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Step 1: Login To ePartConnection Setup

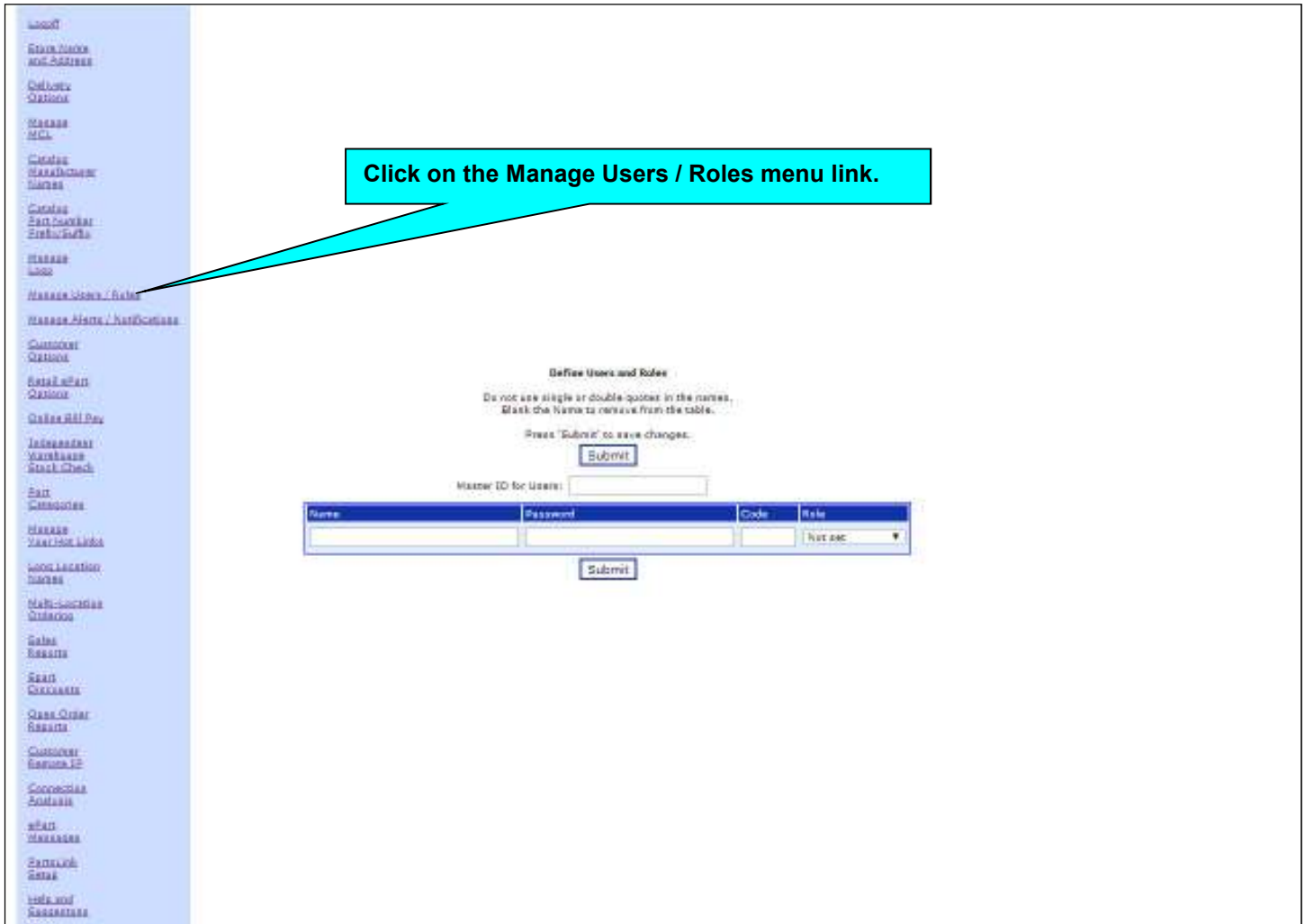
The owner will begin by logging into the ePartConnection Setup website (setup.epartconnection.com), using the Store ID and master password and clicking on the [Login](#) button.



The screenshot shows the login interface for the ePart Connection - Parts Store Setup website. At the top left is the ePART connection.com logo. Below the logo is a blue horizontal bar with the text "ePart Connection - Parts Store Setup". In the center of the page is a light blue login box. Inside this box, the text "Login" is displayed. Below that, it says "Call Autologin at 800.722.6112 for your password." There are two input fields: one for "Store ID" and one for "Password". A "Login" button is located at the bottom right of the login box.

Step 2: Setup Users And Roles

The owner then needs to setup all the different users and their roles. This is accomplished by clicking on the *Manage Users / Roles* menu link as shown:



Click on the Manage Users / Roles menu link.

Define Users and Roles

Do not use single or double quotes in the names. Blank the Name to remove from the table.

Press 'Submit' to save changes.

Submit

Master ID for Users:

Name	Password	Code	Role
<input type="text"/>	<input type="text"/>	<input type="text"/>	Not set ▼

Submit

- Within the *Define Users and Roles* screen, click within the **Name** column and enter in the user's name.
- Under the **Password** column, enter in the user password they will use.
- Under the **Code** column, you must enter in the salesman code from the management system.
- Under the **Role** column, click on the down arrow at the end of the field and select the "Sales" role from the menu options listed.
- Click on the **Submit** button to save the entered user name.

