PartsWatch
How To Use Training Documents
Document Version R0.3

October 11, 2018

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Publication Record

Revision 0.3 is the current version of the *PW How To Use the Training Documents document.*

Rev.	Publication Date	Author Name	Description of Revisions
0.1	10/08/2018	Jay Altman	Initial Publication
0.2	10/10/2018	Jay Altman	Minor revisions
0.3	10/11/2018	Jay Altman	Minor Revisions

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.

APPLICATION AREAS

Within all of the new R57 documents, there are 15 Application Areas that are used to categorize all of the information contained in the document (see list below). For a few Areas (particularly Invoicing, Purchasing and Add-ons), there are also a few Sub-Areas (see list below).

Note: Multi-Store is a Sub-Area contained in different Areas (e.g. Purchasing, Inventory and User Interface).

Below is a list of all Areas with a description of the primary functions within each Area:

1. Invoicing
   - Promotions
   - Catalog
   - Point of Sale (except Returns)
   - Returns
   - Sourcing
   - Forms
2. Closeouts – all End of Period functions
3. AR – Statements and Posting Entries
4. Customer –Account Main, Utilities and Pricing
5. Purchasing
   - PO Create
   - PO Detail/Edit
   - PO Transmit
   - PO Receipt
   - Manifests and Return Orders
   - Multi-Store
6. Inventory – Part Main, Utilities and Pricing
   - Multi-Store
7. Reports
8. User Interface – Application Border, Menus, Login, etc.
   - Multi-Store
9. Add-ons
   - RF Gun
   - DFIU
   - Autologue eProducts
10. Data Interfaces – Feeds, Extracts and Services like Axciom or Central Services
11. eCommerce – integration with all websites like Nexpart
12. Utility Options – Task Scheduler and Record Retention
13. PC Setup – Mode 2 and Background Processor (BGP)
14. Vendor – Supplier and Line Main
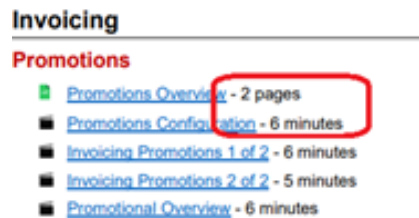15. Controls – Enterprise, System and Store configuration screens

R57 NEW DOCUMENTS AND VIDEOS

There are seven new documents in PW R57; this section contains a description of each document.

Overview – Documents and Videos

R57 (57.3) includes scope items from 56.1.6, 56.1.7, 57.0, 57.1, 57.2 and 57.3, and is oriented toward all PW customers upgrading from R56 (56.1.5).

Every link to a document displays the number of pages in the document, and every link to a video displays the number of minutes in the video; see sample below:

The most common video length is 5-7 minutes. Shorter videos are 2-3 minutes and the longest videos are 9-12 minutes.

Videos are sometimes broken up into a series of videos for either of two reasons:

- To keep the video lengths to easier viewing times (e.g. 5-7 minutes). A large topic will be broken up into smaller sub-topics.

- To separate videos into setup versus usage functions. Only store owner/managers will need to watch the setup video because often they alone perform the setup tasks (e.g. warranty setup). Everyone in the store will need to watch the usage video because everyone handles usage tasks (e.g. warranty return at POS).

Videos sometimes combine multiple topics (e.g. different reports or different changes to AR) in the same video in order to "inform or instruct" users on multiple new changes.

Videos sometimes have MM:SS timestamps to enable a user to "jump" right to a topic in a video.

In prior releases, PW customers received a Product Enhancements Document (PED). That document was created by "cutting and pasting" contents from all FSDs into one large document. This approach would be challenging for R57 due to the sheer number and size of FSDs.

Therefore, R57 is providing PW customers with a new set of documents to help them learn about all of the new features. A document called Release Enhancements Document (RED) is replacing the PED. The RED contains links to all of the FSDs. The primary plan is for PW customers to learn about the new features by watching the new videos but they can also read the FSDs in addition to, or instead of, the videos.

Release List of Changes (LOC)

- 14 pages
- Contains a list of ~185 changes
- Can be multiple changes for the same FSD
- One sentence description for each change
- Each change has iTrack # reference and a link to one video or video MM:SS timestamp
- The user has a link to this document in F1 Help
- Sample excerpt below:

Release List of Changes   **PWS PartsWatch R57.3**

Invoicing

Promotions

- Added the ability to set up and sell parts on multiple promotional discounts (e.g. BOGO, buy any 3 items for a set price, etc. (#49600 / Video 1 of 14)

Catalog

- Added support for an embedded Federated catalog. (#49580 / Video)
- For the Federated catalog, provided the ability to map catalog lines to store lines. (#52323)
- Added support for running multiple catalogs at Point of Sale. (#49580 / Video)
- For the ACES catalog, provided the capability to select multiple Groups and Subgroups in two different ways: using the Group and Subgroup drop-downs, as well as using a menu on the Part Search pop-up (#53227 / Video 0:42).
- For the ACES catalog, provided the option to hide or show NIFs when parts are displayed, and the checkbox can still toggle after NIFs are displayed. (#48190 / Video 2:55)

Release Enhancements Document (RED)

- 39 pages
- Contains ~140 scope items (FSDs)
- Each scope item has the Purpose and Summary sections from the FSD
- Each scope has a link to the entire FSD "as is"
- There are 8 Overview documents as well (for largest scope items)
- This document replaces the Product Enhancements Document (PED) from prior releases
- The user has a link to this document in F1 Help
- Sample excerpt below:

Release Enhancements Document   **PartsWatch R57.3**

Invoicing

Promotions

iTrack#49600_57.1_PW_Promotions_Setup_FSD_R1.1

Promotions Overview

Previously, PartsWatch was able to provide promotional sale date discounts and quantity breaks to customers at Point of Sale, but was unable to provide other types of promotions such as "buy one / get one" or line item and tender coupons.

Now, special promotional pricing is available at Point of Sale for retail or commercial customers.

