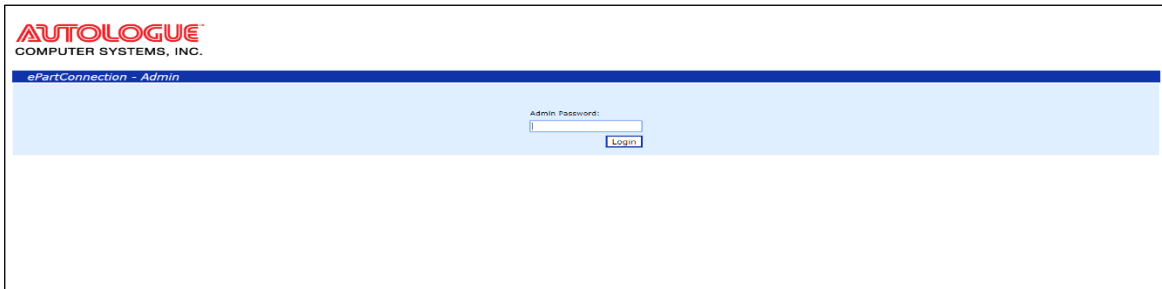


## Overview

ePart Administration is used to set up new customers, and/or modify existing customers concerning eProducts. The following document will cover limited aspects of the ePart Administration Program.

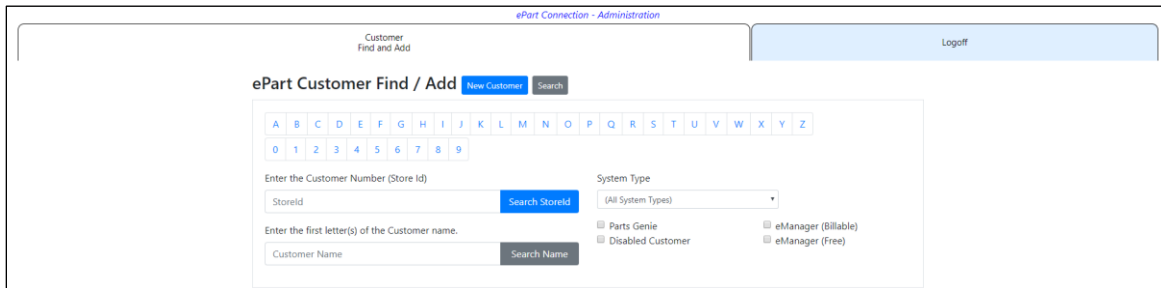
## Logging into ePartConnection - Admin

To log in into your ePartConnection – Admin support site and view all of your existing customers, or set up new customers, enter the following URL within your internet browser: <https://admin.epartconnection.com> and the following screen will be displayed:



- Enter your support **Admin Password**, then click on the **Login** button.

The **ePart Customer Find / Add** screen will now be displayed when you've successfully logged into your site as shown:

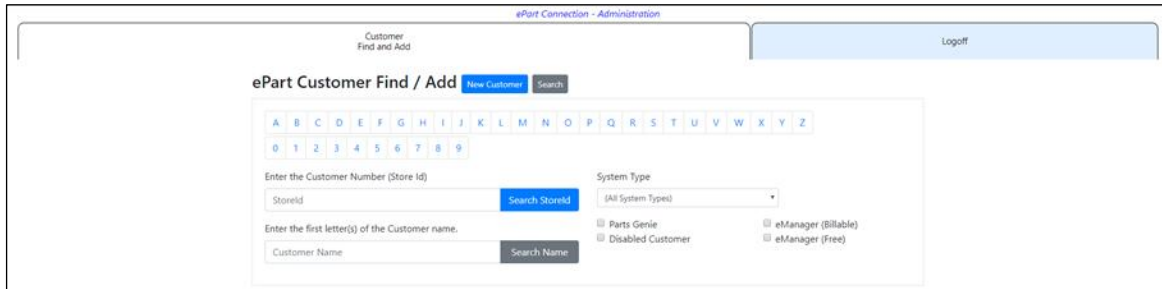


## ePart Customer Find / Add

Using the various hyperlinks listed, you have the ability to perform the following functions:

- Create New Customer (Store ID).
- Search for an existing Customer whose name starts with a specific letter or number.
- Search for an existing Customer by Store ID.
- Search for an existing Customer by Customer Name.
- Search for an existing Customer whose name starts with a specific letter or number and System Type.

- Search for an existing Customer whose name starts with a specific letter or number and “Disabled Customer”. (*Parts Genie, eManager (Billable), eManager (Free), does not apply to all customers*).



