User Document: Alliance Part Ordering version– 1.29

aesServer Installation

Revised 08/22/2014

Prerequisites

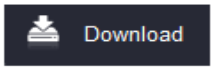
RO Writer 1.29 or greater
Internet Explorer 9 or greater
Microsoft .Net 3.5
Download code provided by your Auto parts Supplier

Installation

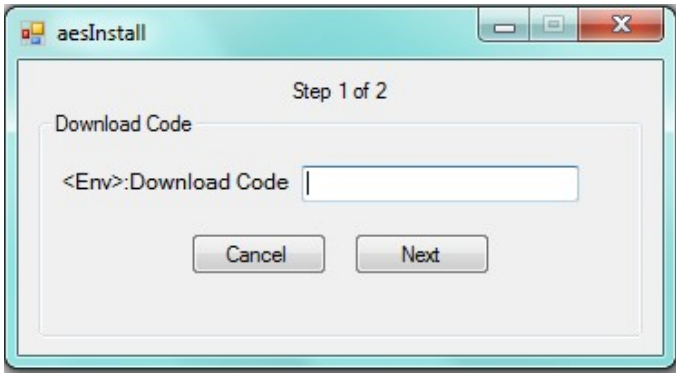
1) Close the RO Writer Shop Management Software

2) Click the download button in the Upper Right hand corner of this window and choose Run.

Step 1

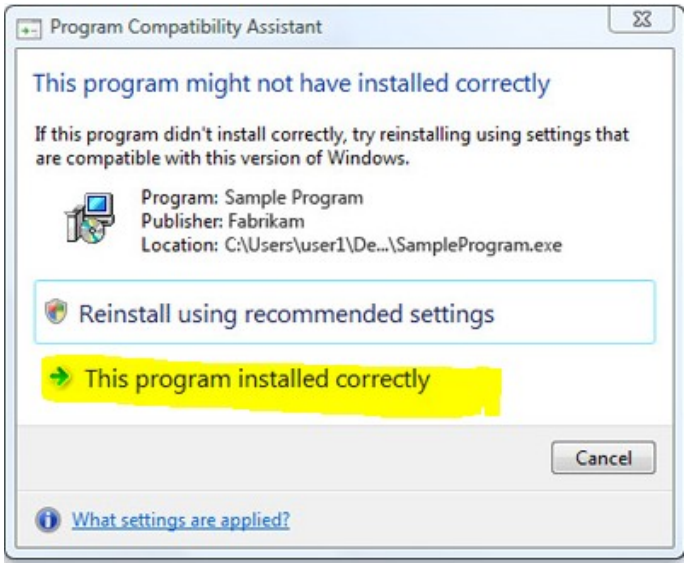


3) Enter the download code provided to you by your parts supplier and click next.



The default directory C:\aesServer will be displayed as the install to directory, click install and the installer will download and install all the required files for this integration.

You may get a message saying “This Program might have not installed correctly” Double Click on “This program installed correctly”


Program Compatibility Assistant
This program might not have installed correctly
If this program didn't install correctly, try reinstalling using settings that are compatible with this version of Windows.
Program: Sample Program
Publisher: Fabrikam
Location: C:\Users\user1\De...\SampleProgram.exe
Reinstall using recommended settings
This program installed correctly
Cancel
What settings are applied?

Contents

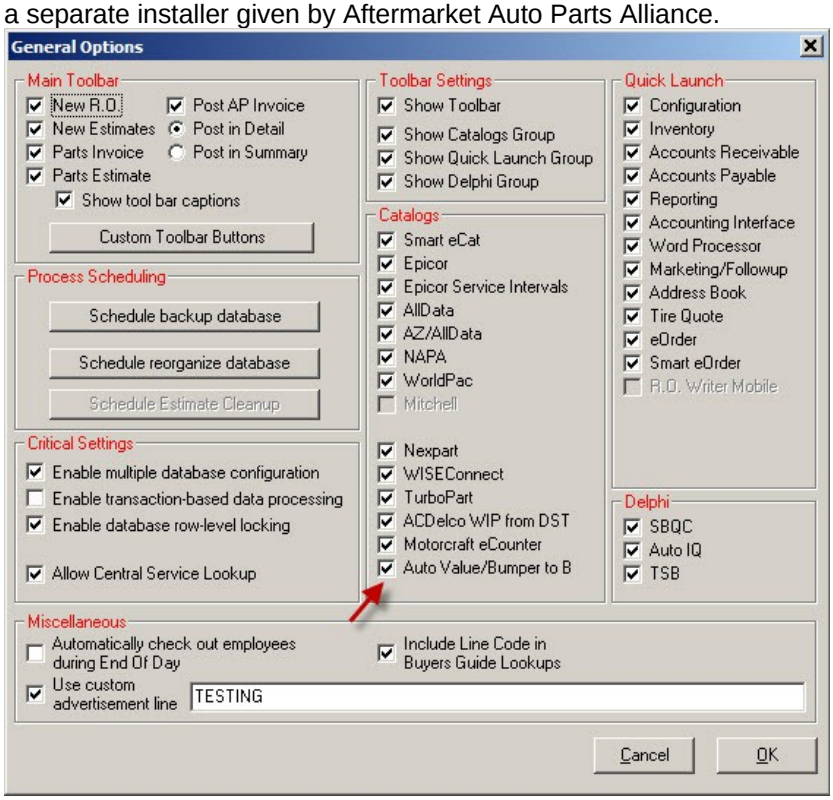
Contents....3
Alliance Part Ordering Overview....4
Alliance Setup....4
Using the Alliance Interface....9

Alliance Part Ordering Overview

Two new Alliance parts ordering connections have been added to Smart eCat and Smart eOrder, Bumper to Bumper and Auto Value. You are able to use Bumper to Bumper or Auto Value not both (see Supplier Setup).

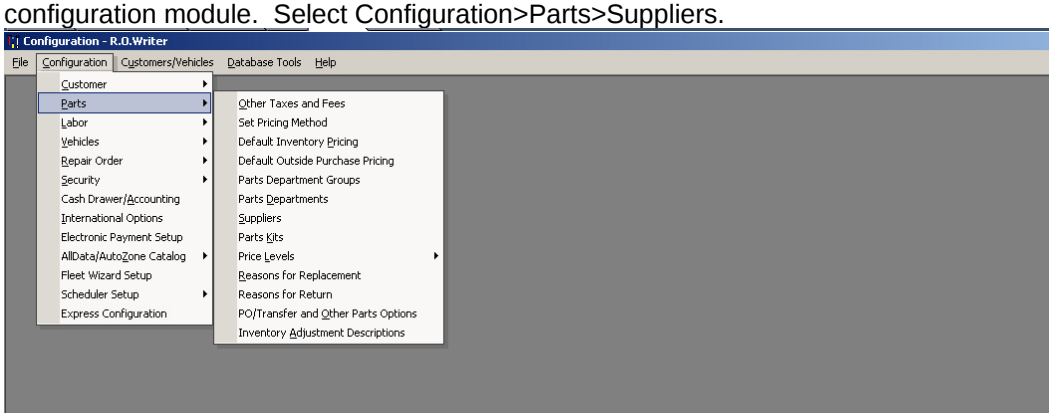
Alliance Setup

Once you've selected the Auto Value/Bumper to Bumper option under Catalogs in General Options in the Configuration module, the selected catalog will appear in Smart eCat. This will be a separate installer given by Aftermarket Auto Parts Alliance.

