the picture to be automatically taken. **Note:** When the user's hand is unsteady, the mobile device may not be able to automatically take a picture. The user will then need to type the VIN.



Once properly aligned, the camera automatically scans the VIN bar code. When successful, the edit box automatically populates with the VIN number bar code.



Tap the **Send To Catalog Screen** button to send the vehicle's VIN to the PartsWatch application's pop-up that displays a list of recently scanned VIN numbers.



A message displays stating 'Invalid VIN' when the VIN scanned by the mobile device's camera, or typed by the user, is considered invalid for any reason, or if a VIN was not scanned or entered.

Once the VIN is received by the PartsWatch application, click the VIN button in the ACES CATALOG screen in the PartsWatch application. All recently scanned VIN values display in the pop-up.



The pop-up displays the following fields:

- VIN NUMBER – Displays the VIN. The VIN values remain in the pop-up until they are purged from the PartsWatch application.
- USERNAME – Displays the login of the employee who transmitted the VIN from the PWMobile application.
- DATE – Displays the date/time when the PartsWatch application received the scanned VIN.

Click OK and the ACES CATALOG screen displays populated with the Year, Make, Model and Engine type for the vehicle that had its VIN scanned. The user can then display the available applicable parts for the vehicle.

3.8. Account Sales Ranking

Tap the **Account Sales Ranking** menu item to open the **Account Sales Ranking** screen. The report immediately runs against the PartsWatch database using the report option settings that are currently set.

Since the report option settings include a default selection of the Current Store and a default date range of 'today', if the report is run first thing in the morning before the current store opens, the screen may display with no sales results yet for the store.

To change the current report options settings, tap the **Options** icon, or swipe the screen from right to left to display the **Report Options** panel. Change Store Group and/or Date Range, as applicable. The following is an example of the Account Sales Ranking report.

Totals	
Net Sales:	\$219,440.44
Gross Sales:	\$267,745.66
Details	
21240	Net Sales: \$3,468.71
TEST ACCOUNT C	Gross Sales: \$3,784.71
3500	Net Sales: \$3,370.31
TEST ACCOUNT A	Gross Sales: \$3,679.56
29400	Net Sales: \$3,202.90
TEST ACCOUNT D	Gross Sales: \$3,420.19
33383	Net Sales: \$2,915.96
TEST ACCOUNT E	Gross Sales: \$3,226.67
5260	Net Sales: \$2,838.28
TEST ACCOUNT B	Gross Sales: \$3,023.64

The Account Sales Ranking report outputs the following information:

Totals – Reports the total Net Sales and Gross Sales for the Store Group within the selected Store Group and Date Range.

Details – Lists all Accounts (Account Name and Account Number), or Account Code (if set in the PartsWatch application), that had Net Sales and Gross Sales within the selected Store Group and Date Range.

3.9. Line Sales Ranking

Tap the **Line Sales Ranking** menu item to open the **Line Sales Ranking** screen. The report immediately runs against the PartsWatch database using the report option settings that are currently set.

Since the report option settings include a default selection of the Current Store and a default date range of 'today', if the report is run first thing in the morning before the current store opens, the screen may display with no sales results yet for the store.

To change the current report options settings, tap the **Options** icon, or swipe the screen from right to left to display the **Report Options** panel. Change Store Group and/or Date Range, as applicable. The following is an example of the Line Sales Ranking report.

Totals	
Net Sales:	\$219,440.64
Gross Sales:	\$267,745.66
Details	
MOT	Net Sales: \$23,054.08
MotorCraft	Gross Sales: \$29,711.43
DD7	Net Sales: \$20,449.97
ACDelco Battery	Gross Sales: \$26,147.64
WAL	Net Sales: \$12,192.58
Walker Exhaust	Gross Sales: \$14,277.63
CEC	Net Sales: \$12,085.42
Centric Brakes	Gross Sales: \$14,719.81
D33	Net Sales: \$6,492.62
ACDelco Starter & Alternator	Gross Sales: \$9,248.95

The Line Sales Ranking report outputs the following information:

Totals – Reports the total Net Sales and Gross Sales for the Store Group within the selected Store Group and Date Range.