## Add New Customer

To create a Store ID (add a new Customer), click on **New Customer**. The following screen will be displayed:

**New Customer** ×

Store Id\*

Customer Name\*

Customer Email\*

**Create New Customer**

Enter the **Store Id** to be used, **Customer** (company) **Name** and **Customer Email**, the customer will use to Reset/Set their password. Once you have verified all information is correct, then click on the **Create New Customer** button.

### Store Information Requirements

**Note:** The Store Name, address and phone number is the information that will be displayed in eOffice for this customer, this is the only place to modify or edit this information.

- Store Name
- Street
- City
- State
- Country
- Postal Code
- Phone

- Web Email (*this field is automatically populated when the Store ID is created – deleting or modifying this email address will NOT affect the email address used in setup on [setup.epartconnection.com](http://setup.epartconnection.com)>Manage Users / Roles*)
- System Type – PARTSWATCH
- Management System Type – PartsWatch

**The following must be checked.**

**eOffice Setup:**

- **eOffice Email:** Email address to be used as “From” email for Invoices and Statements. (Must be set to [noreply@epartconnection.com](mailto:noreply@epartconnection.com), unless customer has their own managed email server/domain).
- **Enable eOffice:** Turns eOffice on for this Store ID, otherwise logins will be refused.
- **Enable Invoice Back Fill:** Only necessary for initial Invoice/Statement upload for new Customer/Store ID, to allow data older than 5 days to be loaded. Will need to be disabled once data has been loaded and verified by implementer.
- **eOffice Chain Id:** Set the *Store ID* of the Main/Master Store here, to link multiple stores together. Main/Master Store ID must have the Store ID entered also. **Chain:** Will show all linked Store ID’s.

**eDelivery Setup:**

- **Number of Trucks:** Set the maximum number of allowed “Trucks” to be setup within eDelivery.
- **Enable eDelivery:** Turns eDelivery on for this Store ID, otherwise logins will be refused.
- **eDelivery Chain ID:** Set the *Store ID* of the Main/Master Store here, to link multiple stores together. Main/Master Store ID must have the Store ID entered also. **Chain:** Will show all linked Store ID’s.

**CRM (eSalesBi) Setup:**

- **Use Salesperson Code on Customer:** Check this box ONLY if customer wants Sales Totals to be the total of all invoices with the selected salesperson’s code on the invoice. Unchecked (Default), sales totals will display all invoices for the selected salesperson’s customers, regardless of the salesman code on each invoice.
- **Enable CRM:** Turns eSalesBI on for this Store ID, otherwise logins will be refused.
- **Maximum # of salespersons:** Set the maximum number of allowed salespersons to be configured in [setup.epartconnection.com](http://setup.epartconnection.com)>Manage Users / Roles.
- **Maximum # of counterpersons:** Set the maximum number of allowed counterpersons to be configured in [setup.epartconnection.com](http://setup.epartconnection.com) >Manage Users / Roles.
- **Maximum number of administrators:** Set the maximum number of allowed administrators to be configured in [setup.epartconnection.com](http://setup.epartconnection.com)> Manage Users / Roles.

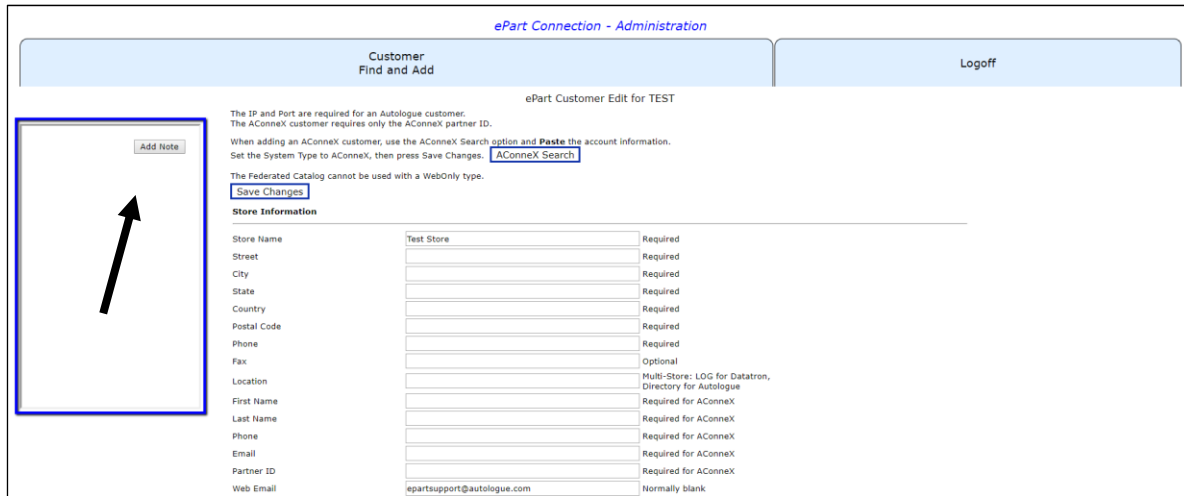
Once all settings have been configured, scroll to the bottom of the page, then click on **Save Changes**.

