

# PartsManager Pro User's Guide



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Version 15022006-3.4

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# 1. Getting Started

PartsManager Pro is a CD/DVD-based application that allows you to find parts and service information and bulletins for multiple OEMs quickly and easily. Organize your work by jobs, create a picklist for each job, and prepare quotes for your customers. Add your own notes to part numbers and parts pages. Print parts diagrams, parts lists, user notes, OEM notes, picklists, and quotes. Configure the interface to your business system. Set up ProQuest eConnect ordering so you can view real-time inventory information from your suppliers and place orders.

## **PartsManager Pro at a Glance**

- ▶ Create jobs to organize your transactions.
- ▶ Search for parts and service information and bulletins.
- ▶ Navigate to parts pages.
- ▶ Create a picklist for each job.
- ▶ Prepare quotes for your customers.
- ▶ Create user notes and view OEM notes.
- ▶ Print parts pages, notes, picklists, quotes, and other information.
- ▶ Bookmark parts pages you use frequently.
- ▶ Set up connections to your business system and eConnect.
- ▶ View real-time inventory information and place orders.

# Opening PartsManager Pro

Use either of these procedures to open the application.

## Use the Desktop icon:

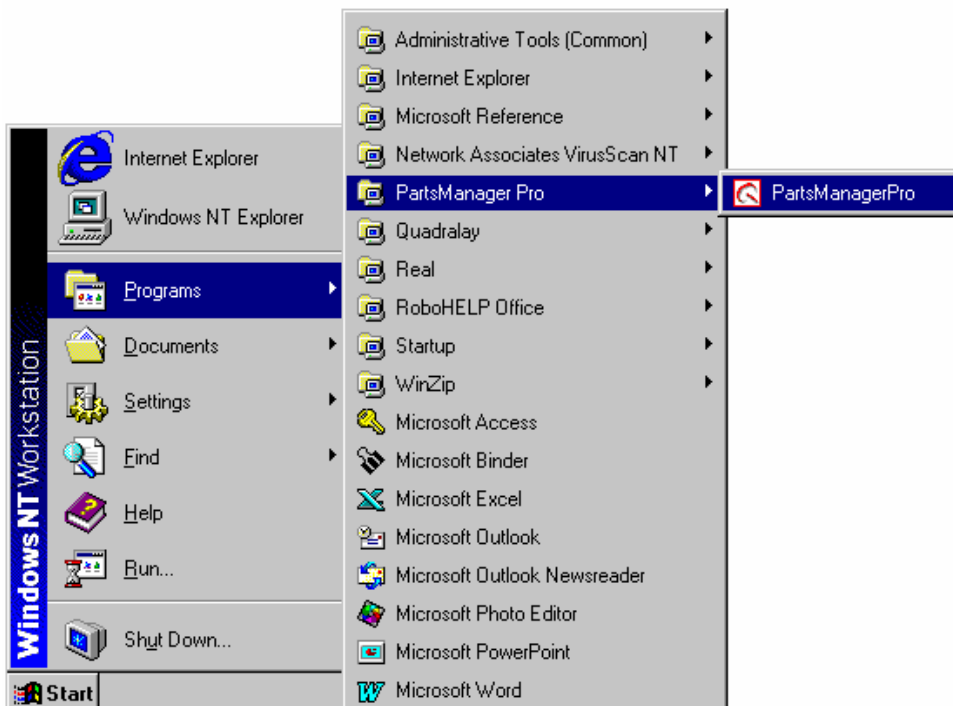
1. Double-click the application icon from the Windows® desktop.



2. The Main Page of the application is displayed.

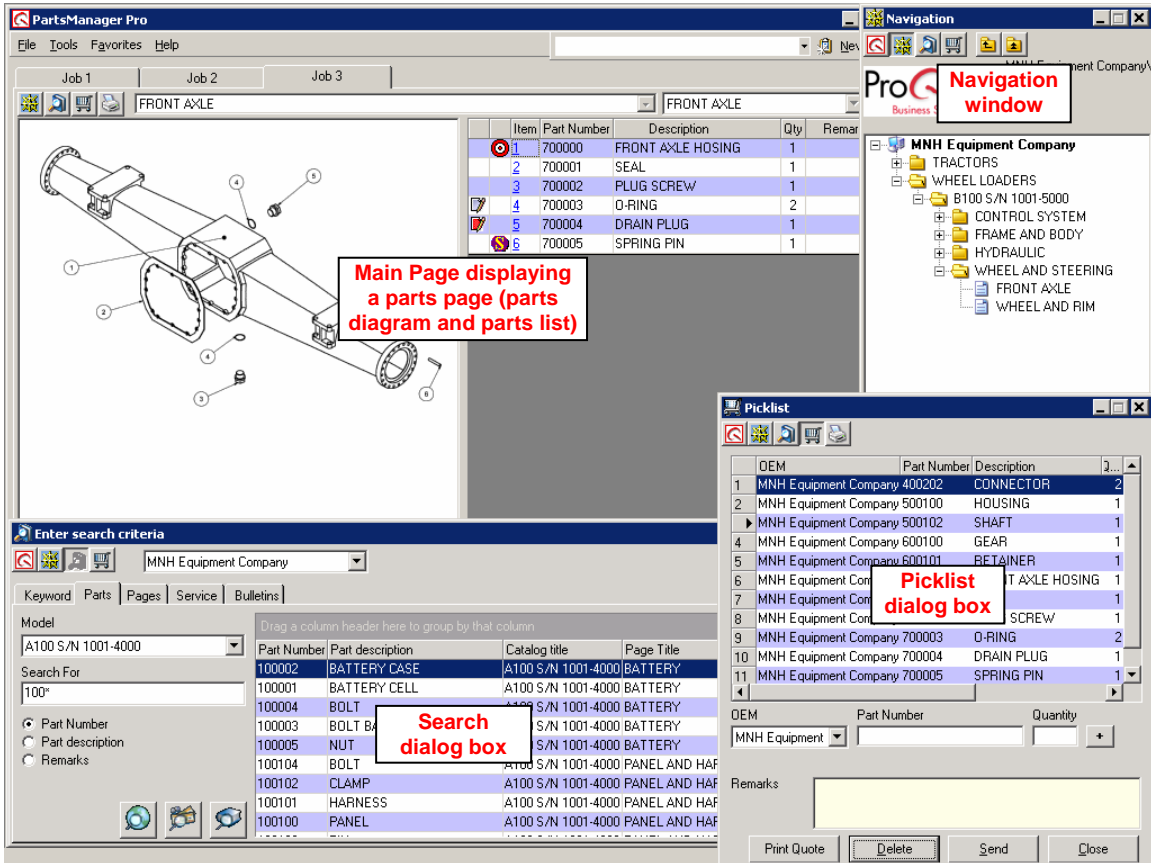
## Use the Windows menus:

1. Click **Start**.
2. Select **Programs**.
3. Select **PartsManager Pro**.
4. Select **PartsManagerPro**
5. The application opens to the Main Page.



# Arranging the Application Windows

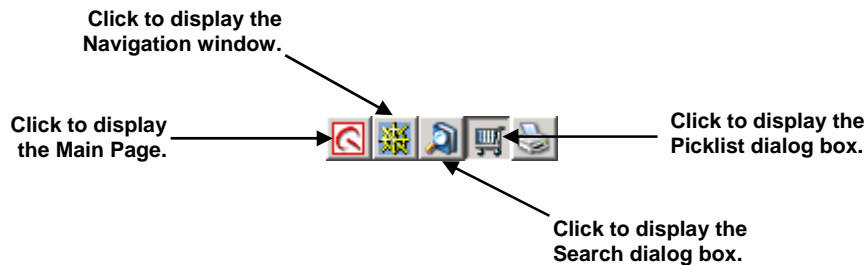
You can move each application window to any position on the screen. You can also keep the windows open at the same time, arranged as you want. Most windows are resizable. Once you arrange and size the windows the way you want, they will remain in those positions each time you open the application.



# Switching Between Application Windows

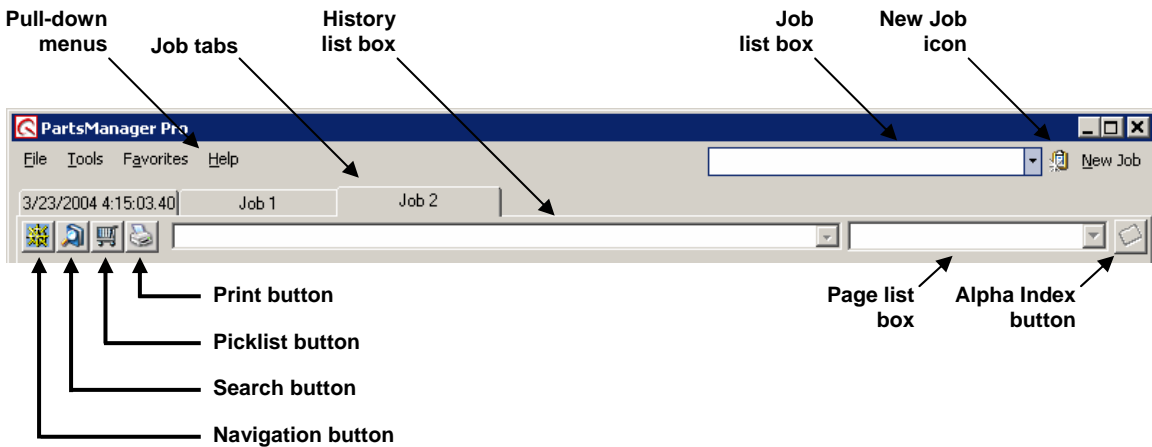
With a single click, the PartsManager Pro button bar allows you to display the Main Page, Navigation window, Search dialog box, or Picklist dialog box. These four buttons are displayed in the Navigation window, Search dialog box, and Picklist dialog box.








**Note:** You can also use the Windows task bar to switch between application windows.



# Using the Main Page

The Main Page is your starting point in the application.



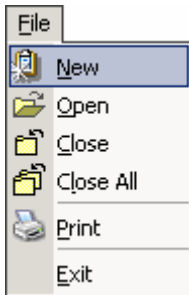
Feature	How to Use
<b>Pull-down menus</b>	Use the pull-down menus to work with jobs, change settings, bookmark frequently used parts pages, and display application Help.
<b>History list box</b>	Use the History list box to return to a previously viewed parts page in a job.
<b>Page list box</b>	The Page list box displays the title of the current parts page and allows you to select a different page.
<b>Job Tabs</b>	Use the job tabs to switch between open jobs.
<b>Job list box</b>	Use the Job list box to type a name for a new job or select an existing job.
	Click the <b>New Job</b> icon to create a new job.
	Click the <b>Navigation</b> button to navigate to parts pages.
	Click the <b>Search</b> button to search for parts and service information.
	Click the <b>Picklist</b> button to open a picklist.
	Click the <b>Print</b> button when a parts page is displayed to print the parts diagram, parts list, page notes, and part notes.
	Click the <b>Alpha Index</b> button to switch between an alpha index and a parts list.
	To identify a button, icon, text box, column header, etc., position the mouse pointer over the feature to display its label or a brief explanation of how to use it (referred to as a ToolTip).

# Using the Pull-Down Menus

The pull-down menus allow you to work with jobs, print, set up the application interface, bookmark your favorite parts pages, and view the user guide, Help, and tutorial. To use a pull-down menu, click a menu name on the menu bar. The menu drops down to show the available commands. Then select a command.

## File Menu

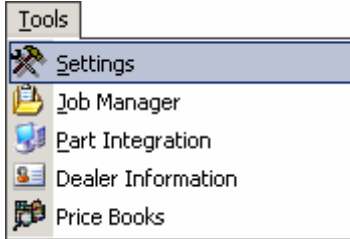
Click **File** on the menu bar and select a command to create, open, close, and print jobs and to close PartsManager Pro.



<b>New</b>	Creates a new job, assigning the date and time as the default name. You can rename the job in the Job Manager.
<b>Open</b>	Opens the Job Manager.
<b>Close</b>	Closes the current job.
<b>Close All</b>	Closes all open jobs.
<b>Print</b>	Opens the Printing dialog box, from which you can print the parts diagram, parts list, page notes, part notes, picklist, or an entire section. The Print command is available only when a parts page is displayed.
<b>Exit</b>	Closes PartsManager Pro.

## Tools Menu

Click **Tools** on the menu bar and select a command to change application settings, open the Job Manager, and configure your business system interface (BSI) or subscribe to eConnect.

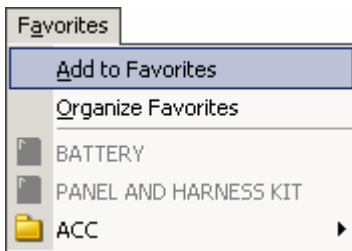


- |                           |  |
|---------------------------|--|
| <b>Settings</b>           | Opens the Settings dialog box, from which you can select options that determine how the application displays parts and service information.                        |
| <b>Job Manager</b>        | Opens the Job Manager dialog box, from which you can open, rename, and delete jobs.  |
| <b>Part Integration</b>   | Opens the Part Integration dialog box, from which you can configure a business system interface or subscribe to eConnect and set up your trade partners (vendors). |
| <b>Dealer Information</b> | Opens the Dealer Information window, in which you can type dealer information for quotes and eConnect orders.  |
| <b>Price Books</b>        | Opens the Price Books dialog box, from which you can import price files into PartsManager Pro.   |

**Note:** This feature is only available for OEMs whose price files are in a particular format.

## Favorites Menu

Click **Favorites** on the menu bar and select a command to bookmark your favorite parts pages, that is, pages you frequently use.



### Add to Favorites

Opens the Favorites window, from which you can bookmark a parts page as a favorite.

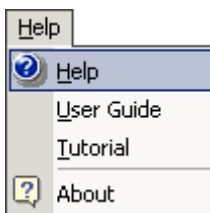
### Organize Favorites

Opens the Organize Favorites window, from which you can organize your favorites in folders.

The individual favorites and the favorite folders you create are listed in the bottom portion of the menu. When you select a favorite, the application immediately takes you to the corresponding parts page. Clicking a folder opens a list of favorites saved in the folder. Clicking a favorite in the folder displays the corresponding parts page.

## Help Menu

Click **Help** on the menu bar and select a command to display the online Help, user's guide, and interactive tutorial.



### Help

Displays the PartsManager Pro online Help.

### User Guide

Displays this user's guide as a PDF in Adobe® Reader®.

### Tutorial

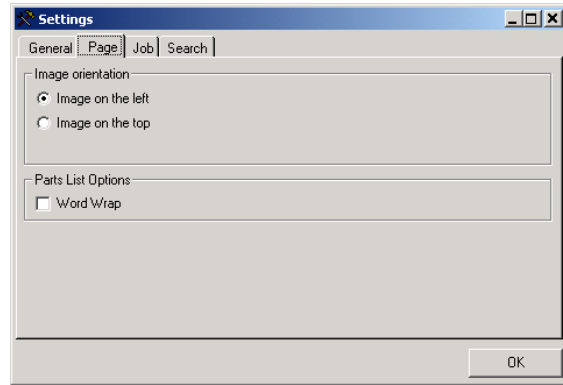
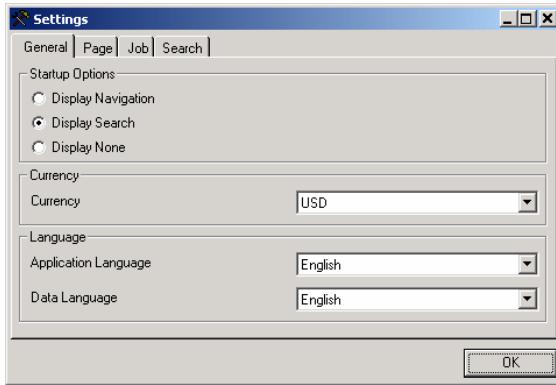
Displays the PartsManager Pro interactive tutorial.

### About

Displays the application and dataset versions.

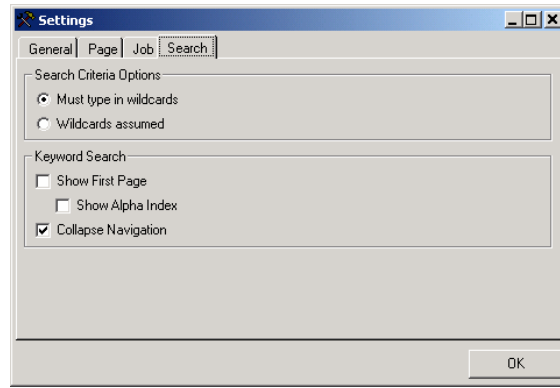
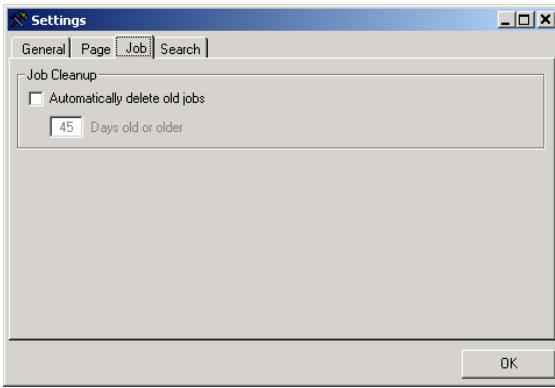
# Changing Settings

PartsManager Pro allows you to set options that determine how the application displays parts and service information. Select **Settings** from the Tools menu. The Settings dialog box is displayed. Click the General tab, Page tab, or Job tab, or Search tab, select the appropriate options, and click **OK**.



Option	How to Use
<b>Display Navigation</b>	Select this option to display the Navigation window with the Main Page when you open the application. Close and reopen the application to see the change. Move the window to a convenient position. It will remain in that position each time you open the application.
<b>Display Search</b>	Select this option to display the Search dialog box with the Main Page when you open the application. Close and reopen the application to see the change. Move the window to a convenient position. It will remain in that position each time you open the application.
<b>Display None</b>	Select this option to display only the Main Page when you open the application.
<b>Currency</b>	Select the currency in which prices are displayed. See chapter 17, “ISO 4217 Currency Codes”, to find the applicable code.
<b>Application Language</b>	Select the language in which application interface text is displayed.
<b>Data Language</b>	Select the language in which OEM data is displayed. When no data is available from the OEM in the selected language, English data is displayed.
<b>Image on the left</b>	Select this option to display the parts diagram to the left of the parts list on a parts page.
<b>Image on the top</b>	Select this option to display the parts diagram above the parts list on a parts page.
<b>Word Wrap</b>	Select this option to make text in a parts list adjust so that the text is viewable horizontally. This eliminates the need to use the horizontal scroll bar.
	<b>Note:</b> If you do not want text to wrap in all parts lists, do not select this option. You can temporarily wrap text in any parts list by right-clicking the parts list and selecting <b>Word Wrap</b> from the context menu.





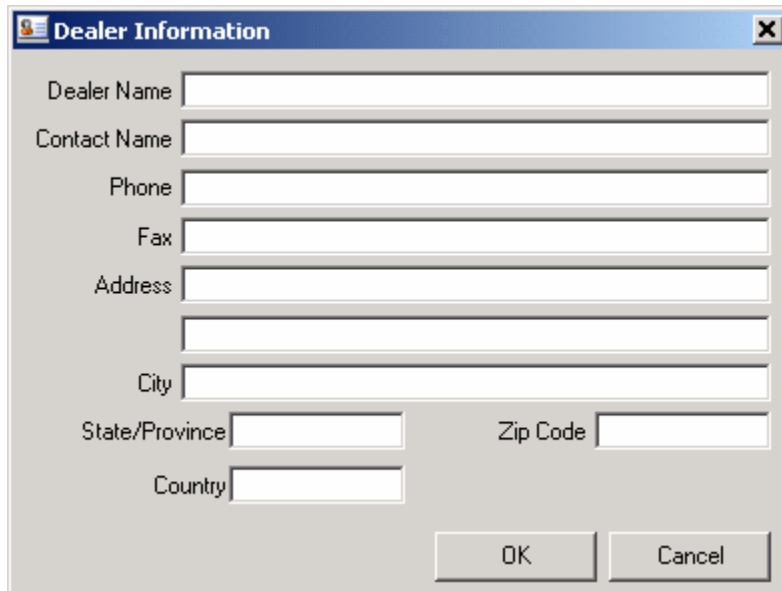
Option	How to Use
<b>Automatically delete old jobs</b>	<p>Select this option to automatically delete all jobs that are older than a specified number days. To change the number of days from 45 to another number, select the option, click in the “Days old or older” box, and type a different number.</p> <p>PartsManager Pro will continually monitor your jobs, delete each job when it reaches the limit you specify, and refresh the list of jobs in the Job Manager.</p>
<b>Must type in wildcards</b>	<p>Select this option if you want to type wildcards for partial part number searches and partial description searches. For example, typing <b>*lock*</b> will search for all part descriptions containing the word “lock”. Typing <b>lock</b> will only search for the exact description “lock”. *</p>
<b>Wildcards assumed</b>	<p>Select this option if you do not want to type wildcards for partial part number searches and partial description searches. For example, typing <b>lock</b> will search for all part descriptions containing the word “lock” <i>in addition to</i> the exact description “lock”. *</p>
<b>Show First Page</b>	<p>Select this option to make a keyword search automatically display the first parts page in the selected catalog.</p>
<b>Show Alpha Index</b>	<p>Select this option to make a keyword search automatically display the alpha index for the selected catalog.</p>
<b>Show First Page Show Alpha Index</b>	<p>Select both options to make a keyword search automatically display the first parts page in the selected catalog, then display the alpha index on top of the parts list.</p>
<b>Collapse Navigation</b>	<p>Select this option to make a keyword search close the navigation tree when it displays your search results</p>

\* For information on using wildcards in searches, see “Using Wildcards” in chapter 3.

## Entering Dealer Information

You only need to enter your dealership information one time. After you type this information, it will be applied automatically to each quote or eConnect order you create. If any information changes, you can modify it at any time.

1. Select **Dealer Information** from the Tools menu to open the Dealer Information window.



The image shows a screenshot of a software dialog box titled "Dealer Information". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner. The main area of the dialog contains several text input fields for entering dealership details. The fields are arranged vertically and are as follows:

- Dealer Name
- Contact Name
- Phone
- Fax
- Address (with a second empty line below it for a second line of address)
- City
- State/Province (with a dropdown arrow)
- Zip Code
- Country (with a dropdown arrow)

At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

2. Type information in the text boxes and click **OK**.

The information you type will appear automatically on your quotes and eConnect orders.

## 2. Working with Jobs

As you use PartsManager Pro, you will work with “jobs”. A job is another name for a transaction, a collection of related tasks you perform to process a parts order.

As you accumulate parts on a picklist, they are associated with a new or existing job. The Job Manager allows you to name and organize jobs for easy access.

When you create a job, a “tab” is created for that job. You can have multiple jobs open at a time, each identified by name on a tab. Switching between open jobs is as easy as clicking a tab name. This feature can be very useful when you need to work on more than one transaction at a time.

For example, while working on a job for customer A, customer B calls to place a new order. You open a new job, name it for customer B’s account, and set up a picklist of parts for that order. As you are finishing that job, you receive a call from customer C inquiring about parts from an existing order. You locate that job in the Job Manager, open it, and quickly answer customer C’s question.

To handle these three situations, you had three jobs open simultaneously and were able to switch between them quickly as needed. The PartsManager Pro application allows you to keep as many as seven jobs open at a time.

**Note:** On Windows 98 PCs, you can keep two jobs open at a time.

In addition, the History list box allows you to quickly redisplay parts pages that you viewed previously for each job.

### Jobs at a Glance

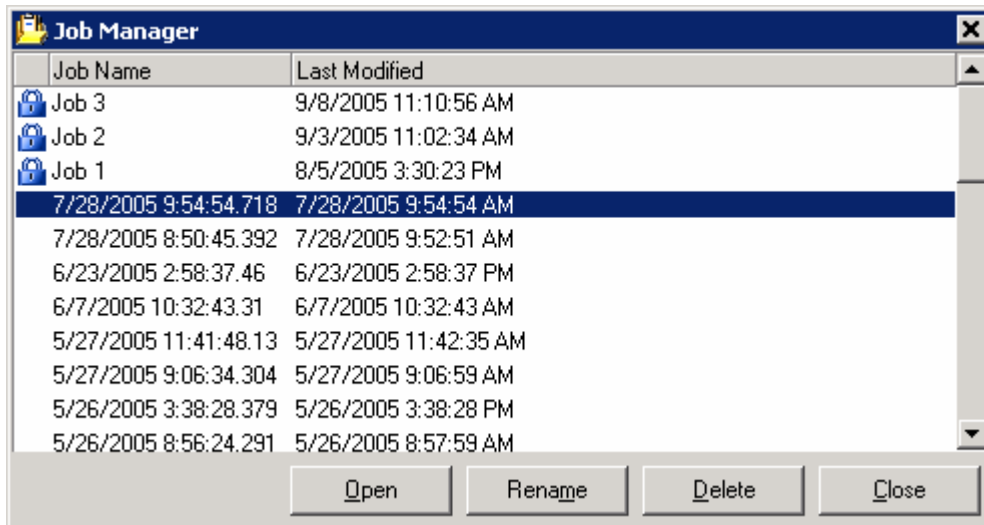
- ▶ A separate tab is created for each job that you start.
- ▶ You can open stored jobs from the Job Manager or the Job list box.
- ▶ When you open a job, the parts page most recently viewed in that job is displayed.
- ▶ You can have a maximum of seven jobs open at the same time. (Windows 98: Two jobs)
- ▶ You can switch between jobs as necessary.


# Managing Jobs

The Job Manager lists all jobs stored in the system and allows you to rename, open, and delete jobs.

## Opening and Using the Job Manager

To open the Job Manager, select **Job Manager** from the Tools Menu.



Feature	How to Use
	Indicates that a job is open and cannot be accessed by users from other computers.
<b>Job Name</b>	The job name can be (1) the default name assigned by the application, which consists of the date and time the job was created, or (2) a name typed by the user who created the job.
<b>Last Modified</b>	Shows the date indicates on which changes were most recently made to a job.
<b>Open</b>	Opens the highlighted job.
<b>Rename</b>	Allows you to rename the highlighted job.
<b>Delete</b>	Deletes the highlighted job.
<b>Close</b>	Closes the Job Manager.

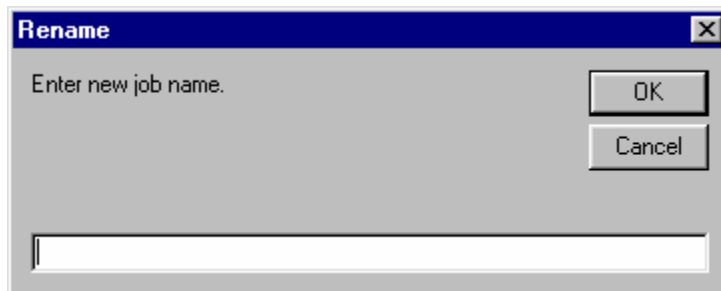
## Opening a Job from the Job Manager

1. Select **Job Manager** from the Tools Menu to open the Job Manager dialog box.
2. Click the job name to highlight it.
3. Click **Open**.

**Note:** You can also open a job from the Job Manager by double-clicking a job name.

## Renaming a Job from the Job Manager

1. Select **Job Manager** from the Tools Menu to open the Job Manager dialog box.
2. Click the job name to highlight it.
3. Click **Rename** to open the Rename dialog box.



4. Type a new name in the text box.
5. Click **OK**. The job name changes in the Job Manager and the tab displays the new name you typed.

## Deleting a Job from the Job Manager

1. Select **Job Manager** from the Tools Menu to open the Job Manager dialog box.
2. Click the job name to highlight it.
3. Click **Delete**. The job is deleted from the system, the job no longer appears in the Job Manager, and no tab for the job is displayed.
4. To delete multiple jobs at the same time, hold down the **Ctrl** key and click each job you want to delete. The selected jobs are highlighted. Then click **Delete**.

**Note:** For information on setting up PartsManager Pro to automatically delete jobs older than a specified number of days, see “Changing Settings” in chapter 1.

## Rearranging Information in the Job Manager

PartsManager Pro allows you to change the order in which jobs are listed and to resize and move columns.

### Sorting Information

If you develop a naming convention for jobs, you can use sorting to arrange jobs by name, making it faster and easier to locate a job. Change the order in which part entries are listed by doing the following:

Click a column header. Entries are listed in order according to the information in that column. An upward-pointing triangle appears on the right side of the header and information is arranged in order from first to last. That is, entries that begin with letters are arranged in A-Z order and entries that begin with numbers are arranged in 1-9 order.

If you click the column header again, a downward-pointing triangle appears on the right side of the header and information is arranged in order from last to first. That is, entries that begin with letters are arranged in Z-A order and entries that begin with numbers are arranged in 9-1 order.

### Resizing Columns

Resize column widths by doing the following:

1. Place the mouse pointer on the boundary between two column headers. The mouse pointer changes to  $\leftrightarrow$ .
2. Hold down the left mouse button.
3. Drag to the left or right.

### Moving Columns

Rearrange the order in which columns appear by doing the following:

1. Place the mouse pointer on a column header.
2. Hold down the left mouse button and drag the header to the left.
3. Stop dragging where you want to insert the column. A small green arrow indicates where the column will be inserted.





4. Release the mouse button. The column is inserted at the arrow.

# Additional Ways to Work with Jobs

## Starting a New Job

1. Click in the Job list box to insert the cursor.
2. Type a job name.

**Note:** When you click  without typing a name, the application assigns a date/time name to the new tab.

3. Click . A new tab is created, labeled with the name you typed.

## Opening a Job from the Job List Box

1. Click the Job list box arrow to open a list of jobs.
2. Select a job.
3. The job opens on a tab.

## Opening a Job from the File Menu

1. Select **Open** from the File Menu.
2. The Job Manager is displayed.
3. Do one of the following:
  - Click the job name to highlight it and click **Open**.
  - Double-click the job name.

## Closing a Job Using a Context Menu

1. Right-click the appropriate job tab to open a context menu.
2. Select **Close**.

## Closing Jobs Using the File Menu

To close the current job, select **Close** from the File menu.

To close all open jobs, select **Close All** from the File menu.

## Renaming a Job Using a Context Menu

1. Right-click the job tab to open a context menu.
2. Select **Rename** to open the Rename dialog box.
3. Type a new name in the text box.
4. Click **OK**. The tab displays the new name you typed.

## Deleting a Job Using a Context Menu

1. Right-click the job tab to open a context menu.
2. Select **Delete**. The job and its tab are deleted.

## Displaying Previously Viewed Parts Pages for a Job

The History list box displays the current parts page in the active job and keeps a record of pages you view. When you have multiple jobs open at a time, the History list box lists the previously viewed parts pages for each job. When you click a job tab, the History list changes to the pages viewed for that job.

Page Title	Catalog title	Model	
DRIVESHAFT	B02	T 30C	..
DRIVESHAFT	B02	T 30C	..
AIR CLEANER AND MUFFLER	B01	E 803	..
CABURETOR, FUEL TANK	B01	E 803	..
STARTER	B01	E 803	..
IGNITION SYSTEM, CLUTCH	B01	E 803	..
SLOW MOVING VEHICLE POST	A23	F 33S	..
TRANSPORT LIGHTS AND BRACKETS	A23	F 33S	..
HYDRAULIC HOSES & CYLINDERS	A23	F 33S	..
STABILIZER WHEEL ASSEMBLY	A21	C08S	..
DECALS	A21	C08S	..

When you open an existing job, the History list box lists the last 10 pages viewed for that job. If you close and reopen PartsManager Pro, the History list box lists the last 10 pages you viewed for each job.

To display a previously viewed parts page, click the appropriate entry in the list box.



# 3. Searching for Information

This chapter provides guidelines to help you perform a search within a catalog. You can search for parts information, parts pages, service information, and bulletins.

## Searches at a Glance

- ▶ Click a tab to select the type of search.
- ▶ Type keywords defined by your OEM.
- ▶ Search by part number, description, and remarks text.
- ▶ Use wildcards to make searches easier.
- ▶ Search the price file.
- ▶ Search for parts pages, service information, and bulletins.
- ▶ Group and sort your search results.

## Typing Keywords and Models

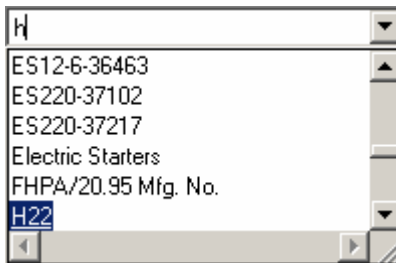
As you type a keyword from the Keyword tab or a model from the Parts tab, the list of available keywords or models automatically scrolls to the first available selection.

This feature allows you to enter a keyword or model more quickly. It also allows you to see available keywords.

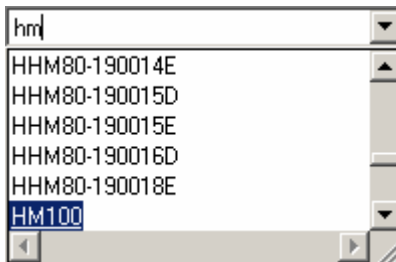
1. When you open the Search dialog box, the first selection is displayed. For example:



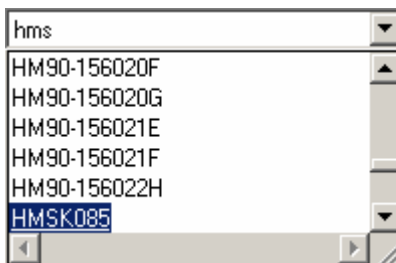
2. Type **h**. A list box opens and scrolls to the first selection that begins with the letter “h”.



