



User Document: Alliance Part Ordering version- 1.29

### aesServer Installation

Revised 08/22/2014

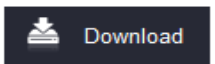
#### **Prerequisites**

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

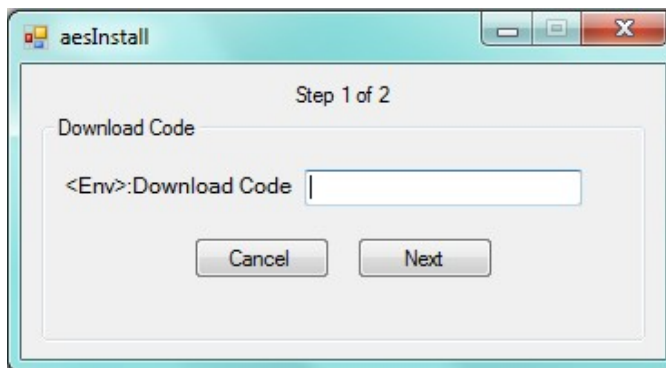
#### **Installation**

- 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**

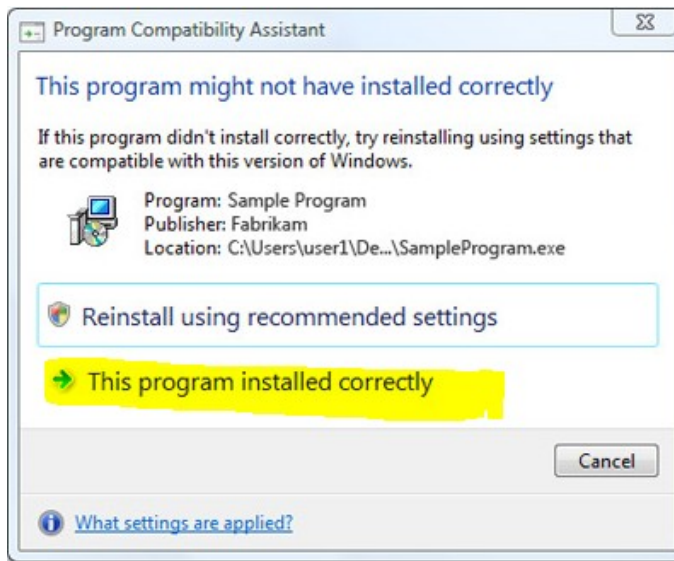


- 3) Enter the download code provided to you by your parts supplier and click next.



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"



## Contents

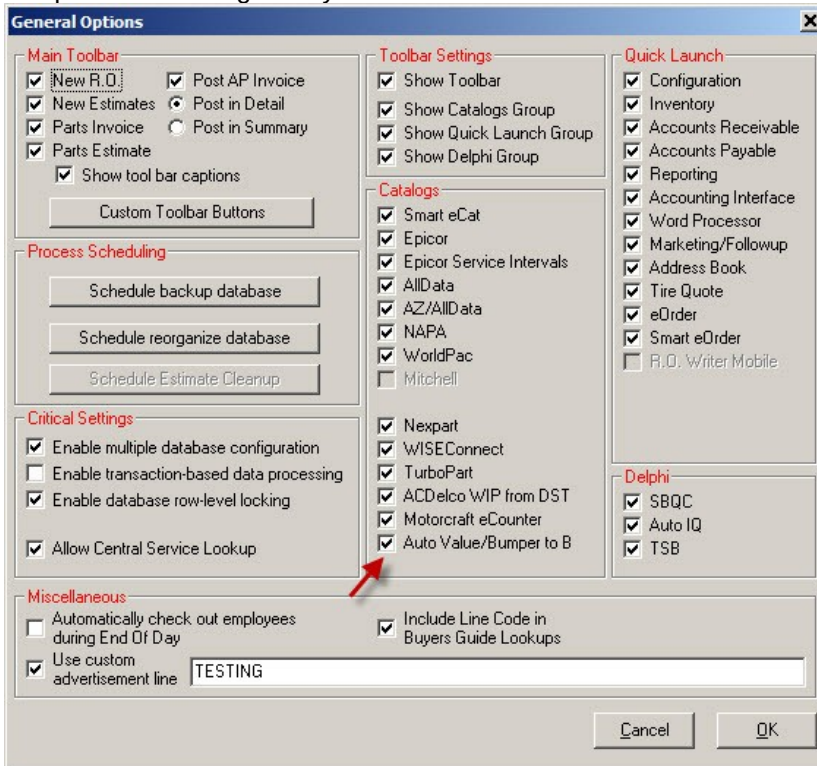
Contents.....	3
Alliance Part Ordering Overview.....	4
Alliance Setup.....	4
Using the Alliance Interface.....	9