Continue this process and add all the users that will be using the Salesman Mode functionality.

Logoff

ePartConnection

- Store Name and Address
- Manage Logo
- Delivery Options
- Manage MCL
- Catalog Manufacturer Names
- Catalog Part Number Prefix/Suffix
- Non Catalog Part Categories
- Manage Hot Links
- Customer Options /

Define Users and Roles

Do not use single or double quotes in the names.
Blank the Name to remove from the table.

Press 'Submit' to save changes.

Submit

Name	Password	Codes	Role
CHOVI	0517	S	Sales
JON	1558	A	Sales
HECTOR	2530	H	Sales
JAY	6590	J	Sales
			Not set

Submit

Step 4: Setting Up The Salesman Accounts

- Log in to ePart Setup and click on the “Customer Options / Promos / Favorites” link
- Customers are assigned to a salesperson based on the Salesman Code in Customer Options in ePart Setup

Light

ePartConnection

Import Export Customer Add Customer Advanced Search

Show 1 to 4 rows

Showing 1 to 3 of 3 entries

Name	Customer Number	Address	City	State	Postal Code	Salesman	
ALEX-OMADE SERVICE	201	842 COMMONWEALTH AVE	BUENA PARK	CA	90601	S	✎ ✖
CHECK JOHNSONS DETAIL	203	580 G Granddessa Ave	Anaheim	CA	92801	S	✎ ✖
CHECKS AUTOMOTIVE REPAIR	202	12540 GILBERT ST	FULLERTON	CA	92608	S	✎ ✖

Manually Adding Accounts

- Click the *Add Customer* button, then click within the *Customer Number* field and enter the customer number for the account being added and press the *<Add New Customer>* key.
- Fill in the new Customer’s address, phone and email information.
- With the cursor positioned within the *Store Id* field, enter in your stores ePartConnection store ID and press the *<Tab>* key.
- With the cursor positioned within the *Password* field, enter in the password for the customer number entered and click on the *Submit* button to save the entered information.

Importing/Exporting Salesman's Accounts

The salesman's accounts can also be imported into *Customer Options* by clicking on the [Import/Export Customer](#) button and selecting the ASCII CSV (comma separated value) file and then clicking on the [Import CSV](#) button. The CSV file should contain the following fields of information:

The only required field is "NUMBER" (Customer Number) which needs to be in Column 1 of the Header.

<u>Import Header</u>	<u>Description</u>
Number	Customer Number
Name	Customer Name
Address	Street Address
City	City
State	State
Country	Country
PostalCode	Zip Code
Phone	Customer Phone Number
MobilePhone	Customer Mobile Phone Number
Email	Customers Email Address
PORequired	Is a PO Required for an Order? (Y/N)
QOH	QOH Option: 0 = Show the actual quantity on hand (QOH). 1 = Show actual QOH or vehicle quantity, whichever is greater. 2 = Show vehicle quantity as your QOH (hides true QOH)
DisableStockOrder	Disable Stockorders from ePart? (Y/N)
HideCost	Hide Cost? (Y/N)
Discount	Discount Index (0 thru 10)
Labor	Enable Labor? (Y/N)
LaborRate	Labor Rate
eOfficeNumber	eOffice Account Number
eOfficePassword	eOffice Password
eOfficePayment	eOffice Payments available options: 0 = none 1 = ACH Only 2 = Credit Card Only 3 = Both
ExcludeBI	Exclude BI (Y/N)
StoreId	ePart Store Id
Password	ePart Password
SalespersonCode	Salesperson Code
RankingCode	Customers Ranking Code

- The customer accounts information can also be exported from this screen by clicking on the [Export CSV](#) button. An *accounts.csv* ASCII CSV file will be automatically downloaded and saved into the users download folder. The file will contain the above fields of information.

Step 5: Installing The ePart Mobile App

The ePart mobile application program can be installed for free onto your Android/Apple mobile devices (tablets/phones) through their respective app stores by searching for "epart" or "Autologue".