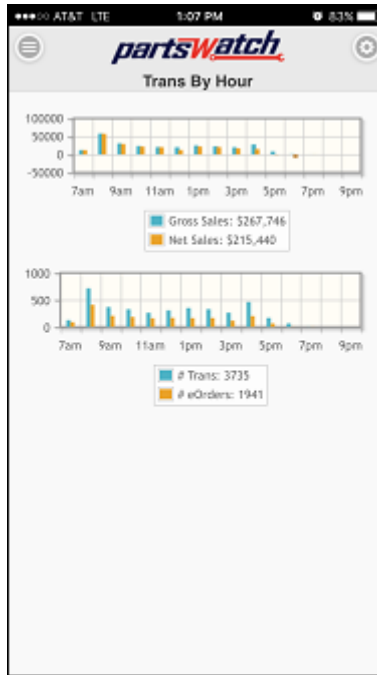
Details – Lists all Lines (Line Name and Line Code) that had Net Sales and Gross Sales within the selected Store Group and Date Range.

3.10. Trans By Hour

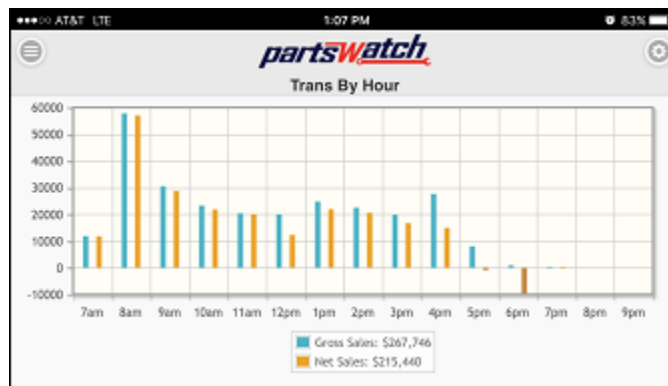
Tap the **Trans By Hour** menu item to open the **Trans By Hour** screen. Two graphs immediately run against the PartsWatch database using the report option settings that are currently set.

To change the current report options settings, tap the **Options** icon, or swipe the screen from right to left to display the **Report Options** panel. Change Store Group and/or Date Range, as applicable.

The following is an example of the Trans By Hour graphs in portrait.

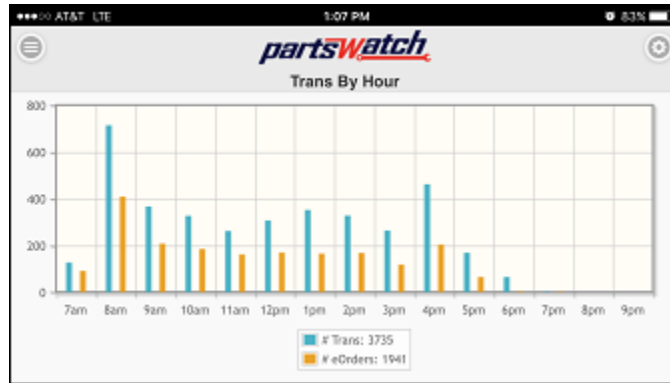


The following is an example of the first Trans By Hour graph in landscape (after rotating the mobile device).



The bar graph displays Gross Sales for the selected Store Group and Date Range, and Net Sales for the selected Store Group and Date Range by hour starting with 7 am and ending with 10 pm. These sales figures are based on the GPM% field values used on sales reports within the PartsWatch application.

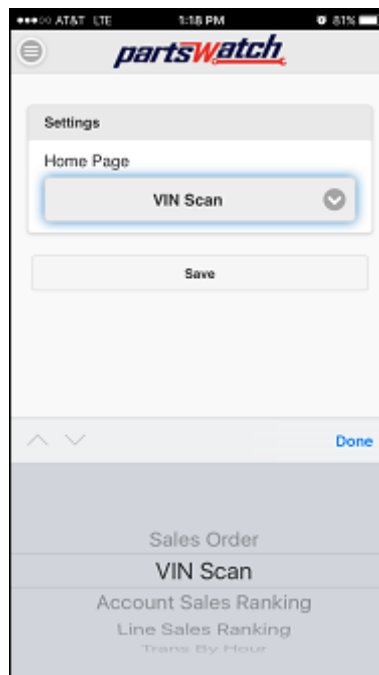
Swipe the screen from bottom to top to display the second graph in landscape (after rotating the mobile device).