3. Type **hm**. The list box scrolls to the first selection that begins with the letters “hm”.




4. Type **hms**. The list box scrolls to the first selection that begins with the letters “hms”.

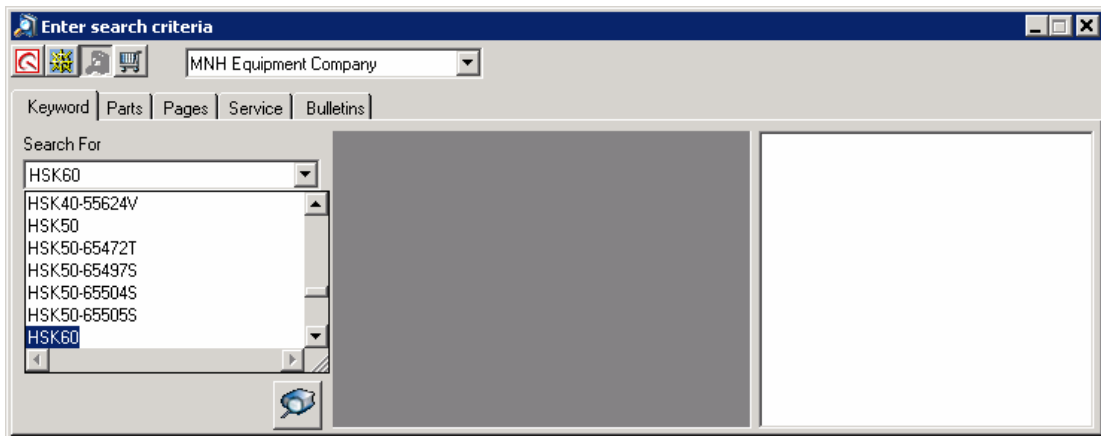



5. Continue typing until you display the keyword or model you need.

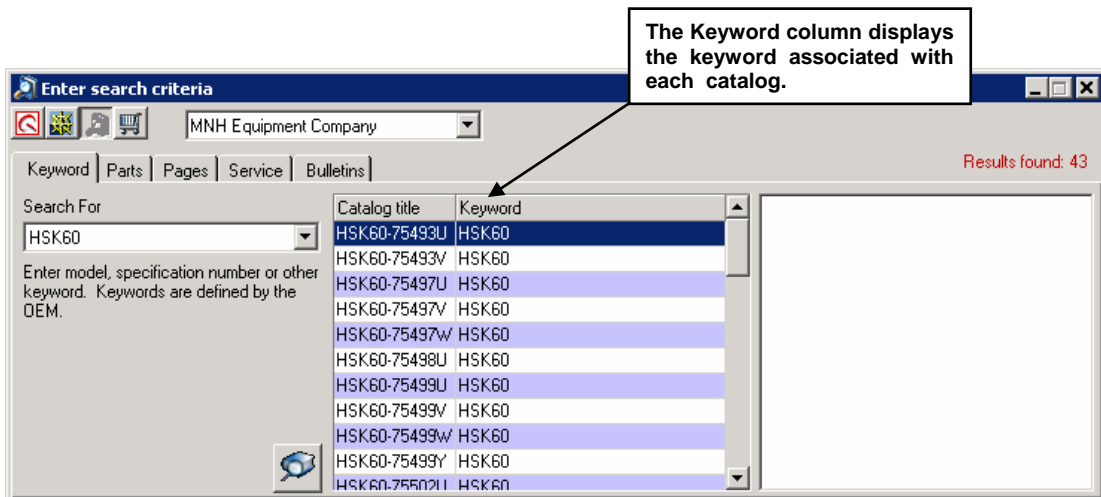
# Searching by Keyword

A keyword search allows you to search for a catalog by typing a model or other keyword. A keyword is defined by your OEM.

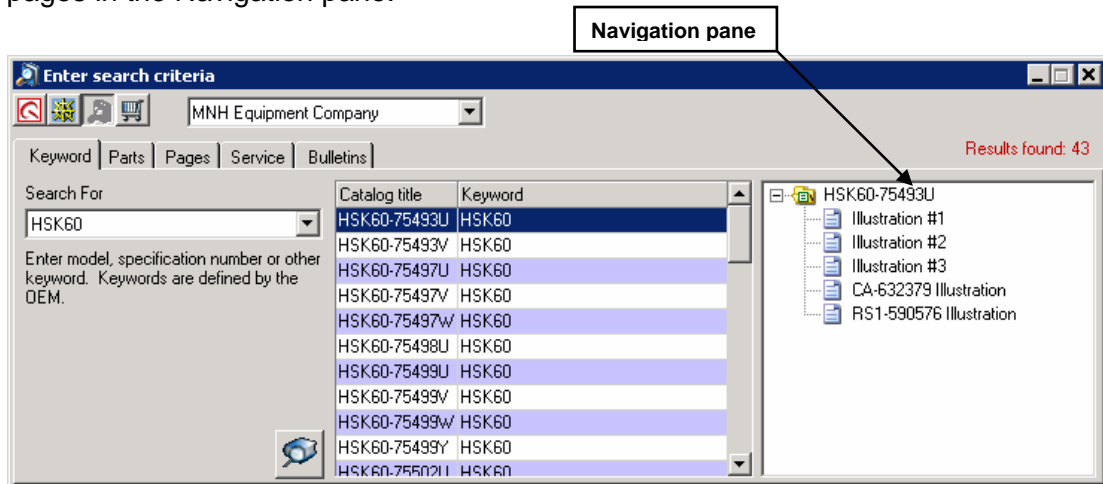
1. Click  to open the Search dialog box.
2. Click the **Keyword** tab.
3. Select an OEM from the list box.
4. Type a keyword in the Search For text box.




5. Click the **Search** button  to display a list of catalogs that match your keyword.



6. Double-click a catalog from the Catalog pane to display the catalog title and parts pages in the Navigation pane.



If "Collapse Navigation" is selected in the Search tab of the Settings dialog box, the navigation tree will be closed. To open the navigation tree, click .

**Note:** You can right-click a catalog in the Navigation pane to compare model specifications. When a Catalog Note icon appears on a folder, you can also view catalog notes. See "Viewing Catalog Notes" and "Comparing Model Specifications" in chapter 4 for the procedures.

7. PartsManager Pro automatically displays the first parts page in the catalog or the alpha index, depending on the Keyword Search option(s) you selected in the Settings dialog box.
8. To display a different page, click a parts page title in the Navigation pane.

**Note:** For information on the keyword search "Show First Page", "Show Alpha Index", and "Collapse Navigation" settings, see "Changing Settings" in chapter 1.

# Searching for Parts Information

You can search for parts information by part number, part description, and remarks text to display a parts page. You can also find prices for parts included in the price file and search for all occurrences of a part number.

## Using Wildcards

**Note:** To use wildcards, the option “Must type in wildcards” must be selected in the Search tab of the Settings dialog box.

PartsManager Pro allows you to type wildcards in your search criteria for part number searches and part description searches.

A wildcard is a special character that represents any other character or group of characters in a search. PartsManager Pro uses the asterisk (\*) for the wildcard character. The asterisk (\*) can represent zero, one, or multiple characters in a part number or description.

**Note:** You cannot use wildcards with Price, Where Used, or Remarks searches.

### Using Wildcards in Part Number Searches

Type a partial part number with the wildcard character (\*). You can type wildcards at the beginning, middle, or end of a number. You can also use more than one wildcard with a number. The following are examples of part number searches using wildcards:

**0201\*      \*4200      02014\*00      02\*4\*00**

For example, typing **0201\*** tells PartsManager Pro to find all part numbers that begin with “0201”, followed by any number of additional characters. Results could include the following: 020185, 0201000007, 0201-104500, 0201AB72

### Using Wildcards in Part Description Searches

Type a partial description with the wildcard character (\*). You can type wildcards at the beginning, middle, or end of a word. You can also use more than one wildcard. The following are examples of description searches using wildcards:

**loc\*      lock\*      \*lock      \*lock\*      s\*loc\***

For example, typing **\*lock\*** tells PartsManager Pro to find all part descriptions that *contain* the word “lock”. Results could include the following: lock nut, lock washer, locking collar, spring locking pin

## Setting Wildcard Options


The Search tab of the Settings dialog box allows you to set how wildcards affect partial part number searches and partial description searches. Select **Settings** from the Tools menu and click the **Search** tab.

Select the option **Must type in wildcards** if you want to type wildcards for partial part number searches and partial description searches. For example, typing **\*lock\*** will search for all part descriptions containing the word “lock”. Typing **lock** will only search for the exact description “lock”.

Select the option **Wildcards assumed** if you do not want to type wildcards for partial part number searches and partial description searches. For example, typing **lock** will search for all part descriptions containing the word “lock” *in addition to* the exact description “bolt”.

## Searching by Part Number


Use a part number search to list parts pages that contain a part number you specify.

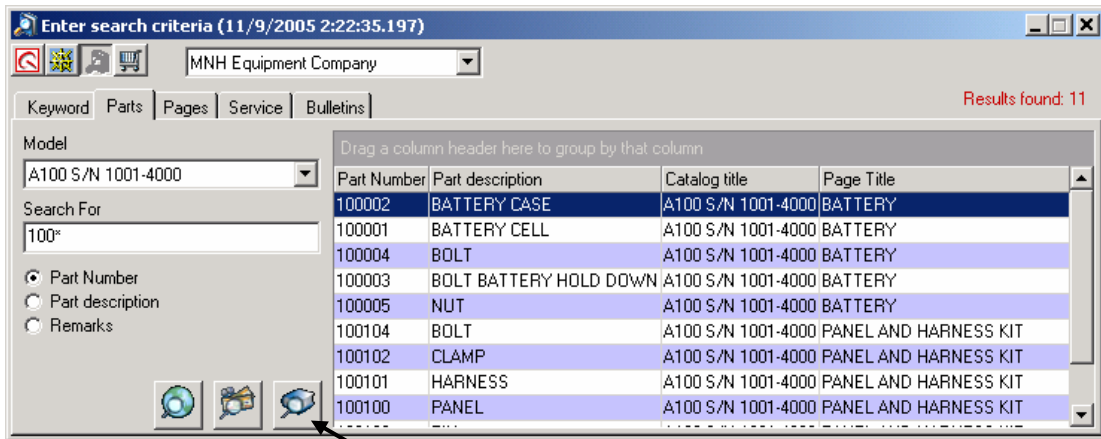
1. Click  to open the Search dialog box.
2. Click the **Parts** tab.
3. Select an OEM from the list box.
4. To narrow your search, select a model.
5. Type a part number in the Search For text box.

**Note:** You can also type a partial part number with one or more wildcard characters (\*). See “Using Wildcards” earlier in this chapter for details.

6. Select the **Part Number** radio button.

**Note:** Be sure that your selection applies to the text you typed in the Search For text box. With the Part Number radio button selected, a part number must appear in the text box.

7. Click the **Search** button  to display a list of parts pages that contain the number you typed.





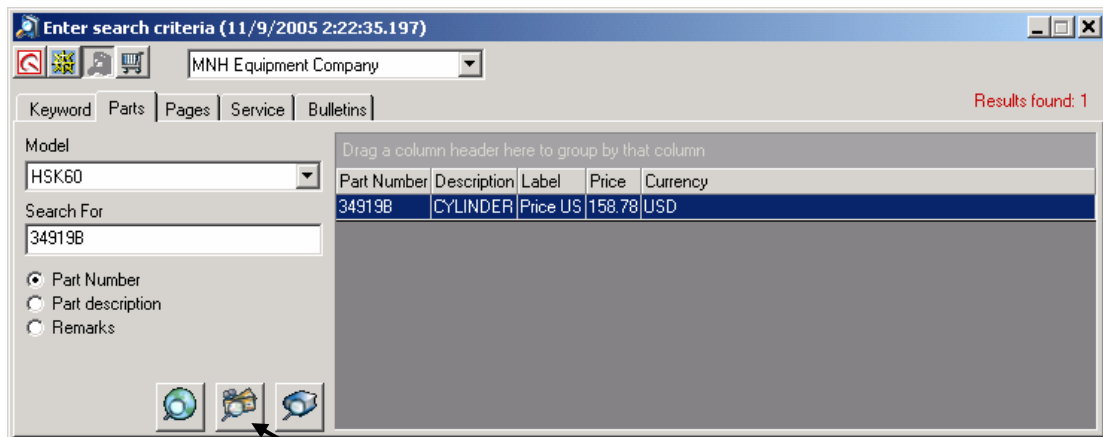
Search button

8. Double-click an entry to display the parts page.

## Searching for Prices

A price search allows you to find the price of any part number included in the price file. A price search does not lead to a parts page. The Price File button is only available for part number searches. You cannot type partial part numbers or use wildcards in a price search.

1. Click  to open the Search dialog box.
2. Click the **Parts** tab.
3. Select an OEM.
4. Type a part number in the Search For text box.
5. Select the Part Number radio button.
6. Click the **Price File** button  to display pricing information.





Price File button

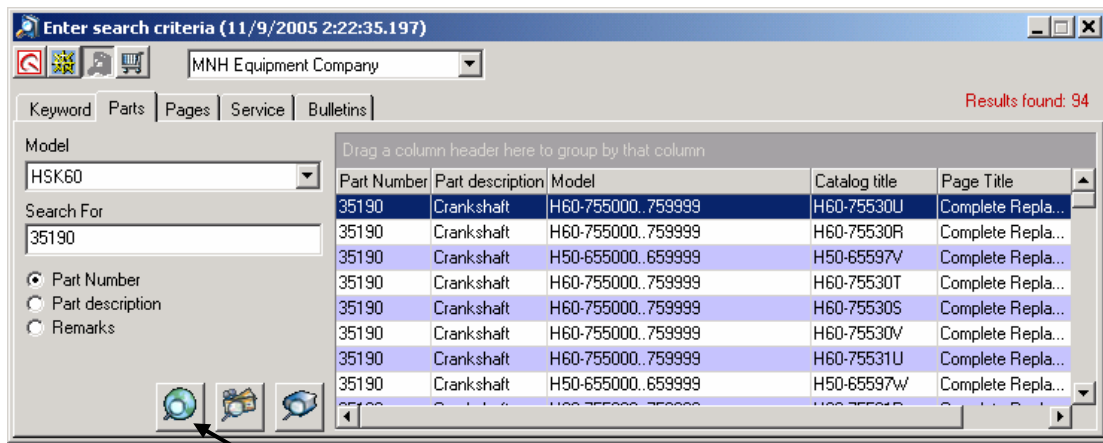
7. To view additional information for a part number in your search results, right-click the part entry to display a context menu and select **More Information**.



## Making a “Where Used” Search

Use this procedure to find all parts pages for all models in all catalogs that include the part number you type. You cannot type partial part numbers or use wildcards in a Where Used search.

1. Click  to open the Search dialog box.
2. Click the **Parts** tab.
3. Select an OEM from the list box.
4. To narrow your search, select a model.
5. Type a part number in the Search For text box.
6. Select the **Part Number** radio button.
7. Click the **Where Used** button  to list all applicable parts pages.




Where Used button

8. Double-click an entry to display the parts page.

## Searching by Part Description


Use a part description search to display a list of parts pages that contain one or more words that you specify from part descriptions.

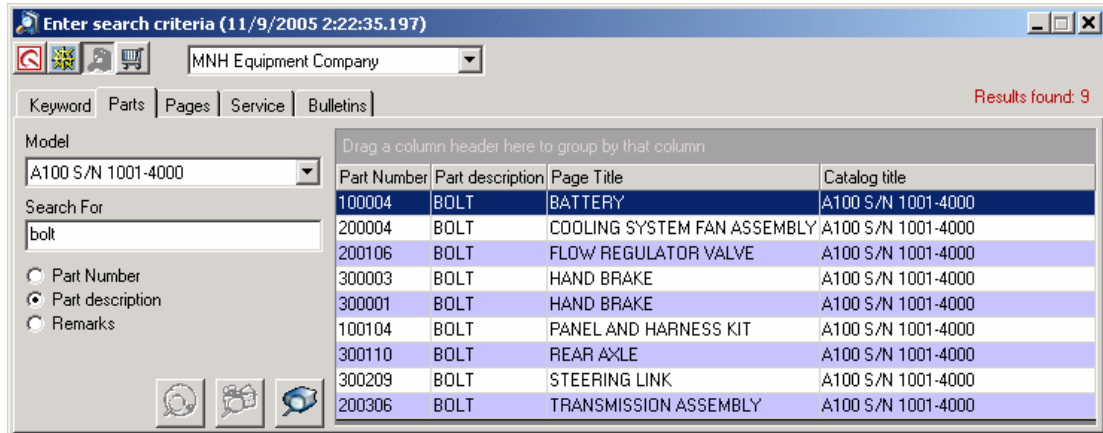
1. Click  to open the Search dialog box.
2. Click the **Parts** tab.
3. Select an OEM from the list box.
4. To narrow your search, select a model.
5. In the Search For text box, type a part description.

**Note:** You can also type a partial description with one or more wildcard characters (\*). See “Using Wildcards” earlier in this chapter for details.

6. Select the **Part Description** radio button.

**Note:** Be sure that your selection applies to the text you typed in the Search For text box. With the Part Description radio button selected, text from a part description must appear in the text box.

7. Click the **Search** button  to display a list of parts pages that contain the word(s) you typed.




The screenshot shows a software window titled "Enter search criteria (11/9/2005 2:22:35.197)". The window has a menu bar with "Keyword", "Parts", "Pages", "Service", and "Bulletins". The "Parts" tab is selected. A dropdown menu shows "MNH Equipment Company". Below the menu bar, there are several tabs: "Model", "Search For", and radio buttons for "Part Number", "Part description" (selected), and "Remarks". The "Model" dropdown is set to "A100 S/N 1001-4000". The "Search For" text box contains "bolt". To the right, a table displays search results. The table has four columns: "Part Number", "Part description", "Page Title", and "Catalog title". There are 9 rows of results, all with "BOLT" as the part description. The first row is highlighted in blue.

Part Number	Part description	Page Title	Catalog title
100004	BOLT	BATTERY	A100 S/N 1001-4000
200004	BOLT	COOLING SYSTEM FAN ASSEMBLY	A100 S/N 1001-4000
200106	BOLT	FLOW REGULATOR VALVE	A100 S/N 1001-4000
300003	BOLT	HAND BRAKE	A100 S/N 1001-4000
300001	BOLT	HAND BRAKE	A100 S/N 1001-4000
100104	BOLT	PANEL AND HARNESS KIT	A100 S/N 1001-4000
300110	BOLT	REAR AXLE	A100 S/N 1001-4000
300209	BOLT	STEERING LINK	A100 S/N 1001-4000
200306	BOLT	TRANSMISSION ASSEMBLY	A100 S/N 1001-4000


8. Double-click an entry to display the parts page.

## Searching by Remarks Text


Use a remarks text search to display a list of parts pages that contain Remarks column text that you specify.

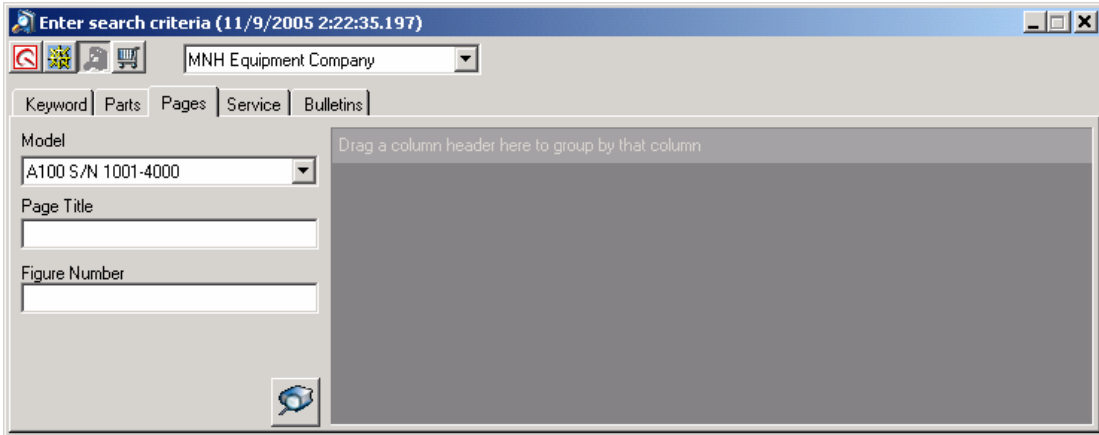
1. Click  to open the Search dialog box.
2. Click the **Parts** tab.
3. Select an OEM from the list box.
4. To narrow your search, select a model.
5. In the Search For text box, type one or more words from the Remarks column.
6. Select the **Remarks** radio button.


**Note:** Be sure that your selection applies to the text you typed in the Search For text box. With the Remarks radio button selected, text from the Remarks column must appear in the text box.

7. Click the **Search** button  to display all available matches for the word(s) you typed.
8. Double-click an entry to display the parts page.


## Searching for Parts Pages

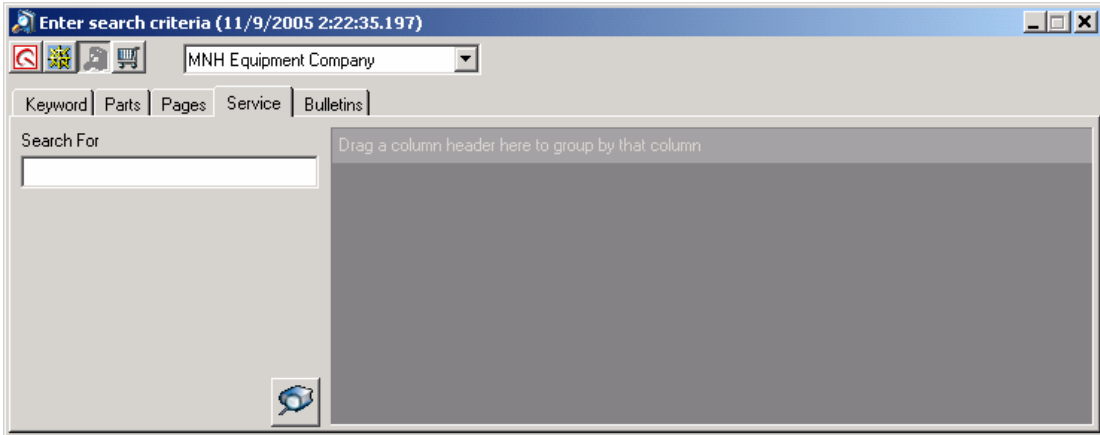
1. Click  to open the Search dialog box.
2. Click the **Pages** tab.




3. Select an OEM from the list box.
4. To narrow your search, select a model.
5. Enter your search criteria by typing either or both of the following:
  - Type one or more words from a page title in the Page Title text box.
  - Type a figure number or partial figure number in the Figure Number text box.
6. Click the **Search** button  to display a list of parts pages that match your search criteria.

# Searching for Service Information


1. Click  to open the Search dialog box.
2. Click the **Service** tab.

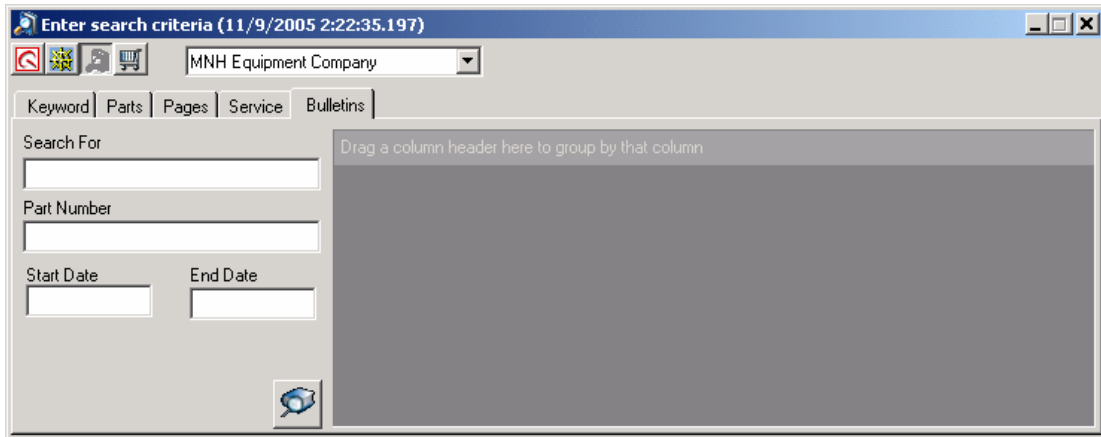



3. Select an OEM from the list box.
4. Type your search criteria in the Search For text box.
5. Click the **Search** button  to display a list of documents that match your search criteria.

# Searching for Bulletins

## Displaying Bulletins

1. Click  to open the Search dialog box.
2. Click the **Bulletins** tab.



3. Select an OEM from the list box.
4. Type your search criteria. (Bulletin search options are listed below.)
5. Click the **Search** button  to display a list of bulletins that match your search criteria.

### Bulletin Search Options:

**Option #1:** In the Search For text box, type one or more words from a bulletin title.

**Option #2:** In the Part Number text box, type the part number to which the bulletin is attached.

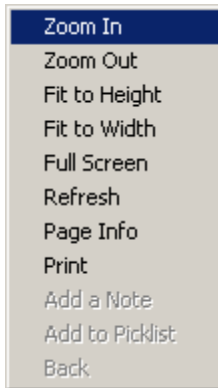
**Option #3:** In the Search For text box, type one or more words from a bulletin title and narrow your search by typing a range of bulletin release dates in the Start Date and End Date text boxes. When you type dates, you must type something in the Search For text box, even if it is only the \* character. Type dates in the format **yyyy-mm-dd** (2005-04-25).

**Option #4:** In the Search For text box, type the wildcard character (\*) and type a range of bulletin release dates in the Start Date and End Date text boxes. When you type start and end dates, you must type something in the Search For text box, even if it is only the \* character. Type dates in the format **yyyy-mm-dd** (2005-04-25).

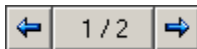
## Working with Bulletins

### If the bulletin opens in the PartsManager Pro main frame:

- ▶ Right-click the bulletin to open a context menu and select a command to zoom, resize, or print the bulletin.



- ▶ You can also double-click a bulletin to zoom in.
- ▶ Multi-page bulletins display paging buttons in the upper left corner of the bulletin display. Click the buttons to page forward and back.



### If the bulletin opens in a separate Adobe Reader window:

- ▶ Use the Adobe Reader features to zoom, resize, page, and print.

# Rearranging Search Results

PartsManager Pro allows you to group and sort information, resize columns, and change the column order. When you retrieve a large number of search results, you can scroll to the parts page title you want. But you may want to rearrange the results first.

## Grouping Search Results

Grouping allows you to sort search results by one or more column headers. For example, you can group by part number or a combination of part number and page title.

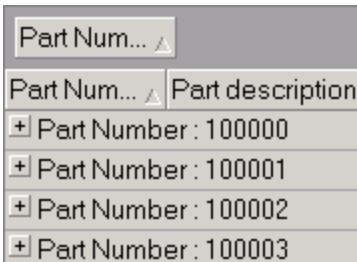
### Example #1: Group Search Results by Part Number

To group search results by part number, do the following:

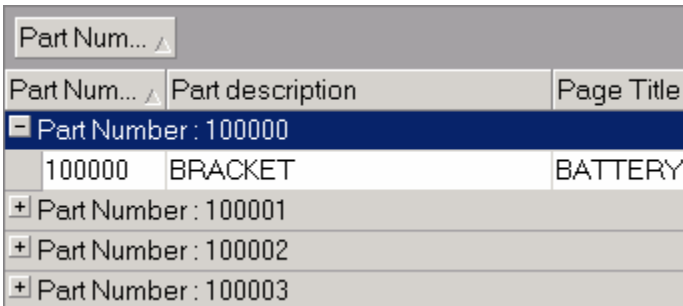
1. Place the mouse pointer on the Part Number column header, hold down the left mouse button, and drag the header to “Drag a column header here to group by that column”. An arrow indicates where the column header will be located.



2. Release the mouse button. The search results are sorted by part number.



3. Scroll to the part number you are looking for and click the plus sign (+) in front of “Part Number”. Parts pages that include that part number are listed.



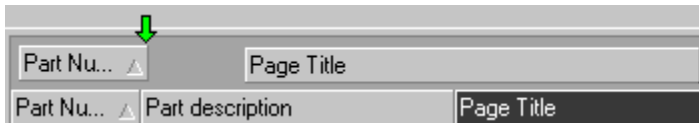
4. Double-click an entry to display the parts page.



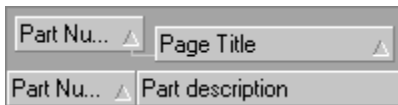
## Example #2: Group by Part Number and Page Title

After grouping search results by part number, you may need to group the results again. To further group the results by page title, do the following:

1. With the search results grouped by part number, place the mouse pointer on the Page Title column header, hold down the left mouse button, and drag the header to “Drag a column header here to group by that column”. An arrow indicates where the column header will be located.



2. Release the mouse button to place the header next to the Part Number header.



3. Scroll to the part number you want and click the plus sign (+) in front of “Part Number”. Then scroll to the page title you want and click the plus sign (+) in front of “Page Title”. Results that include that page title will be listed.
4. Double-click an entry to display the parts page.

## Resizing Columns

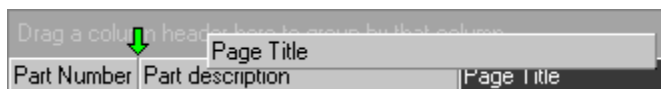
Resize column widths by doing the following:

1. Place the mouse pointer on the boundary between two column headers. The mouse pointer changes to  $\oplus$ .
2. Hold down the left mouse button.
3. Drag to the left or right.

## Moving Columns

Rearrange the order in which columns appear by doing the following:

1. Place the mouse pointer on a column header.
2. Hold down the left mouse button and drag the header to the left.
3. Stop dragging where you want to insert the column. The following example shows the Page Title column being inserted immediately after the Part Number column. An arrow indicates where the column will be inserted.






4. Release the mouse button. The column is inserted at the arrow. In this example, the Page Title column is now located between the Part Number and Part Description columns.


# 4. Navigating to Parts Information






Use the Navigation window to navigate to parts pages, view catalog notes, and compare model specifications (if your OEM data includes catalog notes and model specifications).



## Using Basic Navigation

1. Click  to open the Navigation window.
2. Click  preceding each level of catalog information you want to open.
3. As additional levels of information are displayed, click  preceding each level you want to open.




4. When you reach the final navigation level, that is, entries that are *not* preceded by , click an entry to open the corresponding parts page.

**Note:** You can also use the keyboard arrow keys to navigate. Use  and  to move between  levels. Use  and  to open and close a level.

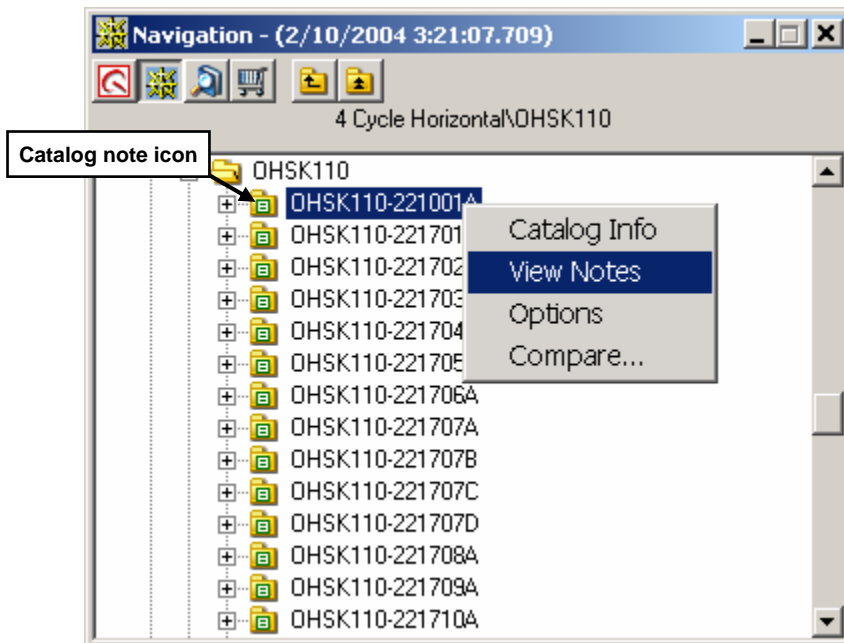
**Note:** Click  to go up one navigation level. Or click  to close all navigation levels.