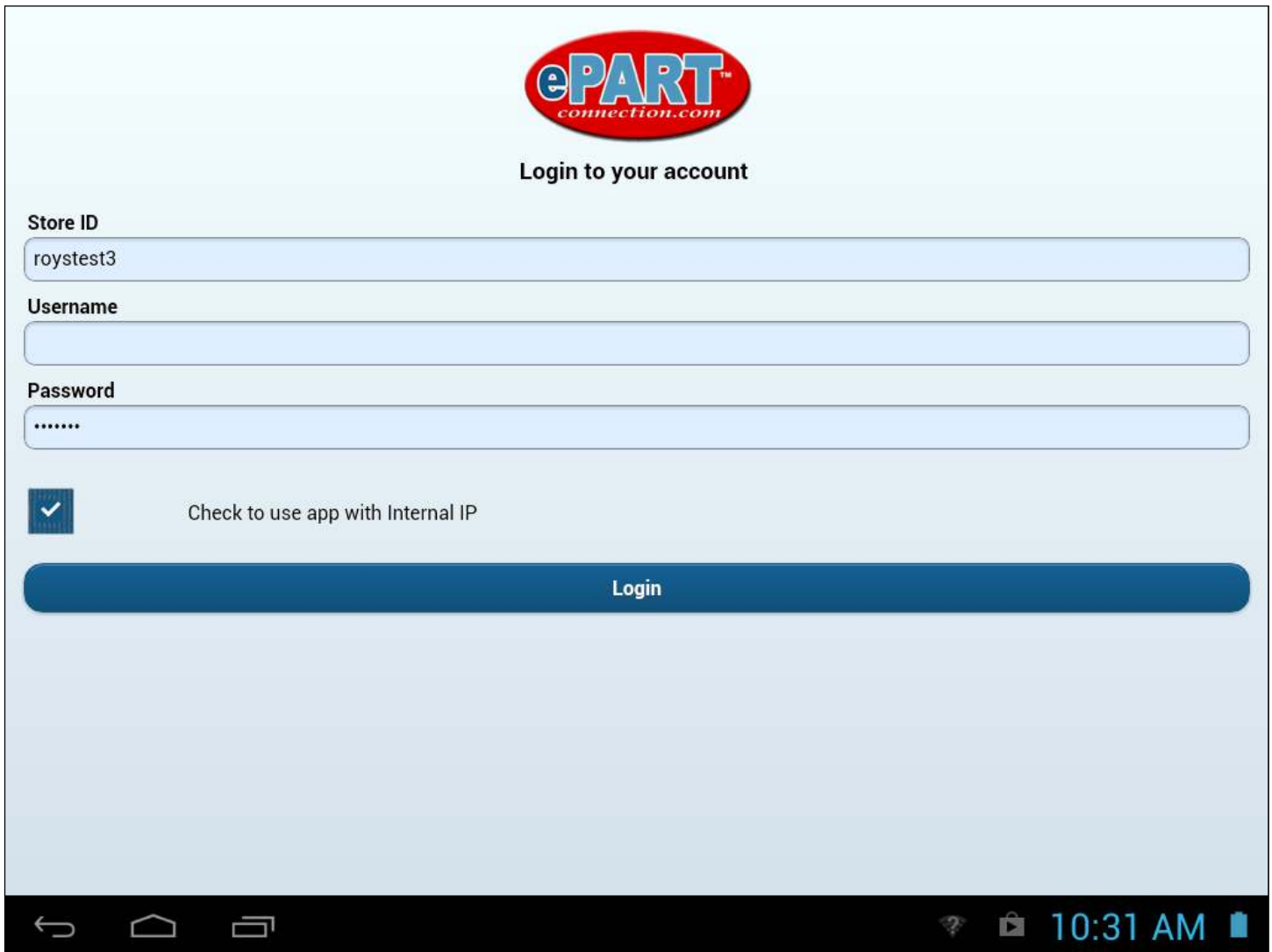
Starting Up The ePart Mobile App



- From the home screen of your tablet/mobile device, click on the ePart icon.

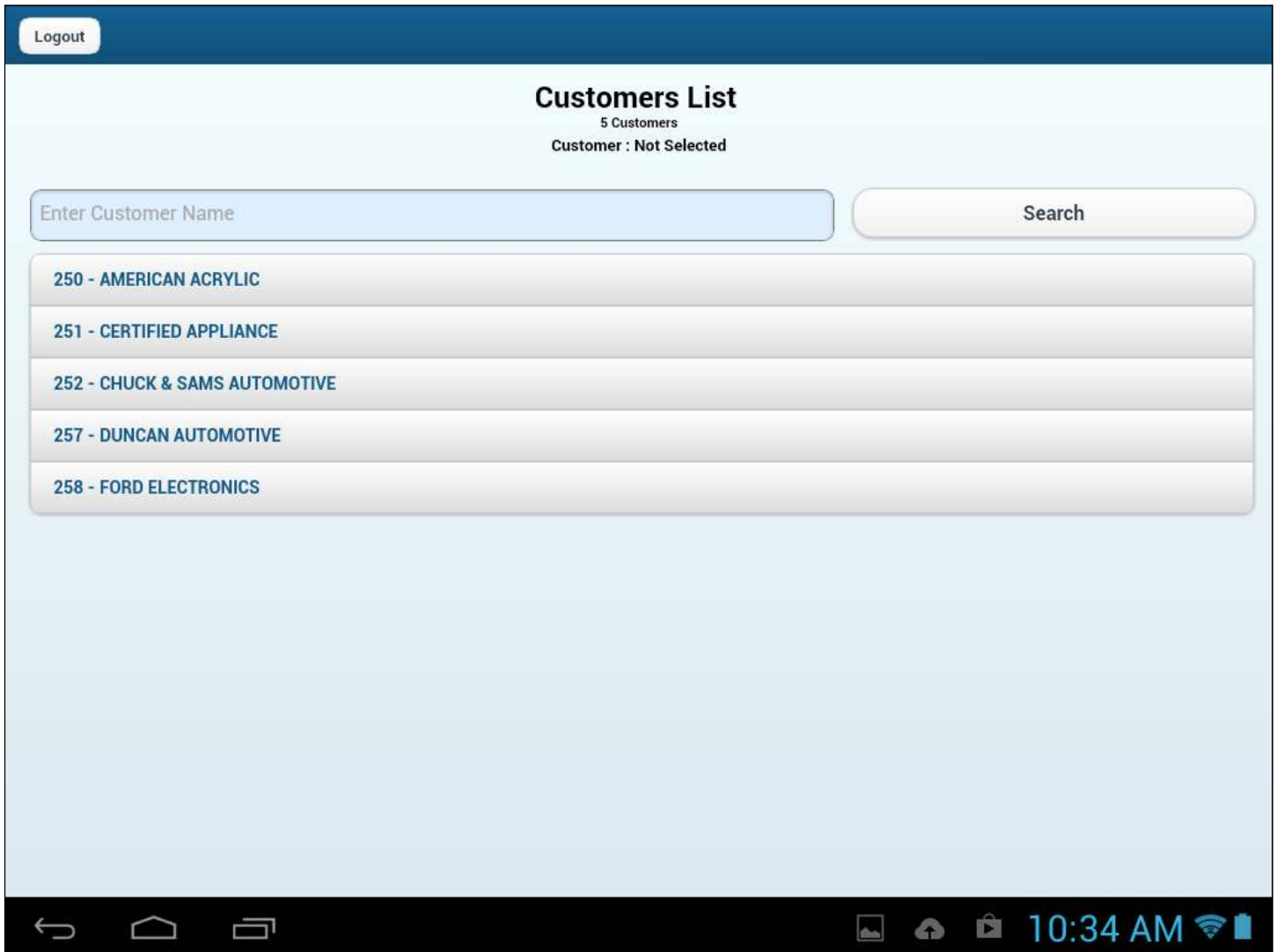
Step 6: Logging In As A Salesman Into The ePart Mobile App