## 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).

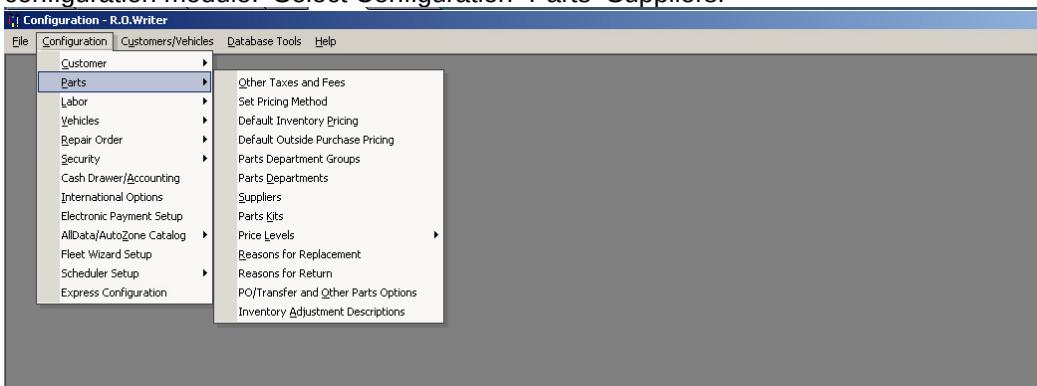
## Alliance Setup

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.

The screenshot shows the 'Suppliers' window with the 'Supplier' dropdown set to 'AUTO VALUE'. The 'Information' section contains fields for Address, City, State, Zip, Account, and Default Accounting Code. The 'Electronic Ordering Interfaces' section is currently empty, with a note stating: '\* Primary ordering interface. This interface cannot be deleted and is the default interface.' Below this note are buttons for 'Set Coverage File Download Options', 'Delete', 'Edit', and 'Add'. At the bottom of the window are 'Cancel', 'Delete', 'Add', and 'Save' buttons.

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.

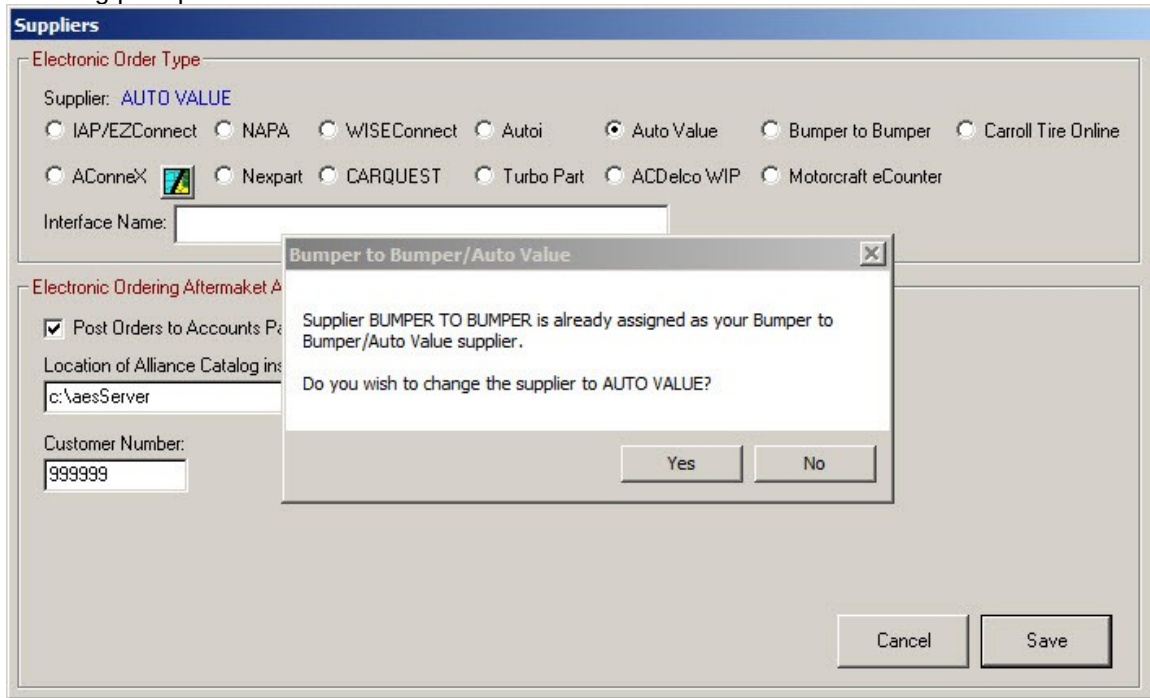
Enter the location the Alliance Catalog was installed or select Set to Default which is c:\aesServer.

