

PWS PartsWatch eProducts Setup Guidelines R1.0

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Table of Contents

| | |
|--|-----------|
| 1. DOCUMENT INFORMATION | 3 |
| 1.1. Publication Record | 3 |
| 2. OVERVIEW | 3 |
| 2.1. Purpose..... | 3 |
| 3. EPART CONNECTION SETUP | 4 |
| 3.1. PW Requirements | 4 |
| 3.2. Store ID..... | 4 |
| 3.3. Account Number..... | 4 |
| 3.4. Password | 4 |
| 3.5. ePart Connection Login | 5 |
| 3.6. Multi-Location Configuration Setup..... | 6 |
| 4. EPAPERLESSOFFICE SETUP..... | 8 |
| 4.1. Configure PW System for ePaperlessOffice Integration..... | 8 |
| 4.2. Import PW Customers into ePaperlessOffice..... | 10 |
| 4.3. Backfilling Previous Invoices and Statements..... | 12 |
| 5. ESALES BI/CRM SETUP | 13 |
| 5.1. Configure PW System for eSales BI/CRM Integration | 13 |
| 6. EDELIVERY SETUP | 14 |
| 6.1. Configure PW System for eDelivery Integration..... | 14 |
| 6.2. Setup eDelivery by Account..... | 14 |
| 6.3. Setup eDelivery by Invoice | 14 |

1. DOCUMENT INFORMATION

1.1. Publication Record

Revision 1.0 is the current version of the *PWS PartsWatch eProducts Setup Guidelines*.

| Rev. | Publication Date | Author Name | Description of Revisions |
|------|------------------|--|--------------------------|
| 1.0 | 05/05/2017 | Jason Daingerfield Eric Grau Theresa Bennett | Initial Publication |

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 provides the PartsWatch setup instructions for:

- ePart Connection
- ePaperlessOffice
- eSales BI/CRM
- eDelivery

3. EPART CONNECTION SETUP

3.1. PW Requirements

The following PW information is required to access ePart Connection.

- Store ID
- Account Number
- Password

Note: The PartsWatch Implementation team is responsible for creating their own authentications for ePart Connection.

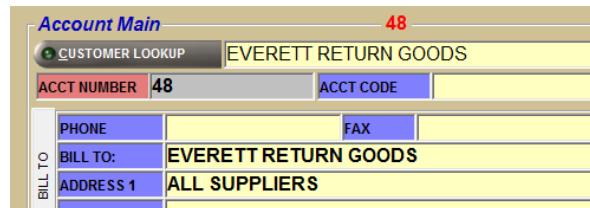
3.2. Store ID

The following only needs to be done once for each PartsWatch store.

1. Obtain a new Store ID from the ePart Connection team. Use Control Maintenance to create an ePart commalias record using the Store ID value provided by the ePaperlessOffice team. One Store ID is required for each store location. See section 4.1 for more information about setting up the commalias record(s).

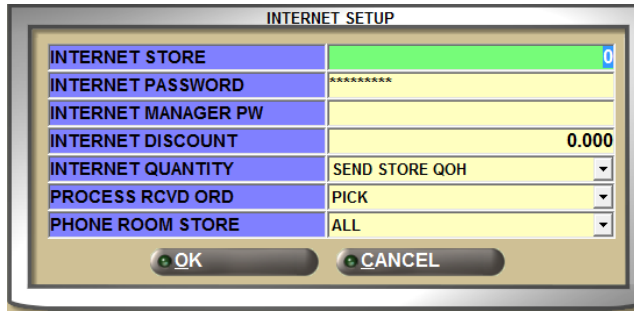
3.3. Account Number

1. Each customer uses their PartsWatch Account Number located in the ACCT NUMBER field on the MAIN ACCOUNT ENTRY screen, accessed from Customer, Accounts, Account Main.