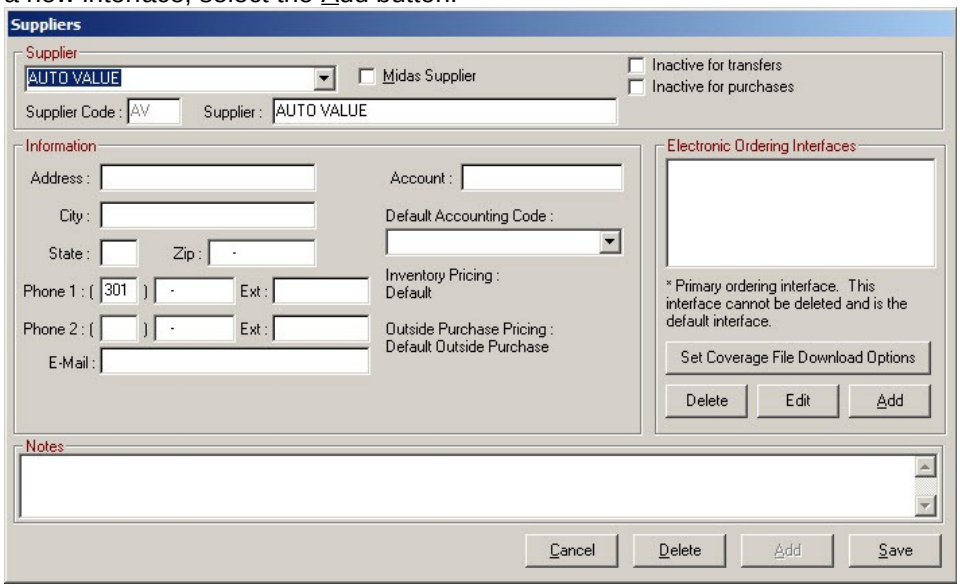


Supplier Setup

Your Auto Value or Bumper to Bumper supplier should be added as a supplier in the configuration module. Select Configuration>Parts>Suppliers.



There is a separate installer to use Bumper to Bumper or Auto Value Connections in Smart eCat. Once that is installed and you have an account set up and have received your login information, you will enter it in the Electronic Ordering Interfaces section. Suppliers can have more than one electronic ordering interface. Interfaces set up for this supplier will appear in the window. To add a new interface, select the Add button.



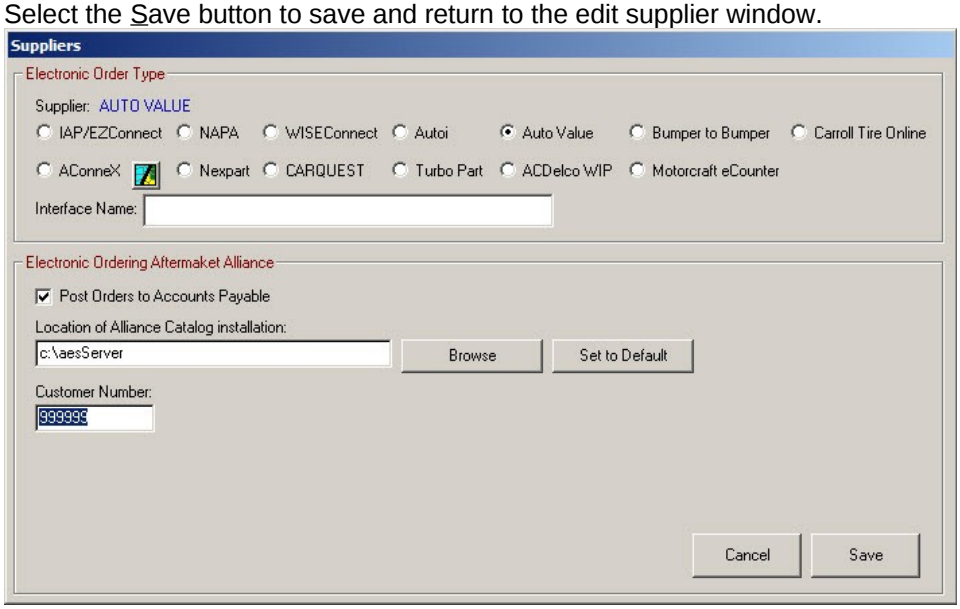
Select either Bumper to Bumper or Auto Value and you can optionally enter an Interface Name or keep the default. You are only able to use Bumper to Bumper or Auto Value not both.

Select Post Orders to Accounts Payable if you would like the system to prompt you to post an Accounts Payable invoice when ordering parts.

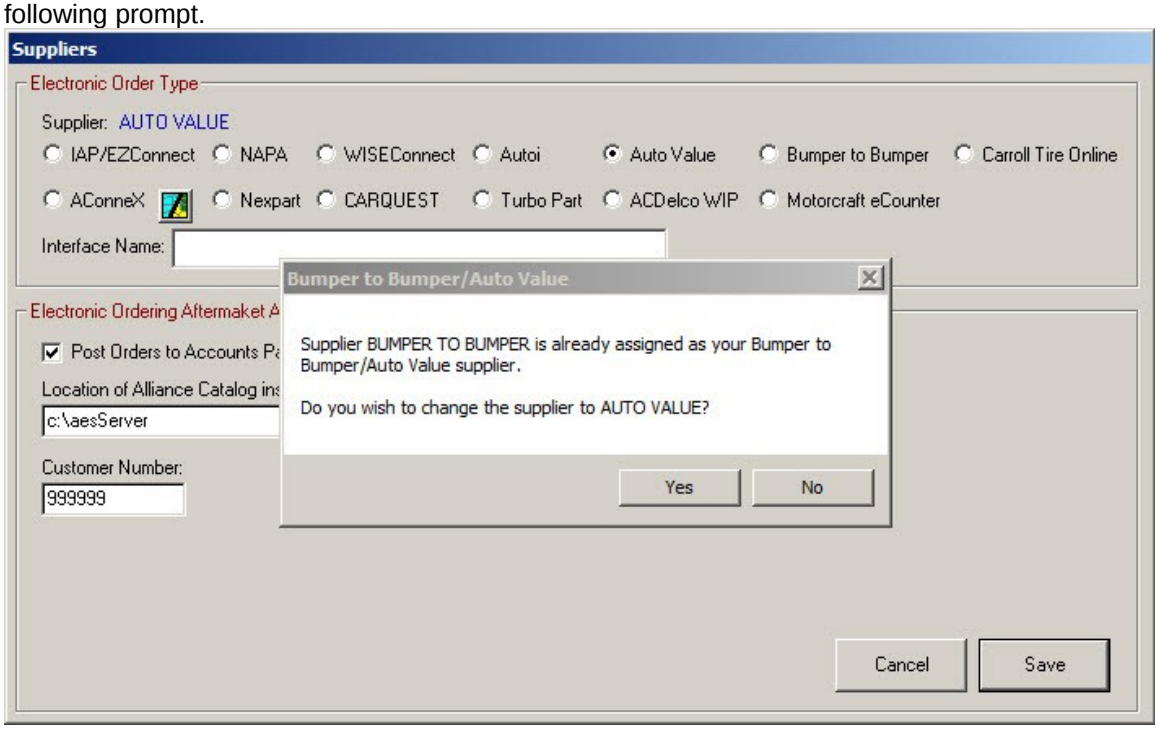
Enter the location the Alliance Catalog was installed or select Set to Default which is c:\aesServer.