Enter your Customer Number.

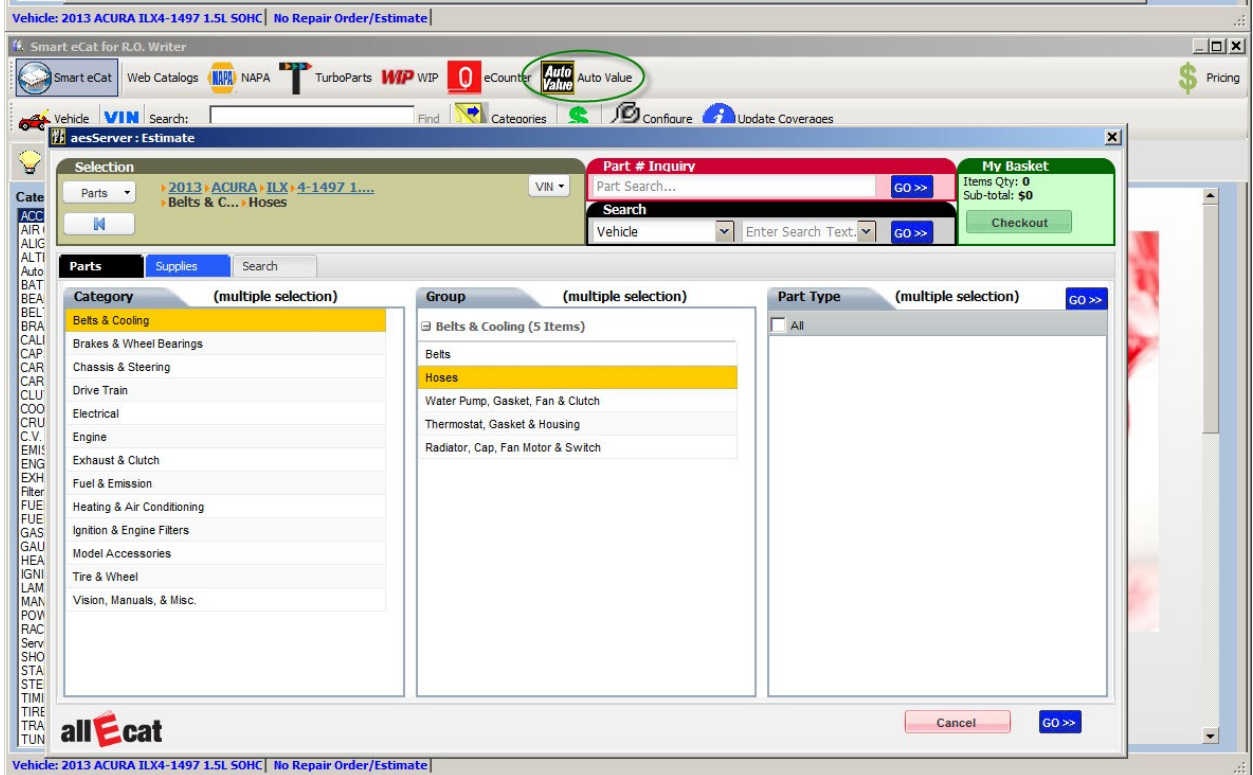
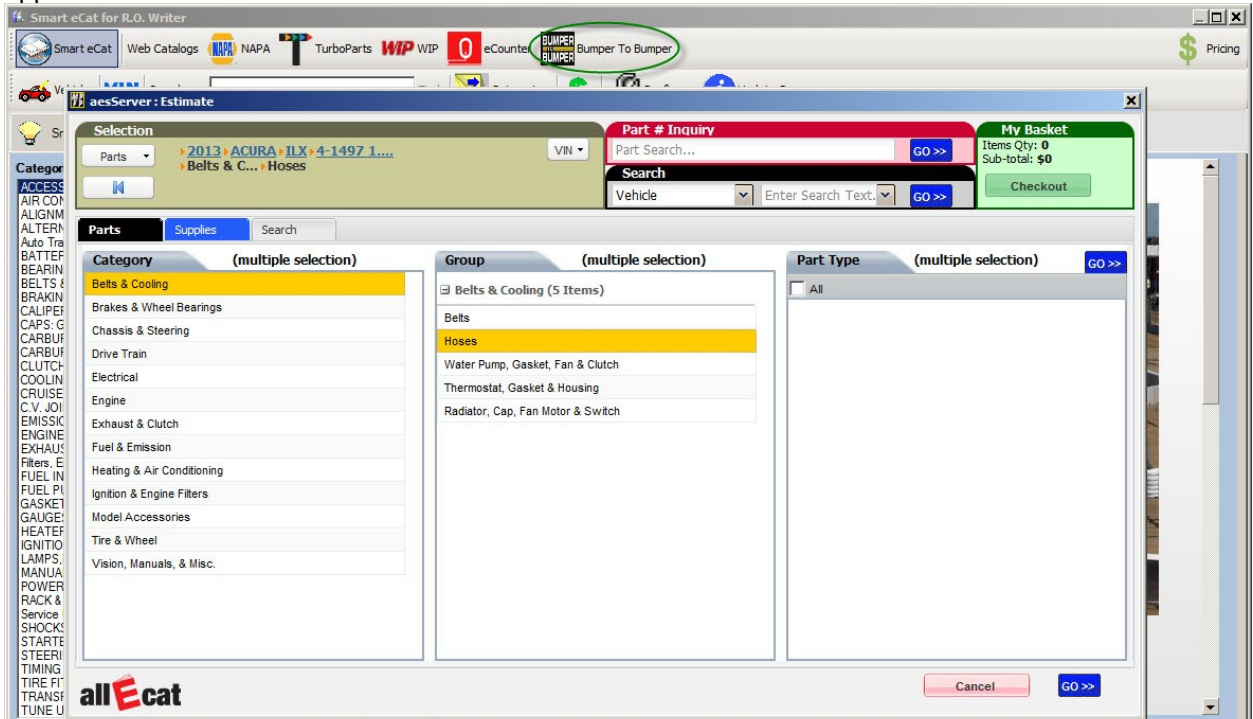
Select the Save button to save and return to the edit supplier window.