The bar graph displays the total number of all sales order transactions (**# Trans**) for the selected Store Group and Date Range, and total number of Internet sales order transactions (**# eOrders**) for the selected Store Group and Date Range only by hour starting with 7 am and ending with 10 pm.

3.11. Settings Screen

Tap the **Settings** menu item to display the **Settings** screen used to select the user’s preferred Home screen function from the list of available application functions. The selected Home screen function displays whenever the user logs in to the PWMobile application.

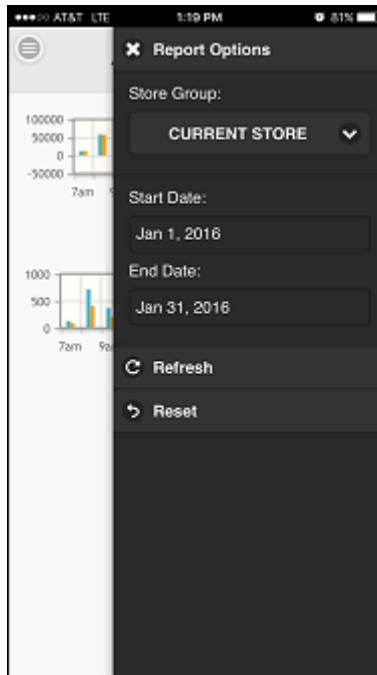


Tap the **Home Page** drop-down arrow to select an available application function as the “Home’ screen. The list of available PWMobile application functions is based on the user’s User Security permissions in the PartsWatch application.

Once a function is selected, tap the **Save** button to save the selection.

3.12. Report Options Panel

Tap the **Options** icon on any report screen, or swipe the report screen from right to left to display the **Report Options** panel used to change the PWMobile application settings. The two settings are Store Group and Date Range.



Store Group

- Current Store is the default.
- Current Store is always the user's login store and cannot be changed.
- Current Store number can be viewed on the **Menu** panel.
- Current Store number can be changed on the **Login** screen.
- Store Group value of ALL represents all of the stores that the user has access to in the PartsWatch database based on his PartsWatch store security in that database.
- The remaining Store Group selections represent all Store Groups that have been created in that PartsWatch database.
- All PWMobile users with access to any of the three reports can see all of the available Store Groups.
- Only store sales for the stores within the selected Store Group (that the user has access to via his User Security access in that PartsWatch database) display.
- A new Store Group can be created in the PartsWatch database when stores that the PWMobile user wants to report sales for are not in any available Store Group selection. **Note:** The new Store Group would be available to all PWMobile users with access to any of the three reports.

Date Range

- Today's date is the default for both Start Date and End Date.
- Both dates can be any valid date: past, present or future.
- No validation is performed between the two dates. Start Date can be after the End Date.
- Only records within the date range are returned in any report.

Tap the **Store Group** drop-down icon to change the selected Store Group.

Tap the **Start Date** or **End Date** value to change the selected Start Date or End Date.

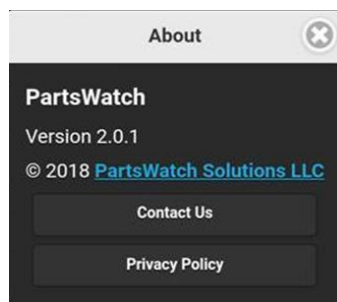
Tap the **Refresh** button to execute the report with the revised settings.

Tap the **Reset** button to reset the settings back to the PWMobile application defaults of Current Store and today's date.

Setting changes remain in effect across all three reports until the user taps the **Reset** button or logs out of the PWMobile application. Upon login, the report settings always contain the PWMobile application defaults.

3.13. About

Tap the **About** menu item to display the **About** pop-up, which identifies the version of the application.



Tap the **Contact Us** button to display an email message addressed to pwmobile@partswatch.com in the mobile device's email application. Enter content and tap **Send** to submit.

Tap the **Privacy Policy** button to display Autologue's Privacy Policy, as PartsWatch Solutions (PWS) is a division of Autologue, and PartsWatch and PWMobile are products of Autologue.