The following login screen will now be displayed:



- The salesman can now login on their mobile device (phone/tablet) by entering their stores' ePartConnection *Store ID* and their assigned salesman *Password*, and then clicking on the [Login](#) button. Leave the [Username](#) field blank.

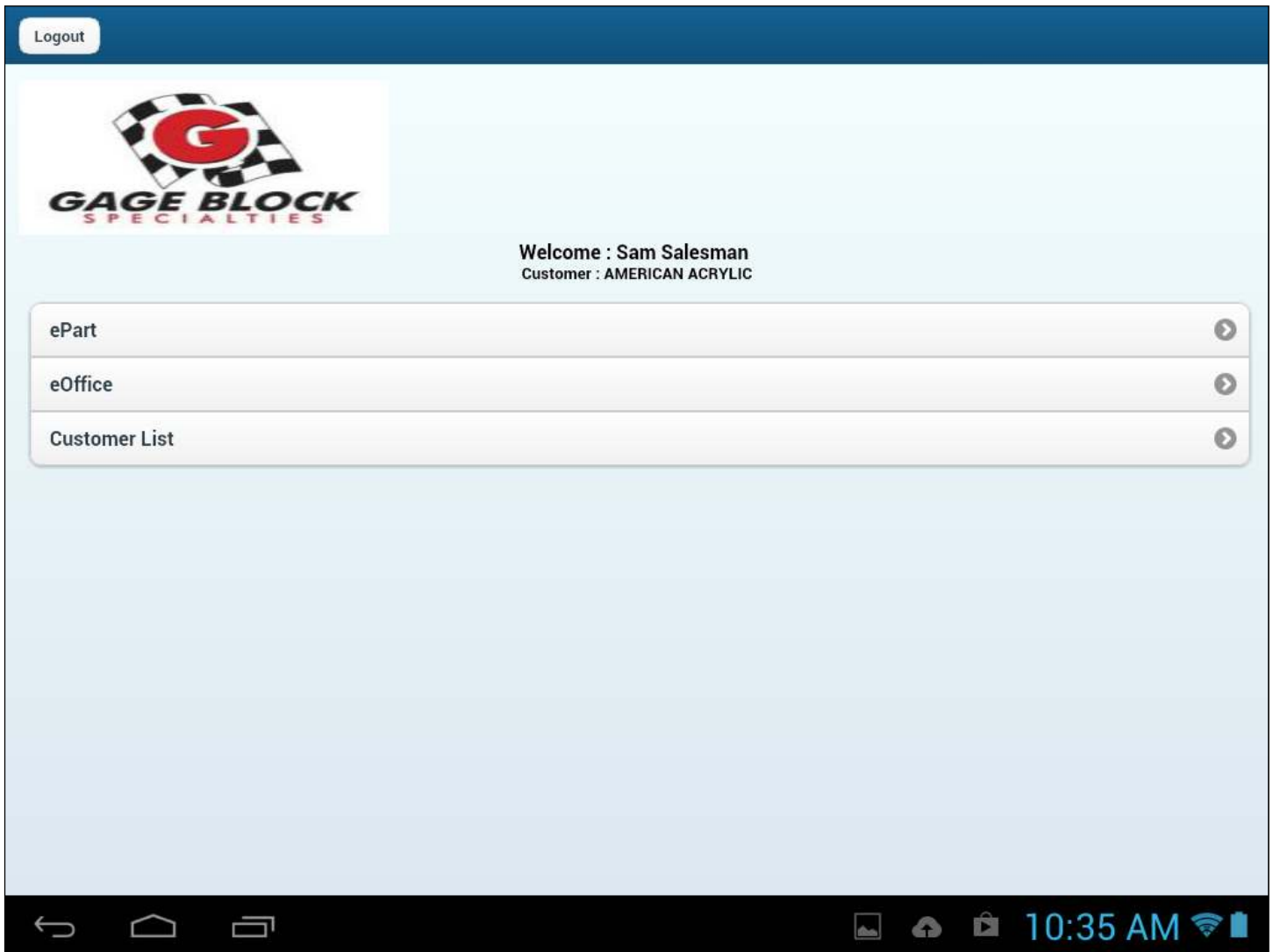
A menu list of the salesman's customer accounts will now be displayed as shown:



Customer Name Search

- With the screen displaying a complete menu list of the salesman's customer accounts, you have the ability to search for a specific customer by clicking within the [Enter Customer Name](#) field and enter in a portion of the customer's name and then clicking on the [Search](#) button. The screen will display a menu list of matching customer names only.