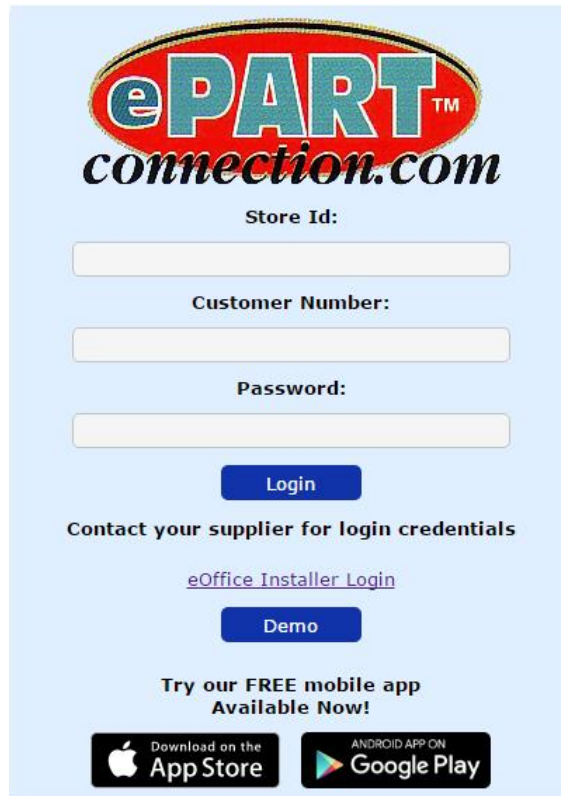
3.4. Password

1. To create a password, enter a password in the INTERNET PASSWORD field in the INTERNET SETUP window, accessed from Customer, Accounts, Account Main, MAIN ACCOUNT ENTRY screen, INTERNET SETUP button.



3.5. ePart Connection Login

- Once the PW requirements are complete, go to <http://epartconnection.com> and log in using the ePart Connection Store ID, along with the PartsWatch Customer Number (Account Number) and Password.



3.6. Multi-Location Configuration Setup

1. In order to configure ePart Connection for multi-store ordering, you must email the ePart Connection Support team to request passwords for access to ePart Connection Setup.
2. Once you have the password, log on to the ePart Connection Setup site via <https://setup.epartconnection.com/> using the first Store ID (created by the Support DBCR) and password and navigate to the Multi-Location Ordering Setup screen.

ePart Connection Setup Login:

Call Autologue at 800.722.1113 for your password.

Store Id:

Password

3. In the *Setup the Location Table* section of the Multi-Location Ordering Setup screen, complete the Location Table as shown below.

Setup the Location Table

Use this StoreId for the Location Table:

- or -

Use this Location Table (StoreId above should be blank):

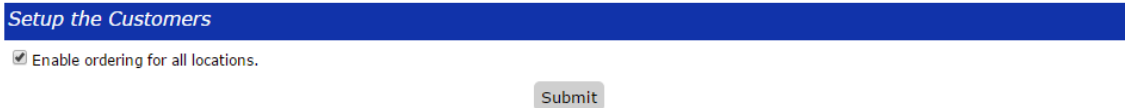
| Mngmt SystemId | Nexpart Branch | Store ID |
|-----------------------|----------------------|----------------------|
| MORRISTOWN STORE - #3 | 3 | PW-DEV-LOC3 |
| SPARTA STORE - #2 | 2 | PW-DEV-LOC2 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Blank the Mngmt SystemId to remove from the table.

- The **Mngmt SystemId** field contains a value of [PARTSWATCH STORE NAME] - #[PARTSWATCH STORE NUMBER]. For example, if your PartsWatch store name is “Newton Store” and your PartsWatch store number is 7, you will enter “Newton Store - #7”. Copy and paste the store name directly from the STORE INFORMATION screen, accessed from Controls, Store, Store Info, to avoid typos.
- The **Nexpart Branch** field contains the PartsWatch store number.
- The **Store ID** field contains the commalias that was created by the Support DBCR in the steps above.

IMPORTANT: None of these fields can contain an underscore.

4. In the *Setup the Customers* section, located directly below the Location Table on the Multi-Location Ordering Setup screen, click the **Enable ordering for all locations** checkbox and click **Submit**.



5. Multi-Location Ordering is now complete for the first store location. You must log out of the Setup site and log back in using the next Store ID. Repeat the instructions above for each of the remaining locations.

4. EPAPERLESSOFFICE SETUP

4.1. Configure PW System for ePaperlessOffice Integration

1. Open the “Support - View Control” page in the Control Maintenance website:
http://itrack.icarz.com/Support/Ctl_list.php
2. Select the control record for the PW system that is integrating with ePaperlessOffice.
3. In the *Features* section, check the eOffice option:

4. Click the “Save” button.
5. Click the “CommAlias” button.
6. For a single-store ePaperlessOffice integration, one Store ID is required for the PW store.
 - A single commalias record must be created with:
 - Alias = “EPART_” followed by the Store ID
 - EntID = <blank>
 - Store = PW store number

- For example:

| ID | Alias | EntID | Store | Edit | Delete |
|----|----------------|-------|-------|-------------------------------------|---------------------------------------|
| 1 | EPART_henschel | NULL | 1 | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |

Alias EntID Store

7. For a multi-store ePaperlessOffice integration, a “master” Store ID is required as well as a Store ID for each PW store. Multiple commalias records must be setup.
 - A “master” commalias record must be created with:
 - Alias value = “EPART_” followed by the “master” Store ID
 - EntID = <blank>
 - Store = <blank>
 - A commalias record must be created for each store with:
 - Alias value = “EPART_” followed by the Store ID
 - EntID = <blank>
 - Store = the PW store number.
 - For example:

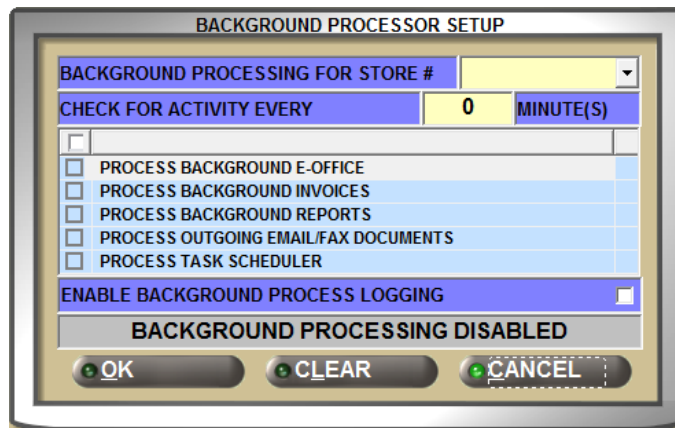
eProducts Setup Guidelines

PWS PartsWatch

| ID | Alias | EntID | Store | | |
|----|-------------------|-------|-------|-------------------------------------|---------------------------------------|
| 1 | EPART_partscrew | NULL | NULL | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |
| 2 | EPART_partscrewny | NULL | 1 | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |
| 3 | EPART_partscrewfl | NULL | 2 | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |

| | | | | | | | |
|-------|----------------------|-------|----------------------|-------|----------------------|------------------------------------|---------------------------------------|
| Alias | <input type="text"/> | EntID | <input type="text"/> | Store | <input type="text"/> | <input type="button" value="Add"/> | <input type="button" value="Cancel"/> |
|-------|----------------------|-------|----------------------|-------|----------------------|------------------------------------|---------------------------------------|

- To get the PDF version of invoices and statements processed so they can be sent to ePaperlessOffice, the PROCESS BACKGROUND E-OFFICE option must be checked in the BACKGROUND PROCESSOR SETUP window, accessed from PC Setup, Set Bkgnd Process.



The text version of invoice and statements are sent regardless of the Background Processor Setup.

4.2. Import PW Customers into ePaperlessOffice

1. Load GLU in a web browser:

http://pwapps.partswatch.com/pw_apps/GLU.php

2. On the GLU login screen, fill out the form and click the **Login** button:

Login to the GoLive store

| | |
|--------------------------------------|--------------------------|
| System ID: | <input type="text"/> |
| Store #: | <input type="text"/> |
| Username: | <input type="text"/> |
| Password: | <input type="password"/> |
| <input type="button" value="Login"/> | |

3. Select the **ePart / ePaperlessOffice / eDelivery / eSalesBI** menu option:

Select an option

| | |
|-----------------------------------|---|
| <input type="button" value="Go"/> | Setup System Close Schedule |
| <input type="button" value="Go"/> | Set System Fiscal Year / Period |
| <input type="button" value="Go"/> | Set Store Active Status |
| <input type="button" value="Go"/> | Set Store Tax Rate Table |
| <input type="button" value="Go"/> | Sync Parts To Part History |
| <input type="button" value="Go"/> | Set Switches |
| <input type="button" value="Go"/> | ePart / ePaperlessOffice / eDelivery / eSalesBI |
| <input type="button" value="Go"/> | Logout |

4. Accounts:

- In R57 or later, click the **Queue Accounts For ePaperlessOffice** option. This will send all of the accounts (name/address/password/etc data from all of the acc records) to the ePart Connection Setup website automatically.
- Or click the **Download Account CSV File** option. This downloads a file called accounts.csv (name/address/password/etc data from all of the acc records), which can be imported on the ePart Connection Setup website.

5. Retail Customers (optional):

- In R57 or later, click the **Queue Retail Customers For ePaperlessOffice** option. This will send all of the retail customers (name/address/password/etc data from all of the iacc records) to the ePart Connection Setup website automatically.
- Or click the **Download Retail Customer CSV File** option. This downloads a file called retail_customers.csv (name/address/password/etc data from all of the iacc records), which can be imported on the ePart Connection Setup website.