# Viewing Catalog Notes

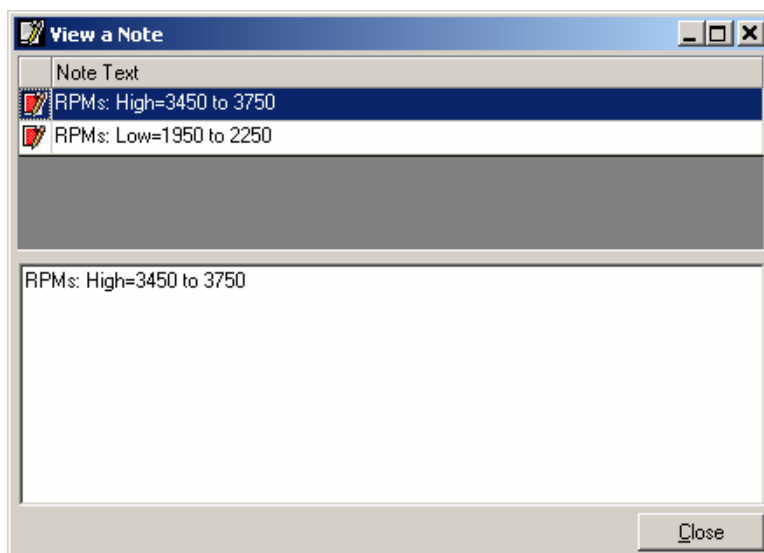
When a catalog-level folder displays a Catalog Note icon , catalog notes are available. If your OEM data supports catalog notes, use this procedure to view available notes.

**Note:** This feature is also available from the Navigation pane of the Search dialog box.

1. Right-click the model specification or catalog to open a context menu. Select **View Notes**.



2. The top portion of the View a Note window displays the initial text of each note.



3. Click an entry to view the complete note in the bottom portion of the window.

# Comparing Model Specifications

If your OEM data supports model specification comparisons, use the Compare feature to compare one model specification with another or to list the parts that must be added and/or removed to change a particular specification to another. This feature compares the parts that make up both specifications and lists the parts that are different in Add and Remove columns.

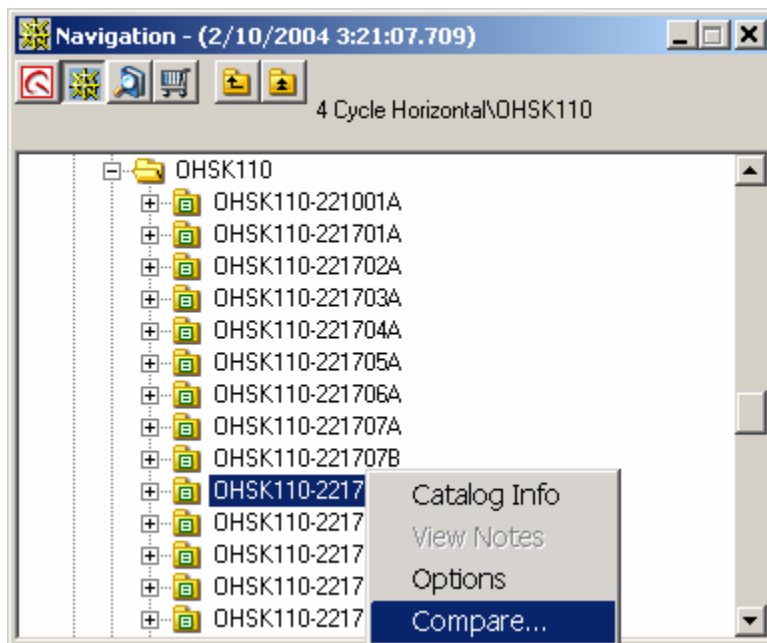
If you need to supply a particular product that is out of stock, you can use this feature to “change” an in-stock product to the product you need to supply. You do this by typing the in-stock product number in the “Change” text box and typing the number you need in the “To” box. When you click the **Search** button, parts you need to add to or remove from the in-stock product to assemble the out-of-stock product are listed.

You may need to compare several products until you find the one you want.

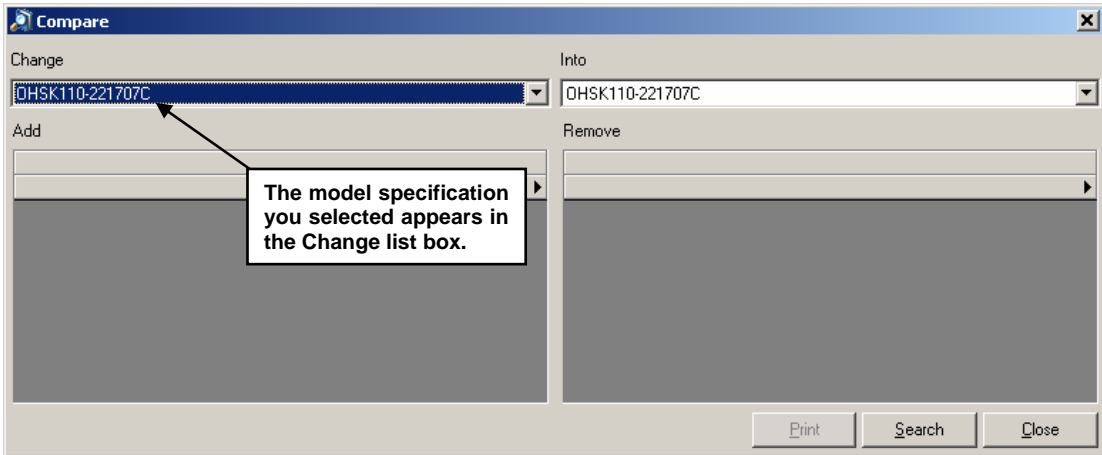
**Note:** This feature is also available from the Navigation pane of the Search dialog box.

## To compare or change model specifications:

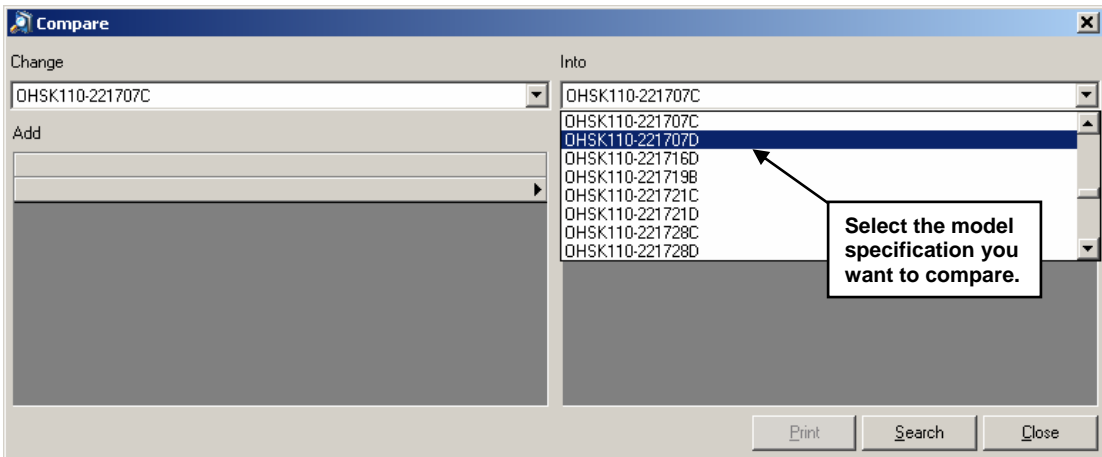
1. Right-click a model specification to open a context menu. Select **Compare**.



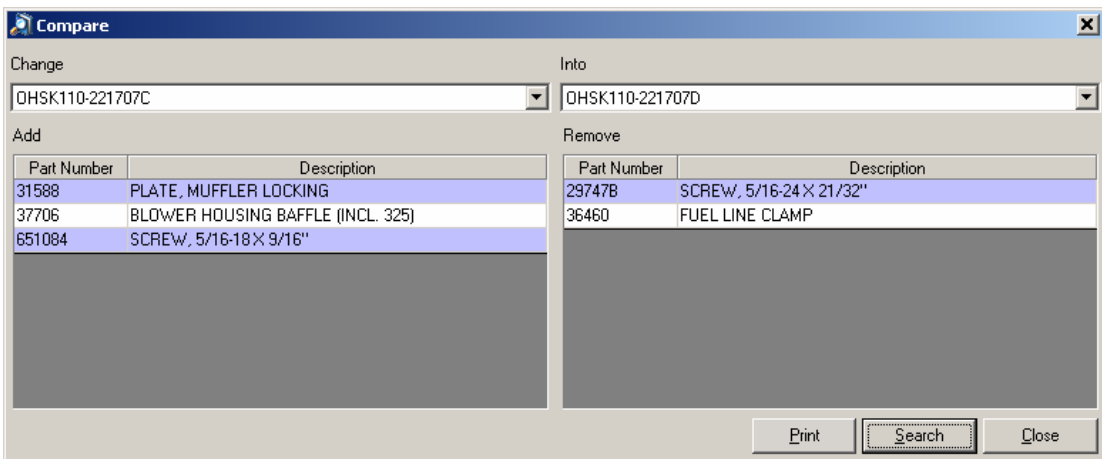
- The Compare dialog box displays the model specification you selected under “Change”.



- From the “Into” text box, select the model specification you want to compare.



- Click **Search**. The dialog box lists the parts that are different in the Add and Remove columns.



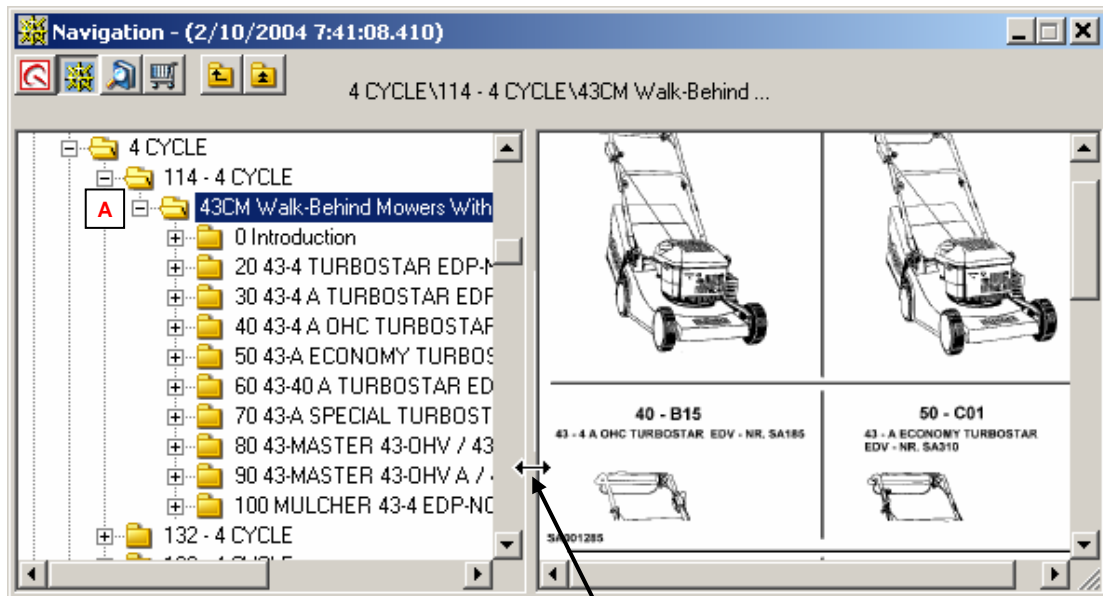
- To print the list of parts to add and remove, click the **Print** button.
- When you finish viewing parts information, click **Close**.

# 5. Using Pictorial and Alpha Indexes

## Using Pictorial Indexes

If your OEM data supports pictorial indexes, use the following procedure to display information from the indexes.

1. Navigate to a catalog that includes a pictorial index.
2. Use the scroll bar to scroll to the catalog title.
3. Click the catalog title (A) to display the primary pictorial index.



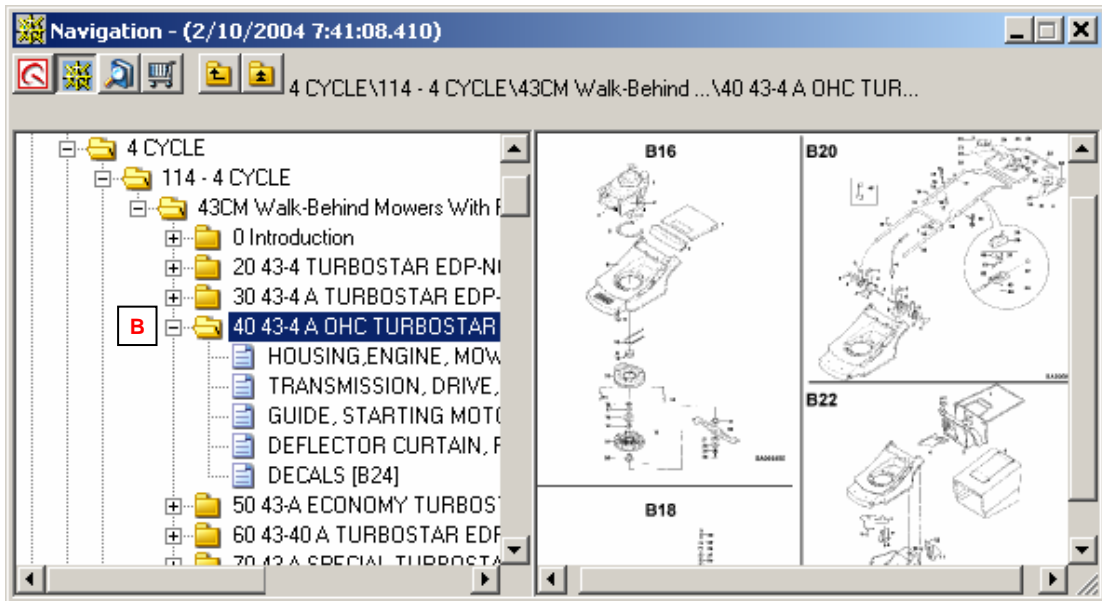
To adjust the width of the pictorial index window:

(1) Place the mouse pointer on the bar that separates the navigation tree from the pictorial index. The pointer changes to a double arrow.

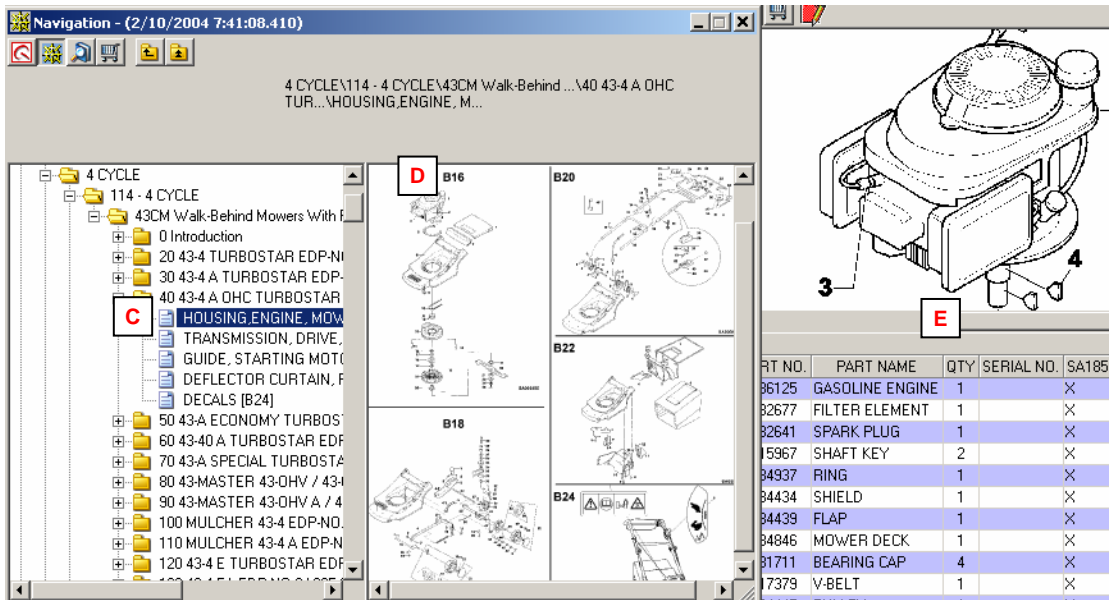
(2) Hold down the left mouse button and drag the bar to the left or right to resize the window.

The index will retain the width you set until you close the window.

- Click the section title (B) to display the section pictorial index.




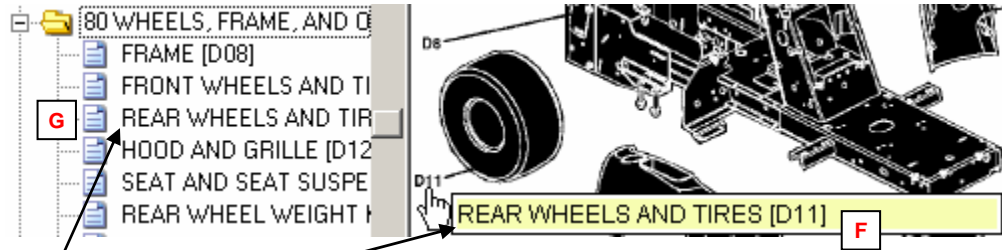
- Click a parts page title (C) or click a callout (D) from the index.
- The parts page (E) is displayed.





### To identify pictorial index callouts:

To identify a callout, hold the mouse pointer on the callout. The pointer changes to a pointing hand . A label (F) corresponding to the entry in the left pane (G) will be displayed. For example:

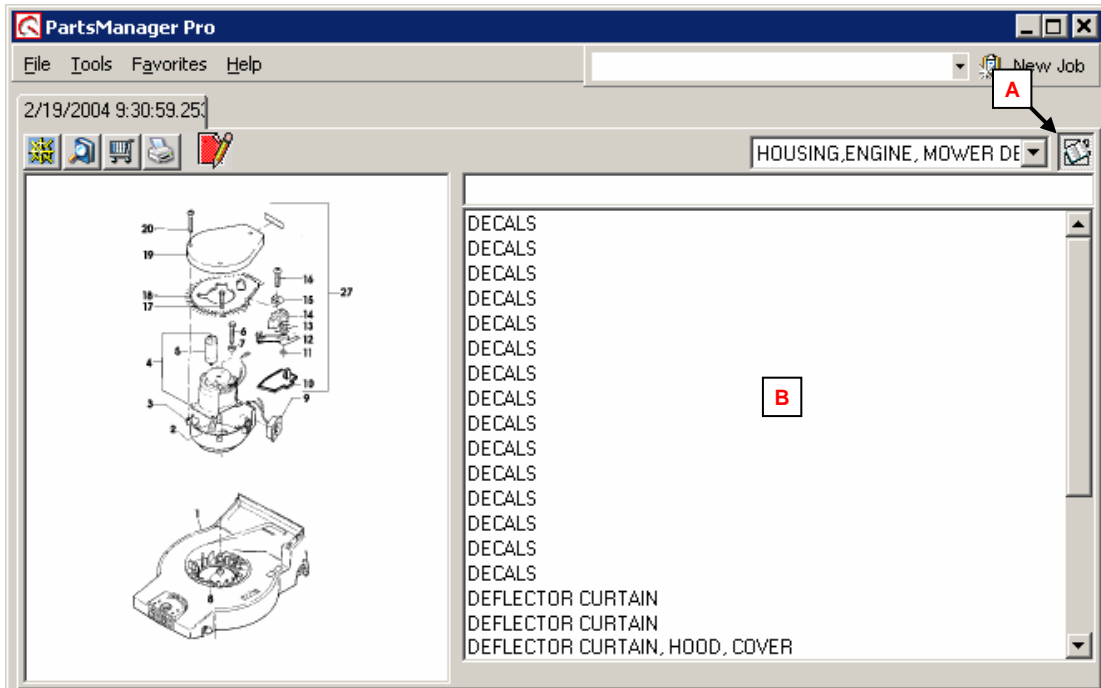


The label identifies the entry to which the callout corresponds.

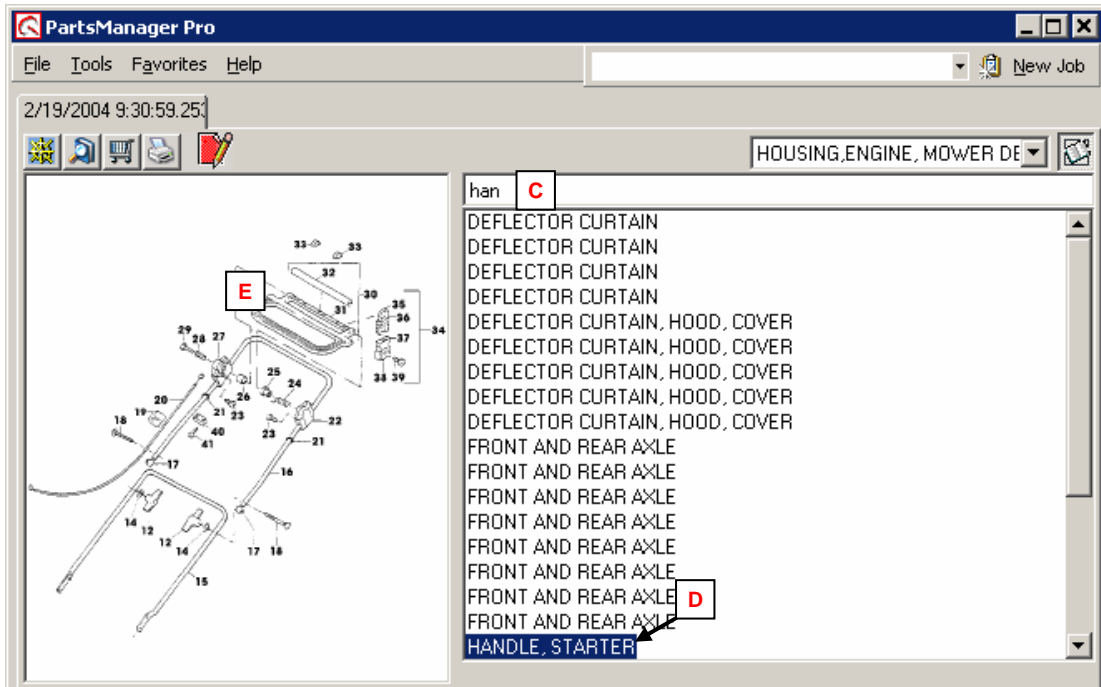
# Using Alpha Indexes

If your OEM data supports alpha indexes, use the following procedure to display information from the indexes.

1. Open a catalog using the Search dialog box or Navigation window.
2. Click the first introduction page or parts page title to open the page.
3. Click the Alpha Index button (A) to display the alpha index (B).

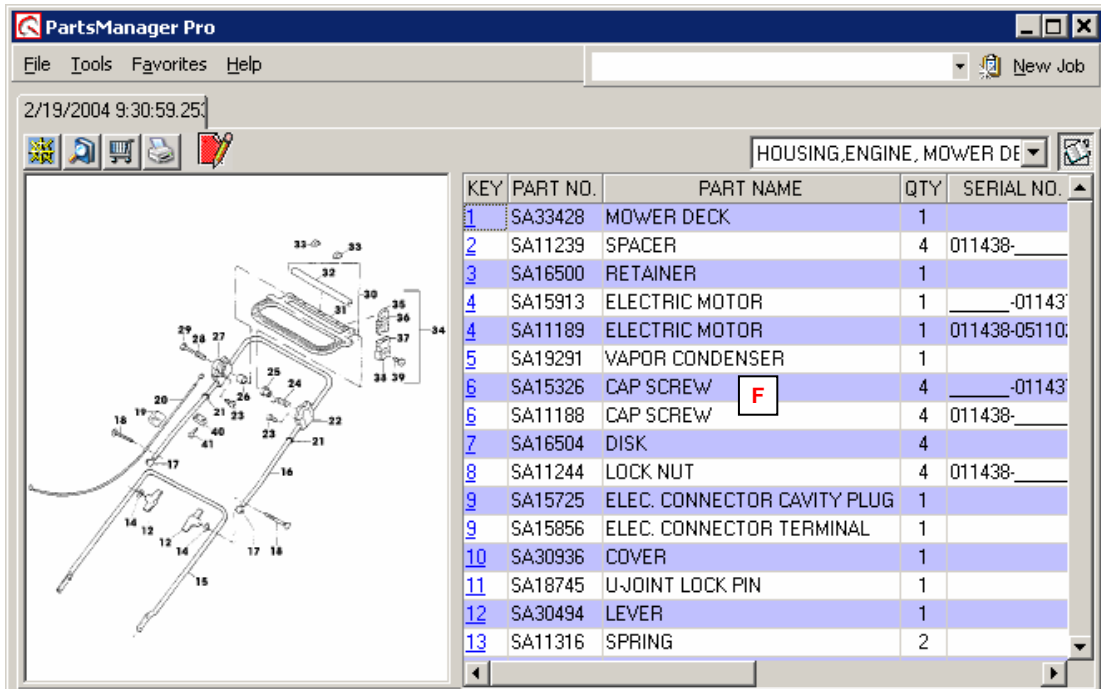


4. Type the first few letters (C) of the item you are searching for. As you type, entries are highlighted (D) and the parts diagram (E) is displayed for the highlighted item.



**Note:** You cannot select parts from the diagram while the alpha index is displayed. Display the parts list (step 5) before attempting to select parts.

- When the appropriate parts diagram is displayed, click the Alpha Index button to display the parts list (F) for the diagram.

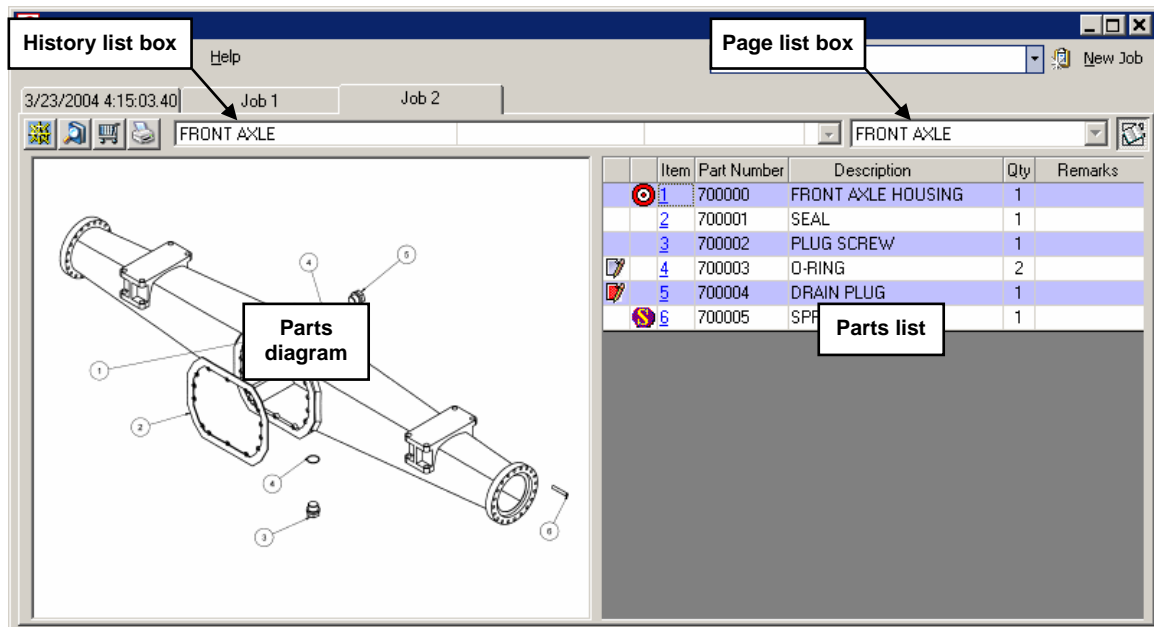


**Note:** You can also double-click the highlighted entry or press the **Enter** key when the entry is highlighted to display the parts list.

- Select the parts you need for your picklist.

# 6. Working with Parts Pages

A parts page consists of a parts diagram and its associated parts list.



## Parts Pages at a Glance

- ▶ Change the relative positions of the parts diagram and parts list by selecting **Settings** from the Tools menu.
- ▶ Quickly display a different parts page by selecting it from the Page list box.
- ▶ Quickly display a previously viewed parts page by selecting it from the History list box.
- ▶ Display additional information for a page and catalog by right-clicking with the mouse.
- ▶ When you click a callout in a parts diagram, a red square highlights the callout and the corresponding entry is highlighted in the parts list.
- ▶ When you click an entry in the parts list, the entry is highlighted and a red square highlights the corresponding callout in the parts diagram.
- ▶ Multi-page parts diagrams display paging buttons. Click the buttons to page forward and back.

## Displaying Previously Viewed Parts Pages

The History list box displays the current parts page in the active job and keeps a record of pages you view. When you have multiple jobs open at a time, the History list box lists the previously viewed parts pages for each job. When you click a job tab, the History list changes to the pages viewed for that job.

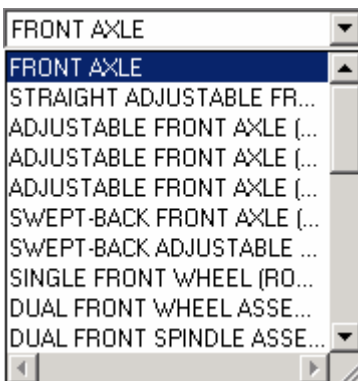
Page Title	Catalog title	Model	
DRIVESHAFT	B02	T 30C	..
AIR CLEANER AND MUFFLER	B01	E 803	..
CABURETOR, FUEL TANK	B01	E 803	..
STARTER	B01	E 803	..
IGNITION SYSTEM, CLUTCH	B01	E 803	..
SLOW MOVING VEHICLE POST	A23	F 33S	..
TRANSPORT LIGHTS AND BRACKETS	A23	F 33S	..
HYDRAULIC HOSES & CYLINDERS	A23	F 33S	..
STABILIZER WHEEL ASSEMBLY	A21	C08S	..
DECALS	A21	C08S	..

When you open an existing job, the History list box lists the last 10 pages viewed for that job. If you close and reopen PartsManager Pro, the History list box lists the last 10 pages you viewed for each job.

To display a previously viewed parts page, click the appropriate entry in the list box.

## Switching Parts Pages

The Page list box displays the title of the current parts page and allows you to switch to a different page.



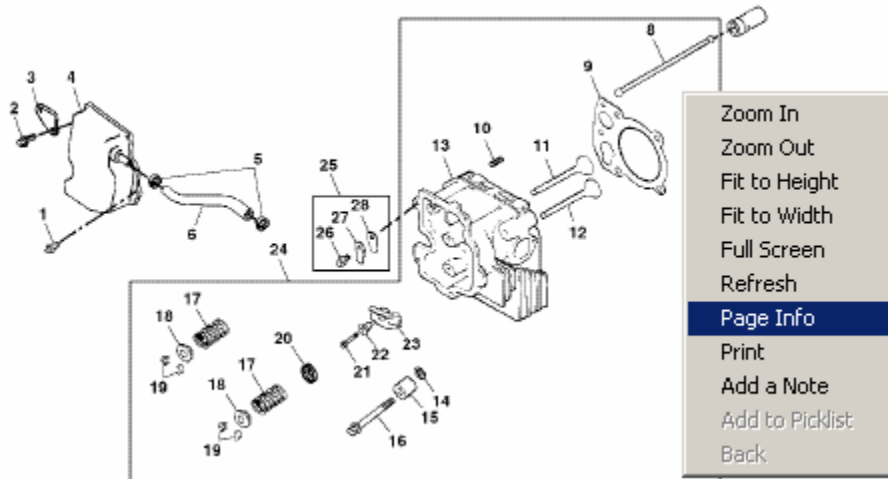
To switch to a different parts page, click the list box arrow to open the list. Then click a title or press the **↑** and **↓** keyboard keys to display a different parts page.

When the last parts page in a section is selected, press the **↓** key or the **Page Down** key to move to the next section of parts pages. When the first parts page in a section is selected, press the **↑** key or the **Page Up** key to move to the previous section of parts pages.

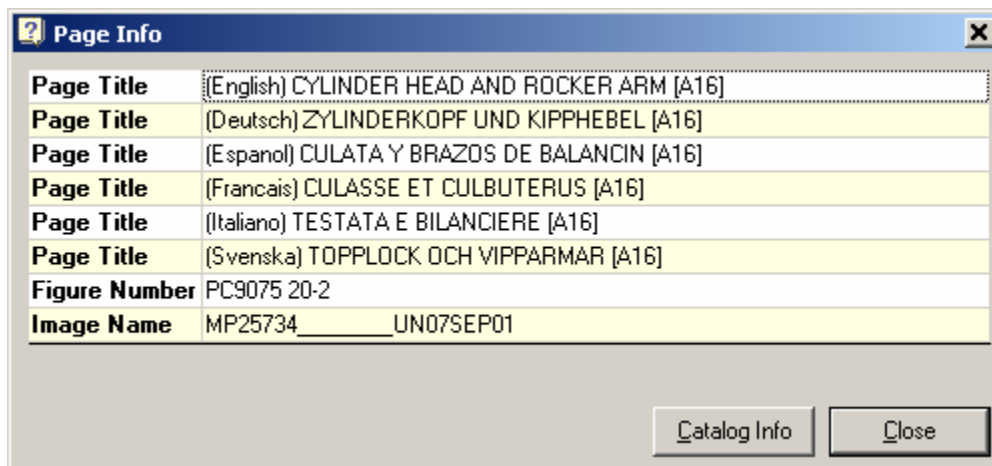
# Displaying Additional Information for a Page and Catalog

Use this procedure to view additional information for the current parts page and catalog.