Catalog

iTrack#52308_57.1_PW_ACES_Catalog_Enhancements_FSD_R1.3

ACES Overview

The purpose of these changes is to improve the functionality and usability of the PartsWatch ACES catalog interface. Some enhancements include a "smart-like" vehicle search, the ability to select multiple Groups and Subgroups (in two different ways), Buyer's Guide, License Plate lookup, saving and reusing catalog jobs, easier sourcing, and filtering results by position, part type or manufacturer.

Release Highlights Document (RHD)

- 5 pages
- Contains the 10 largest scope items
- Each scope item has all of the documents and videos related to that set of changes
- Documents include Overviews, FSDs, How-To documents, Worksheets and Comparison Charts
- The user has a link to this document in F1 Help
- Sample excerpt below:

Release Notes (RN)

- 1 page
- Contains a row for each new R57.3 client side build #
- This document may contain server side production fixes as well
- Each row contains the client side fixes (CRM #s and/or iTrack #s) within the build #
- Only the Official Build # 111 contains links to LOC and RED documents
- Optional builds will contain the client fixes only in that Build #
- The user has a link to this document in the ABOUT PartsWatch pop-up
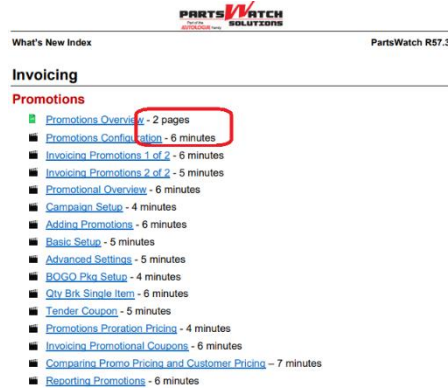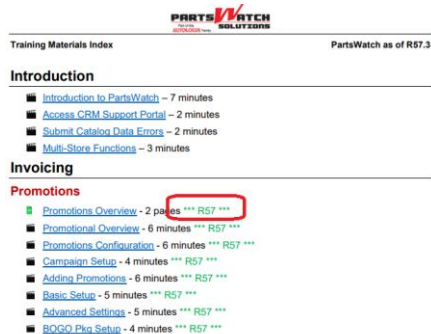- Sample excerpt below:

What's New Index (WNI)

- 5 pages
- Contains a link to 60 videos for all R57 new features
- There are 8 Overview documents as well (for largest scope items)
- There are 3 new How-To documents and 2 new Worksheets
- The user has a link to this document in F1 Help
- Sample excerpt below:

Training Materials Index (TMI)

- 9 pages
- Contains a link to 126 videos for all release (e.g. 53, 56 and 57) functions
- Any video (60 of 126) that is new in R57 is highlighted with *** R57 ***
- There are:
    - 8 Overview documents as well (for largest scope items)
    - How-To documents, Worksheets and Comparison Chart documents
    - Keyboard Shortcuts document
    - User Guides (e.g. RF Gun, DFIU, Mode 2 and PWMobile)
    - Autologue eProducts Setup Guide
    - Pricing Connector Guide and Template documents (for batch loading discounts)
    - Certified and Supported Hardware document
- The user has a link to this document in F1 Help
- Sample excerpt below:

Did You Know Index (DYK)

- 3 pages (but will continue to grow real-time as more DYKs are created)
- Contains a link to every DYK (which are sometimes created on a weekly or monthly basis)
- Each DYK contains its published date, the initial lead DYK question and a link to the entire DYK
- Users can access the links to all DYKs from the SYSTEM INFORMATION screen
- The user has a link to this document in F1 Help
- Sample excerpt below:

Did You Know Index   **PartsWatch**

User Interface

08/30/2018 - How To turn "on" (enable) new application menu items?

05/17/2018 - that you can access the **PartsWatch News** site, that you see on your application's SYSTEM NEWS screen, from anywhere, at any time?

05/05/2018 - the most efficient way to contact PartsWatch support is to use our self-service support portal?

04/26/2018 - that there are a variety of functions in the F1 Help screen for easier navigation and accessibility?

Invoicing

06/01/2018 - that you can find the **ACES catalog part types** you are looking for by using the **Part Search pop-up** without first selecting a group, subgroup and part type?

05/24/2018 - that you can see the new lines added into the WHI Catalog each month right from within PartsWatch?

02/02/2018 - about the following options on the **ACES Catalog screen**?

HOW-TO NAVIGATE THE NEW DOCUMENTS

1. Upon opening any document, the "Table of Contents" (TOC) of that document displays. You can click on a page number to immediately jump to an Area; see sample below:
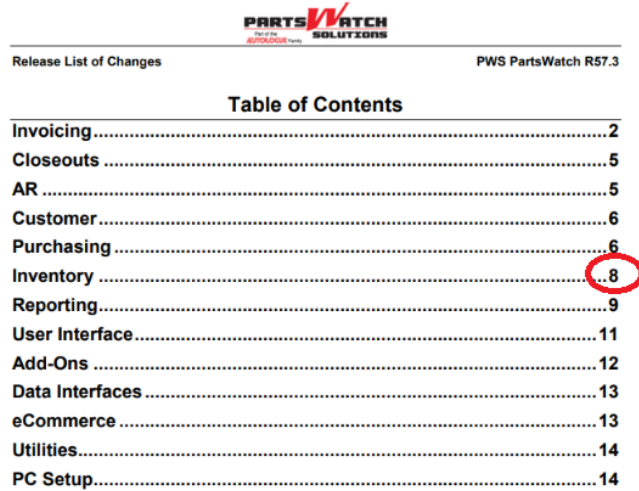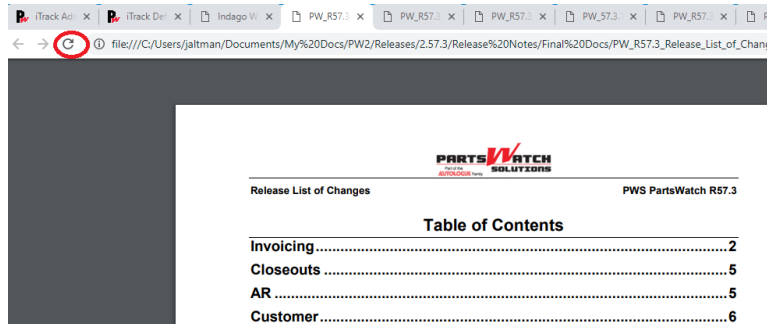