6. If the “download” options were used, open the ePart Connection Setup website to import the customer file that was downloaded (<https://setup.epartconnection.com/>).

- Use the Store ID and password to login.
- In the left side, select **Customer Options**. At the top of the page, click the **Choose File** button and select the accounts.csv file that was downloaded from GLU. Then, click the **Import CSV** button. Once this completes, all account records (acc table) will be available in ePaperlessOffice. Optionally, do the same with the retail_customers.csv file that was downloaded from GLU if also loading retail customer records (iacc table) into ePaperlessOffice.

7. To allow customers to access ePaperlessOffice, customers will login to ePaperlessOffice using the same password as they would use to login to ePart. The ePart password is set up on the MAIN ACCOUNT ENTRY screen, accessed from Customer, Accounts, Account Main, click the INTERNET SETUP button and enter an Internet password in the INTERNET PASSWORD field.

8. If R57 or later, after the initial customer load, all customer adds/updates get sent to the ePart Connection Setup website automatically.

Note:

- For accounts (acc table), the ePaperlessOffice “customer number” is the ACCT NUMBER value on the F4 PW screen.
- For retail customers (iacc table), the ePaperlessOffice “customer number” is the RETAIL ACCT value on the F3 PW screen.

4.3. Backfilling Previous Invoices and Statements

You can “backfill” historic invoices and statements using the **Queue Invoices** and **Queue Statements** options in GLU. Just enter a date range in the “YYYY-MM-DD hh:mm:ss” format.

Select an option

Download Account CSV File

Download Retail Customer CSV File

Queue Accounts For ePaperlessOffice

Queue Retail Customers For ePaperlessOffice

Queue Invoices For ePaperlessOffice

From (Eastern Time):

To (Eastern Time):

Send:

Send At (Eastern Time) - optional:

Queue Statements For ePaperlessOffice

From (Eastern Time):

To (Eastern Time):

Send:

Send At (Eastern Time) - optional:

Back

This writes records to the same tables updated by the invoice finalization and EOM/EOW processes.

This GLU feature allows PWS to load invoices/statements from the last month or a last year (or whatever period of time we decide) when a PW system first signs up for ePaperlessOffice.

5. E SALES BI/CRM SETUP

5.1. Configure PW System for eSales BI/CRM Integration

ePaperlessOffice must be enabled for eSales BI/CRM to work. ePaperlessOffice can be set up in one of two ways.

1. For customers who subscribe to ePaperlessOffice, ePaperlessOffice is set up according to the ePaperlessOffice Setup Guide.
2. For customers who do not subscribe to ePaperlessOffice, ePaperlessOffice must be enabled. Contact Autologue Customer Support to enable the eSales BI/CRM GUI but not the ePaperlessOffice GUI.

6. EDELIVERY SETUP

6.1. Configure PW System for eDelivery Integration

ePaperlessOffice must be enabled for eDelivery to work. ePaperlessOffice can be set up in one of two ways:

1. For customers who subscribe to ePaperlessOffice, ePaperlessOffice is set up according to the ePaperlessOffice Setup Guide.
2. For customers who do not subscribe to ePaperlessOffice, ePaperlessOffice must be enabled. Contact Autologue Customer Support to enable the eDelivery GUI but not the ePaperlessOffice GUI.

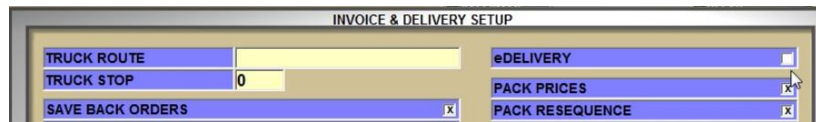
6.2. Setup eDelivery by Account

Setup for eDelivery is done by account.

1. From the MAIN ACCOUNT ENTRY screen, click the INVOICE DELIVERY button to display the INVOICE & DELIVERY SETUP window.
2. Click the eDELIVERY flag to set the account to use eDelivery.

Note: This flag determines if the invoice should go to eDelivery when the invoice is uploaded to ePaperlessOffice.

3. Leave the flag unchecked when the account will not be using eDelivery,



Note: If the database is not configured for ePaperlessOffice, then the eDELIVERY flag is visible but grayed out and not available.

6.3. Setup eDelivery by Invoice

When a customer is selected on the INVOICE screen, the eDELIVERY flag displays either checked or unchecked based on whether the eDELIVERY flag is checked or unchecked in the INVOICE & DELIVERY SETUP window for that customer. You can manually change the setup by checking/unchecking the flag for individual invoices.