Enter your Customer Number.

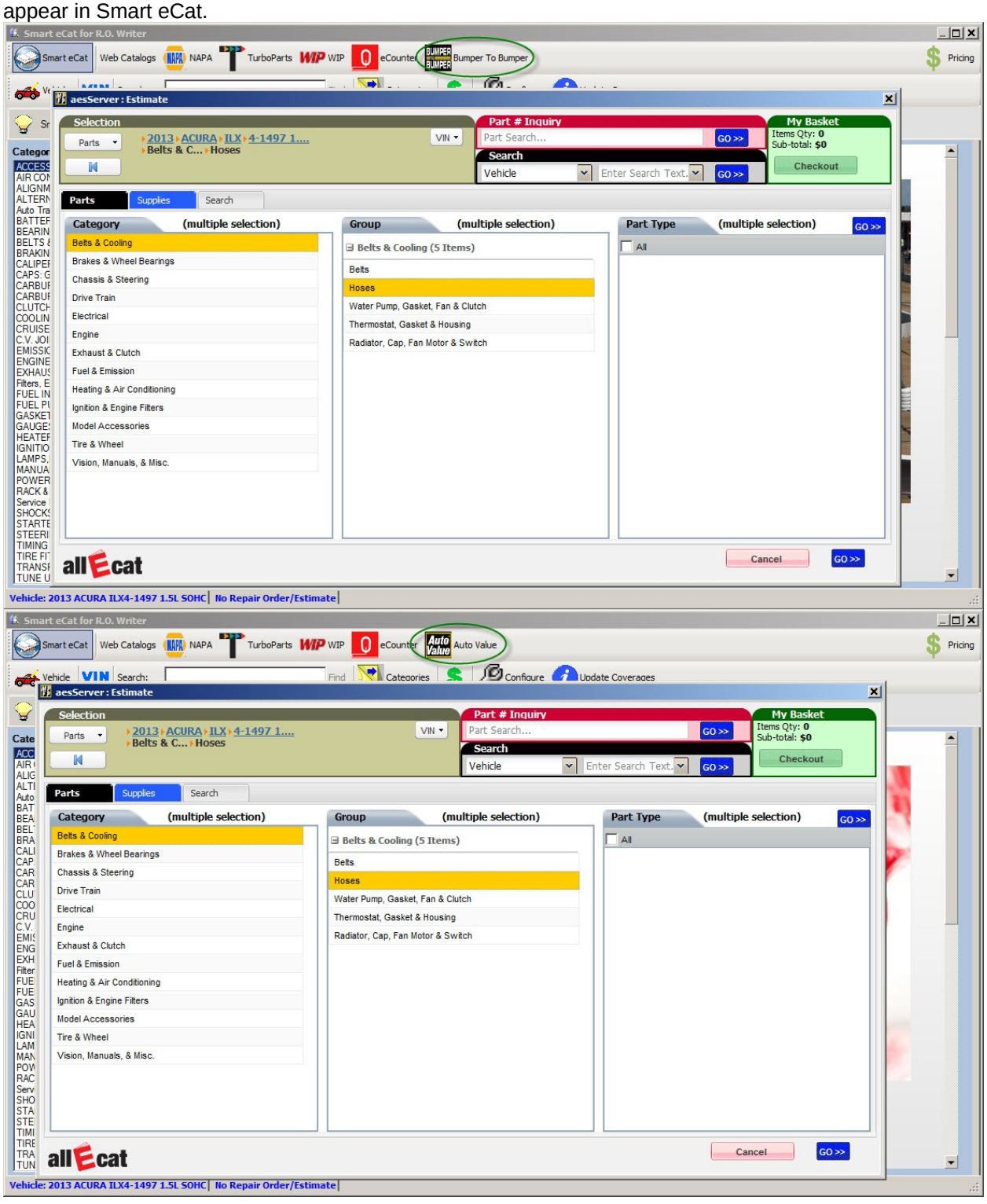
Select the Save button to save and return to the edit supplier window.



If you attempt to assign Bumper to Bumper or Auto Value to another supplier, you will receive the following prompt.



Once you've set up your Auto Value or Bumper to Bumper supplier, the one you selected will appear in Smart eCat.