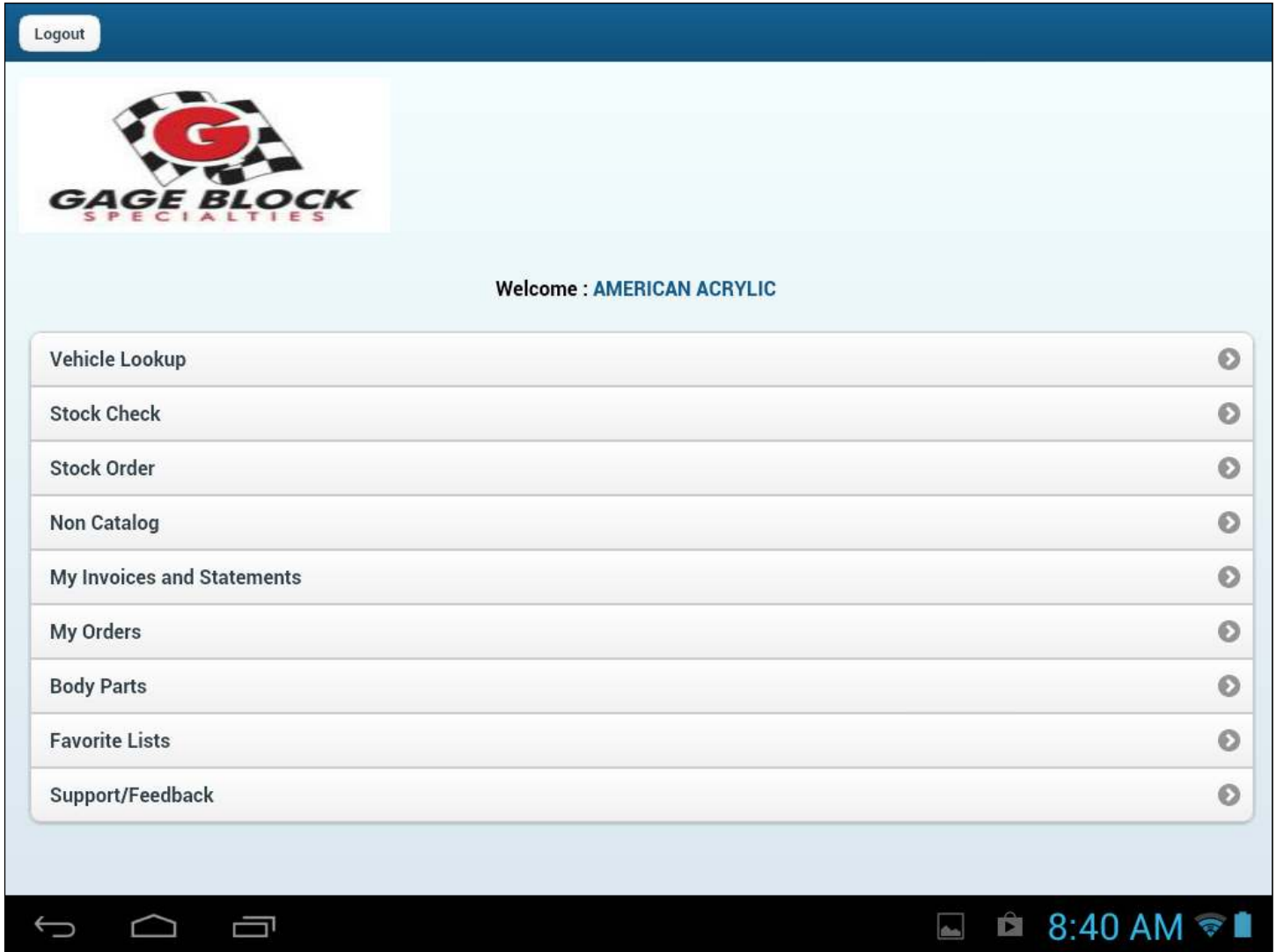
- With the screen displaying a menu list of the salesman's customers, click on a specific customer and the following salesman welcome screen will be displayed as shown:



- With the screen displaying a menu list of the customers options (*ePart/eOffice/Customer List*), click on the specific function you want to perform.