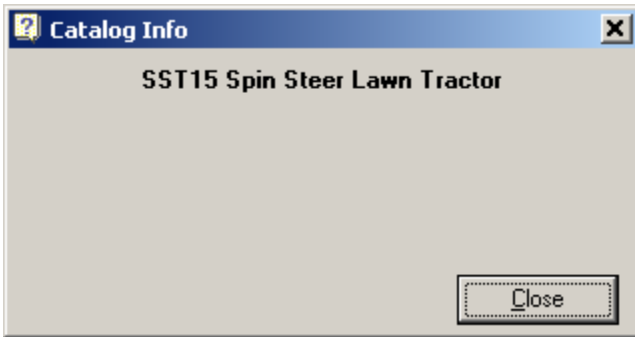
1. Right-click the parts diagram to display a context menu.



2. Select **Page Info** from the menu to display the Page Info window.



3. To view additional information for a catalog, click the **Catalog Info** button to display the Catalog Info window.



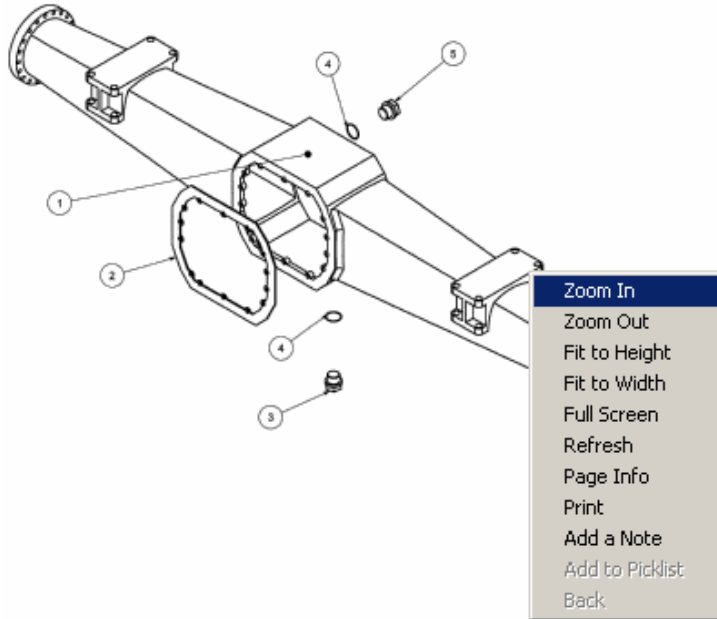
4. When you finish viewing catalog information, click the Catalog Info **Close** button.
5. When you finish viewing page information, click the Page info **Close** button.



# Zooming, Resizing, and Printing Parts Diagrams

## Using the Context Menu

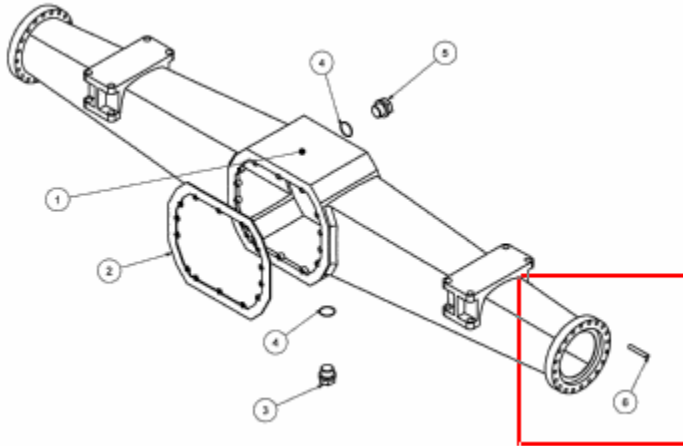
Right-click in a parts diagram to display a context menu. Then select a menu command.



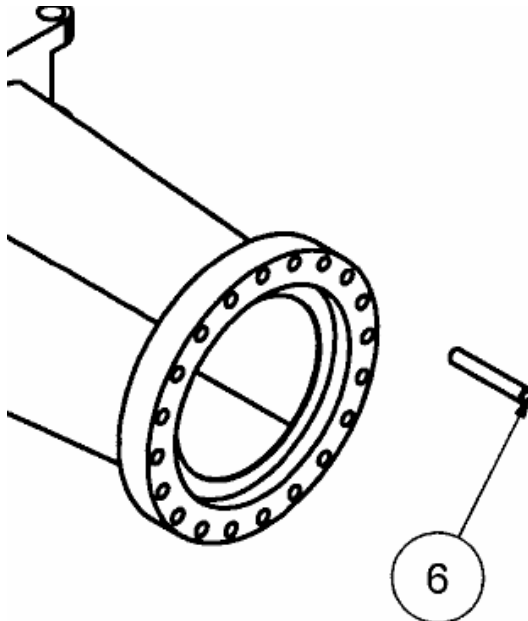
Command	How to Use
<b>Zoom In</b>	Zooms in on an area of the parts diagram.
<b>Zoom Out</b>	Zooms out.
<b>Fit to Height</b>	Resizes the parts diagram to fit the height of the display area.
<b>Fit to Width</b>	Resizes the parts diagram to fit the width of the display area.
<b>Full Screen</b>	Resizes the parts diagram to fill the entire diagram/parts list display area. When the diagram is maximized, this command changes to “Split Screen”. Selecting <b>Split Screen</b> restores the diagram to its default size.
<b>Refresh</b>	Restores the parts diagram to its default size.
<b>Page Info</b>	Displays additional information for a parts page.
<b>Print</b>	Prints the parts diagram, including the parts page title and catalog title.
<b>Add a Note</b>	Allows you to add a user note to the parts page.
<b>Add to Picklist</b>	Adds a part to a picklist.
<b>Back</b>	Not available at parts pages.

## Using the Mouse Pointer to Zoom In on a Parts Diagram

1. Place the mouse pointer above and to the left of the area you want to zoom in on.
2. Hold down the Shift key.
3. Hold down the left mouse button.
4. Start dragging the mouse down and to the right. A red box appears.
5. Keep dragging until the red box covers the area you want to magnify.



6. Release the mouse button and Shift key to zoom in on that portion of the diagram.



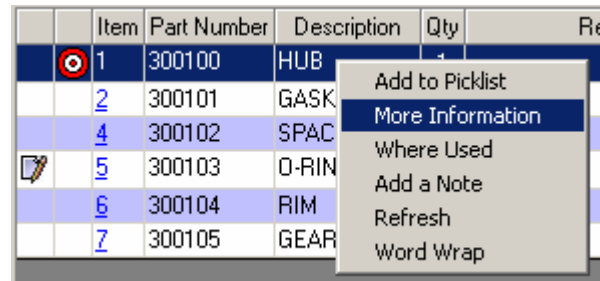
# Working with Parts Lists

The parts list displays the parts corresponding to the callouts on the parts diagram and allows you to select parts for a picklist.

## Viewing Additional Information for a Part

Use this procedure to view the part number, description, price, and supersession information (when available) for a part. If you have a BSI connection, you can also view such information as bin location and part availability. If you subscribe to eConnect, you can also view real-time inventory information from your trade partners (vendors).

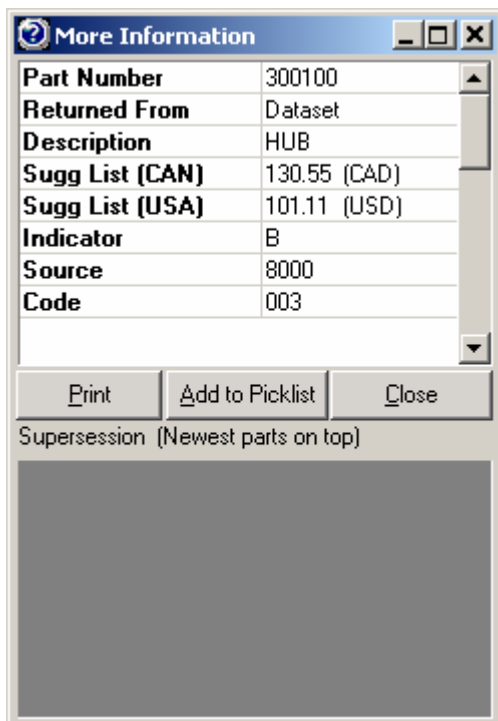
1. Right-click a part entry to display a context menu.
2. Select **More Information** to display the More Information window.



	Item	Part Number	Description	Qty	Re
	1	300100	HUB		
	2	300101	GASK		
	4	300102	SPAC		
	5	300103	O-RIN		
	6	300104	RIM		
	7	300105	GEAR		

A context menu is open over the first row (Item 1, Part Number 300100, Description HUB). The menu items are: Add to Picklist, More Information (highlighted), Where Used, Add a Note, Refresh, and Word Wrap.

**Note:** You can also highlight an entry and press the space bar to open a context menu. Use the arrow keys to select **More Information** and press **Enter** to open the window.



3. To print the information in the window, click the **Print** button.
4. To add the part to your picklist, click the **Add to Picklist** button.
5. When you finish viewing information, click the **Close** button to close the window.

## Viewing Prices

Use this procedure to view the price of an item in the parts list.

The screenshot shows a software interface with two main components: a 'More Information' dialog box on the left and a parts list table on the right.

The 'More Information' dialog box contains the following data:

<b>Part Number</b>	GYT-5UL93-01-4
<b>Returned From</b>	Dataset
<b>Description</b>	GYT-R Oval Mufflers - Carbon Fiber
<b>MSRP</b>	399.99 (USD)

Below the dialog box are buttons for 'Print', 'Add to Picklist', and 'Close'. A 'Supersession (Newest parts on top)' section is also visible but empty.

The parts list table on the right has the following columns: Item, Part Number, Description, Qty, and Remarks. It contains four rows of data:

Item	Part Number	Description	Qty	Remarks
	GYT-5TA93-01-CF	GYT-R Oval Mufflers - Carbon Fiber	1	Carbon fibe...
	GYT-5SF93-01-CF	GYT-R Oval Mufflers - Carbon Fiber	1	Carbon fibe...
	GYT-5UL93-01-CF	GYT-R 1 al M (" - Carbon Fiber	1	Carbon fibe...
	GYT-5SG93-01-CF	GYT-R Oval		Carbon fibe...

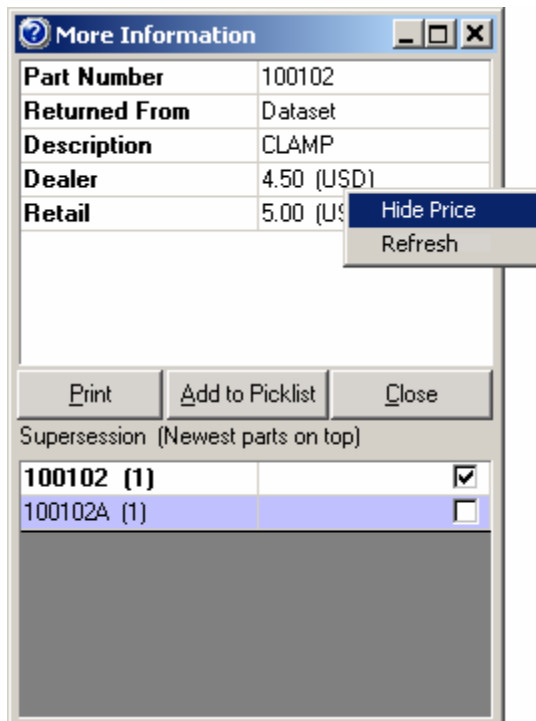
A context menu is open over the third row of the table, with the following options: 'Add to Picklist', 'More Information', 'Where Used', 'Add a Note', 'Refresh', and 'Word Wrap'. The 'More Information' option is highlighted.

1. Right-click a part entry. A Context menu opens.
2. Select **More Information** from the menu.
3. View the price.

## Toggling Price Displays On and Off

If your data includes two types of pricing, PartsManager Pro allows you to temporarily hide one price in the More Information window. If, for example, you have dealer and retail prices, you may want to hide the dealer price while showing part information to a customer. To temporarily hide a price, do the following:

1. With the More Information window displayed, right-click the price you want to hide. A context menu opens.



2. Select **Hide Price** from the menu.
3. The selected price, in this example the dealer price, disappears from the display.  
**Note:** The selected price is only hidden temporarily. All prices are displayed each time you open the More Information window.
4. To redisplay the hidden price while the window is still open, click anywhere in the part information and select **Refresh**.

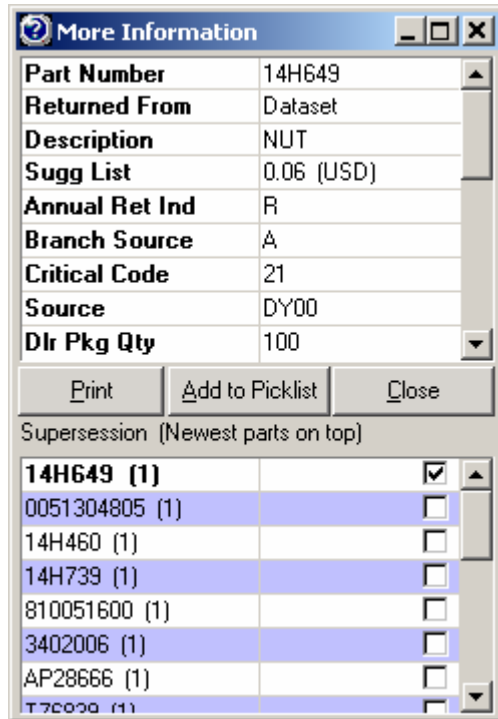
**Note:** If you click outside the lined area that contains part information, the context menu will not open.

## Viewing Supersession Information

When **S** appears in front of an entry, supersession information is available for the part number.

**S** 10 14H649 NUT


1. Click **S** to open the More Information window.





2. To view information for other part numbers in the supersession history, select the check box to the right of the part number. Information for that part number will appear in the top portion of the window.
3. To add a part to your picklist, select the check box to the right of the part number and click **Add to Picklist**.
4. To print the information in the window, click the **Print** button.
5. To close the window without adding a part to your picklist, click **Close**.
6. To delete the superseded part from your picklist, highlight the part entry on the picklist and click **Delete**.

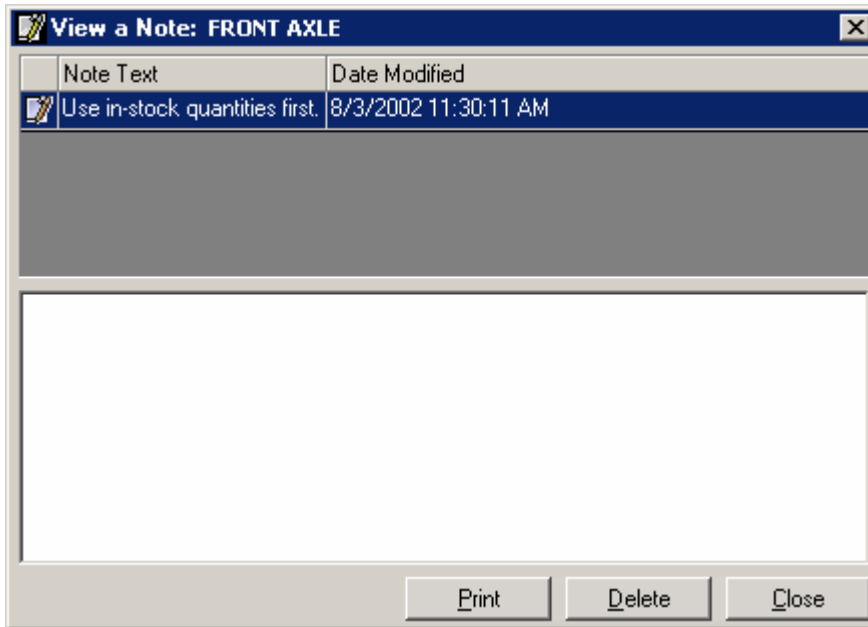
**Note:** If you do not delete the superseded part, both parts will appear on your picklist.

## Viewing User Notes

When  appears in front of an entry, a user note is attached to the part number.

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Click  to open the View a Note window. The text of the note and the date it was created or last modified are displayed. The applicable figure number or page title is displayed in the title bar of the window.




To print the notes listed in the window, click the **Print** button.

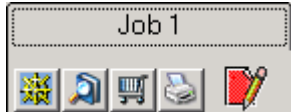
**Note:** When multiple notes are listed, you can sort them by text or date by clicking on a column header. You can also resize the columns.


Click the **Close** button when you finish viewing notes.

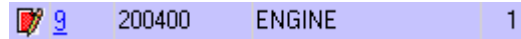
## Viewing OEM Notes

OEM notes are notes created by the manufacturer. Types of notes available vary according to manufacturer. Multiple OEM notes can be linked to a page or part number. You cannot modify or delete OEM notes.


When  appears on a job tab, OEM notes are linked to a parts page.



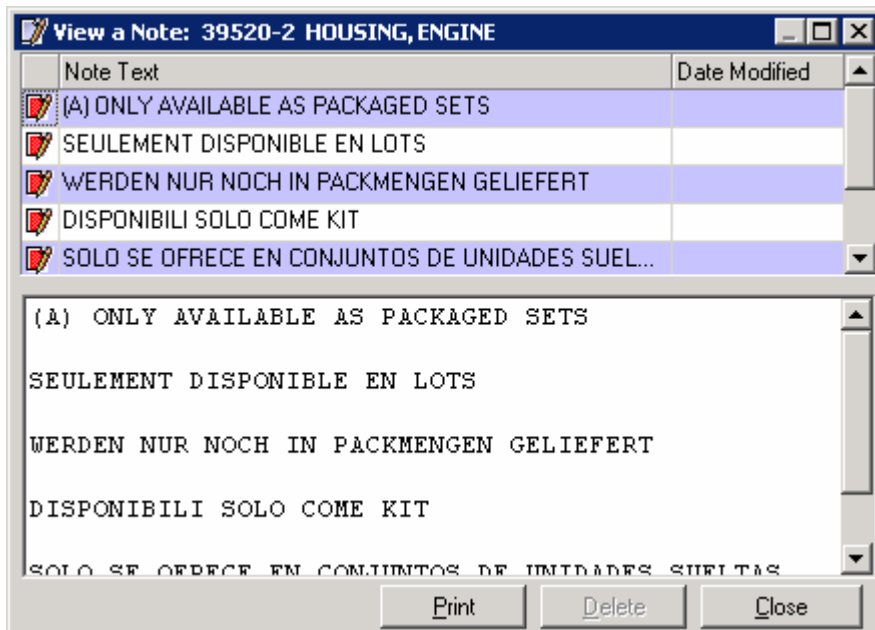
When  appears in front of a part entry, OEM notes are linked to the part number.



A part note can apply to all occurrences of a part number in all catalogs or to a single occurrence of a part number.

To view OEM notes, click  to open the View a Note window. The window lists all notes linked to the parts page or part number. The applicable figure number or page title is displayed in the title bar of the window.

The initial text of each note and the date it was created or modified are displayed. Click a note to display the complete text in the bottom portion of the window.




To print the notes listed in the window, click the **Print** button.


**Note:** When multiple notes are listed, you can sort them by text or date by clicking on a column header. You can also resize the columns.

Click the **Close** button when you finish viewing notes.




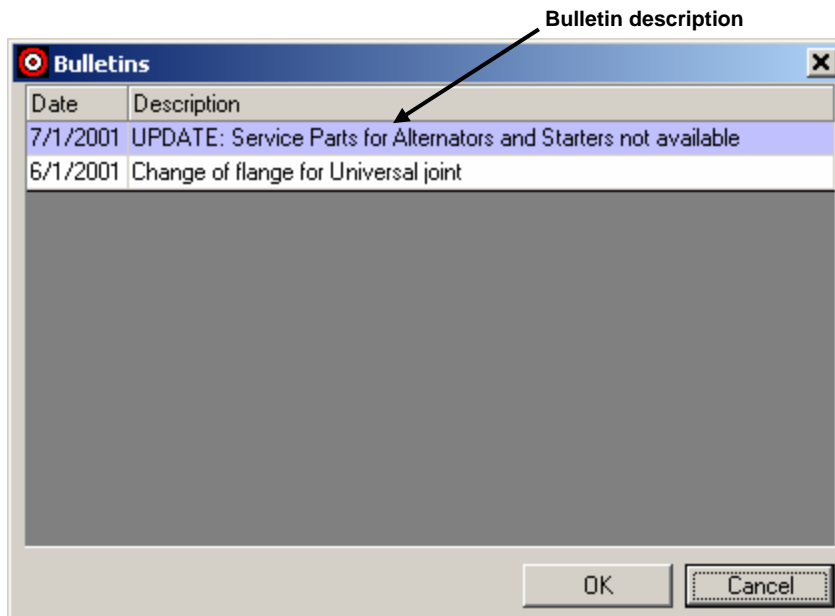
## Viewing Bulletins

When  appears in front of an entry, a bulletin is available.

 12	F251510000	WASHER
--	------------	--------

### To display the bulletin:

1. Click  to open the Bulletins window.

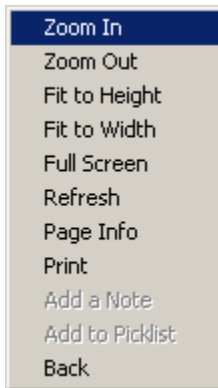


**Note:** When multiple bulletins are listed, you can sort them by date or description by clicking on a column header. You can also resize the columns.

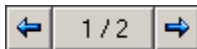
2. Click the bulletin description to display the bulletin.

**If the bulletin opens in the PartsManager Pro main frame:**

- ▶ Right-click the bulletin to open a context menu and select a command to zoom, resize, or print the bulletin.



- ▶ You can also double-click a bulletin to zoom in.
- ▶ When you finish viewing the bulletin, click the **Back** command to return to the parts page from which you opened the bulletin.
- ▶ Multi-page bulletins display paging buttons in the upper left corner of the bulletin display. Click the buttons to page forward and back.



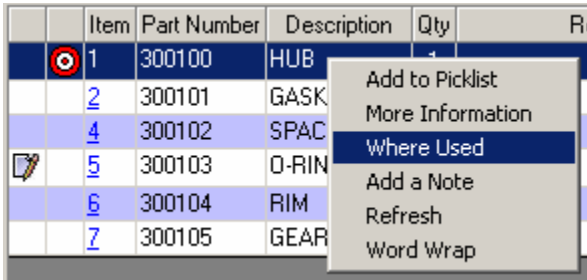
**If the bulletin opens in a separate Adobe Reader window:**

- ▶ Use the Adobe Reader features to zoom, resize, page, and print.
- ▶ When you finish viewing the bulletin, close the window to return to the parts page from which you opened the bulletin.

## Making a “Where Used” Search from a Parts List

You can search for all occurrences of a part number by right-clicking the number. For example, if the OEM-supplied information on a parts page showed an assembly as a line item and you wanted to identify the component parts, a “Where Used” search would locate all parts pages that include that part number. This additional information would help you identify the component parts.

1. Right-click the part entry to highlight it and display a context menu.



The screenshot shows a table with columns: Item, Part Number, Description, Qty, and Price. The table contains seven rows of data. A context menu is open over the first row (Item 1, Part Number 300100, Description HUB). The menu options are: Add to Picklist, More Information, Where Used (highlighted), Add a Note, Refresh, and Word Wrap.

Item	Part Number	Description	Qty	Price
1	300100	HUB		
2	300101	GASK		
4	300102	SPAC		
5	300103	O-RIM		
6	300104	RIM		
7	300105	GEAR		

2. Select **Where Used** to display the Search dialog box.
3. The search results window lists all occurrences of the part number.
4. Double-click an entry to display the parts page.

## Rearranging Information in a Parts List

PartsManager Pro allows you to change the order in which part entries are listed and to resize and move columns.

**Note:** If you modify the parts list and want to restore the original layout, right-click in the parts list to open a context menu. Then click **Refresh**.

### Sorting Information

Change the order in which part entries are listed by doing the following:

Click a column header. Entries are listed in order according to the information in that column. An upward-pointing triangle appears on the right side of the header and information is arranged in order from first to last. That is, entries that begin with letters are arranged in A-Z order and entries that begin with numbers are arranged in 1-9 order.

If you click the column header again, a downward-pointing triangle appears on the right side of the header and information is arranged in order from last to first. That is, entries that begin with letters are arranged in Z-A order and entries that begin with numbers are arranged in 9-1 order.

### Resizing Columns

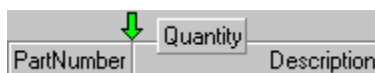
Resize column widths by doing the following:

1. Place the mouse pointer on the boundary between two column headers. The mouse pointer changes to  $\leftrightarrow$ .
2. Hold down the left mouse button.
3. Drag to the left or right.

### Moving Columns

Rearrange the order in which columns appear by doing the following:

1. Place the mouse pointer on a column header.
2. Hold down the left mouse button and drag the header to the left.
3. Stop dragging where you want to insert the column. The following example shows the Quantity column being inserted immediately in front of the Description column. A small green arrow indicates where the column will be inserted.

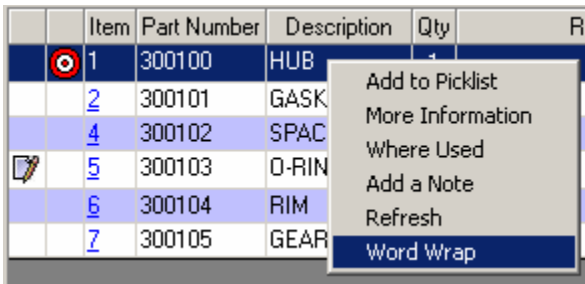


4. Release the mouse button. The column is inserted at the arrow. In this example, the Quantity column is now located between the Part Number and Description columns.

## Temporarily Wrapping Text in a Parts List

Use this procedure to make the text in a parts list temporarily “wrap”, that is, adjust so that the text is viewable horizontally, eliminating the need to use the horizontal scroll bar.

1. Right-click the parts list to open a context menu.
2. Select **Word Wrap** from the menu.



3. The parts text will adjust to fit the viewable area.

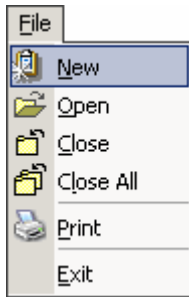
**Note:** The Word Wrap menu option wraps text for the current parts list only. When you display a different parts page, you must select the option again to wrap text in that parts list. If you want text to wrap in all parts lists, select **Settings** from the Tools menu, click the Settings dialog box **Page Settings** tab, select the **Word Wrap** option, and click **OK**.

# Printing Parts Pages

When a parts page is displayed, you can print information by using the **Print** command from the File menu or the **Print** button.

## Using the Print Command from the File Menu

**Note:** To use the **Print** command, a parts page must be displayed.



With a parts page displayed, select **Print** from the File menu. The PartsManager Pro Printing dialog box is displayed. Select one or more options from the dialog box and click **OK**.

You can print the parts diagram, parts list, page notes, part notes, and picklist by selecting any or all of the options at the same time.

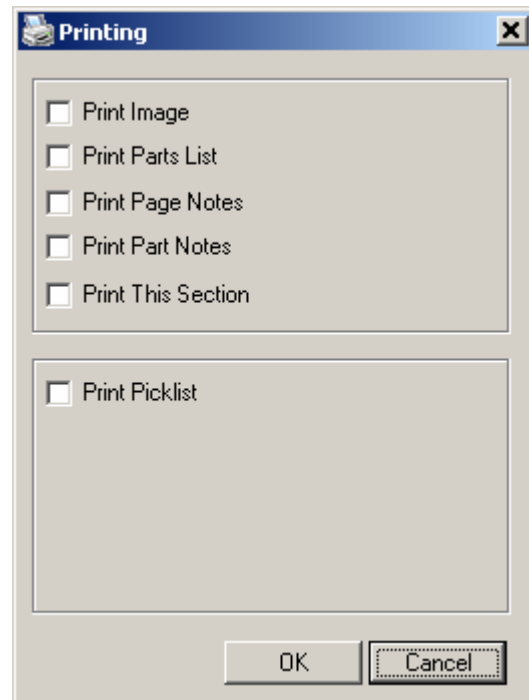
**Exception:** When you select **Print This Section**, you cannot select any other option at the same time.

**Print This Section** prints all parts pages for the level immediately above the pages. For some OEMs, this might be a catalog.

When you print a section, each parts page is displayed and printed in turn. The parts diagram is printed first, followed by the parts list.

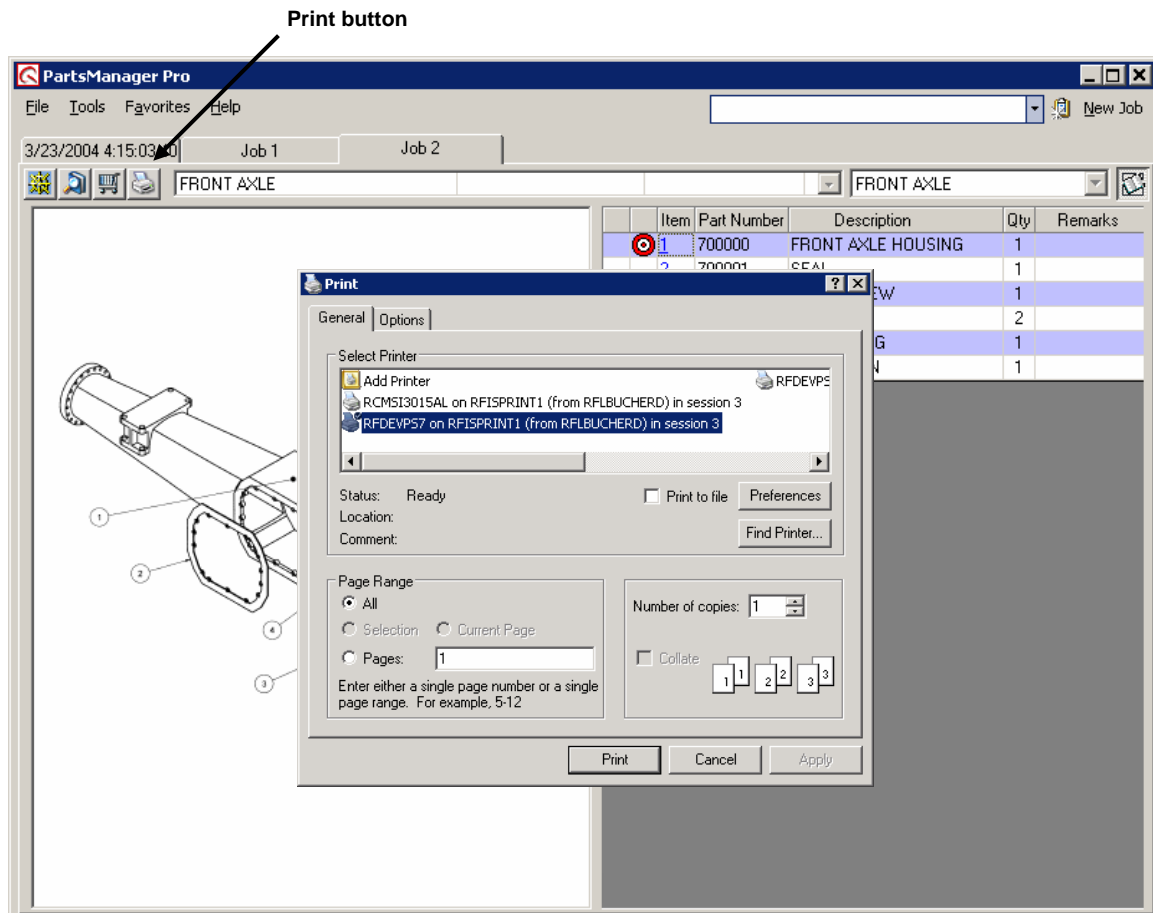
If you click **Cancel** to halt the printing of a section, the parts page currently displayed will finish printing before the process stops.