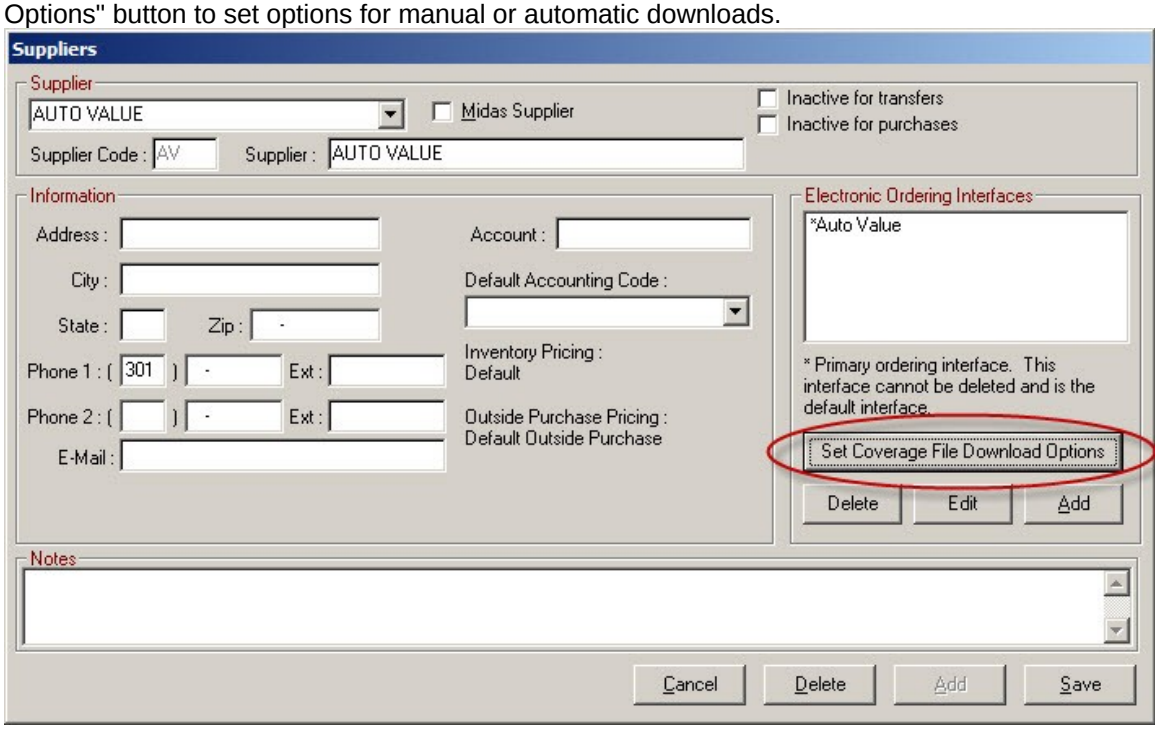


Coverage File Download Options

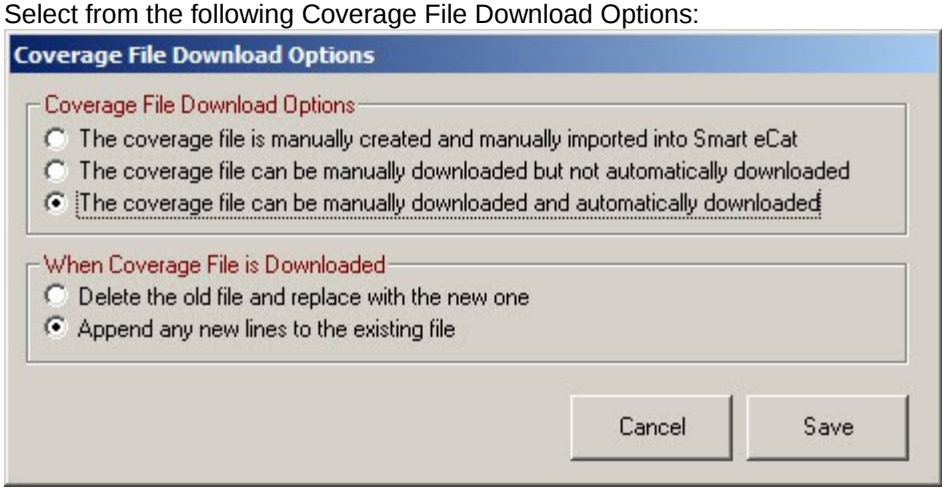
Automatic MCL downloads when R.O. Writer® starts. This feature is available to Smart eCat users. In the Configuration module, select Configuration>Repair Order>Catalog Options. Select whether you want to automatically download coverages, prompt you to download coverages, or never update coverages when R.O. Writer® starts.

The auto download will happen every time Epicor data is updated.

You are able to set download options for each supplier. Select the "Set Coverage File Download Options" button to set options for manual or automatic downloads.



Select from the following Coverage File Download Options:



The coverage file is manually created and manually imported into Smart eCat. When this option is selected, the coverage file cannot be automatically downloaded when R.O. Writer® starts nor can it be downloaded in Smart eCat by selecting the Download Coverages button.

The coverage file can be manually downloaded. When this option is selected, the coverage cannot be automatically downloaded when R.O. Writer® starts but can be downloaded in Smart eCat when selecting the Download Coverages button.

The coverage file can be manually downloaded and automatically downloaded. When this option is selected, the coverage file can be automatically downloaded and can be downloaded in Smart eCat when the Update Coverages button is selected.

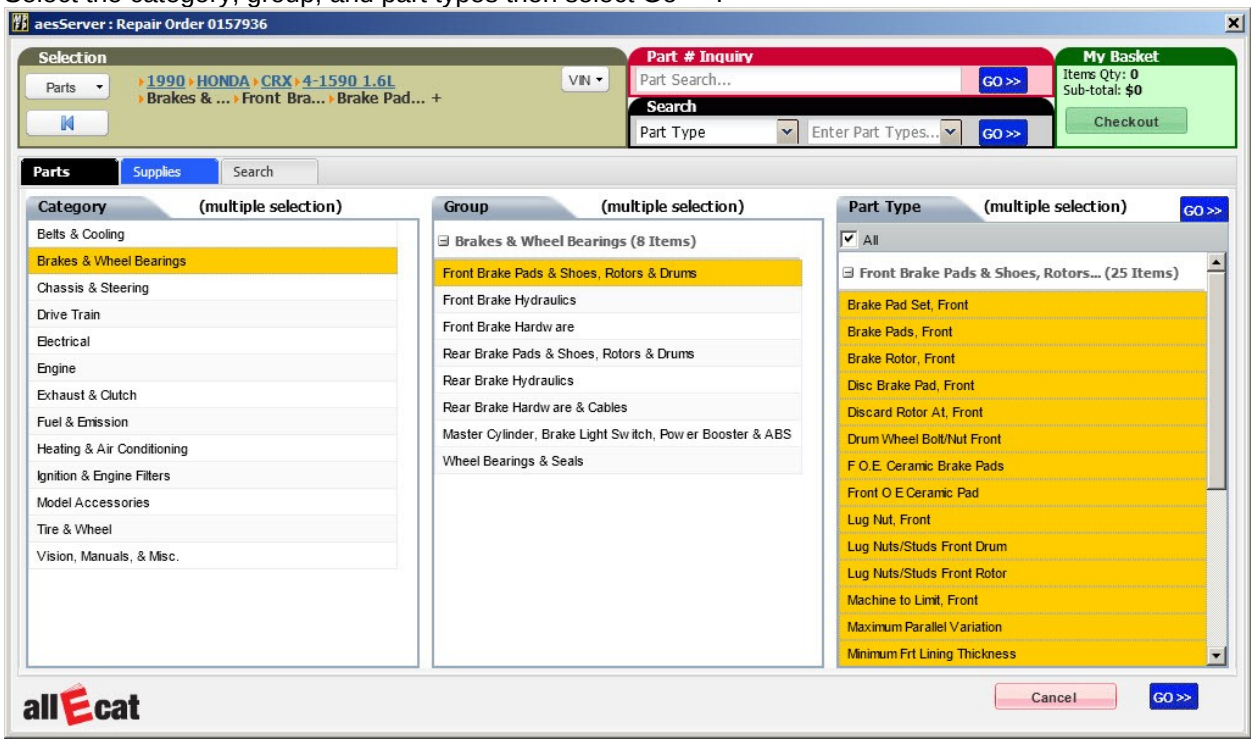
If you've selected the second or third option, you will need to select one of two options:

Delete the old file and replace with the new one
Append any new lines to the existing file