ePart Option

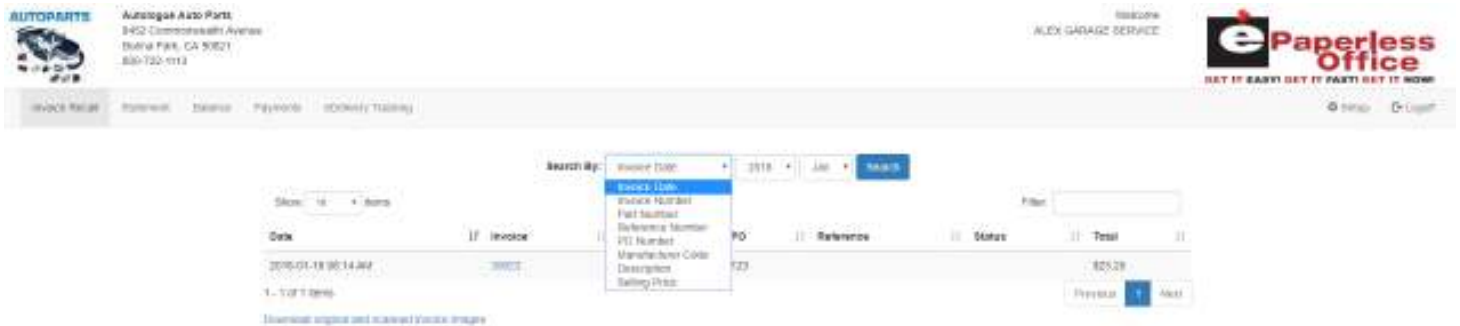
- Clicking on the [ePart](#) menu bar option will automatically log you into the customers' ePartConnection mobile app and the following screen will be displayed as shown:



From this screen, you can perform a variety of ePart functions. See the *ePartConnection Mobile App Users Guide* for complete details.

eOffice Option

- Clicking on the [eOffice](#) menu bar will automatically open up a web browser window and log you into the customers' eOffice website as shown:



- From this screen, you can perform a variety of eOffice searches. See the *ePaperlessOffice-Users Guide* for complete details.
- Clicking on the back arrow will take you back to the previous salesman welcome screen within the mobile app.

Customer List Option

- Clicking on the [Customer List](#) menu bar will automatically return you back to the screen displaying a menu list of the salesman's customers.

Setting Up Vendor Managed Inventory (VMI) For An Account

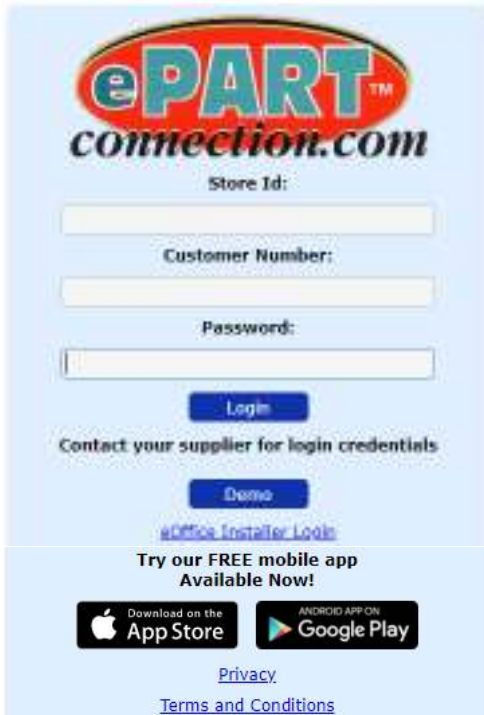
To setup vendor managed inventory for one of your accounts, follow the steps below:

Login Into The ePartConnection Website As Your Account

Access the ePartConnection website by entering the following URL within a web browser:

<http://www.epartconnection.com/>.

The following login screen will now be displayed as shown:



New features available to you now!

- License Plate Lookup Populates Year, Make, Model, Engine & Vin Info
- Manufacturers Content Catalog
i.e Warranty info, Specs, and Attributes

- With the cursor positioned under the **Store Id:** prompt, enter your Store ID and then press the **<Tab>** key.
- With the cursor positioned under the **Customer Number:** prompt, enter the Customer Number you want to setup VMI for then press the **<Tab>** key.
- With the cursor positioned under the **Password:** prompt, enter the accounts password and then press the **<Tab>** key.
- Position the mouse pointer on the **Login** button and click to login to your ePartConnection website as your customer account would.

Editing Favorites

- Position the mouse pointer on the [Edit](#) button and click on it.

The screen will now display the favorites edit screen as shown:

The screenshot shows the 'Favorites' edit screen for Gage Block Specialties Inc. The page header includes the company name, address (17577 Industry Way, Buena Park, CA 90621), and phone number (714.522.3561). The ePART logo is in the top right corner. The main content area has a navigation bar with items like 'HOME', 'LOGOUT', 'DASHBOARD', 'EDIT FAVORITES', 'REORDER', 'MY INVENTORY', 'PARTS', 'CATEGORIES', 'ORDERS', 'INVOICES', 'STATEMENTS', 'HELP', and 'ABOUT'. Below the navigation bar, there is a section for 'Add New Category to Favorites' with a text input field and an 'Add Group' button. A table lists existing categories, including 'My Inventory'. A callout box points to the 'My Inventory' row with the text 'Click on the Edit Category button.' Another callout box points to the text input field with the text 'Enter "My Inventory" here.'

- Click within the [Add New Category to "Favorites"](#) field and enter *My Inventory* and then click on the [Add Group](#) button.
- Position the mouse pointer on the [Edit Category](#) button of the *My Inventory* row and click on it.

The screen will now display the *My Inventory* edit screen as shown:

The screenshot shows the 'My Inventory' edit screen for Gage Block Specialties Inc. The page header includes the company name, address (17577 Industry Way, Buena Park, CA 90621), and phone number (714.522.3551). A navigation bar at the top contains various menu items like 'HOME', 'SALES', 'INVENTORY', etc. The main content area has a form for adding a new part. Five callout boxes with arrows point to specific fields and buttons:

- Enter manufacturer code.** points to the 'Mfg.' field.
- Enter description.** points to the 'Additional Description' field.
- Click on the Add Part button.** points to the 'Add Part' button.
- Enter part number.** points to the 'Part Number' field.
- Enter stocking quantity.** points to the 'Default Quantity to Order' field.