The screenshot shows the 'Suppliers' window with the 'Electronic Order Type' section. The 'Supplier' is 'AUTO VALUE'. Radio buttons are present for 'IAP/EZConnect', 'NAPA', 'WISEConnect', 'Autoi', 'Auto Value' (selected), 'Bumper to Bumper', 'Carroll Tire Online', 'AConneX', 'Nexpart', 'CARQUEST', 'Turbo Part', 'ACDelco WIP', and 'Motorcraft eCounter'. An 'Interface Name' field is empty. The 'Electronic Ordering Aftermarket Alliance' section has a checked box for 'Post Orders to Accounts Payable'. The 'Location of Alliance Catalog installation' is 'c:\aesServer', with 'Browse' and 'Set to Default' buttons. The 'Customer Number' is '888888'. 'Cancel' and 'Save' buttons are at the bottom.

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.

**Suppliers**

**Supplier**  
 AUTO VALUE  Midas Supplier  Inactive for transfers  
 Supplier Code : AV Supplier : AUTO VALUE  Inactive for purchases

**Information**  
 Address : \_\_\_\_\_ Account : \_\_\_\_\_  
 City : \_\_\_\_\_ Default Accounting Code : \_\_\_\_\_  
 State : \_\_\_\_\_ Zip : \_\_\_\_\_  
 Phone 1 : ( 301 ) - \_\_\_\_\_ Ext : \_\_\_\_\_  
 Phone 2 : ( ) - \_\_\_\_\_ Ext : \_\_\_\_\_  
 E-Mail : \_\_\_\_\_  
 Inventory Pricing : Default  
 Outside Purchase Pricing : Default Outside Purchase

**Electronic Ordering Interfaces**  
 \*Auto Value  
 \* Primary ordering interface. This interface cannot be deleted and is the default interface.  
 Set Coverage File Download Options  
 Delete Edit Add

**Notes**  
 \_\_\_\_\_

Cancel Delete Add Save

Select from the following Coverage File Download Options:

**Coverage File Download Options**

**Coverage File Download Options**  
 The coverage file is manually created and manually imported into Smart eCat  
 The coverage file can be manually downloaded but not automatically downloaded  
 The coverage file can be manually downloaded and automatically downloaded

**When Coverage File is Downloaded**  
 Delete the old file and replace with the new one  
 Append any new lines to the existing file

Cancel Save



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.