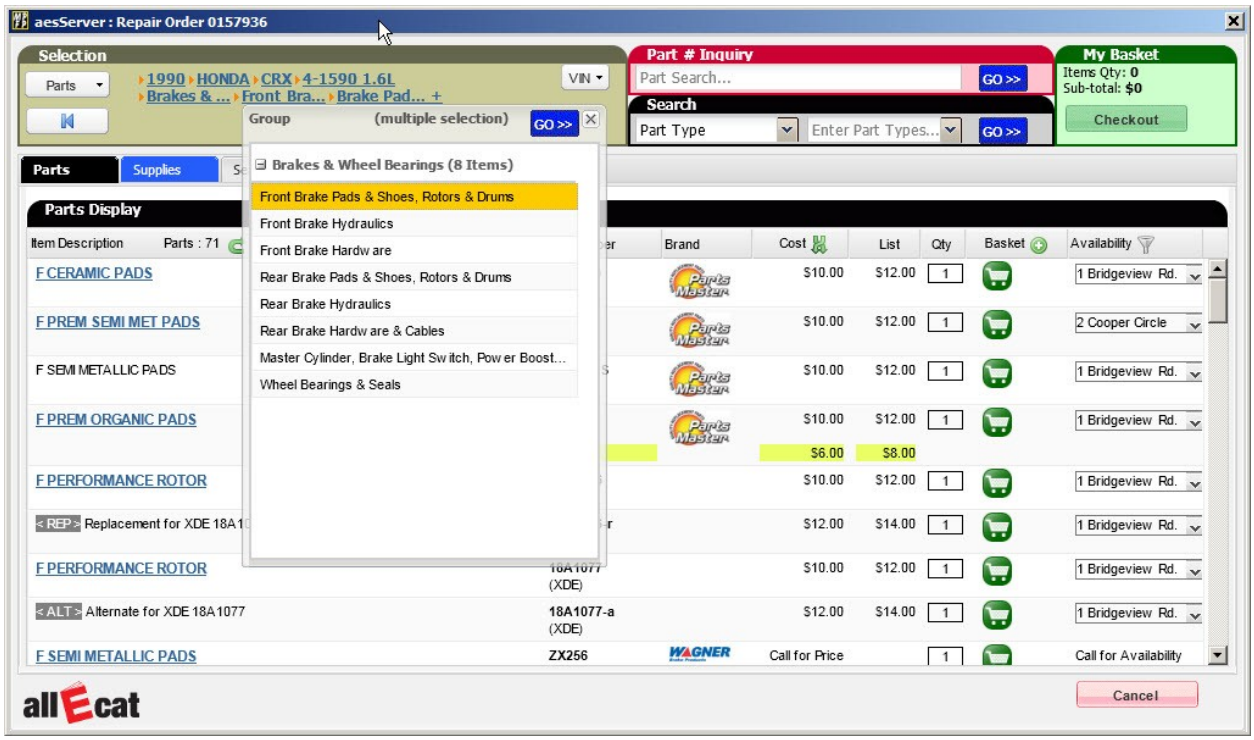
Using the Alliance Interface

Selecting the Bumper to Bumper or Auto Value icon from the Quick Launch bar or in Smart eCat displays the selected catalog.

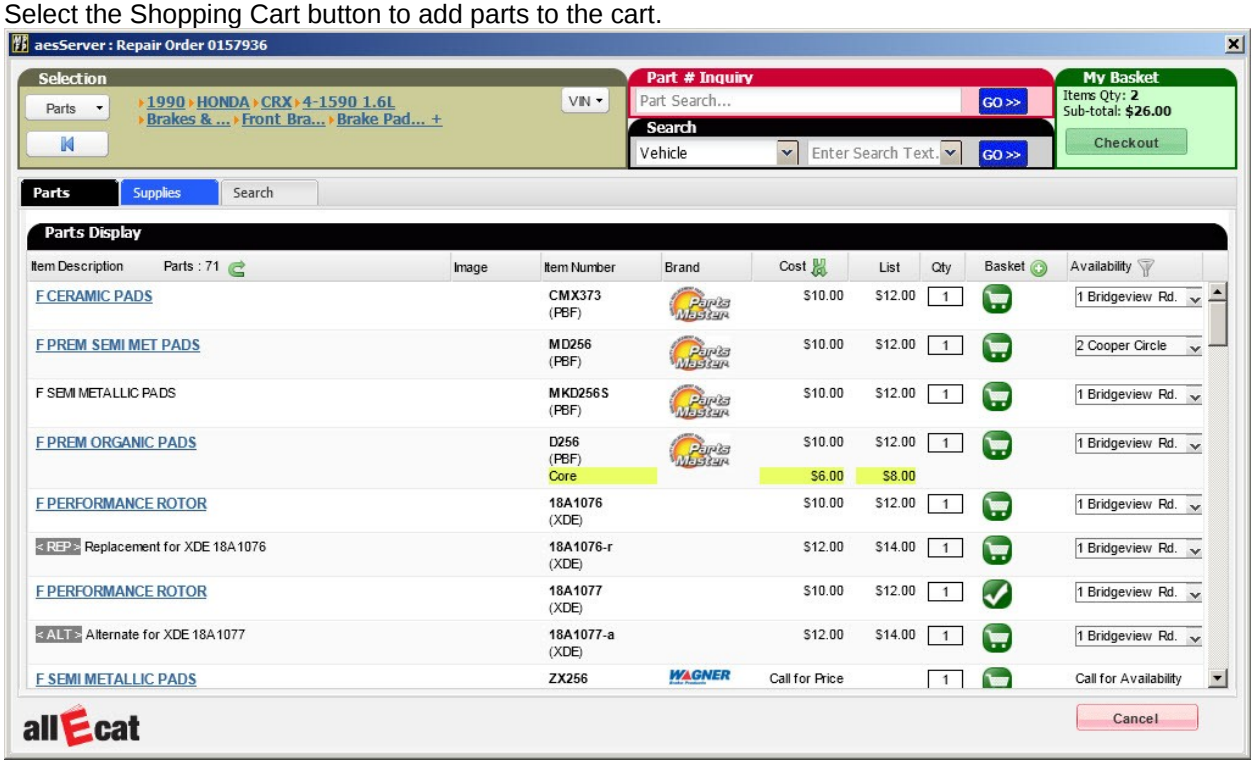
Select the category, group, and part types then select Go >>.