Below the form is a table listing existing parts with columns for Part Number, Description, Mfg., Stocking Qty, and an 'Add Part' button for each row.

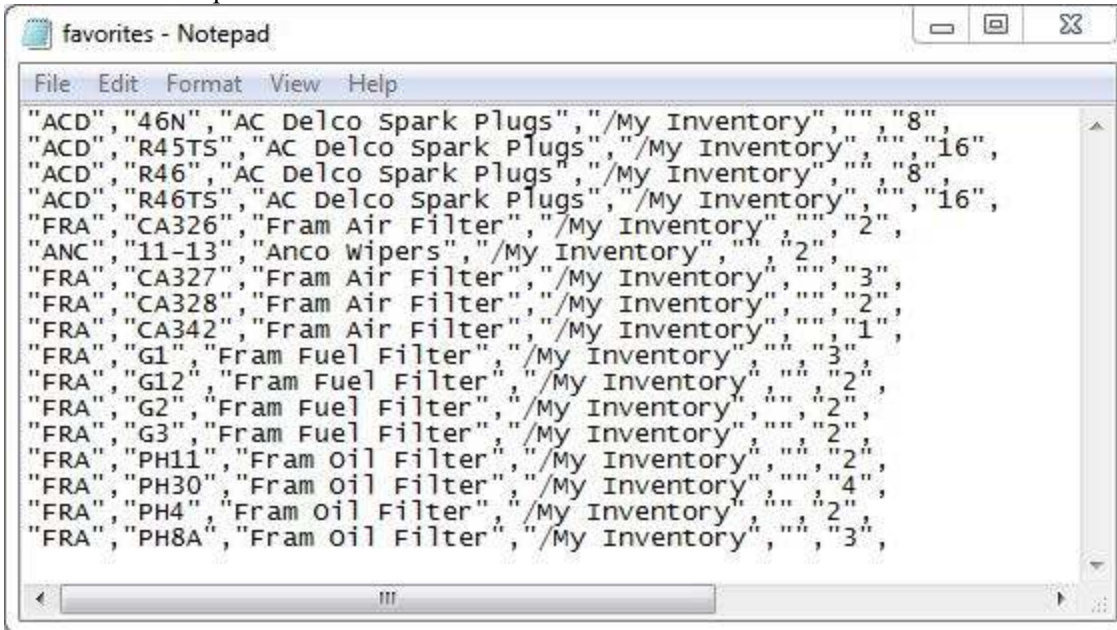
Manually Adding Parts

- To manually add parts that your customer will stock in their inventory, position the mouse pointer under the **Mfg** column heading and click to position the cursor within the field. Enter the manufacturer code for the part number and press the **<Tab>** key.
- With the cursor positioned within the **Part Number** field, enter in the part number and press the **<Tab>** key.
- With the cursor positioned within the **Additional Description** field, you can optionally enter in a description for the part number and press the **<Tab>** key. Note: If a description is not entered, customers won't have the ability to search by description.
- With the cursor positioned within the **Default Quantity to Order** field, enter in the quantity that will be stocked for the part number and then click on the **Add Part** button to save the entered parts information. The part number will now be added to the end of the current parts list.