**Note:** **Print This Section** is available only if supported by your OEM data.



## Using the Parts Page Print Button

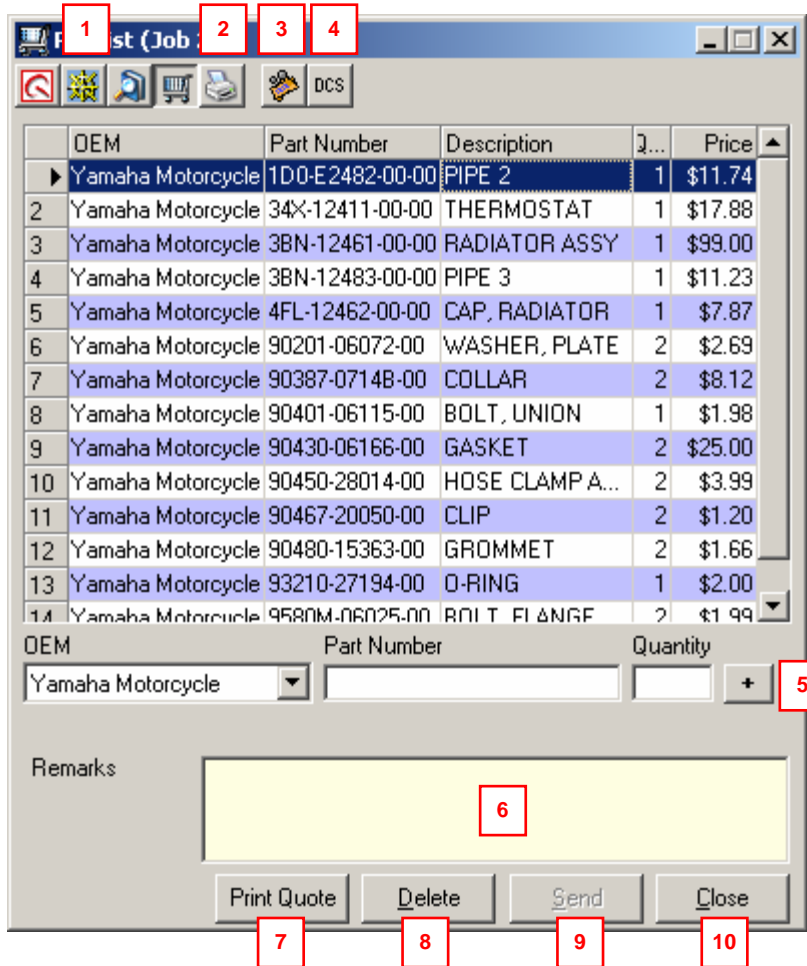
You can also print parts diagrams, parts lists, page notes, and part notes by clicking the parts page **Print** button.



1. Click the **Print** button .
2. The Windows Print dialog box opens.
3. Click the **Print** button in the dialog box.
4. The parts diagram and parts list are printed with applicable page notes and/or part notes.

# 7. Working with Picklists

PartsManager Pro allows you to create a picklist to accumulate part numbers for a job. You can create one picklist for each job and use that picklist to prepare a quote for a customer or send the list of parts to your business system.

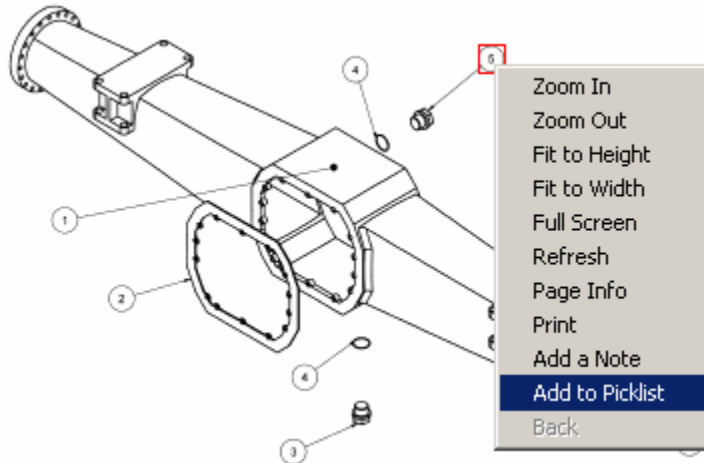


- 1 Display the Main Page, Navigation window, or Search dialog box.
- 2 Print the picklist.
- 3 Display prices in the picklist.
- 4 Create a DCS file. (See chapter 15)
- 5 Type a part number and quantity. Click this button to add a part.
- 6 Type a note to appear on the picklist.
- 7 Create a quote for a customer.
- 8 Delete highlighted parts from the picklist.
- 9 Send the picklist to a business system. (See also chapter 13)
- 10 Close the picklist.




## Adding Parts to a Picklist from a Parts Diagram

1. Place the mouse pointer directly on a callout. The pointer changes to a hand pointer.
2. Right-click to display a context menu.
3. Select **Add to Picklist** from the menu.



**Note:** **Add to Picklist** is not available from the menu until you move the pointer to a callout and it changes to a hand pointer.

4. The part is added to your picklist.
5. Click  to view your picklist.

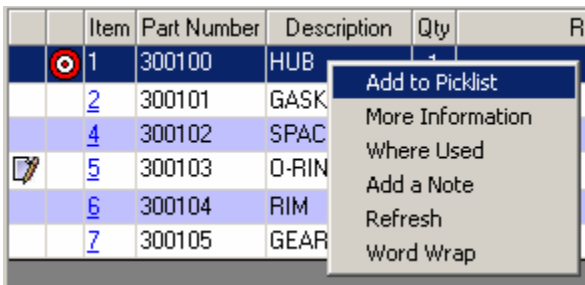
**Note:** You can also add a part by placing the mouse pointer on a callout and double-clicking.

## Adding Parts to a Picklist from a Parts List

1. In the parts list, right-click a part entry to display a context menu.


**Note:** To select multiple parts at a time, hold down the **Ctrl** key and click the entries in the parts list. The entries you select are highlighted. Then right-click the highlighted entries.

2. Select **Add to Picklist** from the menu to add the part to your picklist.



The screenshot shows a table with columns: Item, Part Number, Description, Qty, and Re. The first row is selected and has a context menu open over it. The context menu options are: Add to Picklist, More Information, Where Used, Add a Note, Refresh, and Word Wrap.

Item	Part Number	Description	Qty	Re
1	300100	HUB	1	
2	300101	GASK		
4	300102	SPAC		
5	300103	O-RIN		
6	300104	RIM		
7	300105	GEAR		

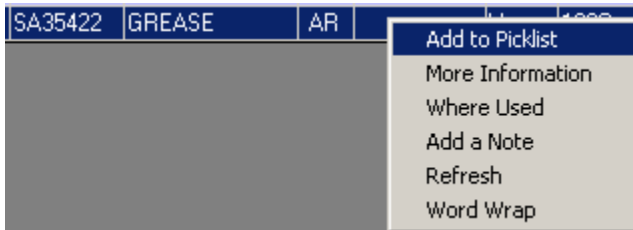
3. Click  to view your picklist.

**Note:** You can also double-click a part entry to add the part to a picklist.

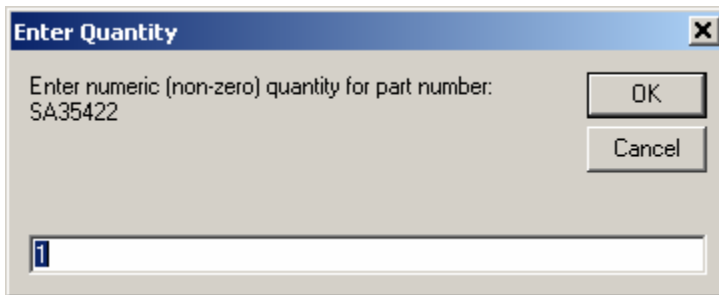
## Adding Parts with Non-Numeric Quantities

When a part shows a non-numeric quantity—“as required” (AR), for example—PartsManager Pro prompts for a numeric quantity when you add the part to a picklist.

1. Right-click the part and select **Add to Picklist**.




2. The following dialog box is displayed.



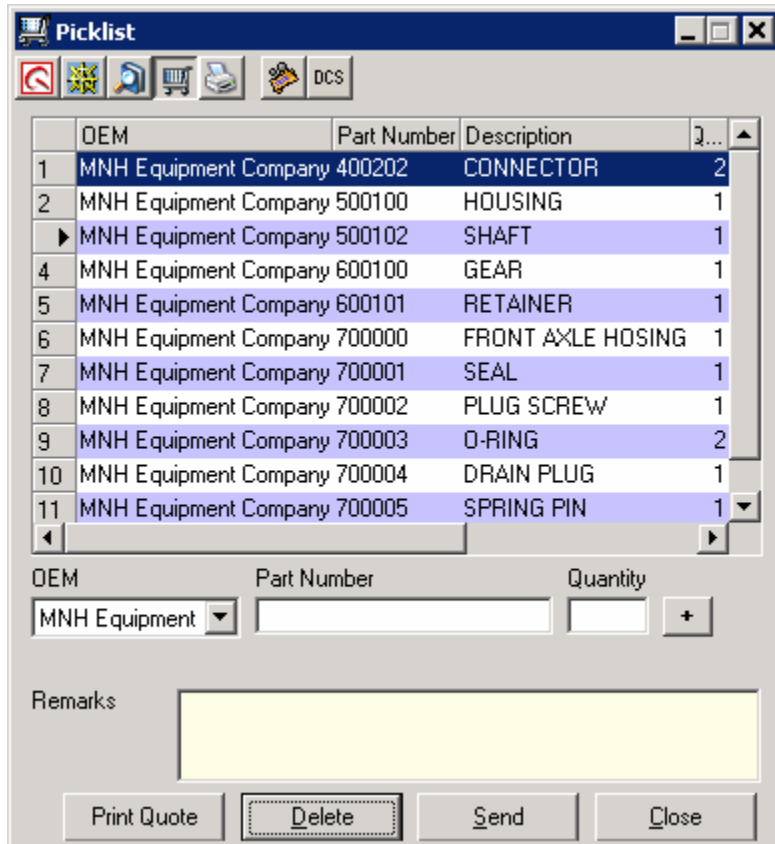
**Note:** A quantity of “1” appears by default.



3. If you need a single part, click **OK**. If you need more than one part, type a different number before clicking **OK**. The part will be added to your picklist with the quantity you entered.

## Adding Parts from the Picklist Dialog Box

After creating a picklist, click  to open the Picklist dialog box and view your list. From this dialog box you can add parts and modify your picklist.

1. Click .
2. The Picklist dialog box is displayed.



3. Select an OEM.
4. Type a part number in the Part Number text box
5. Type a quantity in the Quantity text box.
6. Click  or press **Enter**.
7. Repeat steps 4 through 6 for each part you need to add to the list. The parts appear in the picklist in the order in which they were added.
8. If you type information in the Remarks text box, it will appear each time you display this picklist.
9. To print the picklist, click .

## Changing Quantities on a Picklist

1. Click the quantity to highlight it.
2. Type the new quantity.

## Deleting Parts from a Picklist

### To delete a part from a picklist:


1. Click the part number you want to delete. The entry is highlighted.
2. Click **Delete**. The part is removed from your picklist.

### To delete multiple parts from a picklist:

1. Hold down the **Ctrl** key.
2. Click each part number you want to delete. The entries are highlighted.
3. Click **Delete**. The parts are removed from your picklist.

## Printing a Picklist

### To print directly from a picklist:

1. Click the picklist **Print** button .
2. The Windows Print dialog box opens.
3. Click the **Print** button in the dialog box.
4. The picklist is printed.

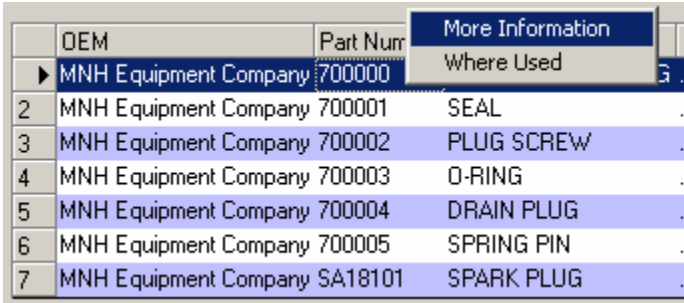
### To print a picklist when a parts page is displayed:

1. Select **Print** from the File menu.
2. The PartsManager Pro Printing dialog box is displayed.
3. Select **Print Picklist** from the dialog box.
4. Click **OK**.

# Displaying More Information from a Picklist

You can display additional information for a part number from a picklist by right-clicking the number.

1. With the picklist displayed, right-click the part entry to highlight it and display a context menu.

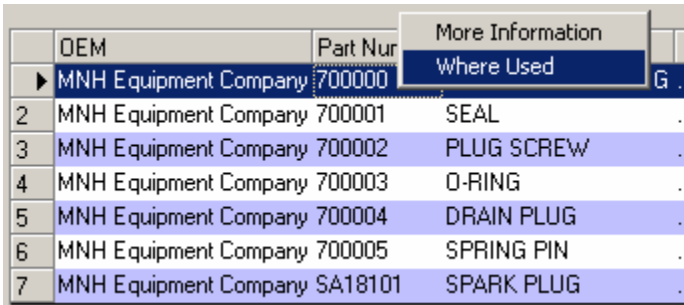


2. Select **More Information** to display the More Information window.

# Making a “Where Used” Search from a Picklist

You can search for all occurrences of a part number from a picklist by right-clicking the number.

1. With the picklist displayed, right-click the part entry to highlight it and display a context menu.



2. Select **Where Used** to display the Search dialog box.
3. The search results window lists all occurrences of the part number.
4. Double-click an entry to display the parts page.

# Rearranging Information in a Picklist

PartsManager Pro allows you to change the order in which information is listed and resize columns.

## Sorting Information


Change the order in which part entries are listed by doing the following:

Click a column header. Entries are listed in order according to the information in that column. An upward-pointing triangle appears on the right side of the header and information is arranged in order from first to last. That is, entries that begin with letters are arranged in A-Z order and entries that begin with numbers are arranged in 1-9 order.

If you click the column header again, a downward-pointing triangle appears on the right side of the header and information is arranged in order from last to first. That is, entries that begin with letters are arranged in Z-A order and entries that begin with numbers are arranged in 9-1 order.

## Resizing Columns

Resize column widths by doing the following:

1. Place the mouse pointer on the boundary between two column headers. The mouse pointer changes to .
2. Hold down the left mouse button.
3. Drag to the left or right.

# 8. Preparing a Quote for a Customer

PartsManager Pro allows you to prepare a quote for a customer. You can import and modify a picklist or type information manually. Then print your quote and/or save it as an HTML file.

## Using the Print Quote Dialog Box

With a picklist displayed, click **Print Quote** to display the Print Quote dialog box.

**Print Quote**

PO: 12345-001      Account: 0088

**Customer Info**

Customer: ABC Equipment Co.      Contact Name: John Smith  
Phone: 333-444-5555  
Address: 1234 Enterprise Way      State/Province: OH  
City: Springville      Zip Code: 44444  
Country: USA

Remarks: Items to ship immediately upon approval

Dealer Information: Add Row, Delete Row



Part Number	Description	Quantity	Price	Subtotal
400202	CONNECTOR	2	\$4.50	\$9.00
500100	HOUSING	1	\$20.50	\$20.50
500102	SHAFT	1	\$18.75	\$18.75
600100	GEAR	1	\$15.00	\$15.00
600101	RETAINER	1	\$6.00	\$6.00
700000	FRONT AXLE HOUSING	1	\$35.00	\$35.00
700001	SEAL	1	\$8.75	\$8.75
700002	PLUG SCREW	1	\$2.50	\$2.50
700003	O-RING	2	\$1.10	\$2.20

Currency Code: USD      Shipping Method: Best Way      Shipping/Handling: 15.00  
Labor Rate: 14.50  
Labor Hours: .5  
Total Cost: 147.80

Buttons: Import from Picklist, Print, Close



**Note:** When the Print Quote dialog box is displayed, you cannot switch to other functions in the application.



Feature	How to Use
<b>PO</b>	Type the customer's purchase order number in the PO text box.
<b>Account</b>	Type the customer's account number in the Account text box.
<b>Customer Information</b>	Type the name, contact, and address of the customer who will receive the quote.
<b>Remarks</b>	Type any special information you want to appear on the quote in the Remarks text box.
	Click the <b>Price Escalator</b> button and type a value to apply a discount or markup to all prices on the quote. See "Adjusting Prices on a Quote" for details.
<b>Dealer Information</b>	You only need to enter your dealership information one time. After you type this information, it will be applied automatically to each quote or eConnect order you create. If any information changes, you can modify it at any time. See "Entering Dealer Information" in chapter 1 for the procedure.
<b>Add Row</b>	Click the <b>Add Row</b> button to add a row to the Parts List window.
<b>Delete Row</b>	To delete one item from the Parts List window, click the entry to highlight it. Then click the <b>Delete Row</b> button. To delete multiple items, hold down the <b>Ctrl</b> key and click each item you want to delete. Then click the <b>Delete Row</b> button. To delete all items, click the first item, hold down the <b>Shift</b> key, and scroll down to the last item and click it. Then click the <b>Delete Row</b> button.
<b>Parts List window</b>	Displays the contents of a picklist or information you type. You can type more than parts information in this window. For example, you could add a line and type the tax.
<b>Currency Code</b>	Select the appropriate code for the currency you use.
<b>Shipping Method</b>	Type the name of the shipping vendor or method (Best Way, for example) that will deliver the parts to your customer.
<b>Import from Picklist</b>	Click the <b>Import from Picklist</b> button to import parts information from the current picklist into the Parts List window. You can modify this information if necessary.
<b>Print</b>	Click the <b>Print</b> button to open a dialog box. Print a paper copy of the quote and/or save the quote as a printable HTML file.
<b>Shipping/Handling</b>	Type the shipping and handling cost.
<b>Labor Rate</b>	Type the labor rate.
<b>Labor Hours</b>	Type the number of hours.
<b>Total Cost</b> 	Click the <b>Calculator</b> button to display the total for the prices, shipping, and labor. Click the button to recalculate the total any time you add more parts or manually change one or more prices. You do not need to recalculate after applying a value with the Price Escalator button. You can also type the total cost manually.
<b>Close</b>	Click the <b>Close</b> button to close the Print Quote dialog box.

## Preparing a Quote

The following procedure shows the basic steps in preparing a quote for a customer. All steps are not necessary for all situations. Use the dialog box features that are appropriate for each particular quote.

1. Type the customer's purchase order number in the PO text box.
2. Type the customer's account number in the Account text box.
3. Type the customer's business name and address and the name of the contact.
4. Type any special information you want to appear on the quote in the Remarks text box.
5. If you have not already entered your dealership information, click the **Dealer Information** button to open the Dealer Name dialog box. Then type information to identify you on the quote. Once you type your dealership information, it will be applied to each quote you create.
6. Click the **Import from Picklist** button to import the current picklist into the Parts List window. Or Press the **Add Row** button to create a blank row and type parts information instead.
7. If necessary, click the **Add Row** button to add rows for typing additional information such as additional parts, the amount of tax, etc.
8. If necessary modify the information. You can modify any information displayed, whether you typed it or imported it from a picklist.
9. Click the **Price Escalator** button  and apply a discount or markup to all prices on the quote.
10. Type the shipping and handling charge.
11. Type the labor rate and number of hours.
12. Click the **Calculator** button  to total your charges. You can also manually type the total if you prefer.
13. Click the **Print** button to open a dialog box.
  - To print your quote to fax to a customer, select **Print Quote** from the dialog box.
  - To save your quote as a printable HTML file for future reference or to make later modifications or additions, select **Save Quote** from the dialog box.
  - Click **OK**.
14. When you finish, click the Print Quote dialog box **Close** button.

## Entering Dealer Information

You only need to enter your dealership information one time. After you type this information, it will be applied automatically to each quote or eConnect order you create. If any information changes, you can modify it at any time. See “Entering Dealer Information” in chapter 1 for the procedure.

## Importing a Picklist

You can type parts and price information in the Parts List window or you can import information from the picklist for the current job.

To import picklist information, click the **Import from Picklist** button. The part number, description, quantity, and price for the parts on the picklist are displayed in the Parts List window. The OEM is not displayed for each part.

You can modify any information that appears in the Parts List window. Simply type over any information you need to change. If you change the quantity or price, the new subtotal is displayed in the Subtotal column.

To add more entries below the last item, click the **Add Row** button to create a blank row.

## Entering Parts and Price Information

As an alternative to importing and modifying information from a picklist, you can type all the parts and price information that will appear in the quote.

For each part that you want to include in the quote, type the part number, description, quantity, and price on a separate line in the Parts List window.


You can also type other types of information in this area. For example, you might want to type the amount of tax. You do not need to type information in every column.


When necessary, use the **Add Row** button to add rows for typing information.

1. Click the **Add Row** button. A new row appears with zeros displayed in the Price and Subtotal columns.
2. Click in the Part Number column, type a part number, and press the **Tab** key.
3. Type a description and press the **Tab** key.
4. Type a quantity and press the **Tab** key.
5. Type a price and press the **Tab** key. The price in the Subtotal column will be the sum of the unit cost you typed times the quantity you typed.
6. Use the **Add Row** button to add as many rows as necessary for additional information.
7. If necessary, modify any information, including prices, whether you typed it or imported it from a picklist.

## Calculating the Total Cost

Once you import and/or type information in the Parts List window, type your shipping and handling charge in the Shipping/Handling text box and type the labor rate and labor hours in their respective text boxes.

To calculate the total cost, click the calculator button  that appears next to the Total Cost text box.

**Note:** You must also click  when you change parts prices or other costs to update the total cost displayed.


The total of the parts prices, shipping and handling, labor cost, and any other amounts you typed is displayed in the Total Cost text box. You can type changes to the total.

# Adjusting Prices on a Quote

PartsManager Pro provides two ways to adjust prices on a quote.

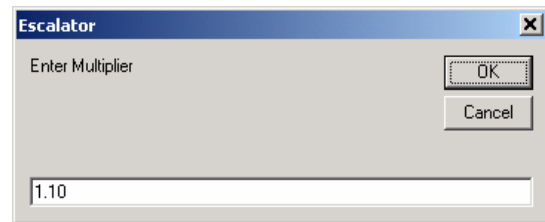
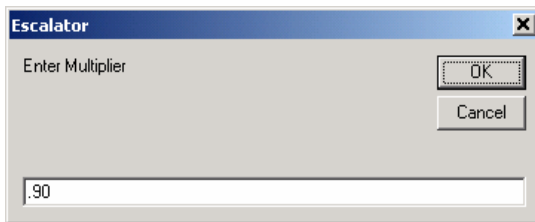
- ▶ Manually change individual prices by typing over an existing amount.
- ▶ Apply a discount or markup to all prices by using the Price Escalator button.

## Applying a Discount or Markup to All Prices

1. Click the **Price Escalator** button .
2. The Escalator dialog box is displayed.
3. Type a multiplier, that is, the percentage of the current price that you want to appear on the quote. The application multiplies all prices on the quote by the value you type.

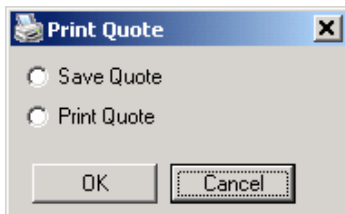
Example: Apply a 10% discount (charge 90% of the current price). Type **.90**.

Example: Apply a 10% markup (charge 110% of the current price). Type **1.10**.



For additional examples, see “Examples of Discounts and Markups” on the next page.

4. Click **OK**. The quote shows the discount or markup applied to all prices. Shipping/Handling and labor charges remain the same. The total adjusts automatically.
5. Click the **Print** button on the quote. The Print Quote dialog box is displayed.



To save the quote as a printable HTML file, select **Save Quote** and click **OK**. The adjusted prices and total are saved. See “Saving a Quote” on page 85 for details.

To print the quote, select **Print Quote** and click **OK**. The adjusted prices and total appear on the printed quote. See “Printing a Quote” on page 86 for details.

To save the quote as a printable HTML file *and* print it immediately, select **Save Quote**, click **OK**, and save the file. Then with the quote still open, click the **Print** button to redisplay the Print Quote dialog box, select **Print Quote**, and click **OK**.

## Examples of Discounts and Markups

### Discount prices by 25%:

In this example, you are effectively charging 75% of the original price. Type **.75** or **0.75** in the Escalator dialog box. For a \$2.00 item, the application multiplies the original price (\$2.00) by 0.75. The adjusted price is \$1.50.

### Mark up prices by 25%:

In this example, you are effectively charging 125% of the original price. Type **1.25** in the Escalator dialog box. For a \$2.00 item, the application multiplies the original price (\$2.00) by 1.25. The adjusted price is \$2.50.

### Double prices

In this example, you are effectively charging 200% of the original price. Type **2.00** or **2** in the Escalator dialog box. For a \$2.00 item, the application multiplies the original price (\$2.00) by 2. The adjusted price is \$4.00.

## Additional Information about Adjusting All Prices

Discounts and markups are applied to prices only. They do not affect shipping/handling and labor charges.

If you click the **Add Row** button to add an item to the quote after applying a discount or markup, the discount or markup will be cancelled and the original prices re-displayed.

If you make a mistake before selecting a print option, close and reopen the quote to redisplay the original prices and total.

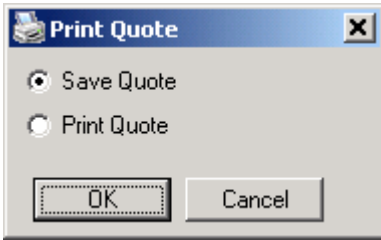
If you make a mistake after selecting a print option, delete all items from the quote and re-import the picklist.

**Note:** To delete all items, click the first item, hold down the **Shift** key, and scroll down to the last item and click it. Then click the **Delete Row** button.

# Saving a Quote

After entering the information in your quote, use this procedure to save your quote as a printable HTML file. You can save the file in a location of your choice and modify and/or print it. Or you can save it for future reference.

1. Click the **Print** button on the quote. The Print Quote dialog box is displayed.
2. Select **Save Quote**.



3. Click **OK**. The Save As dialog box is displayed.
4. Navigate to a folder or create a folder in which to save the file, type a file name, and click the **Save** button.
5. Double-click the file name to open the quote. It will look similar to the following:

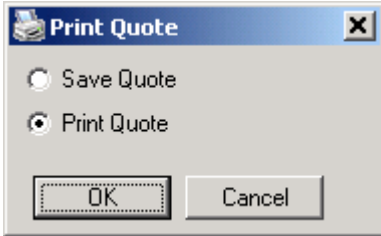
<b>PO</b> 12345-001	<b>Account</b> 0088	<b>Date</b> 7/15/2005				
<b>Dealer Information</b> Parts Emporium Ltd Samuel Jones 99 Market St Newtown, OH 44445 USA 333-445-6789		<b>Customer Info</b> ABC Equipment Co. John Smith 1234 Enterprise Way Springville, OH 44444 USA 333-444-5555				
	Part Number	Description	Quantity	Price	Extended Price	
1	400202	CONNECTOR	2	4.50	9.00	
2	500100	HOUSING	1	20.50	20.50	
3	500102	SHAFT	1	18.75	18.75	
4	600100	GEAR	1	15.00	15.00	
5	600101	RETAINER	1	6.00	6.00	
6	700000	FRONT AXLE HOISING	1	35.00	35.00	
7	700001	SEAL	1	8.75	8.75	
8	700002	PLUG SCREW	1	2.50	2.50	
9	700003	O-RING	2	1.10	2.20	
10	700004	DRAIN PLUG	1	5.75	5.75	
11	700005	SPRING PIN	1	2.10	2.10	
<b>Comments</b> Items to ship immediately upon approval			<b>Subtotal</b>	<b>Shipping</b>	<b>Labor</b>	<b>Total</b>
			125.55	15.00	7.25	147.80
<b>Shipping Method</b> Best Way			<b>Currency</b> USD			

**Note:** To save the quote as a printable HTML file *and* print it immediately, select **Save Quote**, click **OK**, and save the file. Then with the quote still open, click the **Print** button to redisplay the Print Quote dialog box, select **Print Quote**, and click **OK**.

# Printing a Quote

After entering the information in your quote, use this procedure to print a paper copy of your quote to fax to a customer.

1. Click the **Print** button on the quote. The Print Quote dialog box is displayed.
2. Select **Print Quote**.



3. Click **OK**. The Windows Print dialog box is displayed.
4. Click **Print** in the Windows Print dialog box to print the quote. The printed quote will look similar to the following:

<b>PO</b> 12345-001	<b>Account</b> 0088	<b>Date</b> 7/15/2005				
<b>Dealer Information</b> Parts Emporium Ltd Samuel Jones 99 Market St Newtown, OH 44445 USA 333-445-6789		<b>Customer Info</b> ABC Equipment Co. John Smith 1234 Enterprise Way Springville, OH 44444 USA 333-444-5555				
	Part Number	Description	Quantity	Price	Extended Price	
1	400202	CONNECTOR	2	4.50	9.00	
2	500100	HOUSING	1	20.50	20.50	
3	500102	SHAFT	1	18.75	18.75	
4	600100	GEAR	1	15.00	15.00	
5	600101	RETAINER	1	6.00	6.00	
6	700000	FRONT AXLE HOISING	1	35.00	35.00	
7	700001	SEAL	1	8.75	8.75	
8	700002	PLUG SCREW	1	2.50	2.50	
9	700003	O-RING	2	1.10	2.20	
10	700004	DRAIN PLUG	1	5.75	5.75	
11	700005	SPRING PIN	1	2.10	2.10	
<b>Comments</b> Items to ship immediately upon approval			<b>Subtotal</b>	<b>Shipping</b>	<b>Labor</b>	<b>Total</b>
			125.55	15.00	7.25	147.80
<b>Shipping Method</b> Best Way			<b>Currency</b> USD			

**Note:** To save the quote as a printable HTML file *and* print it immediately, select **Save Quote**, click **OK**, and save the file. Then with the quote still open, click the **Print** button to redisplay the Print Quote dialog box, select **Print Quote**, and click **OK**.

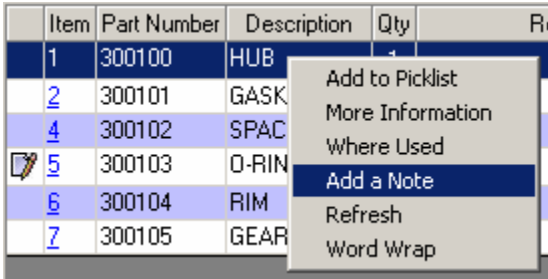


# 9. Creating and Viewing User Notes

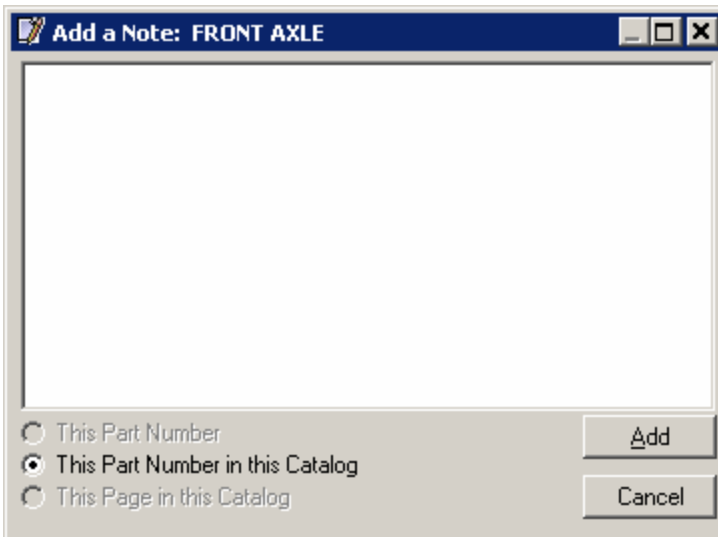
To supplement information from the OEM, you can create your own notes and link them to part numbers in a single catalog or all catalogs.

## Creating User Notes

1. With the appropriate parts page displayed, right-click the part number to which you want to link a note. The part entry is highlighted and a context menu is displayed.



2. Select **Add a Note** to display the Add a Note dialog box. The applicable figure number or page title is displayed in the title bar of the dialog box.




3. Type your note in the text box.


4. Select an option.

- To link your note to this part number only, select **This Part Number**.
- To link your note to all occurrences of this part number in the current catalog, select **This Part Number in this Catalog**.
- To link your note to the current parts page, select **This Page in this Catalog**.

5. Click **Add**.



- If you selected the first or second radio button,  precedes the part number(s) in the parts list.

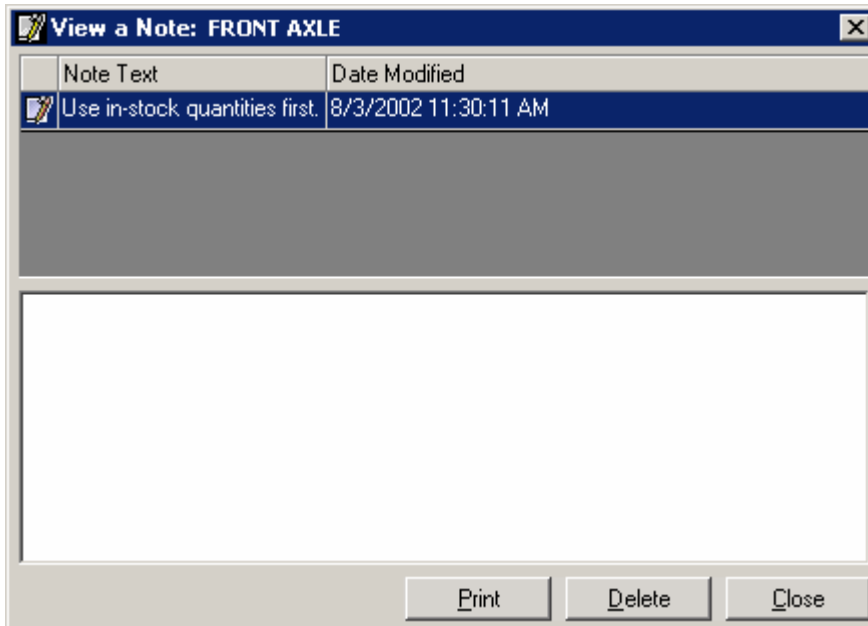


- If you selected the third radio button,  appears on the Job tab when you display that parts page.