2. To get back to the TOC (top of the document), click the "refresh" button; see sample below:
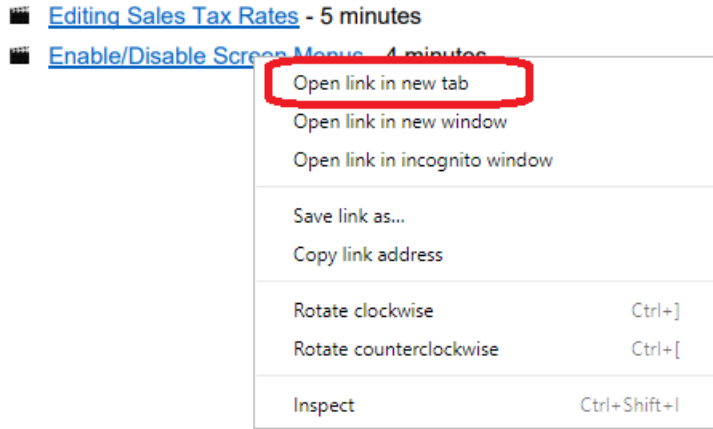

3. If you click on any hyperlink, the next document or video will open *in the same Windows tab*. After reading the document, or watching the video, you can return back to the main document "Table of Contents" section by clicking the return arrow; see sample below:
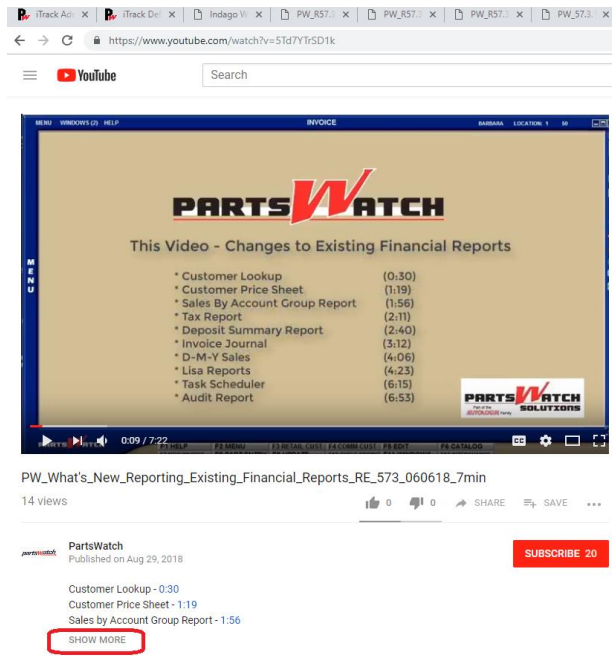
4. If you want to open a document or video *in a different tab* (so that you can have both the main document and the other document/video open at once), right-click on the hyperlink, and select the appropriate menu item; see sample below:
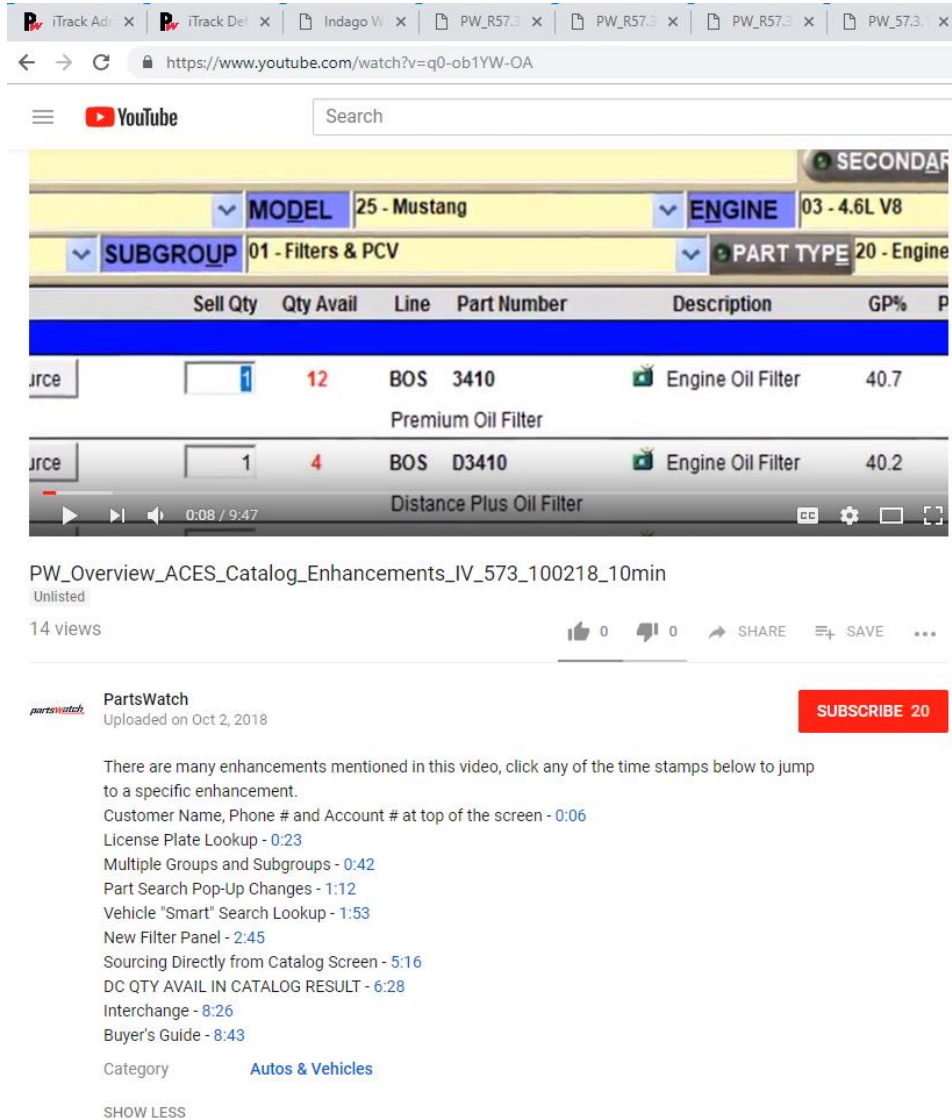