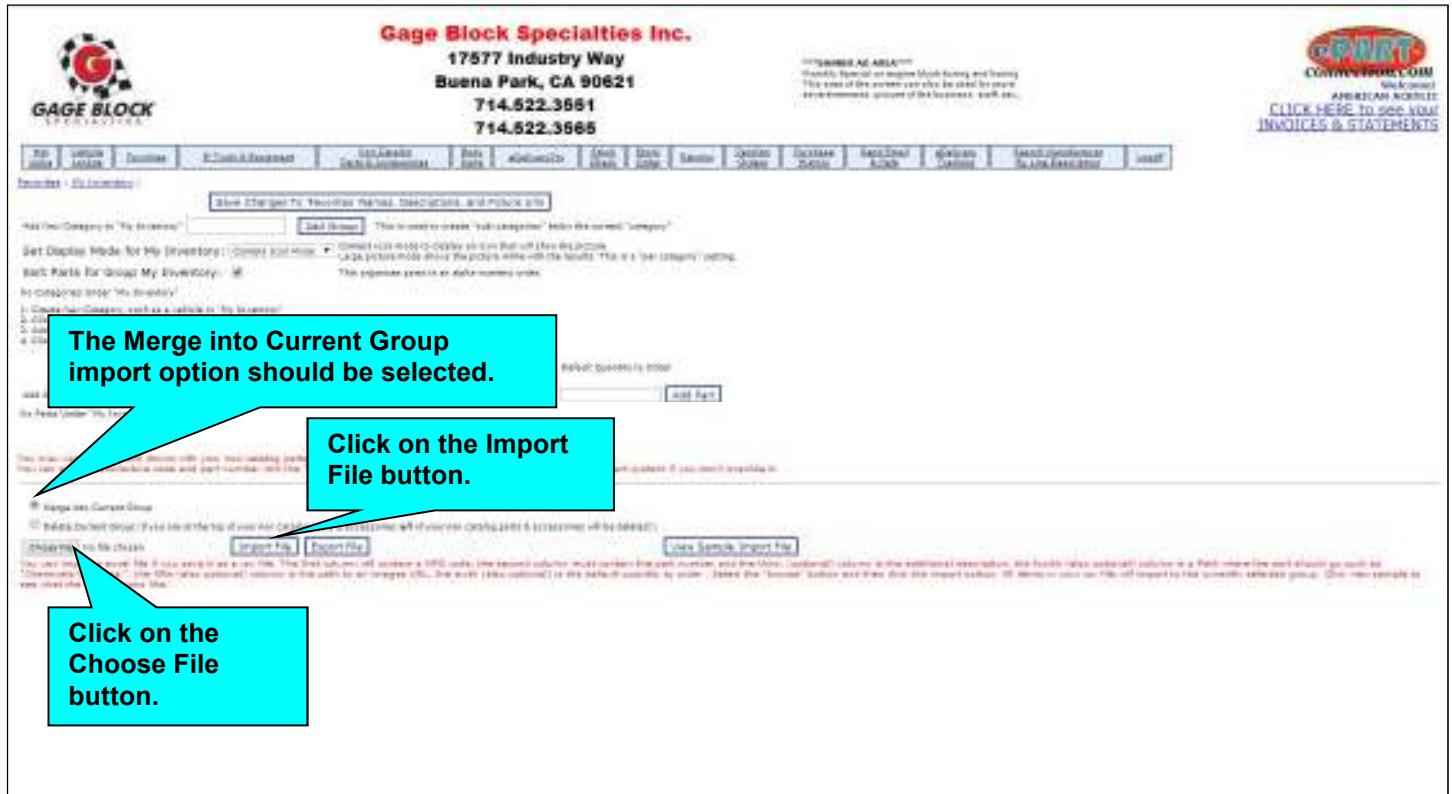
Importing Parts

- To import parts that your customer will stock in their inventory, a comma separated value (CSV) file can be used to import the parts into the My Inventory part category.

Below is an example of the CSV formatted file:



The file consists of 6 separate fields that have quotes around each field value and are separated by a comma. Here are in order of the fields: Mfr Code, Part Number, Description (optional), Category Path (optional), Picture URL (optional), Stocking Quantity.



- Scroll down the bottom section of the screen and make sure the *Merge into Current Group* import option is selected.

- Click on the [Choose File](#) button. Select the CSV file that contains the parts information to be imported and then click on the [Open](#) button. The file name selected will now be displayed to the right of the [Choose File](#) button.
- Click on the [Import File](#) button and the parts information from the selected file will now be imported into the *My Inventory* parts group.

The screen will now display the imported parts within the *My Inventory* category as shown:


The screenshot shows the ePart mobile setup interface for Gage Block Specialties Inc. The page displays a list of imported parts under the "My Inventory" section. A callout box highlights the heading "My Inventory".

Part Number	Description	Qty	Picture	Url For Picture	Upload Picture
ACD04878	AC Dials Spark Plug	18	Picture	Choose File No file chosen	Upload Picture
ACD4461	AC Dials Spark Plug	18	Picture	Choose File No file chosen	Upload Picture
ACD04406	AC Dials Spark Plug	18	Picture	Choose File No file chosen	Upload Picture
ACD04879	AC Dials Spark Plug	18	Picture	Choose File No file chosen	Upload Picture
WKA 04208	New Air Filter	2	Picture	Choose File No file chosen	Upload Picture
WKA 04201	New Air Filter	2	Picture	Choose File No file chosen	Upload Picture
WKA 04228	New Air Filter	2	Picture	Choose File No file chosen	Upload Picture
WKA 04242	New Air Filter	2	Picture	Choose File No file chosen	Upload Picture

Uploading Pictures


- At this point, you now have the option to upload a picture for a part number listed by clicking on the [Choose File](#) button of the row the part number is on.
- Select the picture file (*.jpg*, *.tif*, *.gif*, *.bmp*) to be uploaded and then click on the [Open](#) button. The filename selected will now be displayed to the right of the [Choose File](#) button of the row the part number is on.
- Click on the [Upload Picture](#) button to the right of the filename and the picture will now be attached to the part and the URL filename information will now be listed under the *Url For Picture* column. Note: The picture will NOT be visible until the information is saved in the next step.
- Click on the [Save Changes To "Favorites" Names, Descriptions, and Picture URLs](#) button and the picture will now be shown for the part number under the *Picture* column.

The screen will now display the imported pictures within the *My Inventory* category as shown:



Gage Block Specialties Inc.
17877 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3555

****WARNING: NO ARJIS****
Specialty Specialties or special block-making and handling.
The user of the screen can also be used for other
developmental projects of the business. mail, etc.









AMERICAN ACQUISITION
[CLICK HERE to see your INVOICES & STATEMENTS](#)

HOME
SEARCH
ADD NEW
EDIT
DELETE
EXPORT
IMPORT
ADMIN
HELP

Inventory > My Inventory

Set Display Mode for My Inventory: Grid List Compact Compact Mobile

Set Parts for Group My Inventory: All Selected

ID	Part Name	Qty	Unit Price	Total Price	Image	URL	Action
ACD480	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD481	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD482	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD483	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD484	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD485	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD486	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD487	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture
ACD488	AC Delta Block Page 2	2	0.000000	0.000000		http://img1000.com/2008/08/14/14-08-0000	Upload Picture

Pictures images are displayed here.

Url's For Pictures are displayed here.