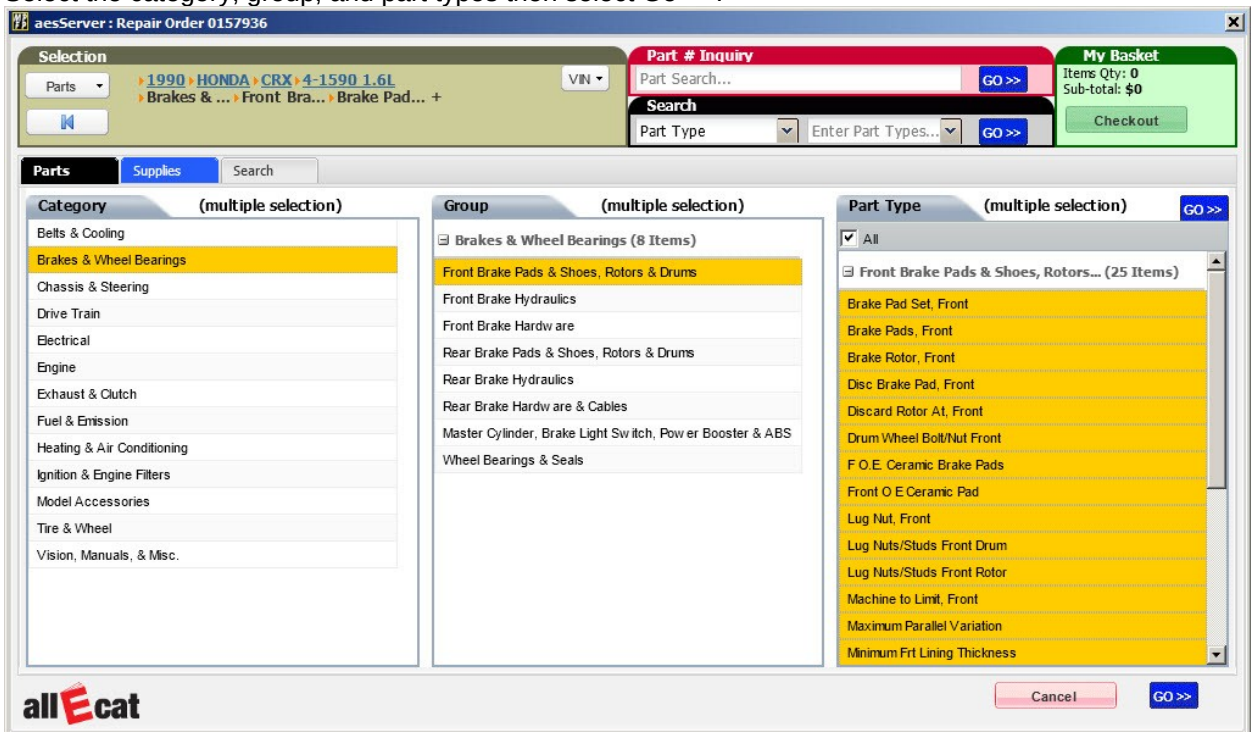
If you've selected the second or third option, you will need to select one of two options:

- 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.

Selection: 1990 HONDA CRX 4-1590 1.6L  
Brakes & ... Front Bra... Brake Pad... +

Part # Inquiry: Part Search... GO >>

My Basket: Items Qty: 0, Sub-total: \$0, Checkout

Group: (multiple selection) GO >>

Brakes & Wheel Bearings (8 Items)

- Front Brake Pads & Shoes, Rotors & Drums
- Front Brake Hydraulics
- Front Brake Hardw are
- Rear Brake Pads & Shoes, Rotors & Drums
- Rear Brake Hydraulics
- Rear Brake Hardw are & Cables
- Master Cylinder, Brake Light Sw itch, Pow er Boost...
- Wheel Bearings & Seals

Brand	Cost	List	Qty	Basket	Availability
Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
Parts Master	\$10.00	\$12.00	1		2 Cooper Circle
Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
	\$6.00	\$8.00			
	\$10.00	\$12.00	1		1 Bridgeview Rd.
	\$12.00	\$14.00	1		1 Bridgeview Rd.
	\$10.00	\$12.00	1		1 Bridgeview Rd.
	\$12.00	\$14.00	1		1 Bridgeview Rd.
WAGNER	Call for Price		1		Call for Availability