5. Several videos that combine different new features into one video (e.g. Existing Financial Reports) will display at the beginning of the video the MM:SS locations for each new feature (report); see sample below.
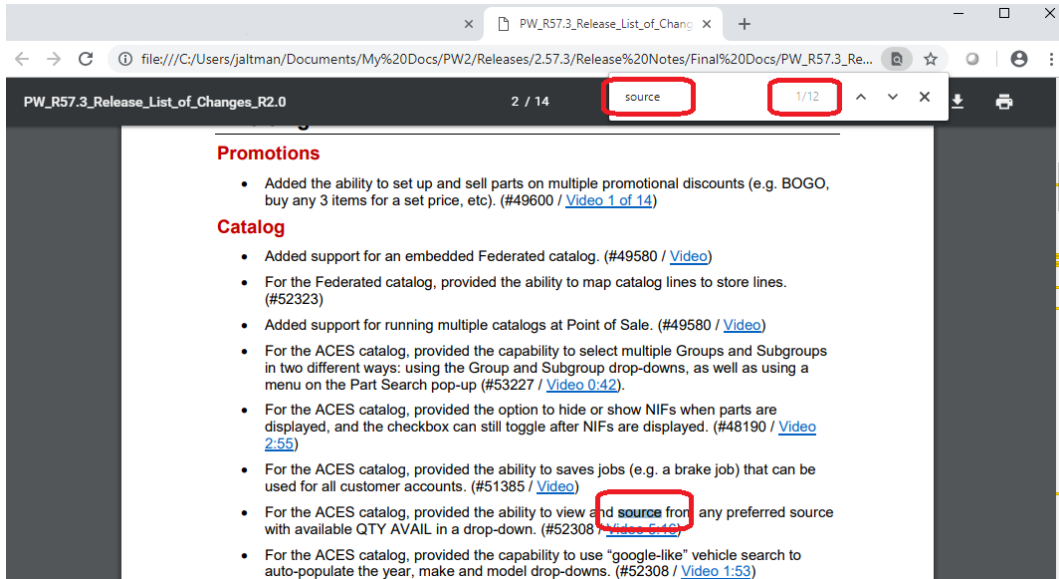
Note: This is to enable a user to drag the horizontal scroll bar to that exact MM:SS location in the video. Note also that YouTube displays the same list of MM:SS locations. You can click these links to "jump" to a location in the video. See the SHOW MORE clickable link to display more MM:SS locations in the video; see sample below:
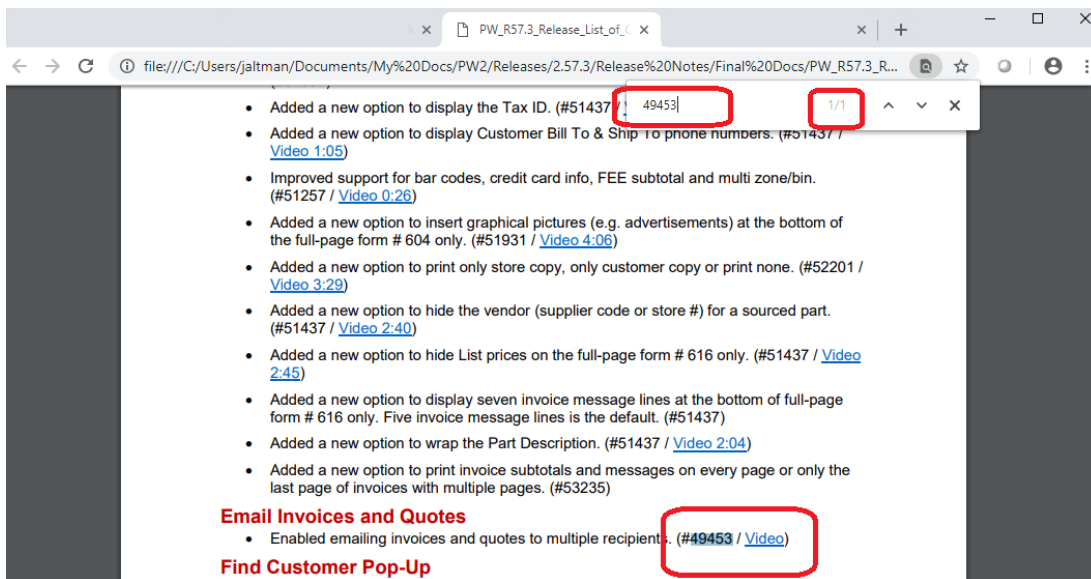
6. Some videos that are long (9+ minutes) for one new feature (e.g. ACES Catalog UI) may not display MM:SS locations in the beginning of the video but there is a list of those MM:SS locations in YouTube that are clickable links to those locations; see sample below:

7. While any of the documents are "open" in a browser, you can press the Ctrl + F keys together in order to display a Find pop-up. Any text characters entered into the pop-up will be searched for within the entire document. In the sample below, the text "source" was entered. This text was found twelve times in the document (as noted in the pop-up) and the first instance was "jumped to" in the Invoicing, Catalog sub-area; see below:
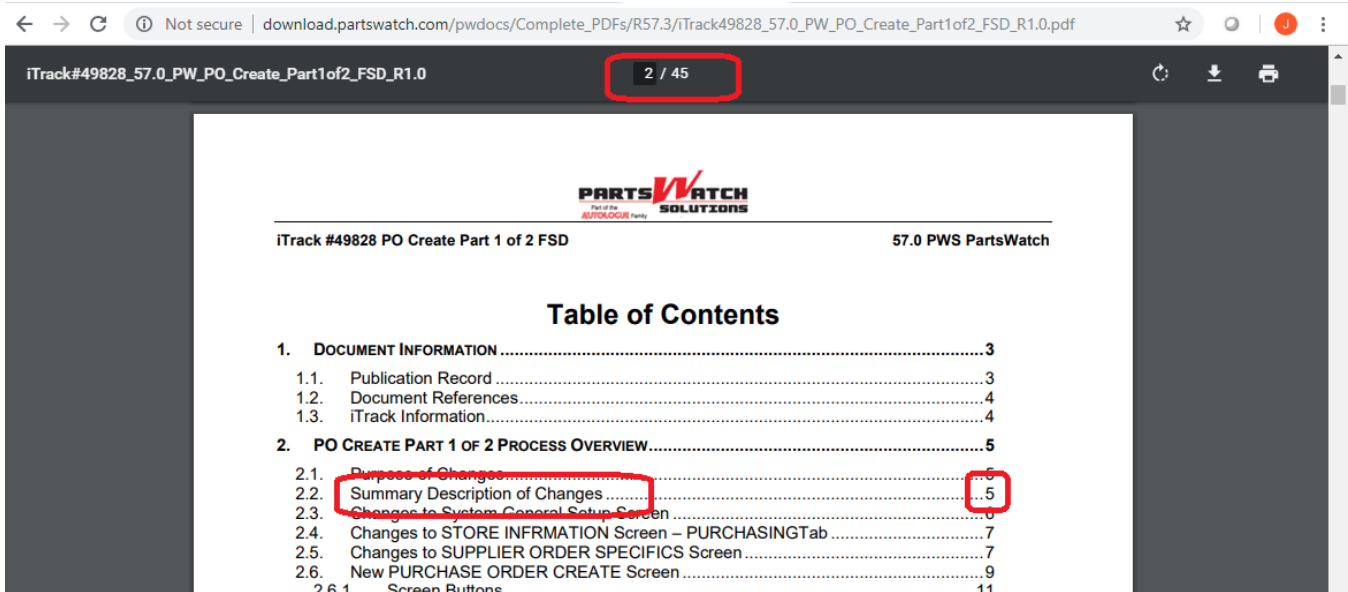
As another example, any iTrack # can be entered as the text to search for in the LOC document and this will quickly identify if the scope item has a training video; see sample below:
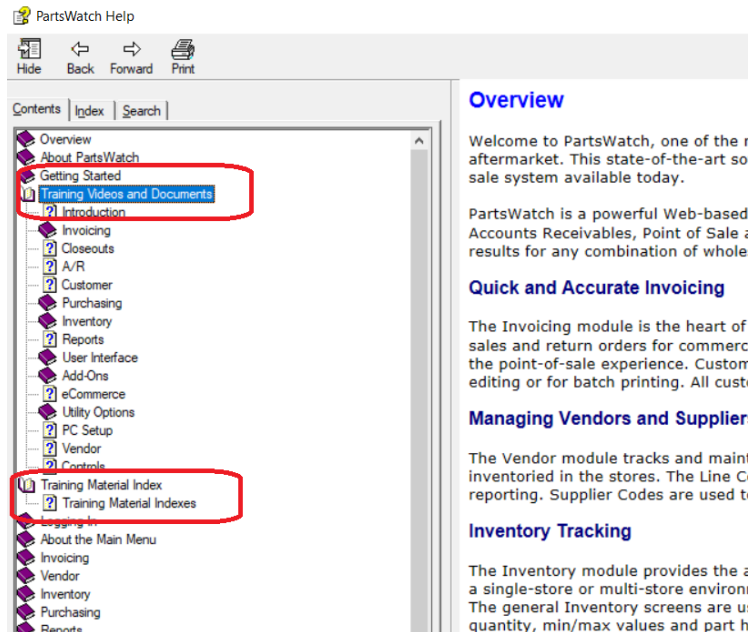

8. While any of the FSD documents are "open" in a browser, you can jump to a specific page in the document by:

   - First move your cursor to the top of the document so that the black "header ribbon" displays. The header ribbon displays (in the center of the ribbon) the page you are on and the total number of pages in the document. In the example below, the user is viewing the Table of Contents on page 2 and there are 45 pages in the document.

   - To extend the same example, if you wanted to jump to the "Summary Description of Changes" section in the document on page 5, you can click on the page number (2) at the

top center of the header ribbon, and when highlighted, you can then type in the page number 5. You can continue to type in different page numbers to jump throughout the entire document; see sample below:
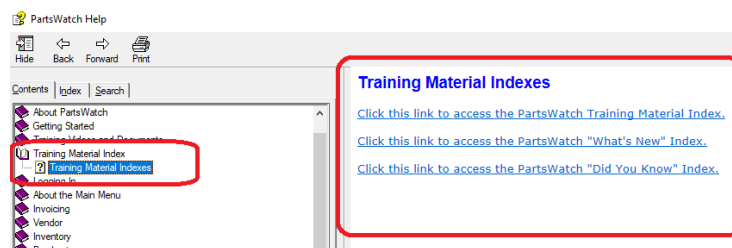
WHERE TO FIND ALL OF THE NEW DOCUMENTS IN F1 HELP

1. At the top of the "Contents" of F1 Help, there is a section called "Training Videos and Documents".

   • Within this section, there are the fifteen Application Areas. Within each Area section, there are links to the training videos or documents related to that Area (possibly further categorized by Sub-areas); see sample below:

2. There is another section called "Training Materials Index" right below the "Training Videos and Documents" section; also at the top of F1 Help; see sample below:
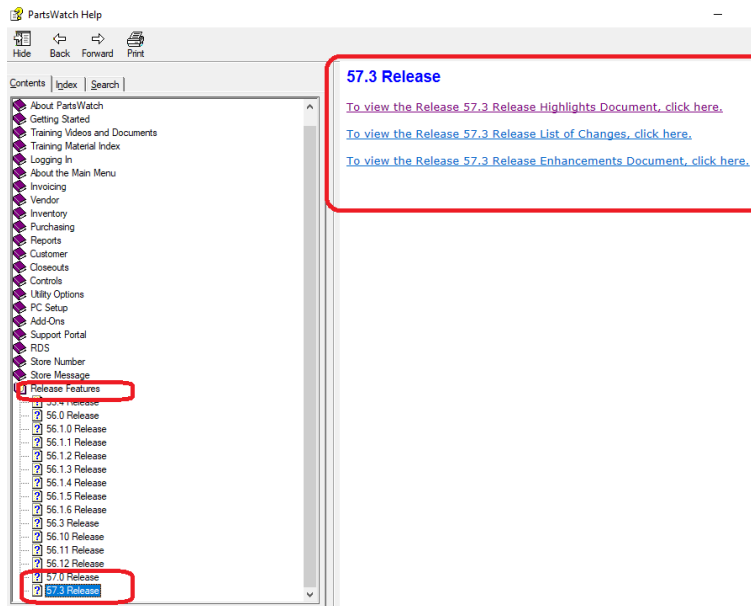

3. Within the "Training Materials Index" section, there are links to three documents:

   • Training Materials Index (TMI)

   • What's New Index (WNI)

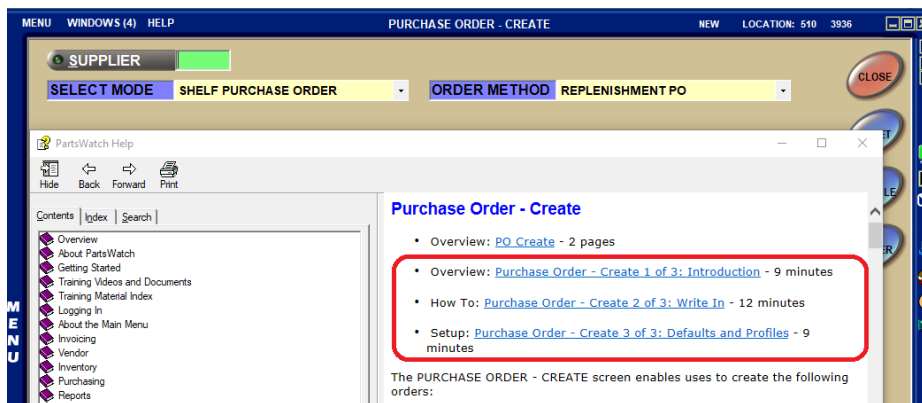   • Did You Know Index (DYKI)

Note: While the F1 Help contains "static" information that is only updated when another client build is deployed on all desktops, the TMI document can "dynamically" add new video links at any time.

4. At the bottom of the "Contents" of F1 Help, there is a section called "Release Features".

5. Within that section, there is another section called "57.3 Features".

6. Within that section, there are links to three documents; see sample below:

    • Release Highlights Document (RHD)

    • Release List of Changes (LOC)

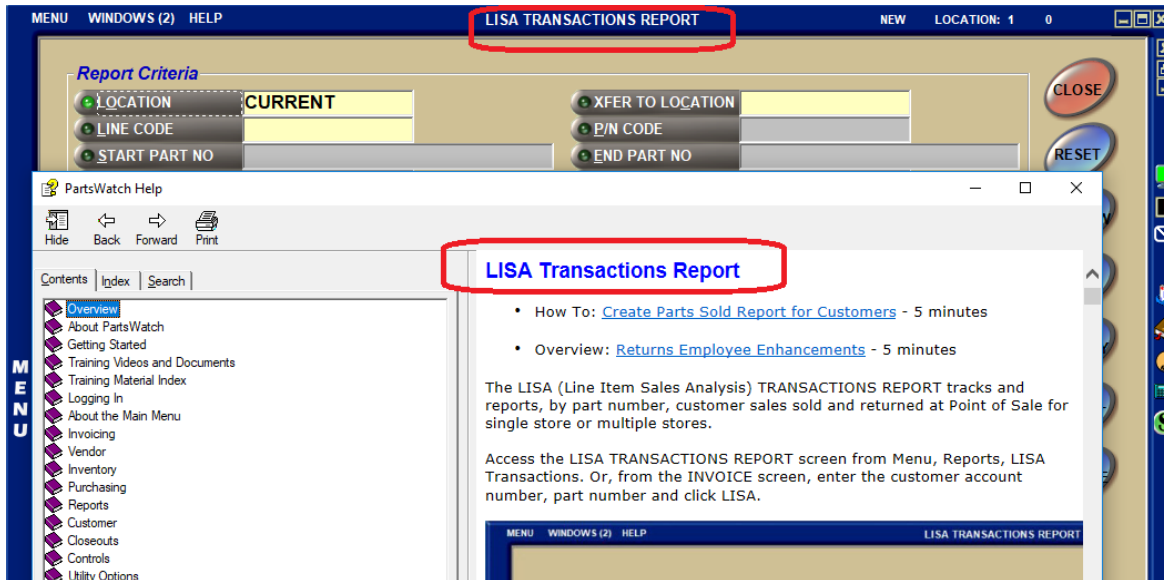   • Release Enhancements Document (RED)