## Viewing User Notes

When  appears in front of a part entry or on a job tab, a user note is available. Click  to open the View a Note window. The text of the note and the date it was created or last modified are displayed. The applicable figure number or page title is displayed in the title bar of the window.



## Modifying User Notes

1. Click the note. The text of the note is displayed in the large text box.
2. Type your changes.
3. Click **Close**. The modified note is attached to the part number.

**Note:** Click the note again in the upper portion of the window to see your changes.

## Deleting User Notes

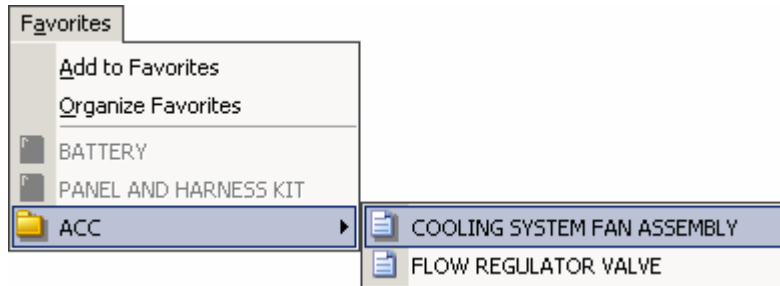
1. Click the note. The note is highlighted.
2. Click **Delete**.

## Printing User Notes

To print the notes listed in the window, click the **Print** button.

# 10. Bookmarking Your Favorite Parts Pages

When you use certain parts pages frequently, you can store them as “favorites”. The favorite folders and files you create are listed in the bottom portion of the Favorites menu so you can select them quickly and easily.



When you select a favorite, PartsManager Pro immediately takes you to the parts page. The parts page is displayed in the current job.

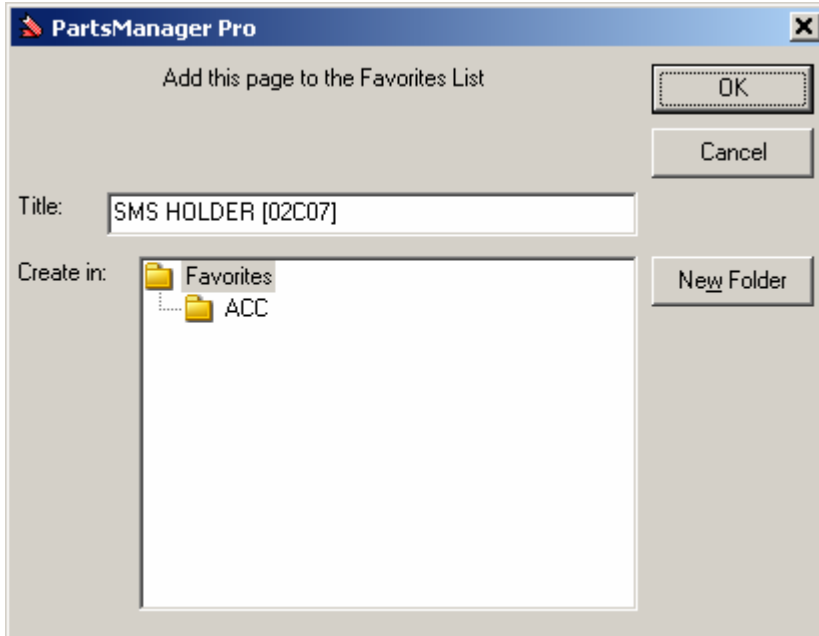
Clicking a folder opens a list of favorites saved in the folder. Clicking a favorite in the folder displays the corresponding parts page.

**Note:** On a network, favorites are only available from the PC on which they were created. They cannot be accessed from other PCs on the network.

**Note:** If you uninstall an OEM, any favorites saved for that OEM are grayed out and are no longer available.

# Creating Favorites

To bookmark a parts page as a favorite, display the page and select **Add to Favorites** from the Favorites menu. The Favorites dialog box will be displayed.



Element	How to Use
<b>Title</b>	The Title text box displays the title of the open parts page. You can click in the text box and type a new title.
<b>Create In</b>	The Create In window lists favorite files and folders.
<b>OK</b>	The OK button saves a favorite and closes the dialog box.
<b>Cancel</b>	The Cancel button closes the dialog box without saving a favorite.
<b>New Folder</b>	The New Folder button creates a new folder with a default name in the Create In window. You can change the default name by selecting <b>Organize Favorites</b> from the Favorites menu.

### **Example: Create a Favorite**

1. With the parts page displayed, select **Add to Favorites** from the Favorites menu to open the Favorites dialog box.

**Note:** You can change the title of your favorite by clicking in the Title text box and typing a new title.

2. Add your favorite to a folder.
  - To create a new folder for your favorite, click **New Folder** to display a new folder in the Create In window. The application assigns a default name to a new folder. You can change the name.
  - To add your favorite to an existing folder, click the folder to highlight it.
3. Click **OK** to store your favorite in the folder.

# Organizing Favorites

Select **Organize Favorites** from the Favorites menu to open the Organize Favorites dialog box.



Element	How to Use
<b>Create Folder</b>	The Create Folder button allows you to create a new folder with a default name in the Favorites window. You can change the default name with the Rename button.
<b>Move to Folder</b>	The Move to Folder button allows you to move the selected favorite to a different folder.
<b>Rename</b>	The Rename button allows you to rename the selected folder.
<b>Delete</b>	The Delete button deletes the selected folder.
<b>Favorites Window</b>	The Favorites window lists favorites and favorite folders stored on the PC.
<b>Close</b>	The Close button saves your changes and closes the Organize Favorites dialog box.

### **Moving a Favorite**

1. Click the favorite to highlight it.
2. Click **Move to Folder** to open a dialog box.
3. Click the destination folder to highlight it.
4. Click **OK**.

### **Renaming a Favorite or Folder**

1. Click the favorite or folder to highlight the name.
2. Click **Rename**.
3. Type the new name.
4. Click **Close**.

### **Deleting a Favorite or Folder**

1. Click the favorite or folder to highlight the name.
2. Click **Delete**.
3. Click **Close**.



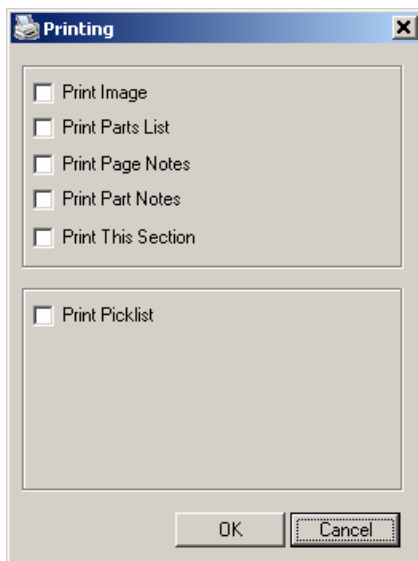
# 11. Printing: Quick Reference

PartsManager Pro allows you to print parts pages, picklists, page notes, part notes, sections, More Information displays, supersession information, quotes, and part compare information. This chapter provides a quick overview of how to print these types of information. For details, see the applicable chapter in this guide for each feature.

## Print Parts Pages

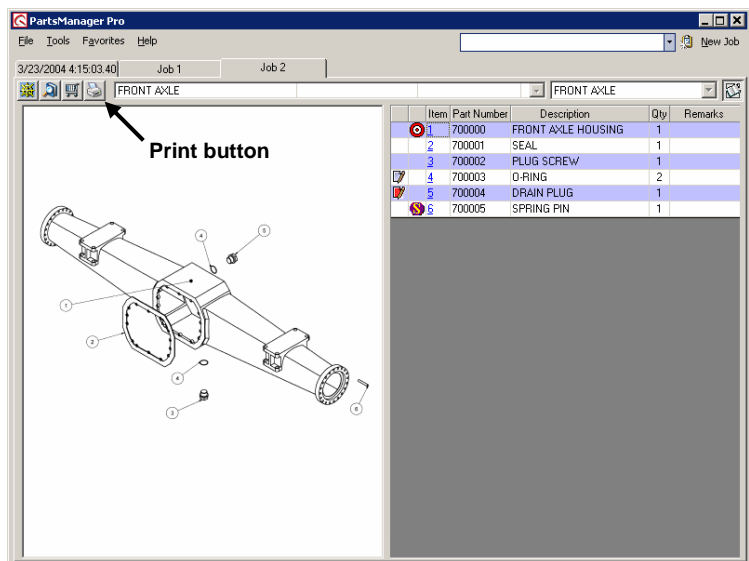
When a parts page is displayed, you can print information by using the **Print** command from the File menu or the **Print** button.

### Using the File Menu “Print” Command



1. Select **Print** from the File menu.
2. The Printing dialog box opens.
3. Select one or more options.
4. Click **OK**.

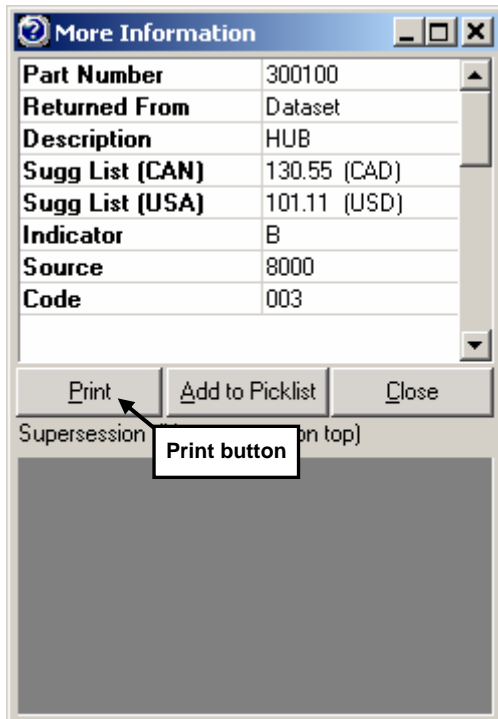
### Using the Parts Page “Print” Button



1. Click the **Print** button.
2. The Windows Print dialog box opens.
3. Click the **Print** button in the dialog box.
4. The parts diagram, parts list, page notes, and part notes print.

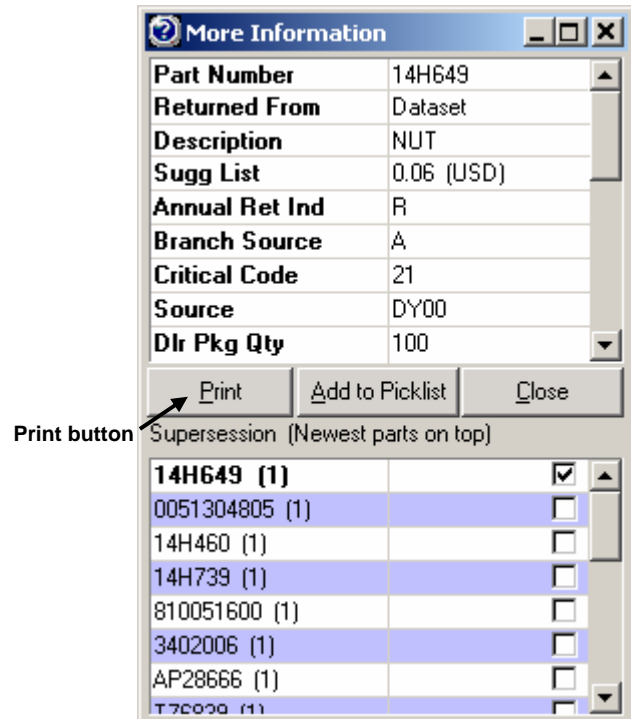
# Print More Information and Supersession History

## Printing More Information



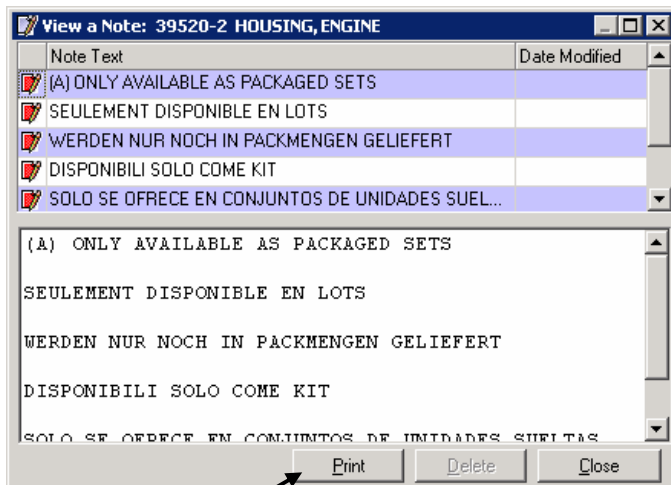
1. Right-click an entry in a parts list.
2. Select **More Information**.
3. The More Information window opens.
4. Click the **Print** button.
5. Information in the window prints.



## Printing Supersession Information



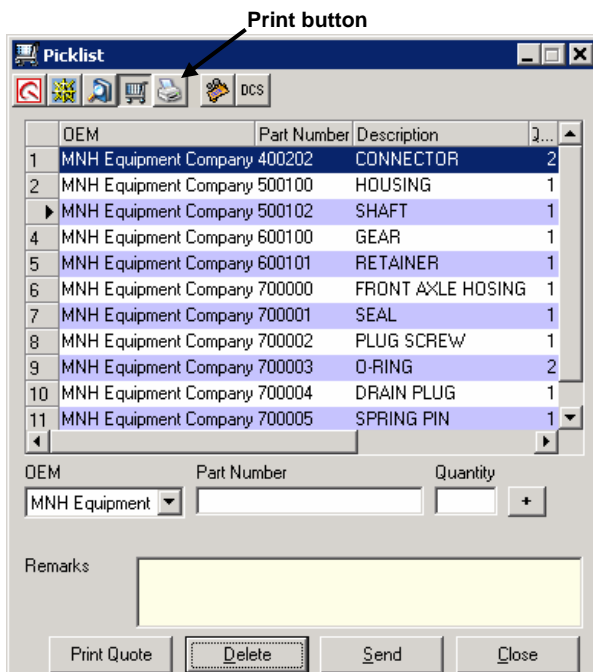
1. Click **S** in a parts list.
2. The More Information window opens.
3. Click the **Print** button.
4. Information in the window prints.


## Print Page and Part Notes from the Notes Window



1. Click the OEM note icon  or user note icon  in a parts list or on a parts page tab.
2. The Notes window is displayed.
3. Click the **Print** button.
4. The notes listed in the window are printed.

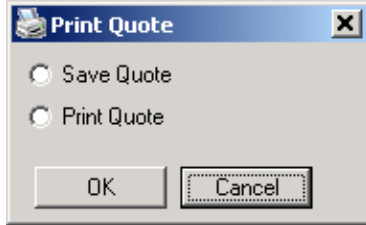
## Print a Picklist



1. Click the picklist **Print** button .
2. The Windows Print dialog box opens.
3. Click the **Print** button in the dialog box.
4. The picklist is printed.

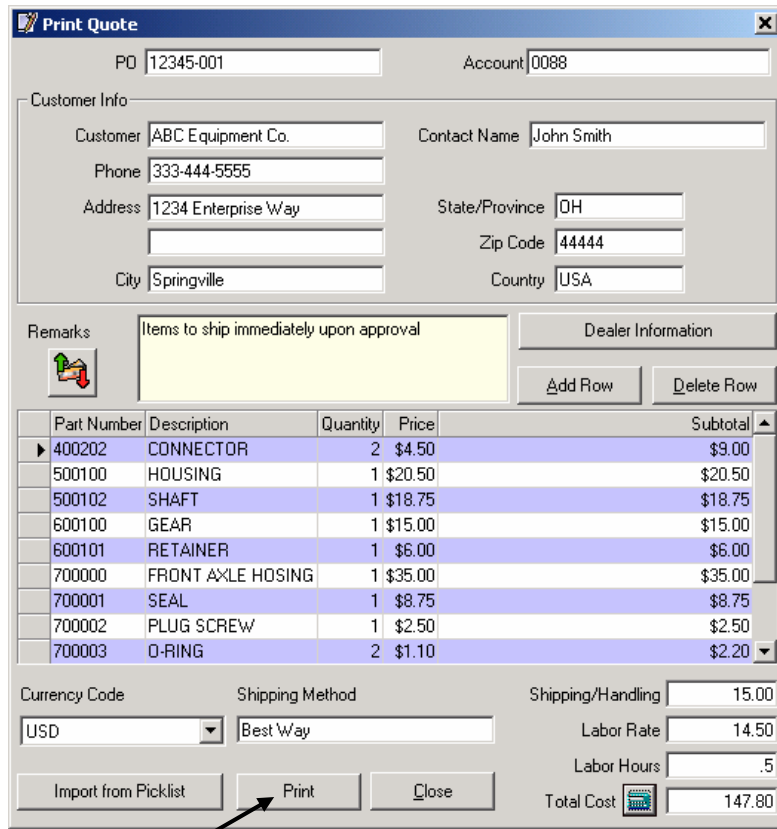
# Print a Quote

From the quote, click the **Print** button. The Print Quote dialog box opens.



To save the quote as a printable HTML file, select **Save Quote** and click **OK**.

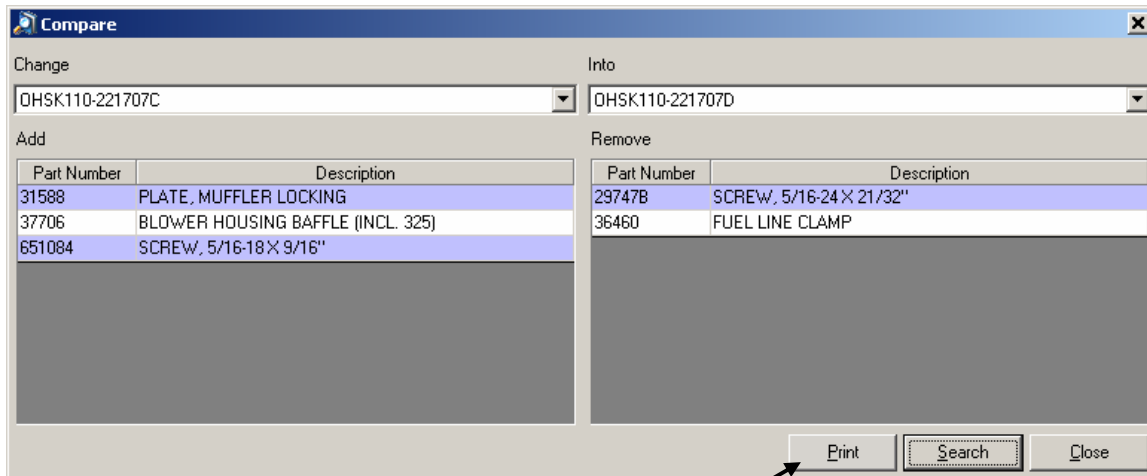
To print the quote, select **Print Quote** and click **OK**.



Print button

# Print "Compare" Information

After selecting the model specifications you want to compare, click **Search** to list the parts that are different. To print the part numbers and descriptions, click the **Print** button.



Print button

# 12. Shortcut Keys: Quick Reference

Keyboard shortcuts are available for many PartsManager Pro features. This chapter provides shortcuts for some commonly used application functions. Use the keystrokes shown in the “Do this” column as follows:

Keystrokes	What they mean
“Alt+key1 key2”	Hold down the Alt key and press key1. Then press key2.
“Alt+key1 key2” [item] Alt+key3 key4	Hold down the Alt key and press key1. Press key2. Next, highlight the item. Then hold down the Alt key and press key3. Finally, press key4.
“Tab [button] Enter”	Press the Tab key as often as necessary to highlight the button. Then press the Enter key.
“ Tab [button] Enter [criteria] Alt+key1”	Press the Tab key as often as necessary to highlight the button. Next, press the Enter key. Then enter your search criteria. Finally, hold down the Alt key and press key1.

## Changing Settings

To	Do this
Open the Settings dialog box.	Alt+T S

## Working with Jobs

To	Do this
Create a new job.	Alt+N
Open the Job Manager.	Alt+F O or Alt+T J
Close the Job Manager.	Alt+C
Open an existing job.	Alt+F O [job] Alt+O or Alt+T J [job] Alt+O
Close the current job.	Alt+F C
Close all open jobs.	Alt+F L
Close the application.	Alt+F E
Rename a job.	Alt+F O [job] Alt+M or Alt+T J [job] Alt+M
Delete a job.	Alt+F O [job] Alt+D or Alt+T J [job] Alt+D

## Searching for Information

To	Do this
Open the Search window.	Tab  Enter




## Navigating to a Parts Page

To	Do this
Open the Navigation window.	Tab  Enter.

## Working with Parts Pages

To	Do this
Open the Print dialog box.	Alt+F P
Mark a parts page as a favorite.	Alt+A A
Organize your favorites.	Alt+A O

## Working with Picklists

To	Do this
Open the Picklist dialog box.	Tab  Enter
Delete a part from a picklist.	Tab  Enter [part] Alt+D
Send a part to a business system (if configured).	Tab  Enter [part] Alt+S
Close the Picklist dialog box.	Alt+C

## Working with Quotes (with Quote dialog box open)

To	Do this
Add a row.	Alt+A
Delete a row.	Alt+D
Close the Quote dialog box.	Alt+C

## Getting Help

To	Do this
Open the online Help.	Alt+H H
Open the user's guide as a PDF.	Alt+H U
Start the interactive tutorial.	Alt+H T

## Closing PartsManager Pro

To	Do this
Close the application.	Alt+F E

# 13. Setting Up a Business System Interface (BSI)

PartsManager Pro allows you to create, modify, and delete business system interface configurations. When you configure your business system interface, you can send parts information to your business system and receive return information in the More Information window. If you create more than one configuration, you can select the one you want to view and modify the values or delete the configuration entirely. See “Sample BSI Configurations” for examples of configurations that allow you to send single-OEM and multiple-OEM picklists via your BSI.

## Setting BSI Options

Start setting up your business system interface from the PartsManager Pro Part Integration dialog box. Select **Part Integration** from the Tools menu.

The screenshot shows the 'Part Integration' dialog box with three tabs: 'BSI', 'eConnect', and 'WW Price Books'. The 'BSI' tab is active, showing a 'BSI Setup' section with a list box containing '-- New --'. To the right of the list box is the 'Connection Info' section with fields for 'IP Address', 'Timeout (ms)', and 'Port'. Below this is the 'Branch Info' section with fields for 'Branch', 'Customer Number', 'Manufacturer Code', 'Dataset' (set to 'MNH Equipment Company'), and 'Currency Code' (set to 'USD'). There is also a checkbox for 'Send orders to this branch'. At the bottom of the dialog are 'Delete', 'Save', and 'Close' buttons.

Depending on your business needs, you will either set up a connection to a business system or subscribe to eConnect. You will *not* use both.

For information on setting up eConnect, see the next chapter.

**Note:** The WW Price Books tab is only available for OEMs whose price files are in a particular format.

## Setting BSI Options

Option	How to Set
<b>IP Address</b>	Type the IP address of the branch server to which you are connecting.
<b>Timeout (ms)</b>	Type the amount of time in milliseconds (ms) that PartsManager Pro should wait for a response when a request is submitted. For example, if you type <b>5000</b> , PartsManager Pro will wait five seconds (5000 ms = 5 seconds).
<b>Port</b>	Type the port number to which you are connecting.
<b>Send orders to this branch</b>	Select this check box if you want to submit orders from PartsManager Pro to this branch.  <b>Note:</b> If you do not select this check box, you will not be able to access this branch even if you create a configuration.
<b>Branch</b>	Type the name of the branch. The name you type appears in the window in the upper left corner of the dialog box after you save the configuration.
<b>Customer Number</b>	Type the number to use as a default customer number.
<b>Manufacturer Code</b>	Type the code that identifies the manufacturer.
<b>Dataset</b>	Select the manufacturer whose parts will be supplied by the branch.
<b>Currency Code</b>	Type the currency code to be applied to prices.
<b>Delete</b>	Select a branch from the window in the upper left corner of the dialog and click the <b>Delete</b> button to delete a BSI configuration.
<b>Save</b>	Click the <b>Save</b> button when you finish entering information.
<b>Close</b>	Click the <b>Close</b> button to close the Part Integration dialog box.



## Creating a BSI Configuration

1. Select **Part Integration** from the Tools menu.  
The Part Integration dialog box is displayed.
2. Select **New** from the window in the upper left corner.
3. Enter appropriate information in the text boxes and list boxes.
4. Click **Save**.
5. Click **Close**.

## Modifying a BSI Configuration

1. Select **Part Integration** from the Tools menu.  
The Part Integration dialog box is displayed.
2. Select the appropriate configuration from the window in the upper left corner. The values you entered for that configuration are displayed in the text boxes and list boxes.
3. Enter new information in the applicable text boxes and list boxes.
4. Click **Save**.
5. Click **Close**.

## Deleting a BSI Configuration

1. Select **Part Integration** from the Tools menu.  
The Part Integration dialog box is displayed.
2. Select the appropriate configuration from the window in the upper left corner.
3. Click **Delete**.
4. Click **Close**.

# Sample BSI Configurations

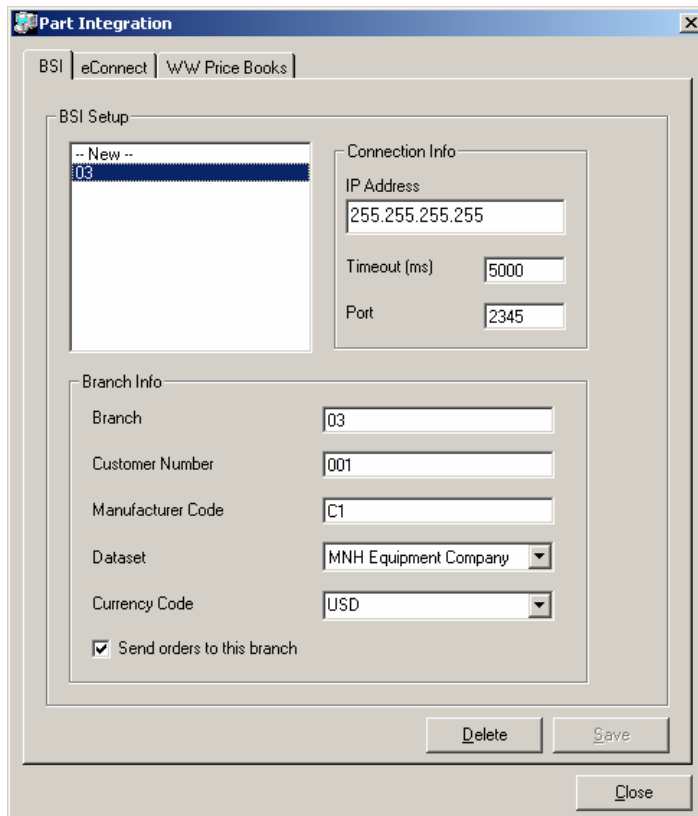
These examples show how to set up BSI configurations for sending single-OEM or marketing unit or multiple-OEM or marketing unit picklists to one or more business systems. How you create your BSI configurations will depend on your particular business system environment.

## Configuring the BSI for a Single-OEM/Marketing Unit

1. Select **Part Integration** from the PartsManager Pro Tools menu. The Part Integration dialog box is displayed.
2. Select **New** from the window in the upper left corner.
3. Type an IP address, timeout value (in milliseconds), and port in the appropriate text boxes. Select an OEM or marketing unit from the OEM list box.

**Note:** You must always enter at least these four values when creating a BSI configuration.

4. If appropriate, type a branch name, customer number, and manufacturer code. If you want to send orders to this branch, select the “Send orders to this branch” check box.
5. Click **Save**.
6. The name you typed in the Branch text box will appear in the window in the upper left corner of the dialog box. When you click the branch name, the values you entered are displayed.

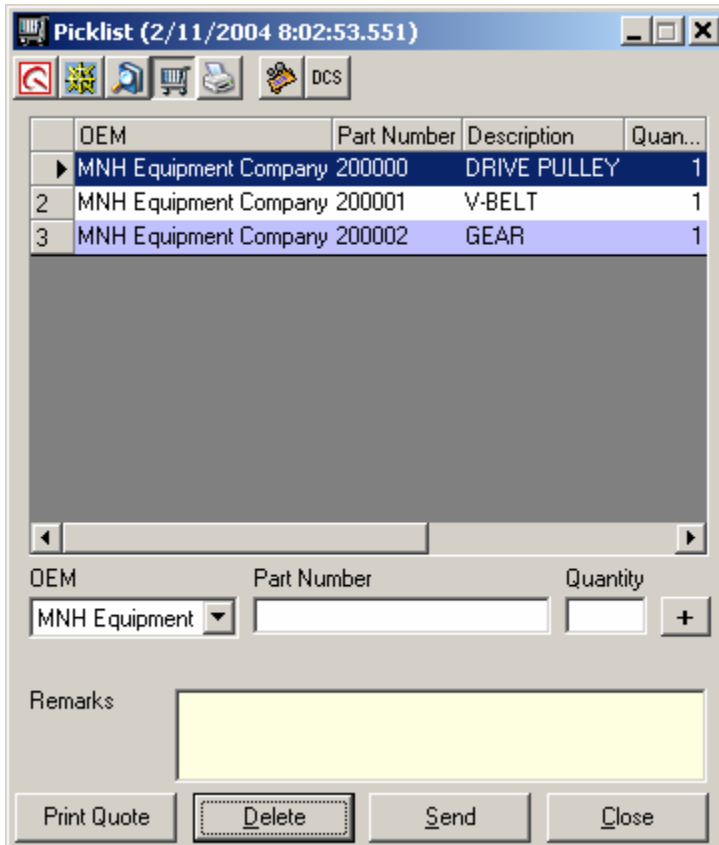


The screenshot shows the 'Part Integration' dialog box with the following fields and values:

Section	Field	Value
BSI Setup	Connection Info	
	IP Address	255.255.255.255
	Timeout (ms)	5000
	Port	2345
Branch Info	Branch	03
	Customer Number	001
	Manufacturer Code	C1
	Dataset	MNH Equipment Company
	Currency Code	USD
	<input checked="" type="checkbox"/> Send orders to this branch	

Buttons: Delete, Save, Close

7. Create a picklist. See “Working with Picklists” for the procedure.



8. Click the Picklist dialog box **Send** button.

**Note:** A message indicates that the picklist with data from a single OEM/marketing unit was sent to a single business system.

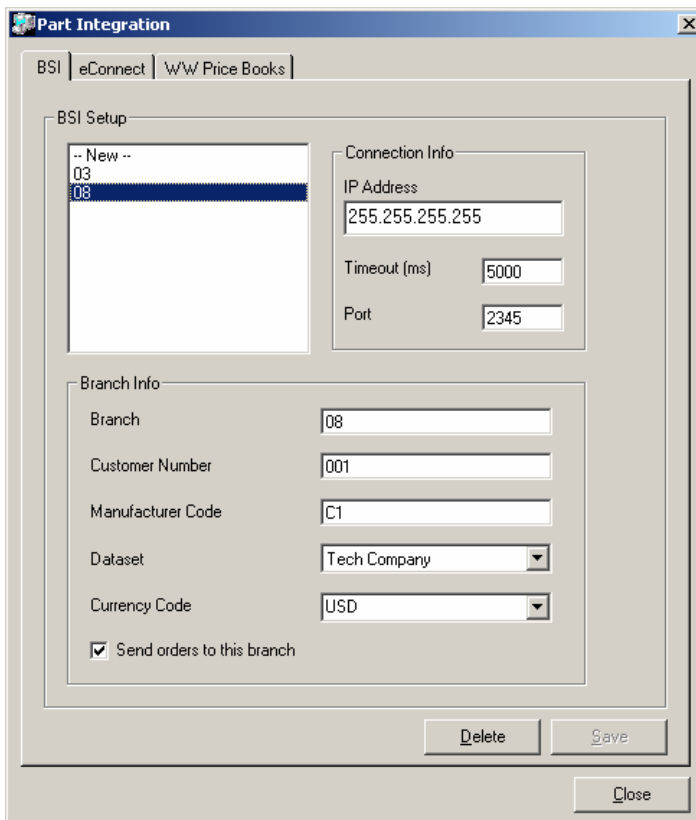
9. Click **OK** to close the message box.

## Configuring the BSI for Multiple OEMs/Marketing Units with the Same Manufacturer Code

1. Select **Part Integration** from the PartsManager Pro Tools menu. The Part Integration dialog box is displayed.
2. Select **New** from the window in the upper left corner.
3. Type an IP address, timeout value (in milliseconds), port, and manufacturer code in the appropriate text boxes. Select an OEM or marketing unit from the OEM list box.