**Optional:**

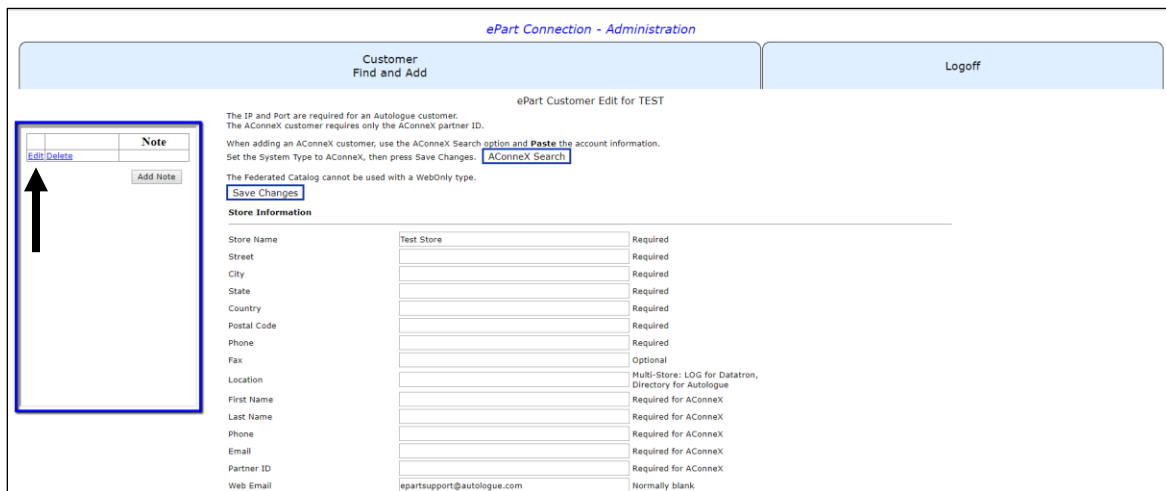
If you want to track configuration changes or updates, you can add/edit **Notes** for individual Store ID's at any given time. The **Add Note** box will move down with the screen as you scroll so you can always see them.

**Add Note:**

To create/add a new note, click on **Add Note**.



A new **Note** entry box will display.



Once the edit **Note** box displays, click on **Edit** and you can now add a text note to this Store ID. You can now start typing your note into the box to the right of the **Save** and **Cancel** buttons. When you've completed adding your notes, click on the **Save** button.

*ePart Connection - Administration*

Customer Find and Add
Logoff

ePart Customer Edit for TEST

The IP and Port are required for an Autologue customer.  
The AConneX customer requires only the AConneX partner ID.

When adding an AConneX customer, use the AConneX Search option and **Paste** the account information.  
Set the System Type to AConneX, then press Save Changes. [AConneX Search](#)

The Federated Catalog cannot be used with a WebOnly type.

[Save Changes](#)

**Note Information**

Store Name	Test Store	Required
Street		Required
City		Required
State		Required
Country		Required
Postal Code		Required
Phone		Required
Fax		Optional
Location		Multi-Store: LOG for Datatron, Directory for Autologue
First Name		Required for AConneX
Last Name		Required for AConneX
Phone		Required for AConneX
Email		Required for AConneX
Partner ID		Required for AConneX
Web Email	epartsupport@autologue.com	Normally blank

**Note**

Additional Users Added to CRM. 1/9/19 SM

[Save](#) [Cancel](#) [Add Note](#)

Your note will display, as below. Anyone can modify or delete the note by clicking on the **Edit** button or clicking on the **Delete** button.

*ePart Connection - Administration*

Customer Find and Add
Logoff

ePart Customer Edit for TEST

The IP and Port are required for an Autologue customer.  
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When adding an AConneX customer, use the AConneX Search option and **Paste** the account information.  
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The Federated Catalog cannot be used with a WebOnly type.

[Save Changes](#)

**Note Information**

Store Name	Test Store	Required
Street		Required
City		Required
State		Required
Country		Required
Postal Code		Required
Phone		Required
Fax		Optional
Location		Multi-Store: LOG for Datatron, Directory for Autologue
First Name		Required for AConneX
Last Name		Required for AConneX
Phone		Required for AConneX
Email		Required for AConneX
Partner ID		Required for AConneX
Web Email	epartsupport@autologue.com	Normally blank

**Note**

Additional Users Added to CRM. 1/9/19 SM

[Edit](#) [Delete](#) [Add Note](#)