7. Throughout the F1 Help file, every video that was contained in the "Training Videos and Documents" section is also contained in another section. That means there are two places within the F1 Help file to find any video. At the top of the F1 Help file, all of the videos are together for browsing all videos. Throughout the F1 Help file, videos are scattered within their associated topic areas for use as a reference. For example, if a user navigates to the new PO-CREATE screen section of F1 Help, the new training videos for that function are at the top of that section.
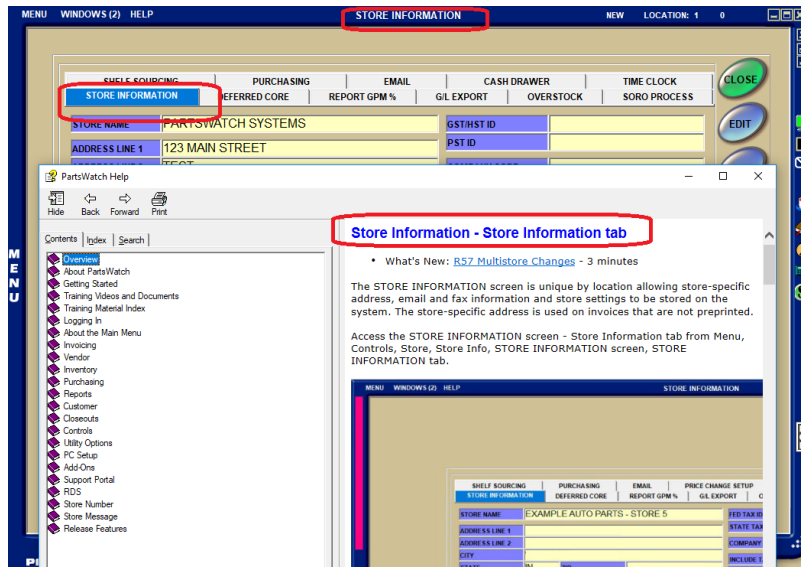
WHAT ELSE IS NEW IN F1 HELP

Screen context sensitive help from every screen in the application. While any application screen is open (e.g. LISA TRANSACTION REPORT), if you press the F1 HELP hot key, the F1 Help file opens to that same section (e.g. Lisa Transaction Report); see sample below:
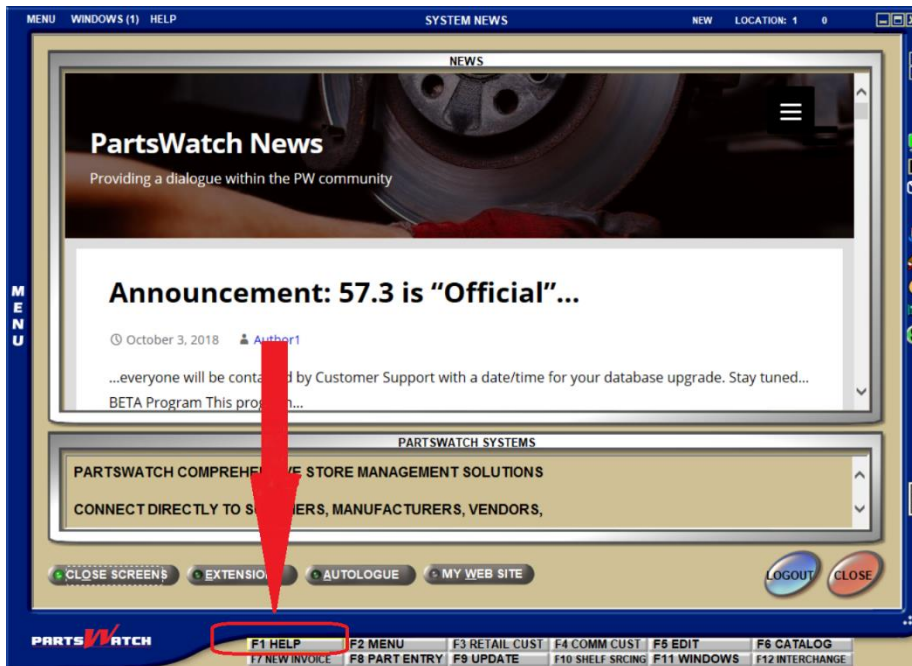

There is also screen TAB context sensitive help from three screens in the application. They are:

- Controls, Store, Store Info

- Controls, Store, Invoice Options

- Controls, Store, AR & Close Options

While any of the three screens is open (e.g. STORE INFORMATION), on any TAB (e.g. STORE INFORMATION), if you press the F1 HELP hot key, the F1 Help file opens to that same section (e.g. Store Information – Store Information tab); see sample below:
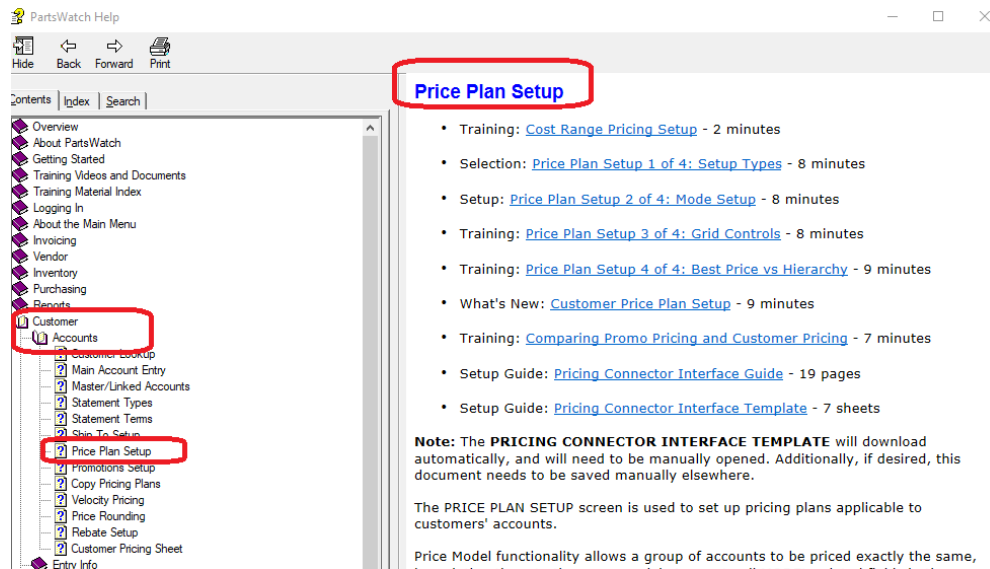
The F1 HELP hotkey is located at the bottom of every application screen; see sample below:
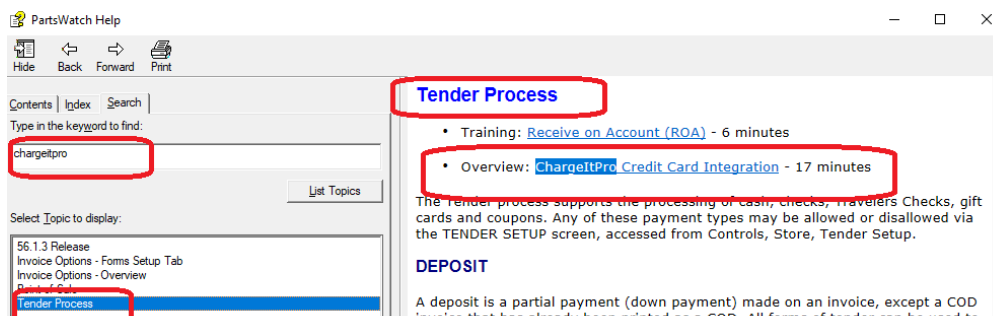
WHAT HAS ALWAYS BEEN IN F1 HELP