allEcat Cancel

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

Selection: 1990 HONDA CRX 4-1590 1.6L  
Brakes & ... Front Bra... Brake Pad... +

Part # Inquiry: Part Search... GO >>

My Basket: Items Qty: 2, Sub-total: \$26.00, Checkout

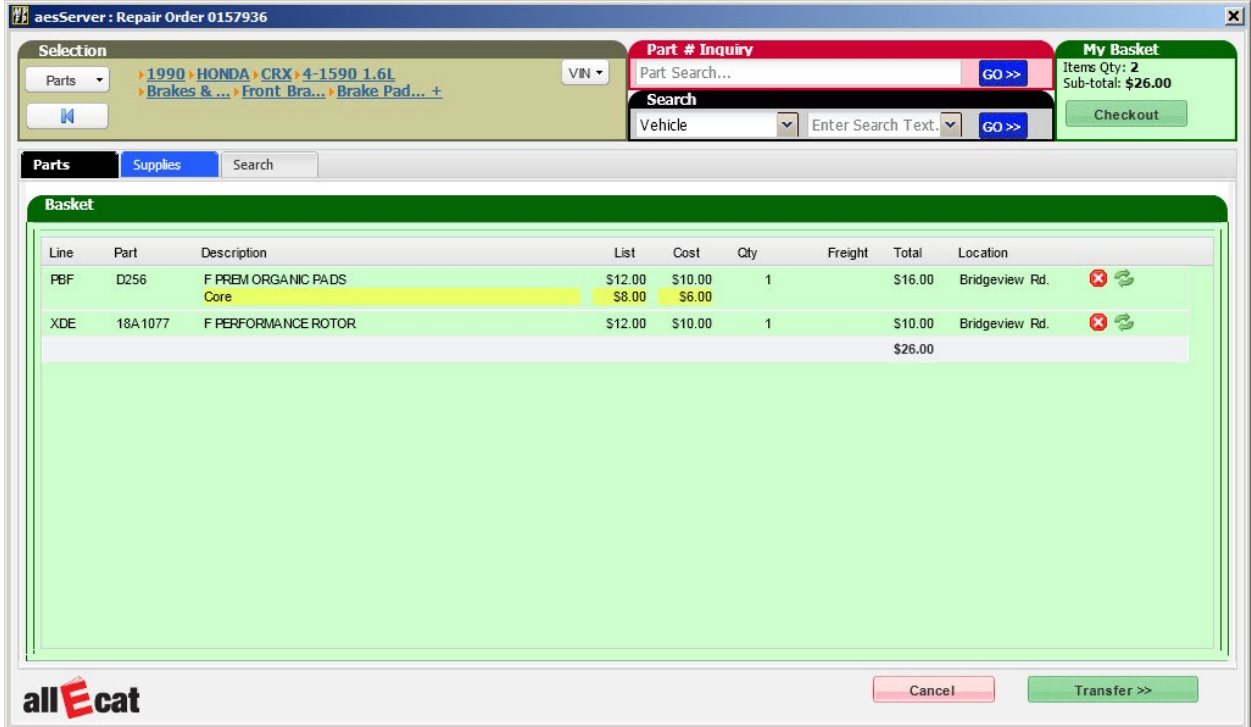
Search: Vehicle Enter Search Text... GO >>

Parts Display

Item Description	Parts : 71	Image	Item Number	Brand	Cost	List	Qty	Basket	Availability
F CERAMIC PADS			CMX373 (PBF)	Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
F PREM SEMI MET PADS			MD256 (PBF)	Parts Master	\$10.00	\$12.00	1		2 Cooper Circle
F SEMI METALLIC PADS			MKD256S (PBF)	Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
F PREM ORGANIC PADS			D256 (PBF)	Parts Master	\$10.00	\$12.00	1		1 Bridgeview Rd.
F PERFORMANCE ROTOR			Core		\$6.00	\$8.00			
F PERFORMANCE ROTOR			18A1076 (XDE)		\$10.00	\$12.00	1		1 Bridgeview Rd.
< REP > Replacement for XDE 18A1076			18A1076-r (XDE)		\$12.00	\$14.00	1		1 Bridgeview Rd.
F PERFORMANCE ROTOR			18A1077 (XDE)		\$10.00	\$12.00	1		1 Bridgeview Rd.
< ALT > Alternate for XDE 18A1077			18A1077-a (XDE)		\$12.00	\$14.00	1		1 Bridgeview Rd.
F SEMI METALLIC PADS			ZX256	WAGNER	Call for Price		1		Call for Availability