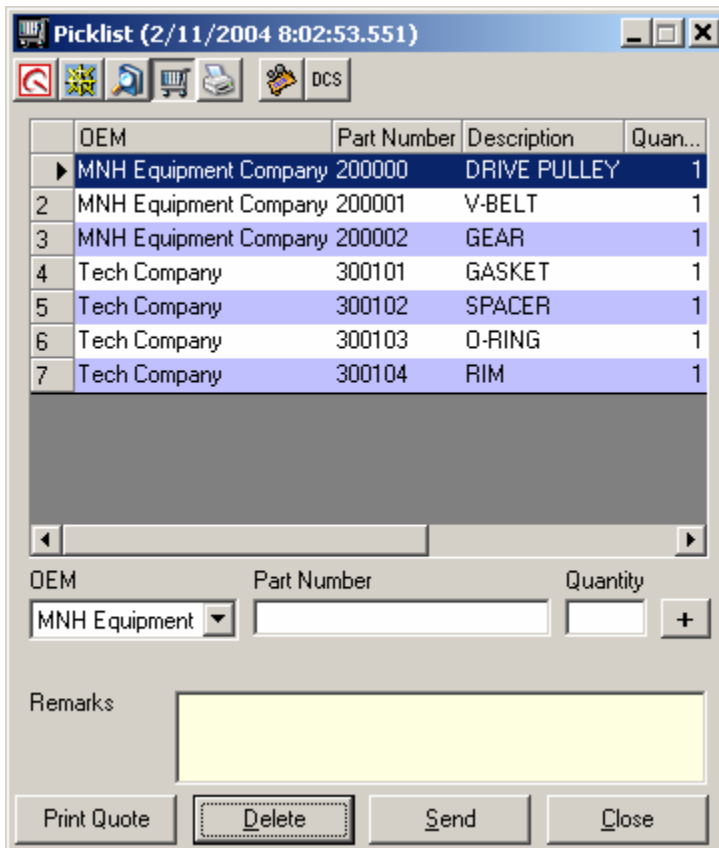
**Note:** You must always enter at least these five values when creating a multi-OEM/marketing unit BSI configuration.

4. When appropriate, type a branch name and customer number. If you want to send orders to this branch, select the “Send orders to this branch” check box.
5. Click **Save**.
6. The name you typed in the Branch text box will appear in the window in the upper left corner of the dialog box. When you click the branch name, the values you entered are displayed.



**Note:** In this example, branch 08 uses the same manufacturer code (C1) as the 03 branch created in the previous example. This indicates that picklists containing data from these two companies will be sent to the same business system.

7. Create a picklist using data from both OEMs/marketing units. See “Working with Picklists” for the procedure.



8. Click the Picklist dialog box **Send** button.

**Note:** A message indicates that the picklist with data from two OEMs/marketing units was sent to a single business system. In this case, these two OEMs/marketing units were configured for the same manufacturer code.

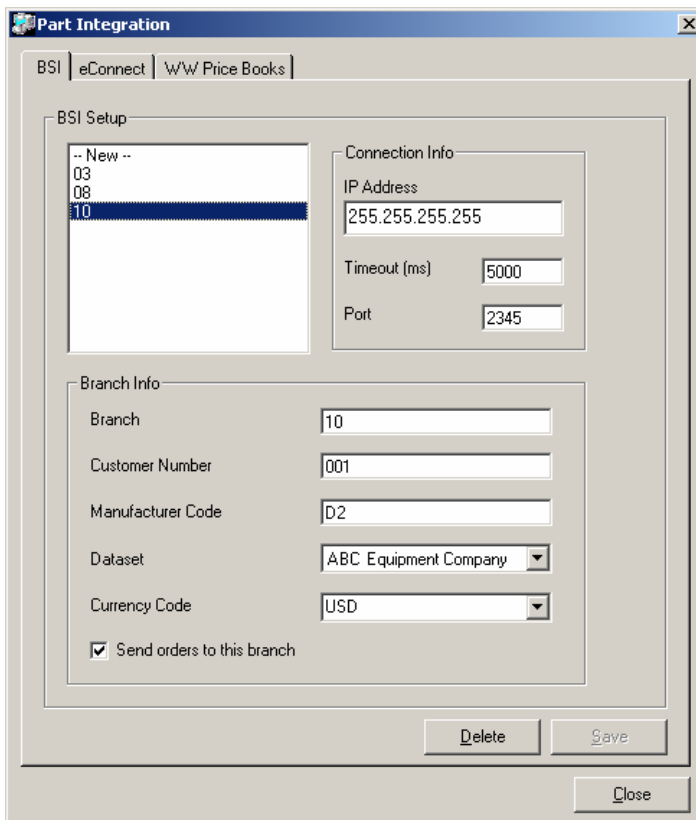
9. Click **OK** to close the message box.

## Configuring the BSI for Multiple OEMs/Marketing Units with Different Manufacturer Codes

1. Select **Part Integration** from the PartsManager Pro Tools menu. The Part Integration dialog box is displayed.
2. Select **New** from the window in the upper left corner.
3. Type an IP address, timeout value (in milliseconds), port, and manufacturer code in the appropriate text boxes. Select an OEM or marketing unit from the OEM list box.

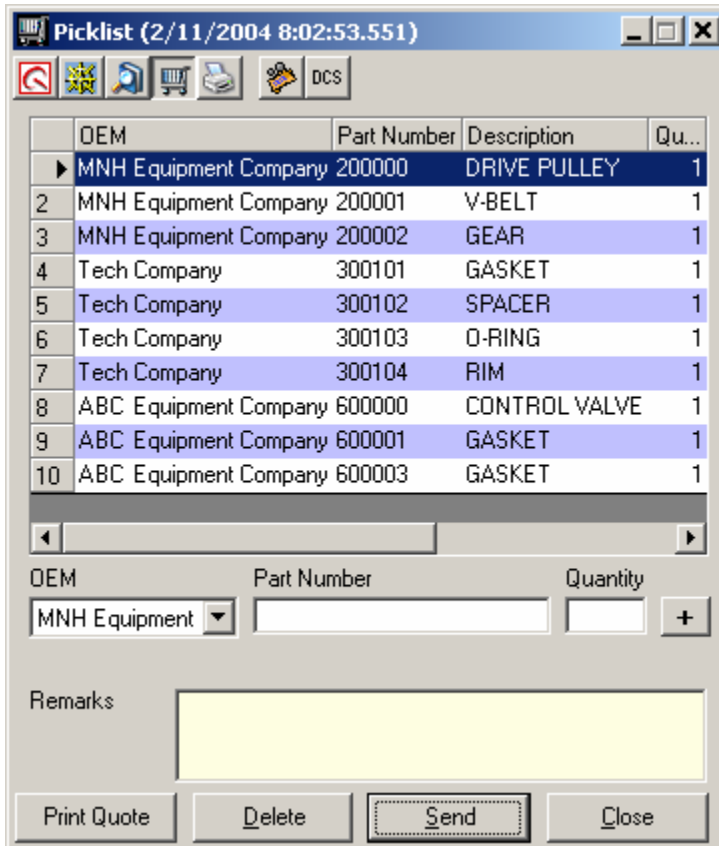
**Note:** You must always enter at least these five values when creating a multi-OEM/marketing unit BSI configuration.

4. When appropriate, type a branch name and customer number. If you want to send orders to this branch, select the “Send orders to this branch” check box.
5. Click **Save**.
6. The name you typed in the Branch text box will appear in the window in the upper left corner of the dialog box. When you click the branch name, the values you entered are displayed.



**Note:** In this example, branch 10 uses a manufacturer code (D2) different from the codes created for the 03 and 08 branches in the previous examples. This indicates that picklists containing data from the 03 and 08 branches will be sent to one business system, while data from 10 will be sent to a different business system.

7. Create a picklist using data from all three OEMs/marketing units. See “Working with Picklists” for the procedure.



8. Click the Picklist dialog box **Send** button.

**Note:** A message indicates that the picklist with data from three OEMs/marketing units was sent to two business systems. In this case, ABC Equipment Company data was sent to one business system, while data for MNH Equipment Company and Tech Company (configured for the same manufacturer code) was sent to a different business system.

9. Click **OK** to close the message box.

# 14. Setting Up and Using eConnect

If you have a connection to a dealer management system (DMS) that does not support ordering parts electronically from your vendor(s), you probably phone or fax your orders. By subscribing to eConnect, you can use PartsManager Pro to view real-time inventory information and order parts electronically from one or more trade partners (vendors).

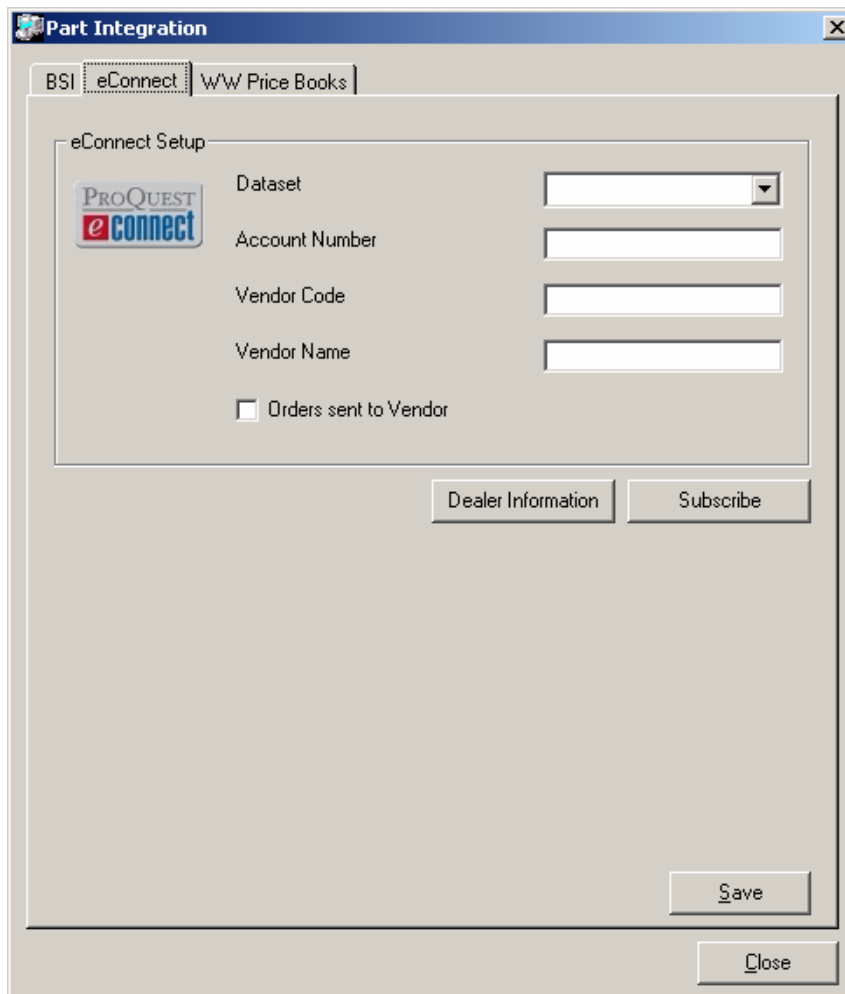
Depending on your business needs, you will either set up a connection to a business system or subscribe to electronic ordering using eConnect. You will *not* use both.

**Important:** You must have an Internet connection to use eConnect with PartsManager Pro.

## Signing In

Start setting up eConnect from the PartsManager Pro Part Integration dialog box.

1. Select **Part Integration** from the Tools menu. Then click the **eConnect** tab.



The screenshot shows the 'Part Integration' dialog box with the 'eConnect' tab selected. The dialog has three tabs: 'BSI', 'eConnect', and 'W/W Price Books'. The 'eConnect Setup' section contains the following fields and controls:

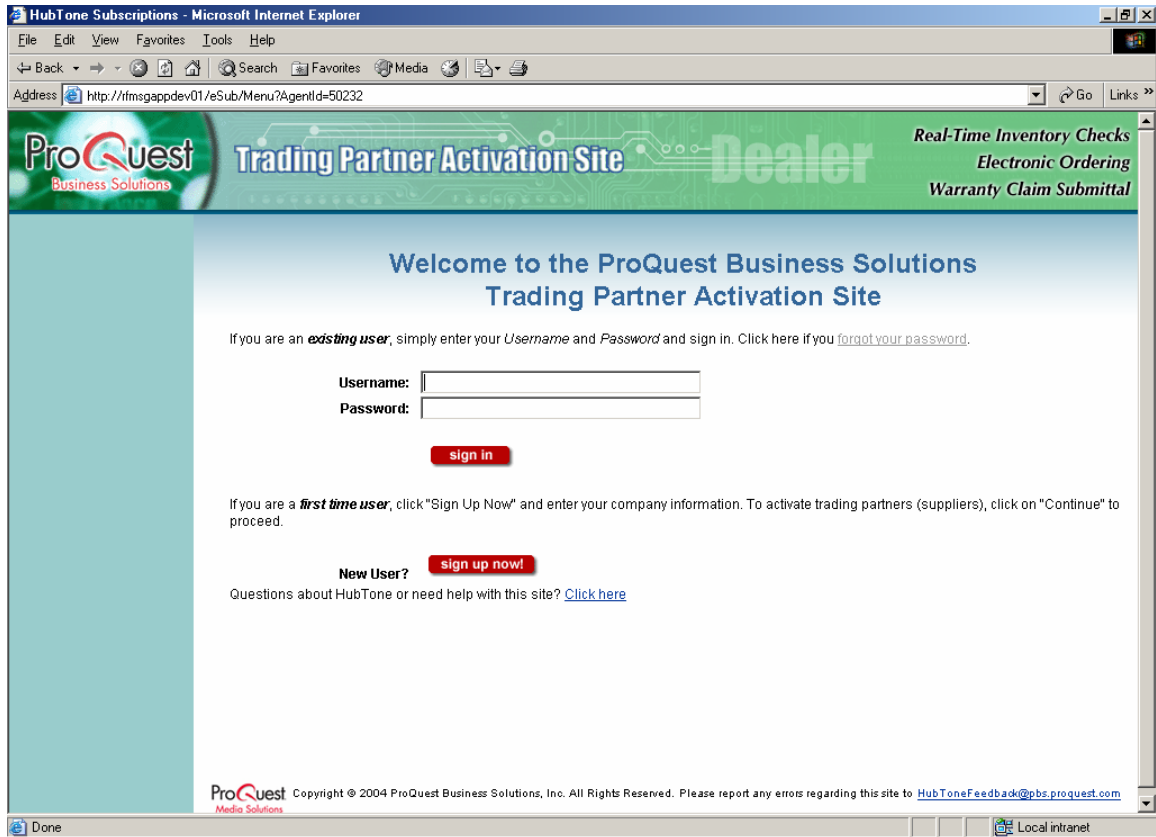
- Dataset:** A dropdown menu.
- Account Number:** A text input field.
- Vendor Code:** A text input field.
- Vendor Name:** A text input field.
- Orders sent to Vendor**

At the bottom of the dialog, there are three buttons: 'Dealer Information', 'Subscribe', and 'Save'. A 'Close' button is located at the bottom right corner of the dialog box.

2. Click the **Subscribe** button.



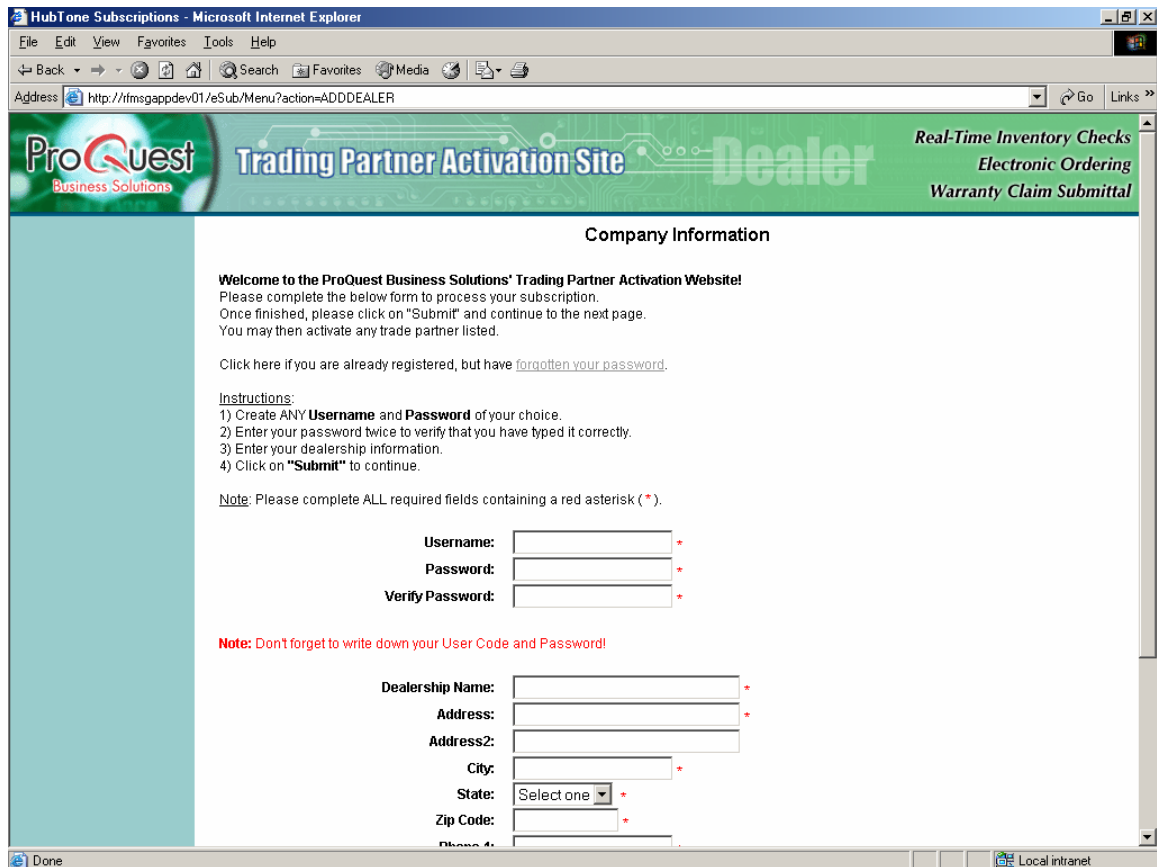
3. The Login page is displayed.



4. Sign in to eConnect.

- If you have already created a user name and password, type your user name and password, click the **Sign In** button, and skip to “Adding a Subscription” later in this chapter.
- If you are a new user, click the **Sign Up Now** button.

The Company Information page is displayed.



5. Type a user name in the Username text box.
6. Type a password in the Password text box.
7. Type the password again in the Verify Password text box.

**Note:** Write down the user name and password that you create.

8. Enter your dealership information.

**Note:** This information is for your eConnect subscription only. It may differ from the dealership information that you entered in PartsManager Pro.

You must enter information in each field that displays a red asterisk (\*). If you previously entered your dealership information, it will already be displayed in these fields. For example:

HubTone Subscriptions - Microsoft Internet Explorer

Address <http://fmsgappdev01/eSub/Menu?action=ADDDEALER>

Click here if you are already registered, but have [forgotten your password](#).

Instructions:  
1) Create ANY **Username** and **Password** of your choice.  
2) Enter your password twice to verify that you have typed it correctly.  
3) Enter your dealership information.  
4) Click on "**Submit**" to continue.

Note: Please complete ALL required fields containing a red asterisk (\*).

Username:  \*

Password:  \*

Verify Password:  \*

**Note: Don't forget to write down your User Code and Password!**

Dealership Name:  \*

Address:  \*

Address2:

City:  \*

State:  \*

Zip Code:  \*

Phone 1:  \*

Phone 2:

Fax:

Email:

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Local intranet

9. Click the **Submit** button.

**Note:** Everyone at your dealership can use the user name and password you create. It is **not** necessary to create a different user name and password for each PC running PartsManager Pro with eConnect.

Next you need to add a subscription. Proceed to the next section, "Adding a Subscription", to learn how.

# Adding a Subscription

When you enter a user ID and password to log on to eConnect, the Current Subscriptions page is displayed. From this page you can start the process of adding a subscription.

The screenshot shows a Microsoft Internet Explorer browser window displaying the ProQuest Trading Partner Activation Site. The address bar shows the URL: <http://fmsgappdev01/eSub/Menu>. The page header includes the ProQuest Business Solutions logo and the text "Trading Partner Activation Site Dealer". On the right side of the header, there are links for "Real-Time Inventory Checks", "Electronic Ordering", and "Warranty Claim Submittal".

The main content area is titled "Current Subscriptions". It features a left-hand navigation menu with the following items: "Trading Partners", "Company Information", "Users Management", "Feedback", and "Logout".

The main content area contains the following text:

**Congratulations!**  
Now all you need to do is add some service subscriptions.  
Click on the "Add New Subscription" button and it will lead you through the process.  
Not sure [which service is right for you?](#)  
You can come back at any later date and add more.  
At any time you may click on the blue links for an explanation of that item.

There are two buttons: "add new subscription" (highlighted in red) and "advanced" (highlighted in red).

Below the buttons is a table with the following columns:

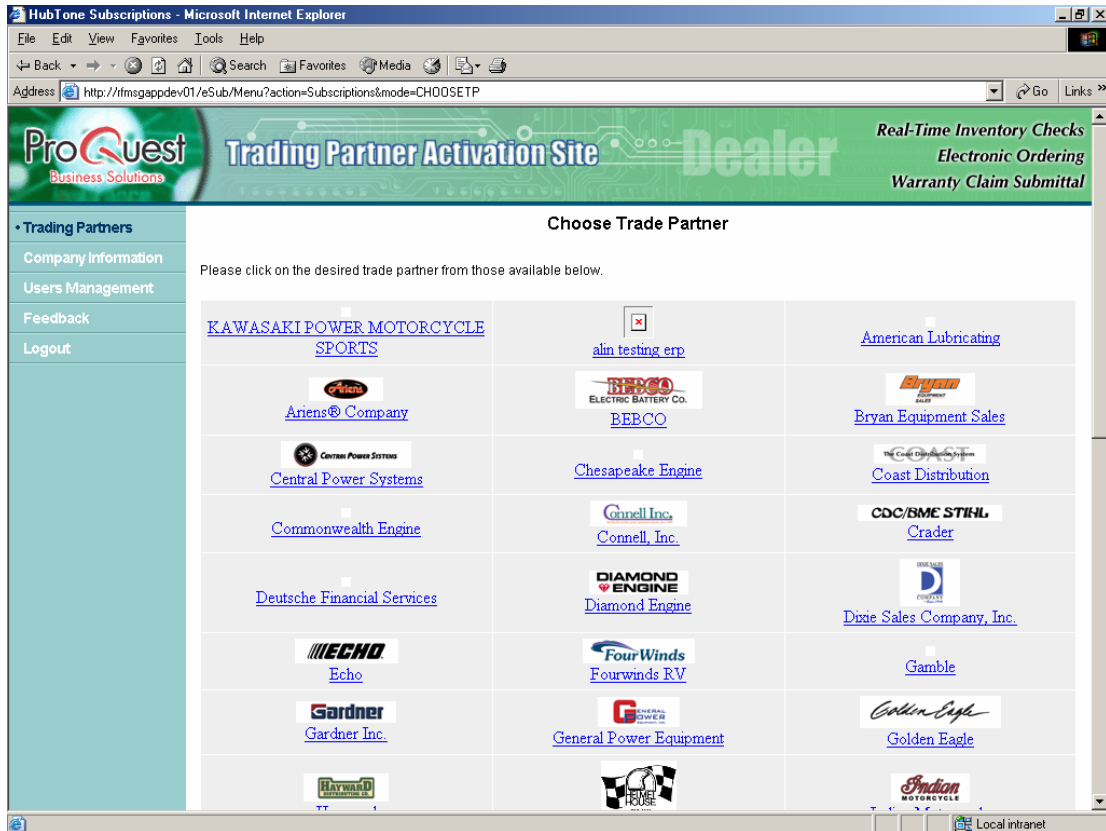
<a href="#">Trading Partner</a>	<a href="#">Vendor</a>	<a href="#">Account Number</a>	<a href="#">Password</a>	<a href="#">Username</a>	<a href="#">Subscription</a>		
<a href="#">---Service Type</a>	<a href="#">Code</a>				<a href="#">Type</a>		

Below the table, there is a red message: "You are not currently subscribed to any services. Please click "Add New Subscription" button above."

At the bottom of the page, there is a footer with the ProQuest logo and the text: "Copyright © 2004 ProQuest Business Solutions, Inc. All Rights Reserved. Please report any errors regarding this site to [HubToneFeedback@pbs.proquest.com](mailto:HubToneFeedback@pbs.proquest.com)".

## To add a subscription:

1. From the Current Subscriptions page, click the **Add New Subscription** button. The Choose Trade Partner page is displayed.



“Trade partners” are the manufacturers and distributors with whom you transact business. It is another term for “vendors” or “suppliers”. The Choose Trade partner page lists all available trade partners alphabetically by name. Each name appears as a clickable link below a logo.

2. If necessary, scroll down the page until you find the trade partner you want.

3. Click the link to display the Choose Service page.



As used with eConnect, “services” refers to two primary ways of doing business with eConnect:

**Dealer Xpress:** Enables electronic ordering using the Dealer Xpress Web application.

**Integrated DMS:** Enables eConnect for PartsManager Pro.

4. Click the [Integrated DMS](#) link.

The Add Service page is displayed.

HubTone Subscriptions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Address <http://fmsgappdev01/eSub/Menu?action=Subscriptions&mode=EDITSERVICE&TPID=1094&ServiceID=1&act=ADD> Go Links

**ProQuest** Business Solutions **Trading Partner Activation Site** Dealer

Real-Time Inventory Checks  
Electronic Ordering  
Warranty Claim Submittal

• Trading Partners **Add Service**

Company Information  
Users Management  
Feedback  
Logout

Please fill out the information for this service.

Tech Inc. -- Integrated DMS

Vendor Code:

Dealer Number:

save cancel

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Local intranet

5. Type the vendor code provided by your DMS in the Vendor Code text box.

**Important:** This code must match the vendor code in your DMS.

6. Type a dealer number in the Dealer Number text box.

**Note:** As used with eConnect, “Dealer Number” is the same as “Account Number”.

7. Click the **Save** button.

The Current Subscriptions page is again displayed. The page now shows your trade partner and the service type to which you subscribed, your vendor code (a code you create to designate the trade partner), your account number (same as your dealer number), and additional information that applies to your subscription(s).

**Current Subscriptions**

**Congratulations!**  
 Now all you need to do is add some service subscriptions.  
 Click on the "Add New Subscription" button and it will lead you through the process.  
 Not sure [which service is right for you?](#)  
 You can come back at any later date and add more.  
 At any time you may click on the blue links for an explanation of that item.

[add new subscription](#) [advanced](#)

<a href="#">Trading Partner</a> ---- <a href="#">Service Type</a>	<a href="#">Vendor Code</a>	<a href="#">Account Number</a>	<a href="#">Password</a>	<a href="#">Username</a>	<a href="#">Subscription Type</a>		
Tech Inc.							<a href="#">remove</a>
---- <a href="#">Integrated DMS</a> <a href="#">Login</a>		12345-001				<a href="#">edit</a>	<a href="#">remove</a>

Total Subscriptions : 1

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**Note:** The column headers on the Current Subscriptions page are Help links. Click a link to display a brief description of how to enter information in that column. The column headers shown on the sample page above are examples only.

**Note:** Clicking the **Edit** button displays the Edit Service page is displayed. From this page you can edit an existing subscription.

- Click the **Logout** link on the left side of the screen.

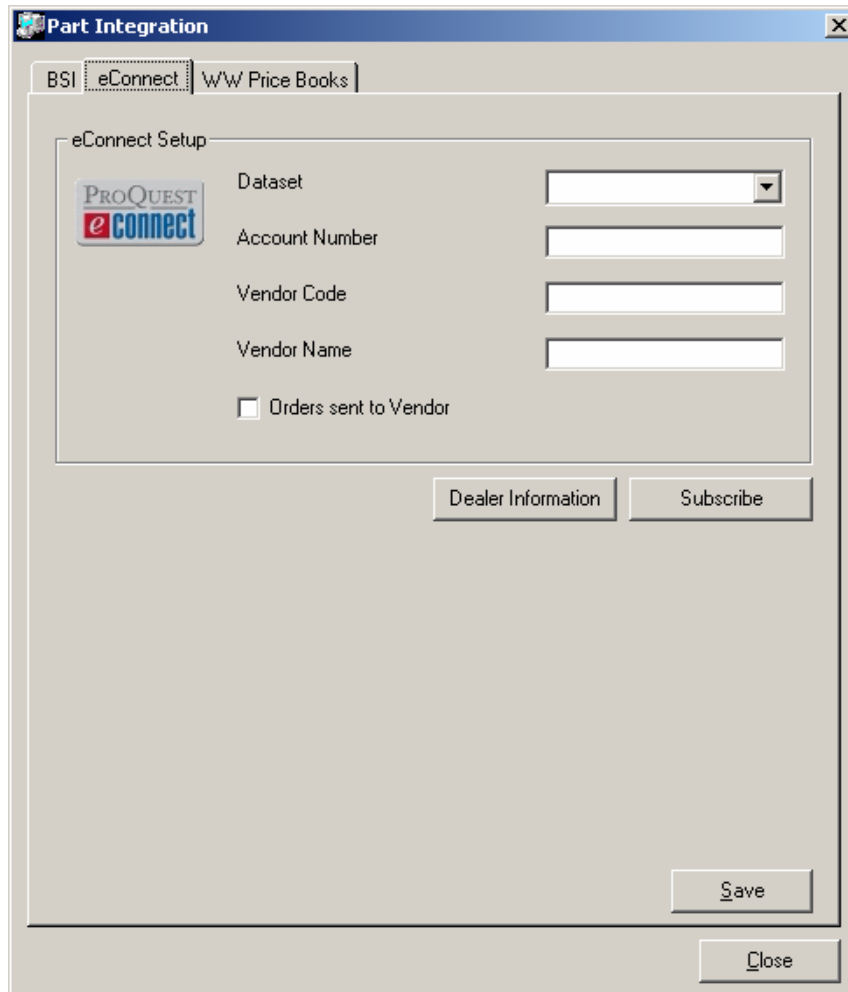
You are now ready to set up eConnect in PartsManager Pro. See the next section, "Setting Up eConnect in PartsManager Pro".



# Setting Up eConnect in PartsManager Pro

The previous section showed how to subscribe to eConnect and set up your trade partners (vendors). This section shows how your subscriptions allow you to set up eConnect in PartsManager Pro.

Start by selecting **Part Integration** from the Tools menu. The Part Integration dialog box is displayed. Click the **eConnect** tab.



The screenshot shows the 'Part Integration' dialog box with the 'eConnect' tab selected. The 'eConnect Setup' section contains the following fields and controls:

- Dataset:** A dropdown menu.
- Account Number:** A text input field.
- Vendor Code:** A text input field.
- Vendor Name:** A text input field.
- Orders sent to Vendor:** A checkbox.

At the bottom of the dialog box, there are three buttons: 'Dealer Information', 'Subscribe', and 'Save'. A 'Close' button is located at the bottom right corner of the dialog box.

Depending on your business needs, you will either set up a connection to a business system or subscribe to eConnect. You will *not* use both.

For information on setting up a connection to a business system, see the previous chapter.

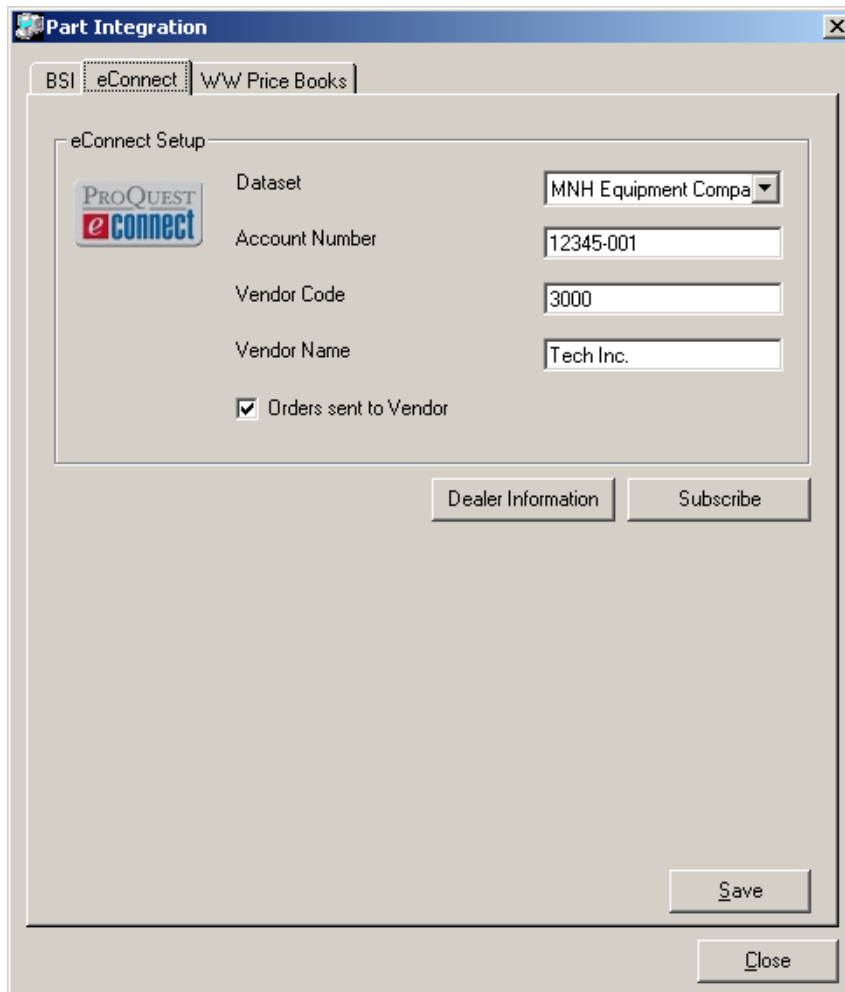
**Note:** The WW Price Books tab is only available for OEMs whose price files are in a particular format.

## Setting eConnect Options

Option	How to Set
<b>Subscribe</b>	Click the <b>Subscribe</b> button to subscribe to services and add trade partners (vendors).
<b>Dealer Information</b>	You only need to enter your dealership information one time. After you type this information, it will be applied automatically to each quote or eConnect order you create. If any information changes, you can modify it at any time. See "Entering Dealer Information" in chapter 1 for the procedure.
<b>Dataset</b>	Currently, a purchase order can include parts from one manufacturer only. Select the manufacturer from this list box.
<b>Account Number</b>	The first time you select an OEM on the eConnect tab, this field will be empty. Once you type and save the number, it will display automatically.  <b>Note:</b> As used with eConnect, "Account Number" is the same as "Dealer Number".
<b>Vendor Code</b>	The first time you select an OEM on the eConnect tab, this field will be empty. Once you type and save the code, it will display automatically.  <b>Note:</b> This code must match the vendor code in your DMS.
<b>Vendor Name</b>	The first time you select an OEM on the eConnect tab, this field will be empty. Once you type and save the name, it will display automatically.
<b>Orders Sent to Vendor</b>	This check box activates and deactivates eConnect. Select this check box to enable eConnect. De-select the check box to disable eConnect.
<b>Save</b>	Click the <b>Save</b> button when you finish entering information.
<b>Close</b>	Click the <b>Close</b> button after typing the account number, vendor code, and vendor name for the selected OEM.

## Entering Ordering Account Information

1. From the eConnect tab in the Part Integration dialog box, select an OEM from the OEM list box.
2. Type the account number, vendor code, and vendor name.
3. Select the **Orders Sent to Vendor** check box.



The screenshot shows the 'Part Integration' dialog box with the 'eConnect' tab selected. The 'eConnect Setup' section contains the following fields and controls:

- Dataset:** A dropdown menu showing 'MNH Equipment Compa'.
- Account Number:** A text box containing '12345-001'.
- Vendor Code:** A text box containing '3000'.
- Vendor Name:** A text box containing 'Tech Inc.'.
- Orders sent to Vendor:** A checked checkbox.

At the bottom of the dialog, there are buttons for 'Dealer Information', 'Subscribe', 'Save', and 'Close'.

4. Click the **Close** button.

**Note:** The first time you select an OEM on the eConnect tab, these fields will be empty. After you type the information in each field and click the **Save** button, the information will be displayed each time you select the OEM.

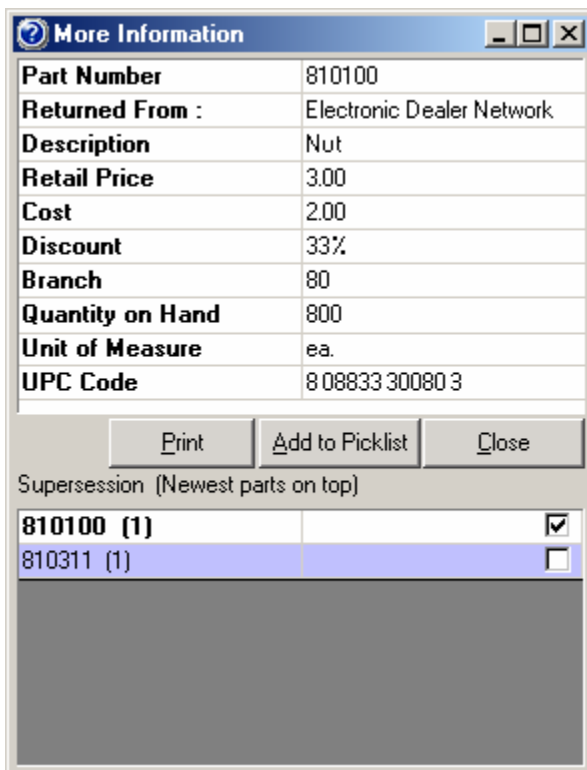
You are now ready to view real-time inventory information from your trade partner(s) and place orders electronically with PartsManager Pro.

## Viewing Vendors' On-Hand Quantities and Prices

Once you set up services and trade partners, the More Information window in PartsManager Pro displays additional information.

1. With a parts page displayed in PartsManager Pro, right-click a part number in the parts list. A context menu opens.
2. Select **More Information** from the menu.
3. The More Information window is displayed. If necessary, scroll down through the window until you find the information you need.

When the window shows "Returned From: Electronic Dealer Network", real-time information from the trade partner is being displayed.




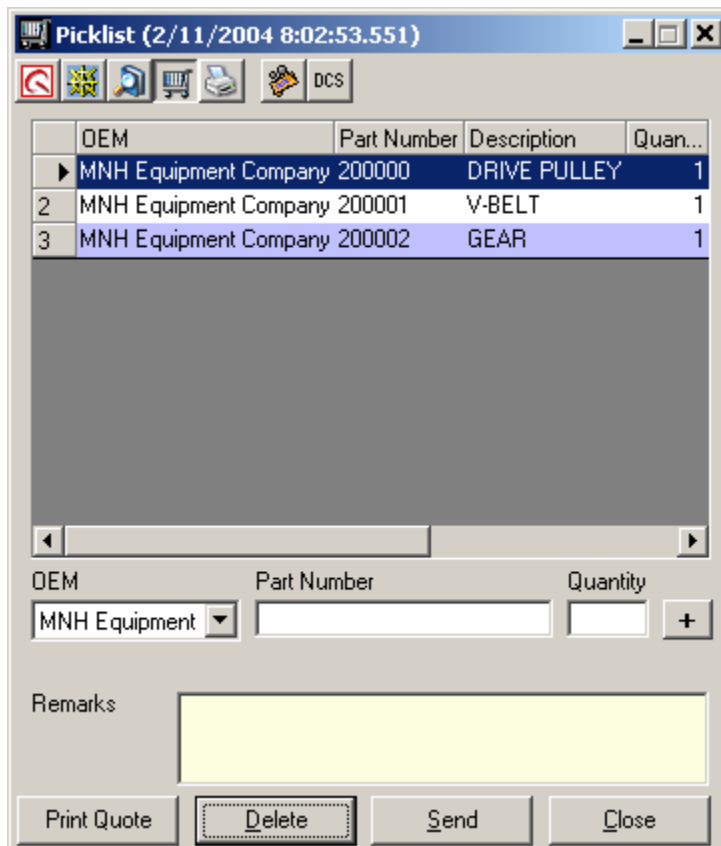
To print the information in the window, click the **Print** button.

# Sending Picklists to Your Trade Partners

Once you set up services and trade partners (vendors), clicking the Picklist dialog box Send button in PartsManager Pro sends the list to your trade partner, allowing you to order the listed parts.

**Important:** If you need to prepare a quote for the customer, create the quote before you send the picklist as an order to your trade partner. When an order is submitted, the parts are cleared from the picklist and you cannot create a quote from that list.

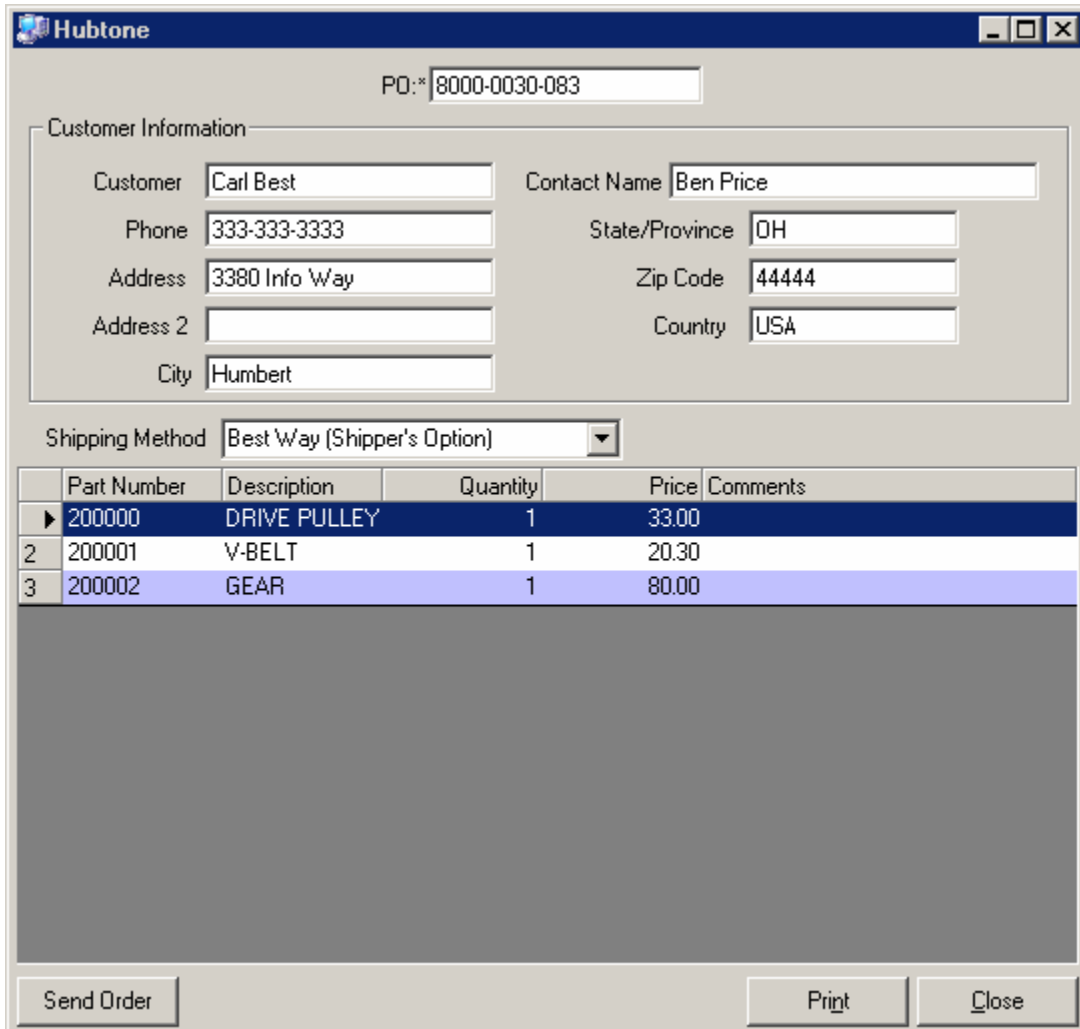
1. Click the Picklist button  to display your picklist. For example:



2. Click the **Send** button. The Order window is displayed.

The Order window displays your customer information, the default shipping method, and the parts from your picklist, including current prices from your trade partner (vendor).

**Note:** “Customer” information, as used here, indicates your dealer information because you are the “customer” to whom the vendor will ship the parts.



The screenshot shows the Hubtone Order window. At the top, there is a text box for the purchase order number (PO:\*) containing the value "8000-0030-083". Below this is a section for Customer Information with several text boxes: Customer (Carl Best), Contact Name (Ben Price), Phone (333-333-3333), State/Province (OH), Address (3380 Info Way), Zip Code (44444), Address 2 (empty), City (Humbert), and Country (USA). Below the customer information is a Shipping Method dropdown menu set to "Best Way (Shipper's Option)". At the bottom of the window are three buttons: "Send Order", "Print", and "Close".

	Part Number	Description	Quantity	Price	Comments
▶	200000	DRIVE PULLEY	1	33.00	
2	200001	V-BELT	1	20.30	
3	200002	GEAR	1	80.00	

3. Type the purchase order number in the text box at the top of the window.

**Note:** You must type the purchase order number. If the purchase order box is empty when you try to submit an order, a message will remind you to type the number.

4. When necessary, select a different shipping method from the list box.
5. To print the order before submitting it, click the **Print** button.
6. Click the **Send Order** button. The message “PO: 8000-0030-083 sent successfully” is displayed.
7. Click **OK** to close the message box.

The parts are cleared from your picklist and the Order window is updated with additional information such as quantity ordered.

The screenshot shows the Hubtone Order window. At the top, the PO number is 8000-0030-083. The Customer Info section includes fields for Customer (Carl Best), Contact Name (Ben Price), Phone (333-333-3333), Address (3380 Info Way), Address 2, City (Humbert), State/Province (OH), Zip Code (44444), and Country (USA). The Shipping Method is set to Best Way (Shipper's Option). Below this is a table of ordered parts:

	Part Number	Description	Quantity	Qty Ordered	Qty Shipped	Qty Back Ord...	Price	Comments
▶	200000	DRIVE PU...	1	1			33.00	
2	200001	V-BELT	1	1			20.30	
3	200002	GEAR	1	1			80.00	

At the bottom of the window are buttons for Send Order, Print, and Close.

8. To print the updated information, click the **Print** button.

9. To close the Order window, click the **Close** button.

**Note:** Once you close the Order window, you cannot reopen it for viewing or printing.

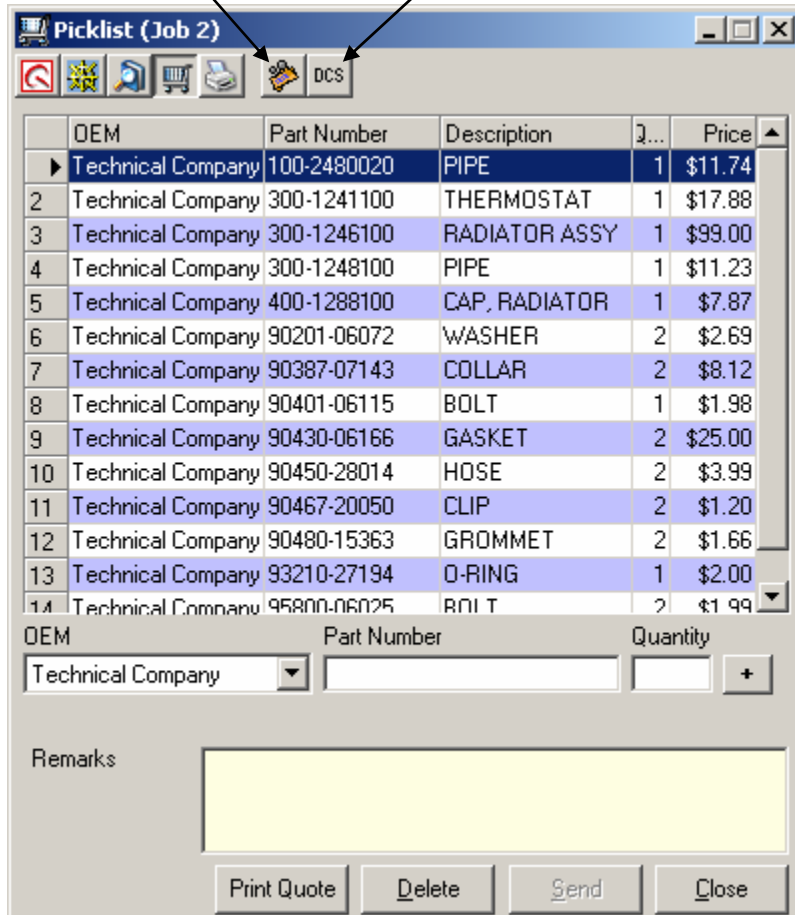
# 15. Creating a DCS File

Use this procedure to create a file for a dealer communication system (DCS) from a picklist.

1. Create a picklist in PartsManager Pro. For example:

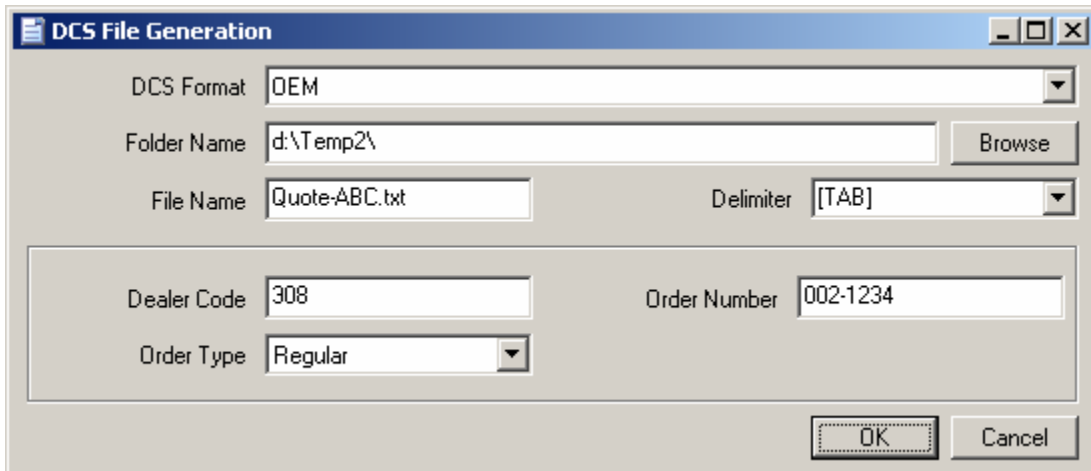
Click this button to display prices.

Click this button to create a DCS file.





- Click the **DCS** button. The DCS File Generation dialog box opens.



- Select the DCS format.
- Click the **Browse** button and navigate to the folder to which you want to write the file.
- Type a name for the file in the File Name box.

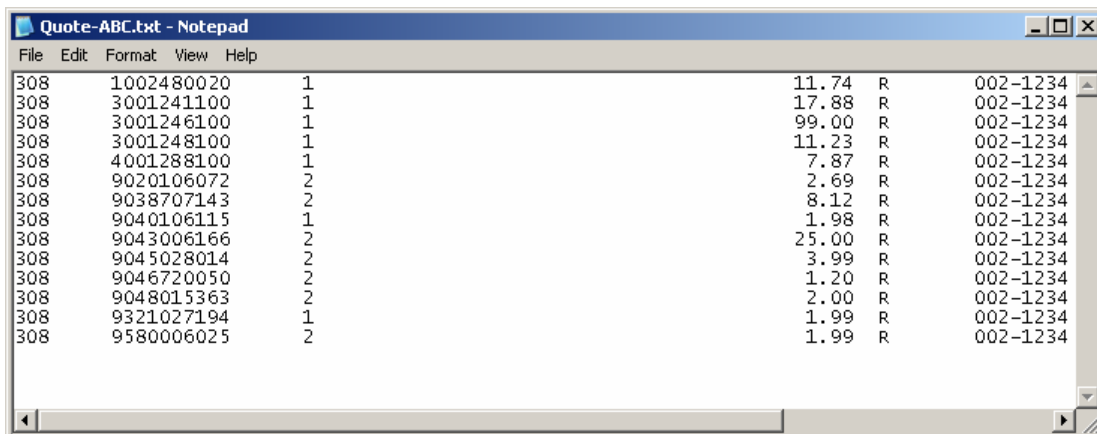
**Note:** After you generate your first DCS file, the format and most recently generated folder and file name are displayed each you open this dialog box.

- Select the field delimiter for the file. For example, to create a tab-delimited file, select [TAB].
- Type your dealer code, select the order type, and type the order number.

**Note:** Dealer Code, Order Type, and Order Number boxes are not available for all OEMs.

- Click **OK** to generate the DCS file. The message “File Created” will be displayed. Click **OK** to close the message.

**Note:** A tab-delimited text file will look similar to the following:



- In your DCS, browse to the file you created.

# 16.ISO 4217 Currency Codes

When you display pricing in PartsManager Pro, each value is followed by a three-letter code. For example, “\$150.00” is displayed as “150.00 USD”. This code comes from ISO standard ISO 4217:1995, which contains codes for currencies worldwide. The following table lists all current codes.

<b>Code</b>	<b>Currency</b>	<b>Code</b>	<b>Currency</b>
ADP	Andorran Peseta	CNY	Yuan Renminbi
AED	UAE Dirham	COP	Colombian Peso
AFA	Afghani	CRC	Costa Rican Colon
ALL	Lek	CUP	Cuban Peso
AMD	Armenian Dram	CVE	Cape Verde Escudo
ANG	Netherlands Antillean Guilder	CYP	Cyprus Pound
AON	New Kwanza	CZK	Czech Koruna
AOR	Kwanza Reajustado	DEM	Deutsche Mark
ARS	Argentine Peso	DJF	Djibouti Franc
ATS	Shilling	DKK	Danish Krone
AUD	Australian Dollar	DOP	Dominican Peso
AWG	Aruban Guilder	DZD	Algerian Dinar
AZM	Azerbaijani Manat	ECS	Sucre
BAD	Dinar	ECV	Unidad de Valor Constante (UVC)
BBD	Barbados Dollar	EEK	Kroon
BDT	Taka	EGP	Egyptian Pound
BEF	Belgian Franc	ESP	Spanish Peseta
BGL	Lev	ETB	Ethiopian Birr
BHD	Bahraini Dinar	EUR	Euro
BIF	Burundi Franc	FIM	Markka
BMD	Bermudian Dollar	FJD	Fiji Dollar
BND	Brunei Dollar	FKP	Falkland Islands Pound
BOB	Boliviano	FRF	French Franc
BOV	MVDol	GBP	Pound Sterling
BRL	Brazilian Real	GEL	Lari
BSD	Bahamian Dollar	GHC	Cedi
BTN	Ngultrum	GIP	Gibraltar Pound
BWP	Pula	GMD	Dalasi
BYB	Belarussian Ruble	GNF	Guinea Franc
BZD	Belize Dollar	GRD	Drachma
CAD	Candian Dollar	GTQ	Quetzal
CHF	Swiss Franc	GWP	Guinea-Bissau Peso
CLF	Unidades de Formento	GYP	Guyana Dollar
CLP	Chilean Peso	HKD	Hong Kong Dollar

<b>Code</b>	<b>Currency</b>	<b>Code</b>	<b>Currency</b>
HNL	Lempira	MWK	Kwacha
HRK	Kuna	MXN	Mexican Nuevo Peso
HTG	Gourde	MYR	Malaysian Ringgit
HUF	Forint	MZM	Metical
IDR	Rupiah	NAD	Namibia Dollar
IEP	Irish Pound	NGN	Naira
ILS	Shekel	NIO	Cordoba Oro
INR	Indian Rupee	NLG	Netherlands Guilder
IQD	Iraqi Dinar	NOK	Norwegian Krone
IRR	Iranian Rial	NPR	Nepalese Rupee
ISK	Iceland Krona	NZD	New Zealand Dollar
ITL	Italian Lira	OMR	Rial Omani
JMD	Jamaican Dollar	PAB	Balboa
JOD	Jordanian Dinar	PEN	Nuevo Sol
JPY	Yen	PGK	Kina
KES	Kenyan Shilling	PHP	Philippine Peso
KGS	Som	PKR	Pakistan Rupee
KHR	Riel	PLN	Zloty
KMF	Comoro Franc	PLZ	Zloty
KPW	North Korean Won	PTE	Portuguese Escudo
KRW	Won	PYG	Guarani
KWD	Kuwaiti Dinar	QAR	Qatari Rial
KYD	Cayman Islands Dollar	ROL	Leu
KZT	Tenge	RUR	Russian Ruble
LAK	Kip	RWF	Rwanda Franc
LBP	Lebanese Pound	SAR	Saudi Riyal
LKR	Sri Lanka Rupee	SBD	Solomon Islands Dollar
LRD	Liberian Dollar	SCR	Seychelles Rupee
LSL	Loti	SDD	Sudanese Dinar
LTL	Lithuanian Litas	SEK	Swedish Krona
LUF	Luxembourg Franc	SGD	Singapore Dollar
LVL	Latvian Lats	SHP	St. Helena Pound
LYD	Libyan Dinar	SIT	Tolar
MAD	Moroccan Dirham	SKK	Slovak Koruna
MDL	Moldovan Leu	SLL	Leone
MGF	Malagasy Franc	SOS	Somali Shilling
MKD	Denar	SRG	Surinam Guilder
MMK	Kyat	STD	Dobra
MNT	Tugrik	SVC	El Salvador Colon
MOP	Pataca	SYR	Syrian Pound
MRO	Ouguiya	SZL	Lilangeni
MTL	Maltese Lira	THB	Baht
MUR	Mauritius Rupee	TJR	Tajik Ruble
MVR	Rufiyaa	TMM	Manat

<b>Code</b>	<b>Currency</b>	<b>Code</b>	<b>Currency</b>
TND	Tunisian Dollar	VND	Dong
TOP	Pa'anga	VUV	Vatu
TPE	Timor Escudo	WST	Tala
TRL	Turkish Lira	XAF	CFA Franc BEAC
TTD	Trinidad and Tobago Dollar	XCD	East Caribbean Dollar
TWD	New Taiwan Dollar	XOF	CFA Franc BCEAO
TZS	Tanzanian Shilling	XPF	CFP Franc
UAG	Hryvna	YER	Yemeni Rial
UAK	Karbovanets	YUM	New Dinar
UGX	Uganda Shilling	ZAL	Financial Rand
USD	US Dollar	ZAR	Rand
UYU	Peso Uruguayo	ZMK	Kwacha
UZS	Uzbekistan Sum	ZRN	New Zaire
VEB	Bolivar	ZWD	Zimbabwe Dollar

# 17. Glossary

This glossary defines terms used in this user's guide.


## **application**

A computer program used for a particular kind of work, such as parts information retrieval or word processing. This term is often used interchangeably with "program."


## **BSI**

An acronym for business system interface. PartsManager Pro allows you set up a BSI connection to your business system.

## **button**

A graphic image that can be clicked to initiate an action. A button may include an icon or a text label to indicate what it does. For example, the Search button  includes a magnifying glass icon, indicating that the button allows you to make a search.

## **catalog notes**

Notes provided by the OEM at the catalog-level of information. When catalog notes are available, the  icon appears on a folder in the Navigation window or navigation pane of the Search dialog box to indicate that catalog notes are available. View catalog notes by right-clicking an entry.

## **check box**

Send orders to this branch

A small box that allows you to turn an option on or off by clicking it. When a check box is selected, a check mark appears in the box.

## **click**

To press and release the left mouse button quickly.

## **combination box (combo box)**

A combination of a list box and text box that includes both a scrollable list and a field in which you can type text. As you type text, items from the list that match the text scroll into view.

**command**

A word or phrase on a pull-down menu that you click to carry out an action.

**compare**

A feature that allows you to compare two model specifications by listing the parts that need to be added and/or deleted to change one model specification into the other.

**configure**

To create or change a setup. For example, PartsManager Pro allows you to configure a connection to your business system.

**context menu**

A pop-up menu that provides access to frequently-used commands when you right-click an item. For example, when you right-click a parts diagram, a context menu lists commands that allow you to zoom, resize, refresh, print, add notes, and add parts to a picklist. Also called a floating menu.

**cursor**

The position indicator on the screen showing where you can enter text.

**dataset**

A dataset is a collection of related information consisting of the database, parts diagrams (TIFF files), hotspot (.hsp) files, and service documents (PDF files) that make up OEM data content. A dataset can include product lines, catalogs, sections, parts pages (parts diagrams and associated parts text), service documents, and bulletins. You can publish multiple datasets, one per CD.

**default**

A predefined setting used by an application when no other option is specified.

**desktop**

The workspace on a computer screen, usually referring to the “main screen” in Windows, which provides access to programs and folders via clickable icons.

**dialog box**

A window on the computer screen that allows you to type or select information, set options, or carry out commands.

**double-click**

To quickly click the left mouse button two times.

**drag**

To move an item on the screen by selecting the item and then pressing and holding down the left mouse button while moving the mouse. For example, you can move a window to another location on the screen by dragging its title bar. You can also define an area of a parts diagram to zoom in on by holding down the Shift key while holding down the left mouse button and moving the mouse.

**eConnect**

The name of ProQuest's Web-based program for subscribing to services and setting up trade partners (vendors) to enable electronic ordering from PartsManager Pro.


**favorite**

A frequently-accessed parts page that you bookmark for future reference.

**highlight**

When you select a menu command or an entry in a list, it is highlighted to indicate that it has been selected. A highlight usually appears as a dark blue band across the entry, and the selected text changes from black to white within the band.

**icon**

A graphical representation of an element in an application or operating system. For example, clicking the New Job icon  allows you to create a new job.

**job**

Another name for a transaction, a collection of related tasks you perform to process a parts order.

**Job Manager**

A dialog box that allows you to open, rename, and delete jobs.

## **keyword**

A word you type in a text box in the Search window's Keyword tab to search for parts information. A keyword may be a model or other term defined by your OEM.




## **list box**

A box that displays the current selection and allows you to click a small arrow on the right side of the box to open the complete list of selections. The list box shown above allows you to select a language for the application.

## **More Information**

A window that displays additional information for a part when you right-click a part entry. If you subscribe to services and set up trade partners (vendors) using ProQuest's eConnect Web site, this window can also display such real-time inventory information as on-hand quantities and current prices from a vendor.

## **mouse pointer**

The small symbol on the screen that moves with the mouse. Within text, the mouse pointer appears as a cursor, but it changes shape depending on its location on the screen. For example: An arrow , a hand , or a cross .


## **navigate, navigation**

To navigate is to follow a path to a particular destination. PartsManager Pro provides a structure for your OEM data that allows you to navigate through the data to a specific parts page. This structure consists of an organized hierarchy which may include datasets, product lines, models, catalogs, sections, parts pages, and service documents. The available navigation levels depend on your OEM data. PartsManager Pro provides a Navigation window and a Search dialog box navigation pane.

## **OEM**

An acronym for original equipment manufacturer.

## **OEM notes**

Notes provided by the original equipment manufacturer. You cannot delete OEM notes. OEM notes are identified by the  icon in front of a parts list entry or on a job tab.



**pane**

A defined segment of a window or dialog box. For example, the Keyword tab of the Search dialog box includes a navigation pane.

**parts diagram**

The illustration portion of a parts page.

**parts list**

The parts text associated with a parts diagram on a parts page. Parts are generally listed by reference number, part number, description, quantity, and remarks. You can also view bulletins, user notes, OEM notes, and supersession information by clicking an icon.

**PartsManager Pro**

A parts and service data retrieval application developed by ProQuest.

**parts page**

An electronic catalog “page” consisting of a parts diagram and parts list.

**Picklist**

A dialog box you use to accumulate parts for a job. You can select parts for a picklist from parts diagrams and parts lists, and you can type part numbers and quantities directly in the dialog box. You can send the contents of a picklist to a business system or order the parts from a vendor, depending on how you set up PartsManager Pro.

**pictorial index**

An image-based index to parts information in the Navigation window. You click images to display levels of information. Clicking a catalog opens an additional pane which displays the primary pictorial index to that catalog. Clicking an image opens sectional index. Clicking a section image callout displays a parts page.

**pull-down menu**

A list of available commands in an application window. Menu names appear in the menu bar near the top of the window. You open a menu by clicking the menu name.

**quote**

A list of parts, with quantities, prices, and additional charges for a customer. You can import a picklist and add additional parts, customer information, dealer information, a purchase order number, and shipping and labor charges. You can then print the quote for the customer.

**radio buttons**

A group of buttons in a dialog box of which only one can be selected at a time. You select a radio button by clicking it.

**remarks**

Additional comments or notes that appear in a parts list.

**right-click**

To click an item by using the right mouse button. You can display a context menu by right-clicking an item. For example, right-clicking a parts list entry opens a menu that allows you to add the part to a picklist, display additional information for the part, make a “where used” search, add a user note, or refresh the list.

**scroll**

To move through text or graphics (up, down, left, or right) to see information that does not fit on the screen. Scroll bars with arrows at the sides and bottom of windows help you scroll through information.


**services**

“Services” refers to two primary ways of doing business with eConnect and PartsManager Pro: Dealer Xpress, which allows electronic ordering of parts, and Integrated DMS, which enables electronic ordering for PartsManager Pro. When you subscribe to Integrated DMS and set up your trade partner(s), you are ready to conduct business using eConnect and PartsManager Pro.

**sort, sorting**

To rearrange information according to some criteria. For example, you can sort the results of a parts search by description, parts page, etc. to make it easier to find the specific information you need.

## **supersession**

Information for a part that has been replaced by one or more other parts. When supersession information is available, the  icon appears in front of a part entry. Clicking the icon displays the information.


## **text box**

A field in a dialog box in which you type information. The text box may be blank or may contain text when the dialog box opens.

## **trade partners**

As used with eConnect, “Trade partners” are the manufacturers and distributors with whom you transact business. It is another term for “vendors” or “suppliers”.

## **user notes**

Notes created by users to supplement information provided by the OEM. You can modify and delete user notes. User notes are identified by the  icon in front of a parts list entry or on a job tab.

## **where used**

A type of search that lists all occurrences of a part number in all catalogs.

## **wildcard**

A wildcard is a special character that represents any other character or group of characters in a search. PartsManager Pro uses the asterisk (\*) for the wildcard character. The asterisk (\*) can represent zero, one, or multiple characters in a part number or description. You can type wildcards in your search criteria for part number searches and part description searches.

## **window**

A rectangular area on the screen in which you view information. You can open, close, resize, and move windows and open several windows at a time.