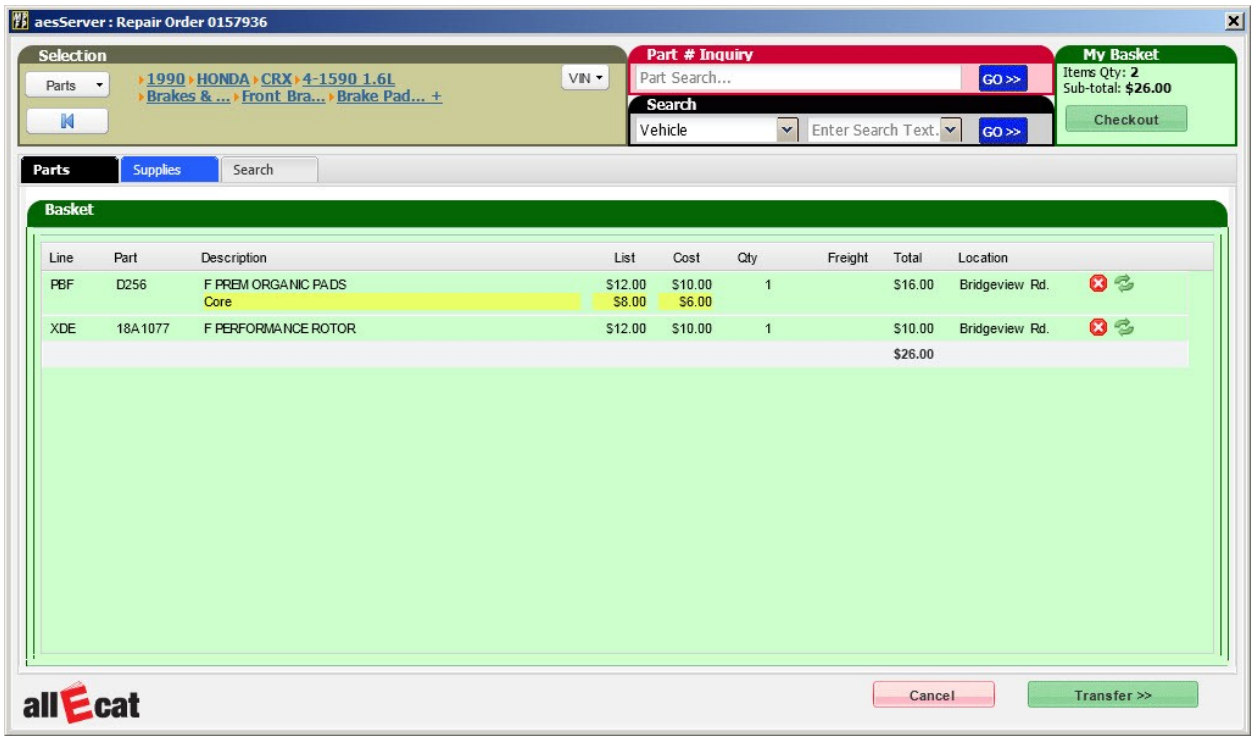
Click on the category, group, or part type to re-select. You can also search by part number or part type.

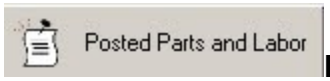


Select the Shopping Cart button to add parts to the cart.



Select Checkout to view the shopping cart. Select the Transfer >> button to add the parts to the Posted Parts and Labor tab in Smart eCat.

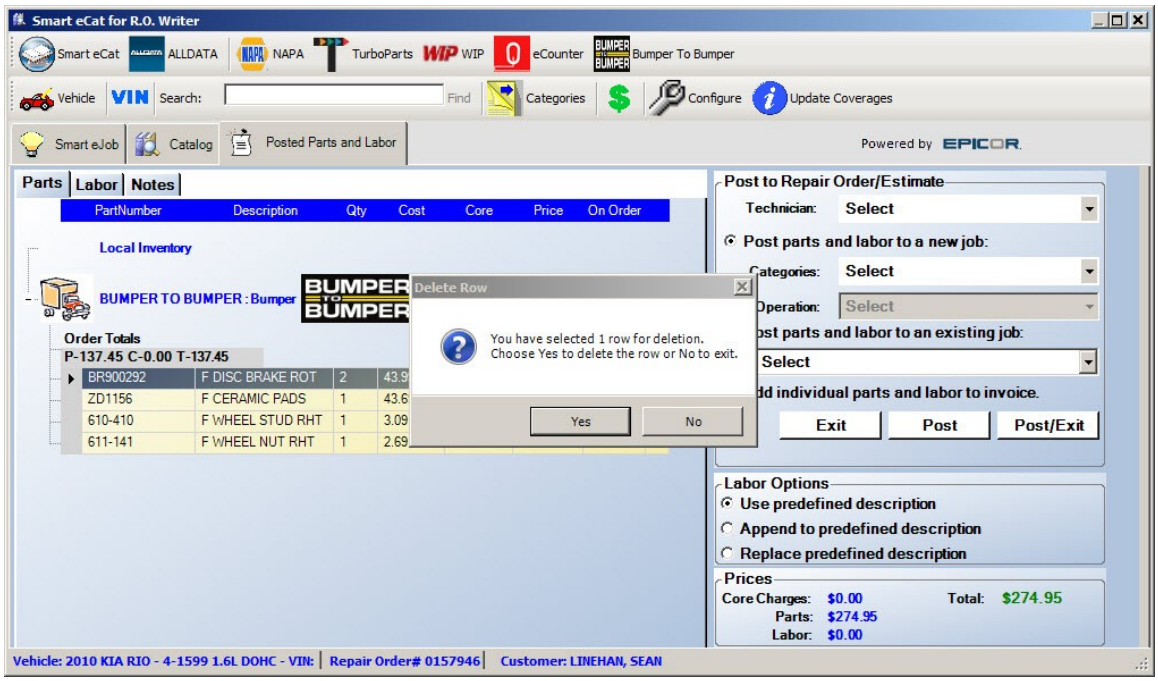




Posted Parts and Labor

Once the parts are posted, you can view them by selecting the Posted Parts and Labor tab. You can then order the parts and post the ticket from this tab.

If you wish to delete a part from the posted parts and labor tab, click on the gray area before the part number to highlight the entire line and press the Delete key on the keyboard.

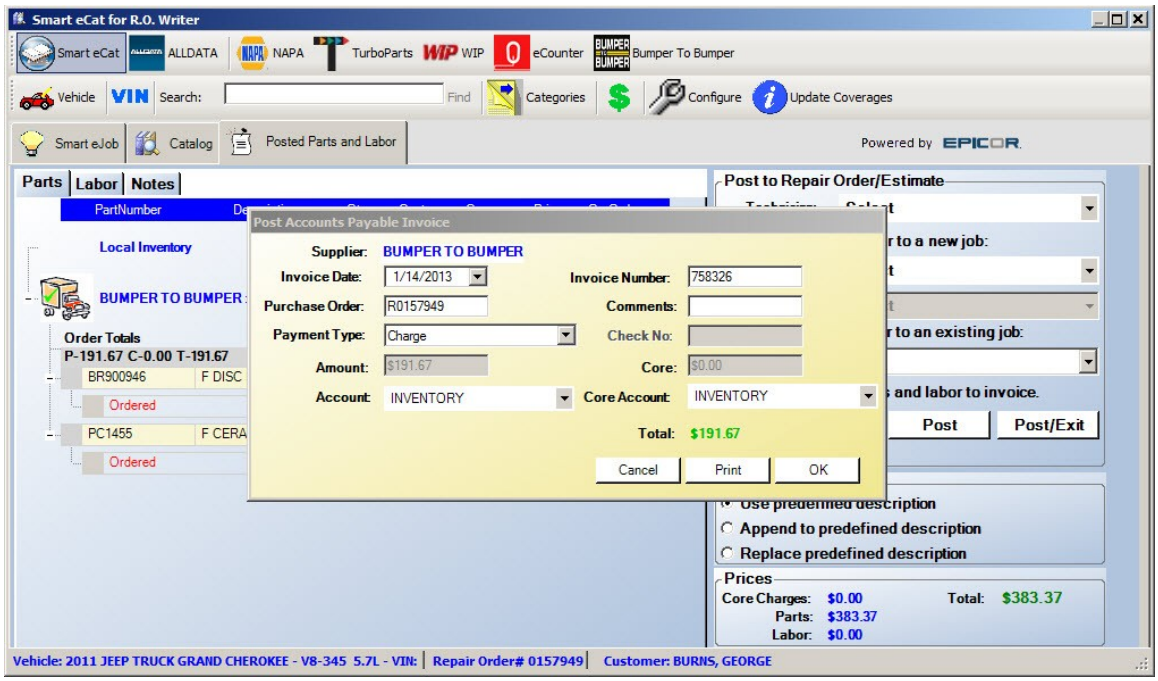


Answer Yes to the prompt, "You have selected 1 row for deletion. Choose Yes to delete the row or No to exit".

You can delete multiple rows by clicking on the gray area of the first part and holding down shift while clicking on the gray area of the last part if the parts are next to each other. If the parts are not next to each other, click on the gray area of the first part and hold down CTRL while clicking on the gray area of the other parts you wish to delete.

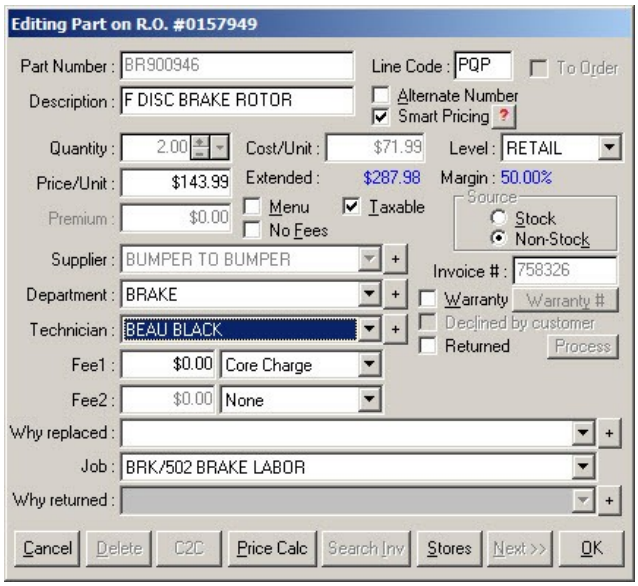
Items available to order online will have a truck icon. Clicking on the truck icon will order the part(s) online and post an accounts payable invoice if the option is set up as Prompt or Always in PO Transfer and Other Parts Options and the supplier you are ordering from is set to Post Orders to AP under Edit Suppliers.

If you did not purchase the Accounts Payable module, and the supplier is set to Post Orders to AP under Edit Suppliers, an invoice will not be posted but a confirmation number will be posted to the ticket in the invoice field. If this option is not set, no invoice number will be posted to the ticket.

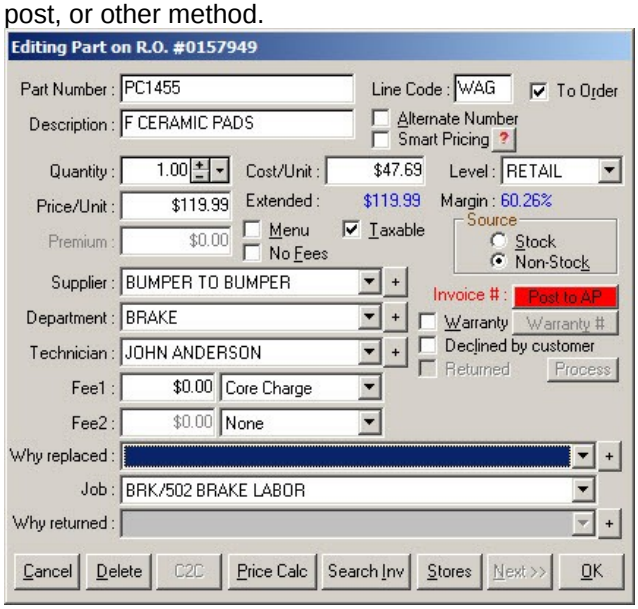


Once parts have been ordered the On Order box will be checked.

When the parts are posted to the repair order, the To Order box will be unchecked and the invoice number will be posted.



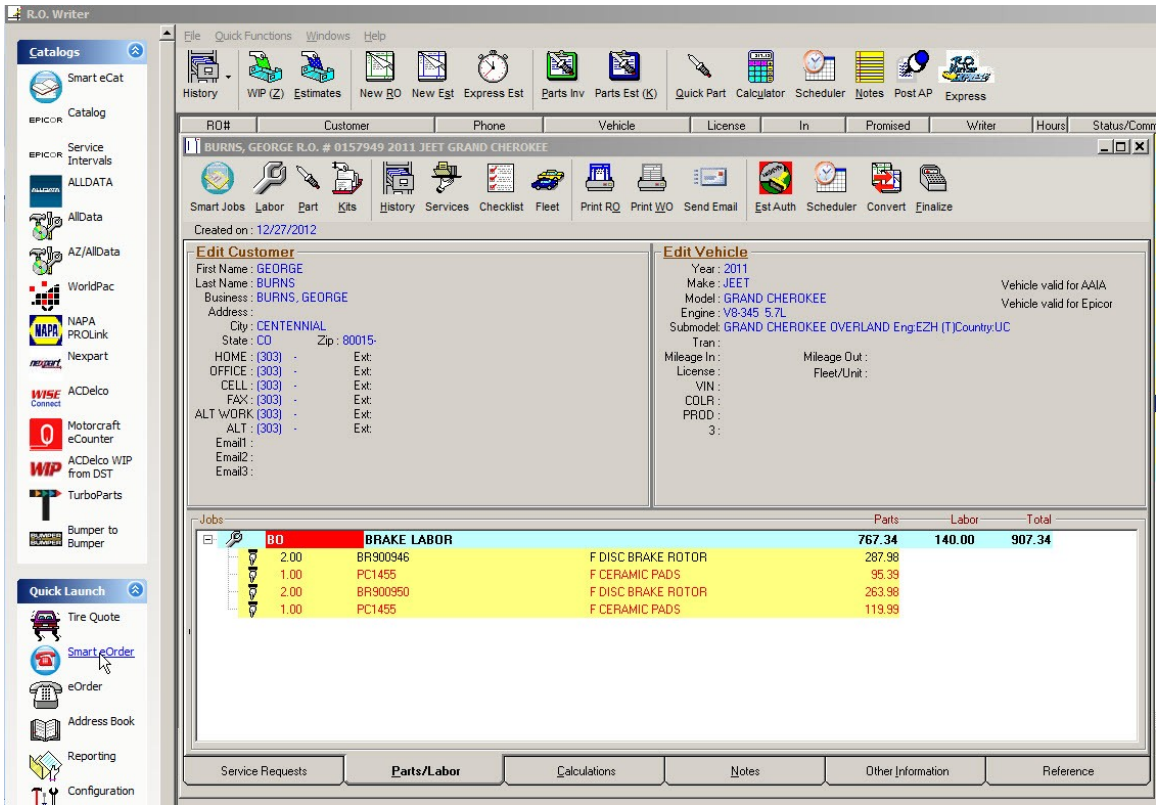
If you do not want to order the parts now in Smart eCat, you can still post the parts to the estimate or repair order. The parts will have the To Order box checked as seen below and the parts can be ordered using Smart eOrder, eOrder, a purchase order, accounts payable detail post, or other method.



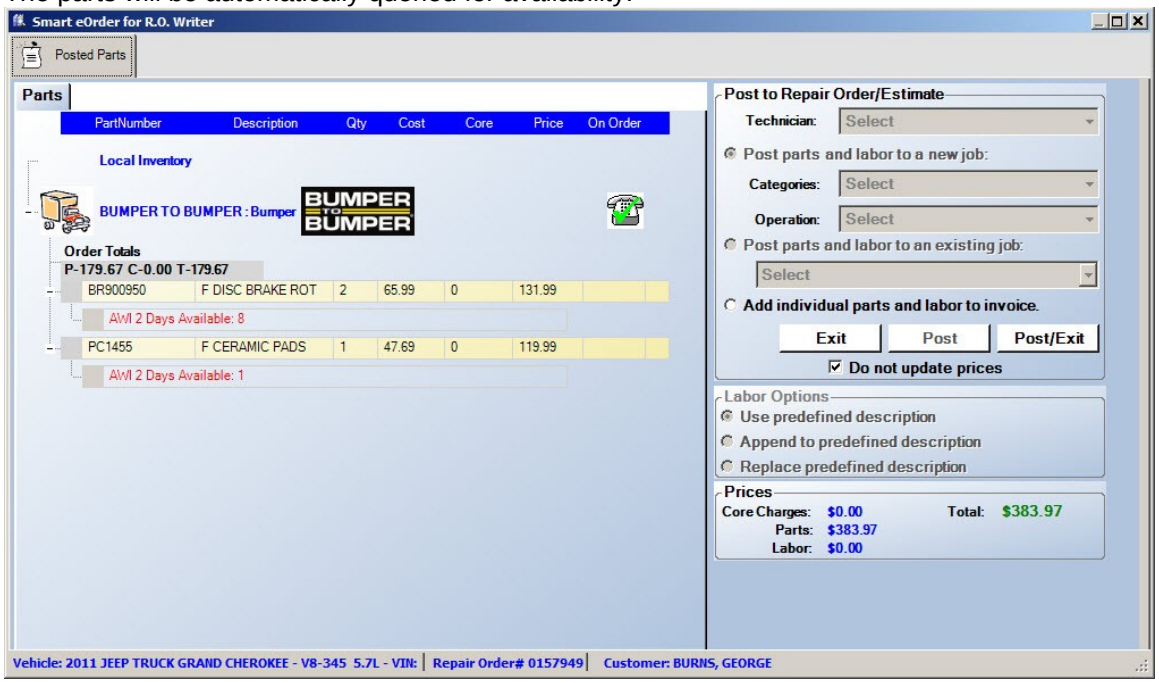
Ordering Alliance Parts using Smart eOrder

Once the parts are posted to the estimate or repair order, you are also able to order the parts using Smart eOrder.

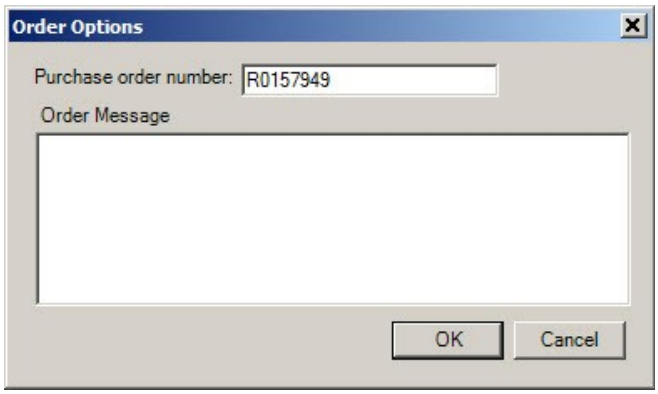
From the estimate or repair order, select the Smart eOrder icon on the Quick Launch bar.



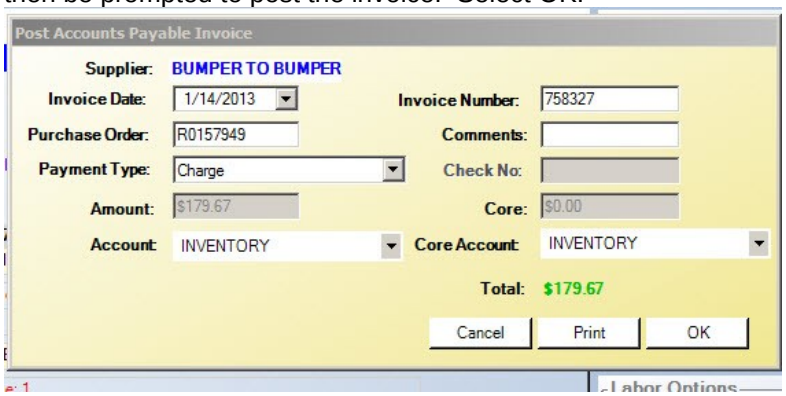
The parts will be automatically queried for availability.

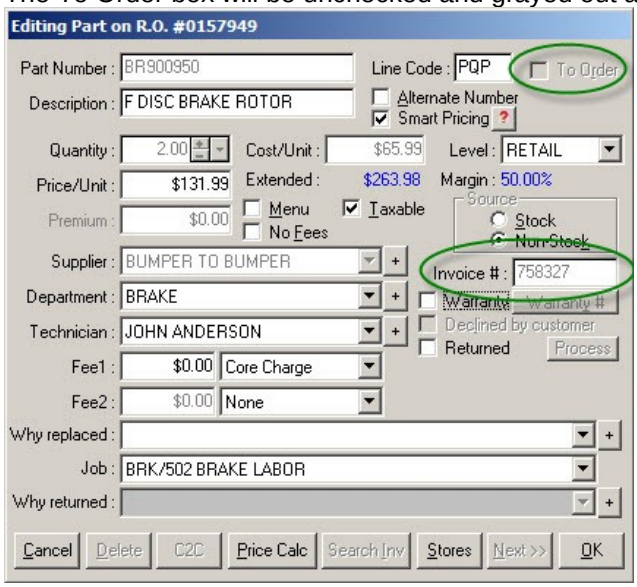


To order the parts, select the Truck Icon. You can optionally enter an Order Message or select OK.



If you had selected the option under Edit Supplier to Post Orders to Accounts Payable, you would then be prompted to post the invoice. Select OK.



Select the Post and Exit button in Smart eOrder to post and exit.

The To Order box will be unchecked and grayed out and the invoice number will be posted.