allEcat Cancel

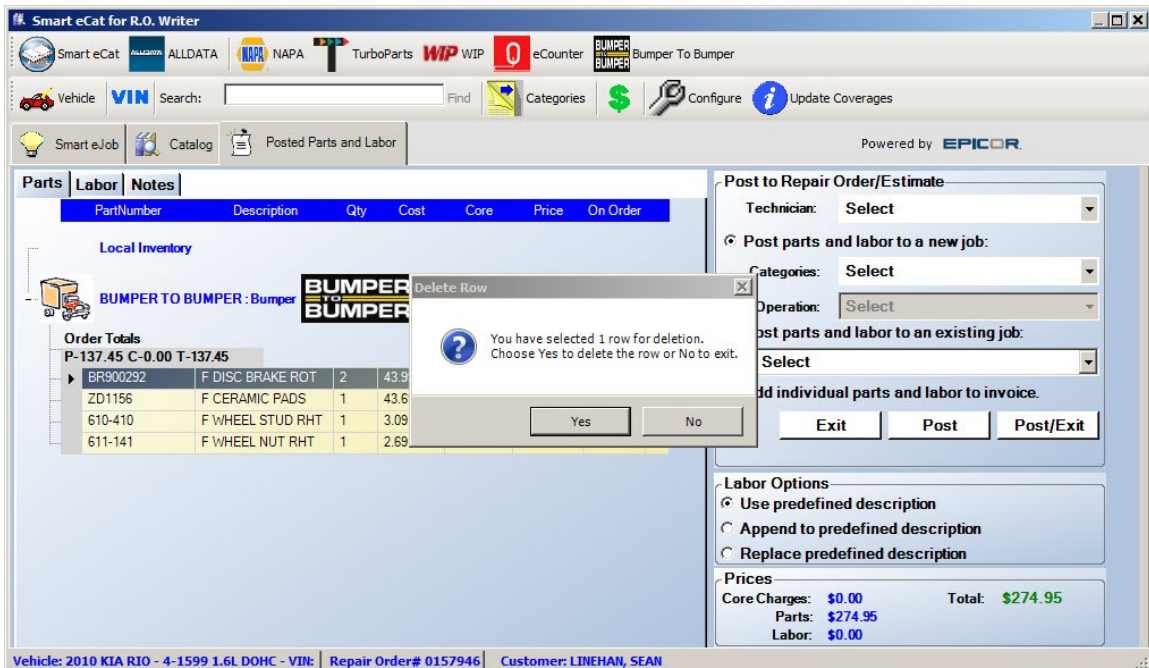
Select Checkout to view the shopping cart. Select the Transfer >> button to add the parts to the Posted Parts and Labor tab in Smart eCat.



### 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.

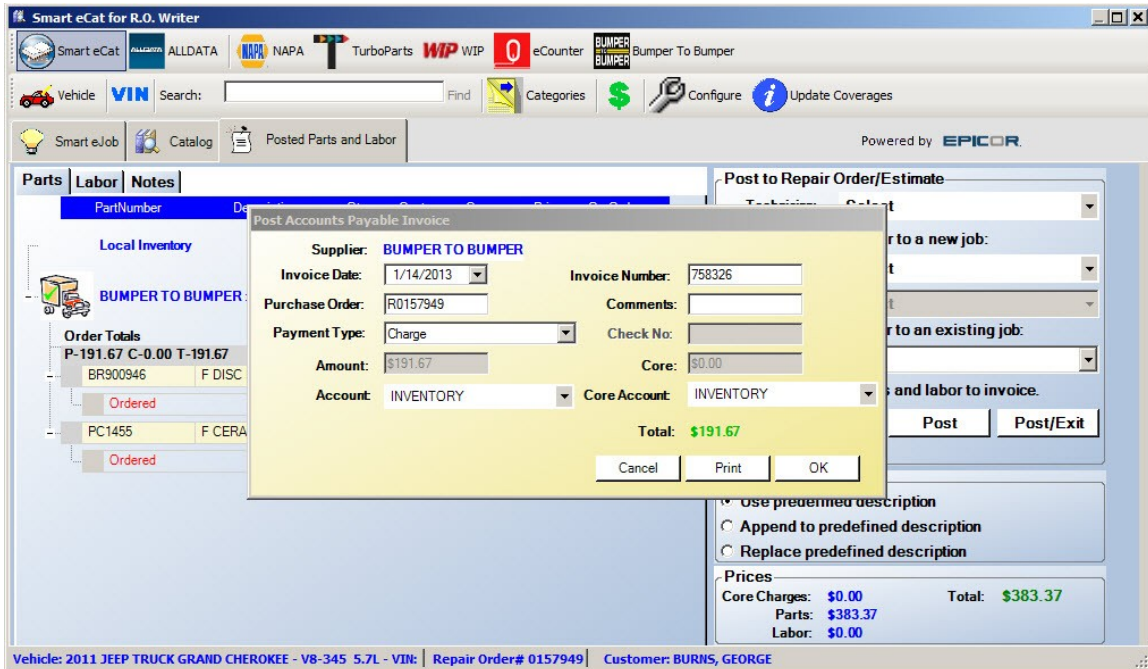


Answer Yes to the prompt, "You have selected 1 row for deletion. Choose Yes to delete the row or No to exit".

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.

**Editing Part on R.O. #0157949**

Part Number: BR900946 Line Code: PQP  To Order

Description: F DISC BRAKE ROTOR  Alternate Number  Smart Pricing ?

Quantity: 2.00 Cost/Unit: \$71.99 Level: RETAIL

Price/Unit: \$143.99 Extended: \$287.98 Margin: 50.00%

Premium: \$0.00  Menu  Taxable  No Fees

Supplier: BUMPER TO BUMPER Invoice #: 758326

Department: BRAKE  Warranty Warranty #

Technician: BEAU BLACK  Declined by customer

Fee1: \$0.00 Core Charge  Returned Process

Fee2: \$0.00 None

Why replaced: +

Job: BRK/502 BRAKE LABOR

Why returned: +

Buttons: Cancel Delete C2D Price Calc Search Inv Stores Next >> OK

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.