The ability to find a section in F1 Help using the Contents menu hierarchy that is similar to the application's menu hierarchy. For example, if you were looking for "help" on the CUSTOMER PRICE PLAN SETUP screen, you could click down the Contents menu starting with Customer, then Account, then Price Plan Setup; see sample below:

Notice that all of the training videos for the CUSTOMER PRICE PLAN SETUP screen are listed at the top of the section. **Note:** In this release, if you navigated to the application screen first (via Customer, Accounts, Acct Pricing, Price Plan Setup) and then clicked the F1 HELP hot key, you would "jump" immediately to this section in the F1 Help file.
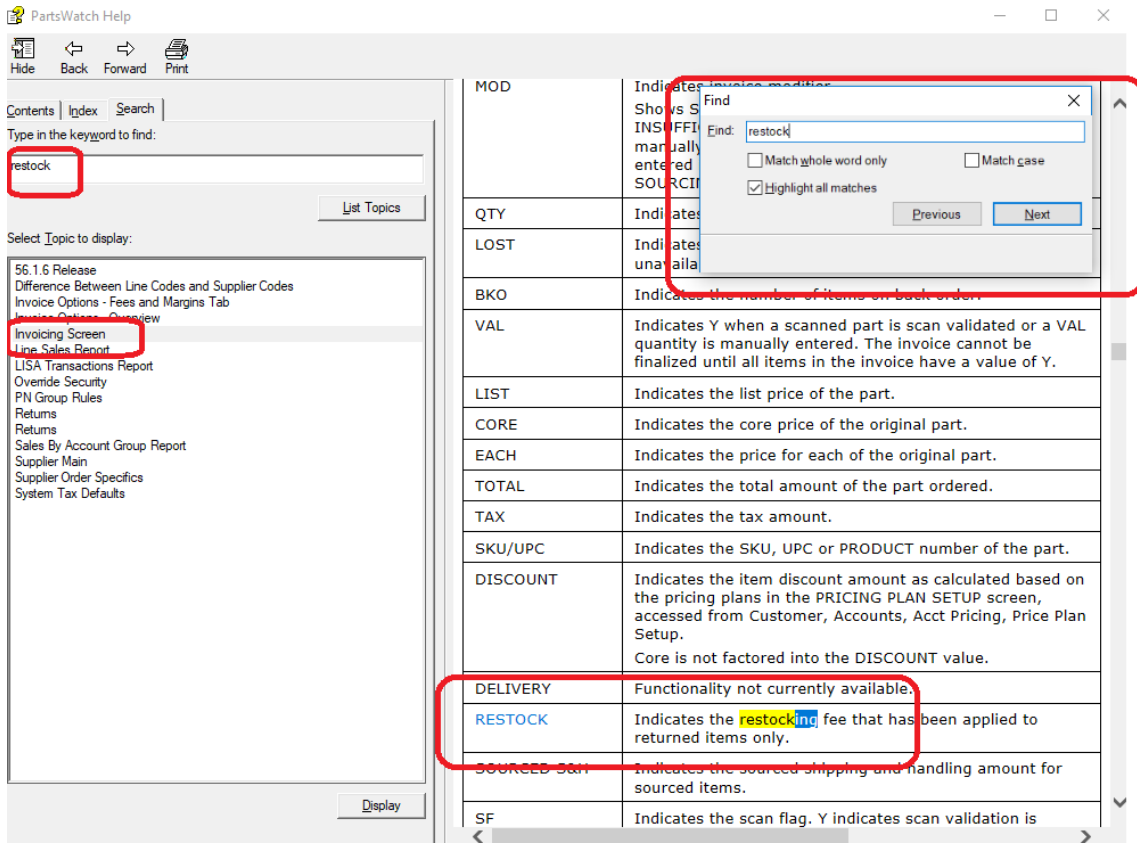
The ability to search for a function in the entire F1 Help file. For example, if you were looking for information about "ChargeItPro" credit card integration and you typed in the text "chargeitpro" in the Search box (and pressed Enter key or the "List Topics" button), you would see a list of topics displayed. In this example, if you select "Tender Process", you see a training video about ChargeItPro Tender Credit Card Integration; see sample below:

Finally, the ability to use both "Search and Find" together. For example, if you were looking for information on "restocking" fees and you typed in only the text "restock" in the Search box (and pressed the Enter key or the "List Topics" button), you would see a list of topics displayed. In this example, if you select "Invoicing Screen", you see the top of that section with no mention of "restocking fees".

Therefore, you then press the Ctrl + F keys together and enter the text "restock" again so that the "restocking fees" content is found in the Invoicing Screen section; see sample below:

To extend the same example above, if you selected the "Returns" topic instead, you would find a training video on "Restocking Fees"; see sample below: