

PartsWatch How To Use Training Documents Document Version R0.3

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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.



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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



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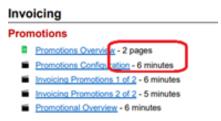
R57 NEW DOCUMENTS AND VIDEOS

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

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scounts (e.g. BOGO

SOLUTIONS

- The user has a link to this document in F1 Help
- Sample excerpt below:

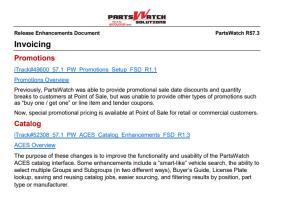
 Added the ability to set up and sell parts on multiple promotion buy any 3 items for a set price, etc. (#49600 / <u>Video 1 of 14</u>) Catalog Added support for an embedded Federated catalog. (#49580 / Video) · For the Federated catalog, provided the ability to map catalog lines to store lines. (#52323) 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 (<u>Video 0:42</u>). 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 / <u>Video</u> 2:55)

Release List of Changes

Invoicing Promotions

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:

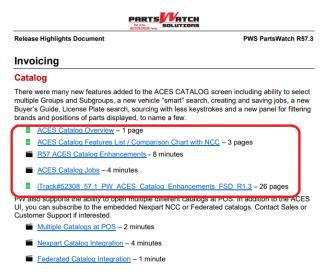






Release Highlights Document (RHD)

- 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 #

Poloseo Notos

- 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:



DWS ParteWatch P57

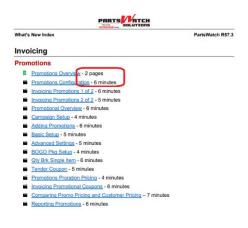
Release Notes PWS Partswatch		
Release #	Date Released	Description of Changes
57.3.111	10/02/2018	Official Release
		Link to the Release List of Changes
		Link to the Release Enhancements Document



PWS PartsWatch

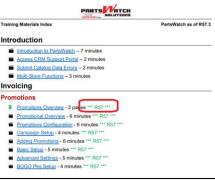
What's New Index (WNI)

- 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

<u>06/01/2018</u> - 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?

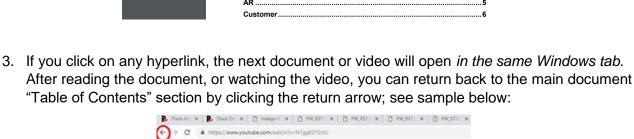
05/24/2018 - that you can see the new lines added into the WHI Catalog each month right from within PartsWatch?

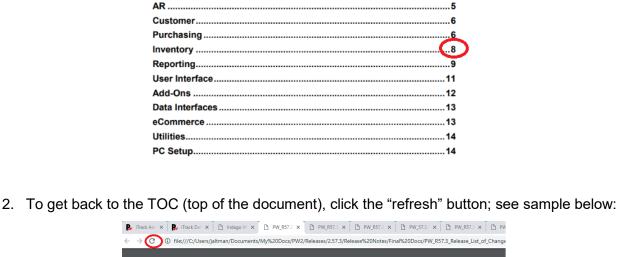
02/02/2018 - about the following options on the ACES Catalog screen?



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Page 10 of 20





How-To Navigate the New Documents

Release List of Changes

Invoicing.

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:

PWS PartsWatch R57.3

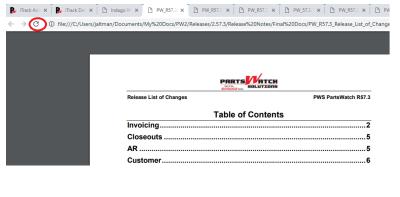
PARTS

Table of Contents

.....

Closeouts

How to Use Training Documents





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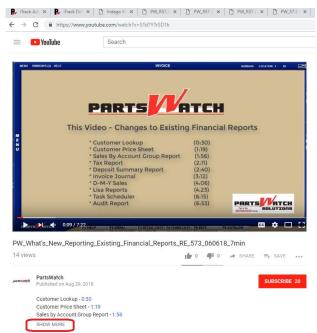
4. If you want to open a document or video *in a different tab* (so that you can have both the main document and the other document/video open at once), right-click on the hyperlink, and select the appropriate menu item; see sample below:

Controls

	Open link in new tab	
	Open link in new window	
	Open link in incognito windo	w
	Save link as	
	Copy link address	
-	Rotate clockwise	Ctrl+]
	Rotate counterclockwise	Ctrl+[
	Inspect	Ctrl+Shift+I

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:





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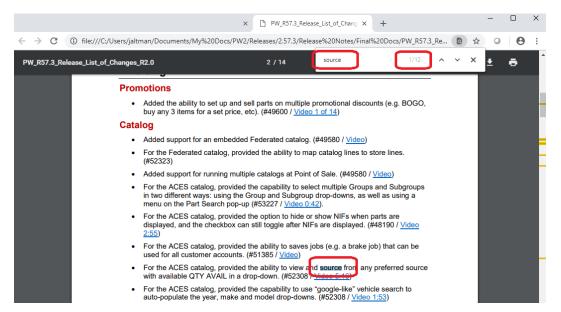
6. Some videos that are long (9+ minutes) for one new feature (e.g. ACES Catalog UI) may not display MM:SS locations in the beginning of the video but there is a list of those MM:SS locations in YouTube that are clickable links to those locations; see sample below:

a				W_R57.3 🗙 🎦 PW_R57.3 🗙	PW_57.3	×
C https://www	w.youtube.com/wa	atch?v=q0)-ob1YW-OA			
YouTube	Searc	h				
				0	SECOND	<u>A</u> F
~	MODEL 25	5 - Musta	ang	VENGINE 03	4.6L V8	
SUBGROUP	01 - Filters & P	CV		SPART TYP	E 20 - Eng	ine
Sell Q	ty Qty Avail	Line	Part Number	Description	GP%	P
	12	BOS Premi	3410 um Oil Filter	菌 Engine Oil Filter	40.7	
-	1 4	BOS	D3410	Engine Oil Filter	40.2	_
		Distar	nce Plus Oil Filter	-		
PartsWatch Uploaded on Oct 2, 20	018			0 ¶! 0 → SHARE ≡ ₁	. SAVE .	•••
	SUBGROUP Sell Q	✓ MODEL 24 SUBGROUP 01 - Filters & P Sell Qty Qty Avail I 12 I 4 ►I<	✓ MODEL 25 - Musta SUBGROUP 01 - Filters & PCV Sell Qty Qty Avail Line 1 12 BOS Premi 1 4 BOS 1 4 BOS 1 4 BOS 1 4 BOS	MODEL 25 - Mustang SUBGROUP 01 - Filters & PCV Sell Qty Qty Avail Line Part Number 1 12 BOS 3410 Premium Oil Filter 1 4 BOS D3410 Distance Plus Oil Filter	MODEL 25 - Mustang ENGINE 03 - SUBGROUP 01 - Filters & PCV PART TYP Sell Qty Qty Avail Line Part Number Description 1 12 BOS 3410 Engine Oil Filter 1 4 BOS D3410 Engine Oil Filter 1 4 BOS D3410 Engine Oil Filter	SUBGROUP 01 - Filters & PCV Sell Qty Qty Avail Line Part Number Description GP% Sell Qty Qty Avail Line Part Number Description GP% 12 BOS 3410 Engine Oil Filter 40.7 Premium Oil Filter 1 4 BOS D3410 Engine Oil Filter 40.2 Distance Plus Oil Filter Engine Oil Filter 40.2

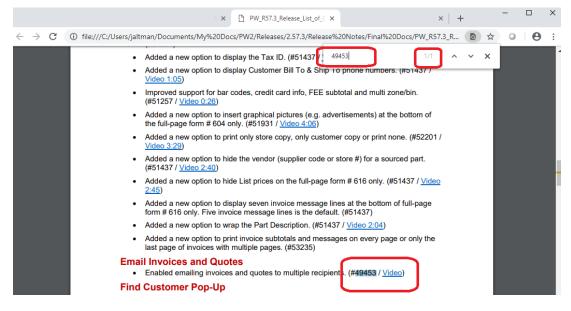
7. While any of the documents are "open" in a browser, you can press the Ctrl + F keys together in order to display a Find pop-up. Any text characters entered into the pop-up will be searched for within the entire document. In the sample below, the text "source" was entered. This text was found twelve 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:



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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



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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:

$\leftarrow \rightarrow C$ (i) Not secure	download.partswatch.com/pwdocs/Complete_PDFs/R57.3/iTrack49828	_57.0_PW_PO_Create_Part1of2_FSD_R1.0.pdf	☆	0	U :
iTrack#49828_57.0_PW_PO_Cro	eate_Part1of2_FSD_R1.0		¢	Ŧ	ē Î
	iTrack #49828 PO Create Part 1 of 2 FSD	57.0 PWS PartsWatch			
	Table of Content 1. DOCUMENT INFORMATION	-			
	1.1. Publication Record 1.2. Document References 1.3. iTrack Information	4			
	2. PO CREATE PART 1 oF 2 PROCESS OVERVIEW 2.1. Purpose of Changes 2.2. Summary Description of Changes 2.3. Changes to System Concret Sotup Serven 2.4. Changes to STORE INFRMATION Screen – PURCHAS 2.5. Changes to SUPPLIER ORDER SPECIFICS Screen 2.6. New PURCHASE ORDER CREATE Screen 2.6.1. Screen Buttons	5 SINGTab			



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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:

PartsWatch Help				
월 (구 다) 🚑 Hide Back Forward Print	_			
Contents Index Search	Overview			
Overview About PartsWatch Getting Started Uniform Videos and Documents	Welcome to PartsWatch, one of the r aftermarket. This state-of-the-art so sale system available today.			
Introduction Writing Dissource Introduction Output Dissource Introduction Output Dissource Introduction	PartsWatch is a powerful Web-based Accounts Receivables, Point of Sale a results for any combination of whole			
Customer	Quick and Accurate Invoicing			
Pretory Pretory Pretory Pretory Ver interface Add-Ons Pretormerce	The Invoicing module is the heart of sales and return orders for commerc the point-of-sale experience. Custom editing or for batch printing. All custom			
Utility Options	Managing Vendors and Supplier			
Vendor Controle Controle Training Material Index	The Vendor module tracks and maint inventoried in the stores. The Line Correporting. Supplier Codes are used to			
Training Material Indexes Logging In About the Main Menu	Inventory Tracking			
Invoicing Vendor Inventory Purchasing Reports	The Inventory module provides the a a single-store or multi-store environi The general Inventory screens are us quantity, min/max values and part h			

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:

😤 PartsWatch Help	-
월 수 다 🚑 Hide Back Forward Print	
Qontents Index Search	Training Material Indexes
About PartsWatch A Getting Started	Click this link to access the PartsWatch Training Material Index.
Training Material Index	Click this link to access the PartsWatch "What's New" Index.
About he Main Menu Nordicing Vendor inventory	
Purchasion	

- 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)

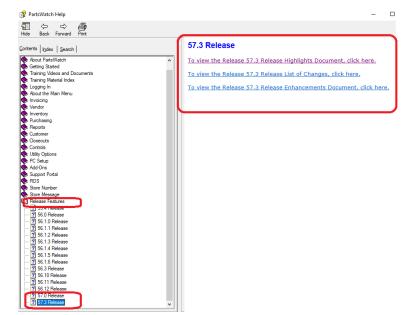
Note: While the F1 Help contains "static" information that is only updated when another client build is deployed on all desktops, the TMI document can "dynamically" add new video links at any time.

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



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- 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.

MENU WINDOWS (4) HELP	PURCHASE ORDER - CREATE	NEW LOCATION: 510	3936
SUPPLIER SELECT MODE SHELF PURCHASE ORDER	ORDER METHOD REPLENISHMENT PO	• •	CLOSE
양 PartsWatch Help 夏 수 라 過 Hule Back Forward Pint		- C	
Noise Back Forward Print Contents [tjdex] Search	Purchase Order - Create Overview: <u>PO Create</u> - 2 pages Overview: <u>Purchase Order - Create 1 of 3</u> : How To: <u>Purchase Order - Create 2 of 3</u> : W Setup: <u>Purchase Order - Create 3 of 3</u> : Del minutes The PURCHASE ORDER - CREATE screen enables orders:	r <u>ite In</u> - 12 minutes Faults and Profiles - 9	s



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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:

I	MENU WINDOWS (2) HELP	LISA TRANSACTIONS REPORT	NEW LOCATION: 1 0
	Content Current C LOCATION CURRENT C LINE CODE Content C START PART NO Content	XFER TO LOCATION D/N CODE END PART NO	
	😵 PartsWatch Help		– o x
	1월 🗘 다 🞒 Hide Back Forward Print		
	Contents Index Search	LISA Transactions Report	^)
M E N U	Overview About PartsWatch Getting Stated Training Material Index Logging in About the Main Menu Invoicing Vendor Invoicing Purchasing Reports Customer Obsecuts Controls Utility Options	How To: <u>Create Parts Sold Report for</u> Overview: <u>Returns Employee Enhant</u> The LISA (Line Item Sales Analysis) TRANS reports, by part number, customer sales so single store or multiple stores. Access the LISA TRANSACTIONS REPORT s Transactions. Or, from the INVOICE screen number, part number and click LISA. MENU WINDOWS (2) HELP	cements - 5 minutes SACTIONS REPORT tracks and old and returned at Point of Sale for screen from Menu, Reports, LISA

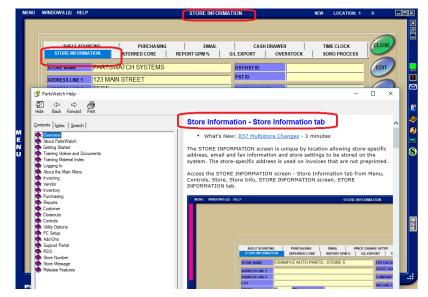
There is also screen TAB context sensitive help from three screens in the application. They are:

- 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:



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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:

PartsWatch Help × 4 Back Forward Print **Price Plan Setup** Contents Index Search Overview About PartsWatch Training: Cost Range Pricing Setup - 2 minutes Getting Started Selection: Price Plan Setup 1 of 4: Setup Types - 8 minutes Training Videos and Documents Training Material Index Setup: Price Plan Setup 2 of 4: Mode Setup - 8 minutes Logging In About the Main Menu • Training: Price Plan Setup 3 of 4: Grid Controls - 8 minutes nvoicing Vendor • Training: Price Plan Setup 4 of 4: Best Price vs Hierarchy - 9 minutes Inventory urchasing • What's New: Customer Price Plan Setup - 9 minutes Customer Di Accounts • Training: Comparing Promo Pricing and Customer Pricing - 7 minutes Main Account Entry
 Main Account Entry
 Master/Linked Acco
 Statement Types
 Statement Terms Setup Guide: Pricing Connector Interface Guide - 19 pages Setup Guide: <u>Pricing Connector Interface Template</u> - 7 sheets Note: The PRICING CONNECTOR INTERFACE TEMPLATE will download - ? Price Plan Setup automatically, and will need to be manually opened. Additionally, if desired, this romotions Setur document needs to be saved manually elsewhere. Copy Pricing Plans Velocity Pri sing The PRICE PLAN SETUP screen is used to set up pricing plans applicable to Price Rounding customers' accounts. Rebate Setup ? Customer Pricing Shee Price Model functionality allows a group of accounts to be priced exactly the same,

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 "ChargeltPro" 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 ChargeltPro Tender Credit Card Integration; see sample below:

😵 PartsWatch Help	– 🗆 X
₩ c> c> c> Hide Back Forward Print	
Contents Index Search	Tender Process
Type in the keyword to find: chargetpro	Training: <u>Receive on Account (ROA)</u> - 6 minutes Overview: <u>ChargettPro Credit Card Integration</u> - 17 minutes
Select Topic to display:	The Tender process supports the processing of cash, checks, maydelf's Checks, gift cards and coupons. Any of these payment types may be allowed or disallowed via the TENDER SETUP screen, accessed from Controls, Store, Tender Setup.
Invoice Options - Forms Setup Tab Invoice Options - Overview	DEPOSIT
Tender Process	A deposit is a partial payment (down payment) made on an invoice, except a COD

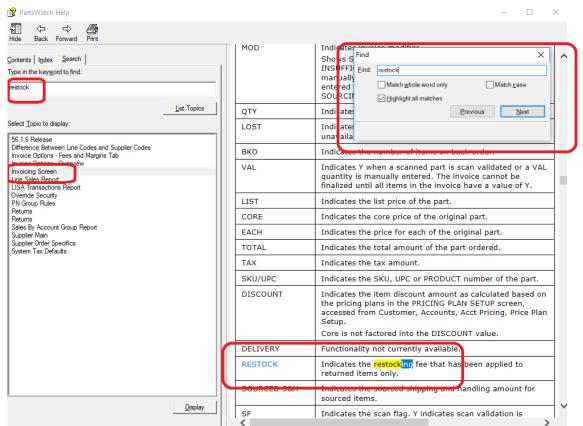
Finally, the ability to use both "Search and Find" together. For example, if you were looking for information on "restocking" fees and you typed in only the text "restock" in the Search box (and pressed the Enter key or the "List Topics" button), you would see a list of topics displayed. In this example,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





PWS PartsWatch

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:

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<u>C</u> ontents Index <u>S</u> earch Type in the keyword to find:	Returns Click on the hyperlinks to access the videos or files.
Select Topic to display:	• Training: <u>Returning Parts</u> - 9 minutes
56.1.6 Release Difference Between Line Codes and Supplier Codes Invoice Options - Fees and Margins Tab Invoice Options - Overview	How To: <u>Return Without Receipts</u> - 7 minutes Overview: Return Validation Enhancements - 6 minutes
Invoicing Screen Line Sales Report LISA Transactions Report Override Security	Overview: <u>Restocking Fee</u> - 3 minutes How-To: <u>Prompt For Sourced Returns</u> - 7 minutes
PN Group Rules Returns Suppler Main Suppler Order Specifics System Tax Defaults	 Training: <u>Warranty Returns at POS</u> - 5 minutes