**Editing Part on R.O. #0157949**

Part Number: PC1455 Line Code: WAG  To Order

Description: F CERAMIC PADS  Alternate Number  Smart Pricing ?

Quantity: 1.00 Cost/Unit: \$47.69 Level: RETAIL

Price/Unit: \$119.99 Extended: \$119.99 Margin: 60.26%

Premium: \$0.00  Menu  Taxable  No Fees

Supplier: BUMPER TO BUMPER Invoice #: Post to AP

Department: BRAKE  Warranty Warranty #

Technician: JOHN ANDERSON  Declined by customer

Fee1: \$0.00 Core Charge  Returned Process

Fee2: \$0.00 None

Why replaced: +

Job: BRK/502 BRAKE LABOR

Why returned: +

Buttons: Cancel Delete C2D Price Calc Search Inv Stores Next >> OK

### 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 screenshot shows the R.O. Writer software interface. The top menu bar includes File, Quick Functions, Windows, and Help. Below the menu is a toolbar with various icons for functions like History, WIP (Z), Estimates, New RO, New Est, Express Est, Parts Inv, Parts Est (K), Quick Part, Calculator, Scheduler, Notes, Post AP, and Express. The main window displays customer and vehicle information for a 2011 Jeep Grand Cherokee. The customer information includes name (GEORGE BURNS), address (CENTENNIAL, CO), and phone numbers. The vehicle information includes year (2011), make (JEEP), model (GRAND CHEROKEE), and engine (V8-345 5.7L). Below this is a table of jobs with columns for Parts, Labor, and Total. The table shows a total of 907.34 for the brake labor job.

Parts	Labor	Total
2.00 BR900946 F DISC BRAKE ROTOR	287.98	
1.00 PC1455 F CERAMIC PADS	95.39	
2.00 BR900950 F DISC BRAKE ROTOR	263.98	
1.00 PC1455 F CERAMIC PADS	119.99	
<b>767.34</b>	<b>140.00</b>	<b>907.34</b>

The parts will be automatically queried for availability.

The screenshot shows the Smart eOrder for R.O. Writer software interface. The main window displays a parts list for a repair order. The parts list includes a truck icon for 'BUMPER TO BUMPER: Bumper' and two items: BR900950 (F DISC BRAKE ROT) and PC1455 (F CERAMIC PADS). The order summary shows a total of \$383.97. The interface also includes a 'Post to Repair Order/Estimate' section with dropdown menus for Technician, Categories, and Operation, and a 'Labor Options' section with radio buttons for description handling. The bottom status bar shows the vehicle information: 2011 JEEP TRUCK GRAND CHEROKEE - V8-345 5.7L - VIN: [redacted] Repair Order# 0157949 Customer: BURNS, GEORGE.

PartNumber	Description	Qty	Cost	Core	Price	On Order
BR900950	F DISC BRAKE ROT	2	65.99	0	131.99	
PC1455	F CERAMIC PADS	1	47.69	0	119.99	

Order Totals  
P-179.67 C-0.00 T-179.67  
Core Charges: \$0.00 Total: \$383.97  
Parts: \$383.97  
Labor: \$0.00

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

**Order Options**

Purchase order number: R0157949

Order Message

OK Cancel

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.

**Post Accounts Payable Invoice**

Supplier: BUMPER TO BUMPER

Invoice Date: 1/14/2013 Invoice Number: 758327

Purchase Order: R0157949 Comments:

Payment Type: Charge Check No:

Amount: \$179.67 Core: \$0.00

Account: INVENTORY Core Account: INVENTORY

Total: \$179.67

Cancel Print 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.

**Editing Part on R.O. #0157949**

Part Number: BR900950 Line Code: PQP  To Order

Description: F DISC BRAKE ROTOR  Alternate Number  Smart Pricing

Quantity: 2.00 Cost/Unit: \$65.99 Level: RETAIL

Price/Unit: \$131.99 Extended: \$263.98 Margin: 50.00%

Premium: \$0.00  Menu  Taxable  No Fees

Supplier: BUMPER TO BUMPER Invoice #: 758327

Department: BRAKE  Warranted  Declined by customer

Technician: JOHN ANDERSON  Returned

Fee1: \$0.00 Core Charge

Fee2: \$0.00 None

Why replaced:

Job: BRK/502 BRAKE LABOR

Why returned:

Cancel Delete C2C Price Calc Search Inv Stores Next >> OK