

CHAPTER 12

Parts Wizard Tools

This chapter describes the variety of information available for products in the Parts Wizard Library and also introduces you to the Product Information/Search Results form which is used to display the product information. The following topics will be covered:

- Parts Wizard Library Overview
- The Parts Wizard Library / DeepEnd Inventory Link
- Product Information Form
- Using Quick Finds
- Using the Search Engines

Parts Wizard Library Overview

The Parts Wizard Library is a comprehensive database of Pool & Spa product information that has been compiled over a number of years and still continues to grow. The information within the Library itself is read-only (you cannot change the information) but the Library is linked to the DeepEnd Inventory files where you can add and change information.

The Parts Wizard Library consists of data and images.

The data includes... Basic Product Information (part number, description, etc.)

Product Features and Additional Notes

Technical Information

Product Key Characteristics (Traits)

Suggested List Prices

Parts Breakdowns

Accessories Lists

Cross References

The images include... Exploded Parts Views

Product Photographs and Illustrations

The Library Password you received was generated specifically for the Library Revision you purchased and for the computer or server for which you received your Software License Activation Key. This password will not work on other computers/networks and is not compatible with Library Revisions other than the revision for which it was

generated. Attempting to install a Library update without purchasing a password will render the system inoperable until the correct Library Revision is reinstalled.

The Parts Wizard Library / DeepEnd Inventory Link

>> Coming Soon <<

Product Information Form

This multi-page data maintenance form displays detailed information for a selected Parts Wizard product item and is also used to display the item(s) found by Quick Find searches.

Additionally, this form is identical to the Search Engines form except for the contents of the first page (List page). Therefore, the descriptions and explanations for all of the pages other than the first page apply to both the Product Information Form and the Search Engines form.

See Also: *Multi-Page Data Maintenance Forms in Chapter 2 – User Interface Overview*

Using Quick Finds later in the chapter

Using Search Engines later in this chapter

There are several places from which this form may be launched...

- A Quick Find
- The Search Engines Form
- The Part Details Form (called from a Parts Explosion)
- Another Product Information Form

and the number of instances of this form that can be open at the same time is limited only by the amount of memory in your computer.

Common Parts Wizard / DeepEnd Actions

There are four common actions that you can take on products that are found and displayed in the Parts Wizard. Each of these actions can be taken by clicking the appropriate button on the Search Engines, Product Information and Part Details forms.

Select Items found in any Parts Wizard search can be added to DeepEnd Sales, Service and Purchase Order transactions. Such transactions must currently be open in their respective data entry forms in DeepEnd in order to be able to receive them the items.

When this button is clicked DeepEnd searches for any open sales, service or purchase order transactions. If any such open transactions are found, a pop-up shortcut menu having the following possible options is displayed.

Add Item to Sales Order

Displayed if any Sales Orders are open

Add Item to POS Sale

Displayed if the POS Entry screen is open

Add Item to Service Job

Displayed if any Service Jobs are open

Add Item to Purchase Order

Displayed if any Purchase Orders are open

Positioning the mouse pointer over any of these options activates a submenu which contains an option for each transaction of that type. This handles cases where you have more than instance of any of these data maintenance forms open at once.

Note that transactions that are read-only due to their status (example: Closed) or user permission restrictions are still displayed in the submenu but they are disabled and cannot be selected.

After selecting the desired transaction, DeepEnd will prompt you to enter the Quantity to add to the transaction. Enter a quantity greater than zero to add the item to the transaction.

Parts If there is a parts list for the selected product, this button displays the parts in a new window. If there is an exploded parts view, the form contains two page tabs - one with the exploded parts view and one with the parts list - and the exploded parts view is displayed. If there is no exploded parts view, the form contains just the parts list and no page tabs.

See Also: *Parts Breakdowns* later in this chapter.

Drilldown... This button launches a new Product Information Form containing only the selected product. By default, the Product Details page is initially selected in the new form.

Add to Inventory Products in the Parts Wizard Library can be added to the DeepEnd Inventory files quickly and easily.

The List Page

The contents of the grid on this page depends on how this form is launched.

- If it is launched by a Quick Find, the grid contains all of the products that matched the number or partial number entered for the search.
- If it was launched by clicking the **Drilldown...** button on another form, the grid contains only the product that is currently selected in the calling form.

If the grid contains more than 1 product, this page is selected when this form is launched. If there is only 1 product, the Product Details page is selected.

The grid contains the following pieces of information for each record.

Manufacturer/Brand

Product #

Description

UPC Code

Series

Model

You will probably need to scroll the grid using the horizontal scroll bar to see all of the columns.

Note that the header for each of these columns has a bold font indicating that you can sort and search on any of these columns. There are two cases where the grid is sorted on more than one column

- Sorting by Manufacturer/Brand sorts first by Manufacturer/Brand and then by Product #.
- Sorting by Series sorts first by Series and then by Model

The Product Details Page

This page contains basic information for each product item. Many of the form controls on this page are self explanatory so this section describes only those controls having features or characteristics that are not obvious.

Sug'd List Price The suggested retail selling price published by the manufacturer. Since not all manufacturers provide suggested list prices, this field may or may not contain a price.

Optionally, you can hide this price from view by selecting Hide MSLP in the System Options.

SKU Stock Keeping Unit - your own product code that you create.

Your SKU is contained in the inventory files – not the Parts Wizard Library files - this text box will be empty for all Parts Wizard products except those that you have added to your inventory files.

The Technical Data Page

This page contains Technical Notes and may also contain up to 10 text boxes that contain key Product Traits. How many traits there are and what they are called depends on what Product Category is assigned to the product as the Primary Category.

Products can be assigned to more than one product category, one of which is designated as the Primary Category.

The Cross References Page

This page displays Cross-Reference items for the selected product.

The top grid contains products having a published cross-reference to the product selected in the navigation grid on the List Page. These cross references are considered *Direct* cross references because they have been published by the manufacturer.

The bottom grid contains products having a published cross-reference to the product that is currently selected in the top grid. These cross references are considered *Direct* cross references to the product in the top grid. However, they are considered *Indirect* cross references to the product selected in the navigation grid on the List Page because they have not been published by any manufacturer.

The product in the top grid has a published cross reference to the product selected in the navigation grid on the List Page and also to all of the products shown in the bottom grid. Therefore, the product selected in the top grid creates an

implied cross reference between the products in the bottom grid and the product selected in the navigation grid on the List Page.

Each grid can be sorted by *Manufacturer/Brand*, *Part Number*, *UPC Code* or *Manufacturer's Suggested List Price (MSLP)*. Additionally, there may be extra notes entered for a cross reference record in either grid. Such notes, if they exist, can be viewed by clicking the **Notes...** button..

The Parts Page

This page contains a grid displaying parts list for the selected product.

Exploded View Displays the Exploded Parts View in a new window. If there is no Exploded Parts View associated with the parts list, this button not displayed.

Notes... Displays additional notes about the selected part. These are not general notes about the part itself but rather assembly-specific notes about the part.

The parts list is not necessarily specific to the selected assembly. Many parts lists are published for a product Series and may contain several variations of the same part for use with different Models within the Series. This is consistent with the way parts lists are published in manufacturers' catalogs.

The Used In Page

This page displays all of the parts lists than contain the selected product.

If you select **Include Cross References in the Search**, the Parts Wizard first search for any cross references for the part and use those cross references, if any, to search for other parts lists.

For example, the Parts Wizard could use an Aladdin cross reference to find that a selected Hayward seal can be used in a Pentair or Sta-Rite pump.

Notes... Displays additional assembly-specific notes about the part..

The Accessories Page

This page displays accessories for the selected product as well as products for which the selected product is an accessory.

Each grid has it's own **Notes...** button that displays additional notes pertaining to the relationship between the "parent product" and the accessory for the currently selected record in the grid.

The Suppliers Page

This page displays the supplier catalog information, including *Supplier Name*, *Order Number*, *Description*, and *List Price*, for the selected product. Only suppliers that have been selected for use can appear on this page.

Using the Search Engines

Search Engines enable you to define specific search criteria and display the search results in a grid. Then you can access further information about any of the products found in the search.

The Search Engines Form is identical to the Product Information Form in every way except for the contents of the first page. The first page, which is the **List** Page in the Product Information Form, is the **Search Engines** Page in the Search Engines form and has the following differences...

- The page tab color is black to make it stand out from the other page tabs.
- The navigation grid is reduced in height and moved to the bottom.
- A secondary set of Search Engine page tabs is added.

Search Engines Overview

Each search engine has selection criteria controls designed specifically for the type of search it performs. Additionally, there are a few selection criteria controls that are common to all of the search engines.

Manufacturer/Brand The brand name of the products. In cases where a manufacturer has more than one major brand (perhaps as a result of business acquisitions), the brands are kept separate for searching purposes. Some items may also be found under more than one brand. This is to handle cases where one manufacturer has acquired another manufacturer and retained some of the products from the acquired manufacturer but under its own brand. For example, some items may be found under American Products and Purex/Triton and Pentair.

Product Category The primary category of the items. The options available here are narrowed down when a Manufacturer/Brand is selected so that only those categories having products made by the selected manufacturer will be available.

Sub-Category The secondary category of the items. This control is disabled until a Product Category is selected and contains only those categories that are sub-categories of the selected Product Category.

None of these three selection criteria are *required* but leaving them blank makes the selection criteria less defined and the number of items found will be greater. Also note, that you can switch from one search engine to another without affecting any selection made to these three selection criteria.

Each of these controls is a Self-Validating Text Box. See *Chapter 2 - Interface Overview*, for more information on this special form control.

Search! This button executes the search.

When any selection criteria is changed, the message Selection Criteria Changed. Click Search! will appear in the upper right corner of the Search Engines page. When the search is executed, this message is cleared and the search results are displayed in the grid.

Auto-Refresh When this checkbox is checked, the search is automatically executed whenever you change any selection criteria.

For some searches, this is quite handy. However, for searches involving several pieces of selection criteria, having auto-refresh on can slow you down by executing the search each time an option is selected

By default, this checkbox is unchecked.

To launch the Search Engines Form, select **Tools | Parts Wizard | Search Engines** from the menu. The following instructions assume that the Search Engines form is open.

The basic steps in performing searches are...

1. Select the desired search engine
2. Specify the selection criteria
3. Click Search! To refresh the search results.

The following sections describe each search engine in detail.

Search By Series & Model

STEPS

1. Select the **Search Engines** page tab.
2. On the Search Engines page, select the **By Model** page tab..
3. Select the desired **Manufacturer/Brand, Product Category** and **Sub-Category** if they are not already selected.
Note that the Series List is updated as you select these options.
4. Select the desired **Series** or select **All**.
Note that the Model List is updated as you change the Series.
5. Select the desired **Model** or select **All**.
6. If Auto-Search is not checked, click **Search!**

Search By Pictures

STEPS

1. Select the **Search Engines** page tab.
2. On the Search Engines page, select the **By Picture** page tab..
3. Select the desired **Manufacturer/Brand, Product Category** and **Sub-Category** if they are not already selected.
Note that the picture displayed on the right side may change as you select these options.
4. Using the arrow buttons beside the picture, step through the pictures until you find the item you are looking for. You can also jump straight to the first or last picture.
Optionally, you can double-click on the picture to enlarge it for better viewing.
5. If Auto-Search is not checked, click **Search!**

Search By Keywords

STEPS

1. Select the **Search Engines** page tab.
2. On the Search Engines page, select the **By Keywords** page tab..
3. Select the desired **Manufacturer/Brand, Product Category** and **Sub-Category** if they are not already selected.

4. In the **Keywords** textbox, type the word(s) you want to search for.
5. Select the fields you wish to search. Note that the more fields you select the longer the search will take and, possibly, more items found.
6. If Auto-Search is not checked, click **Search!**

Search By Traits

Each Product Category can have up to 10 different traits. This search engine enables you to define selection criteria which includes up to 5 traits. You can also select the same trait more than once and specify a different value to find for each instance of the selected trait.

The following logic is used when the search is executed.

- Each different trait selected is treated as a distinct criterion with an implicit “AND” condition between each trait criterion.

Example: If searching for filter cartridges, you may specify both the *Length* and the *Outside Diameter* as selection criteria. In this case, The Parts Wizard would search for all filter cartridges having both the specified Length and the specified Outside Diameter.

- If the same trait is selected more than once, all instances of that trait are gathered together to build the selection criteria for that trait with an implicit “OR” condition between each criterion for that trait. That selection criteria is then treated as a single criterion with an implicit “AND” condition between it and any other selection criteria.

Example: If searching for filter cartridges, you may specify both the *Length* and the *Outside Diameter* as selection criteria with 2 possible values for the Outside Diameter. In this case, The Parts Wizard would search for all filter cartridges having both the specified Length and either one of the two specified Outside Diameters.

Each selection criteria text box can call a Pick List so that you can simply select the value to search for rather than type it in. These pick lists are generated from actual product data so that all of the values that exist in the Parts Wizard Library for all Traits of all Categories exist in the pick lists.

Performing the search...

STEPS

1. Select the **Search Engines** page tab.
2. On the Search Engines page, select the **By Traits** page tab..
3. Select the desired **Manufacturer/Brand, Product Category** and **Sub-Category** if they are not already selected.
4. For each trait you wish to search...
 - a. Select the Trait Name from the dropdown list.
 - b. Type in the value to search for or select the value from the Pick List. In the **Keywords** textbox, type the word(s) you want to search for.
5. If Auto-Search is not checked, click **Search!**

Custom Filter

See *Record Filtering Selection Criteria Form* in Chapter 2 – User Interface Overview.

Using Quick Finds

Quick Finds enable you to quickly find a specific product by entering its Part Number (or old Part Number), Model Number, Supplier Order Number or UPC Bar Code Number. A single text entry window pops up for you to enter the number to find. Any products matching the value you enter are displayed in the Product Information / Search Results form.

As the name implies, Quick Finds are much quicker than using the Search Engines if you already know the number of the product you want.

By Part Number

STEPS

1. Select **Tools | The Parts Wizard | Quick Find by Part Number** from the menu.
2. In the window that appears, type the Part Number you wish to find. The Parts Wizard will search for any items whose Part Number starts with the characters you typed in.
3. If any items are found, they are displayed in the Product Information / Search Results Form.
 - a. If only one item is found, it is displayed in the Details page.
 - b. If several items are found, they are displayed in the List page. If one of these items is an exact match, it is displayed in the Details page.

By Model

STEPS

1. Select **Tools | The Parts Wizard | Quick Find by Model** from the menu.
2. In the window that appears, type the Model you wish to find. The Parts Wizard will search for any items whose Model starts with the characters you typed in.
3. If any items are found, they are displayed in the Product Information / Search Results Form.
 - c. If only one item is found, it is displayed in the Details page.
 - d. If several items are found, they are displayed in the List page. If one of these items is an exact match, it is displayed in the Details page.

By UPC Code

STEPS

1. Select **Tools | The Parts Wizard | Quick Find by UPC Code** from the menu.
2. In the window that appears, type the UPC Code you wish to find. The Parts Wizard will search for any items whose UPC Code starts with the characters you typed in.
3. If any items are found, they are displayed in the Product Information / Search Results Form.

- e. If only one item is found, it is displayed in the Details page.
- f. If several items are found, they are displayed in the List page. If one of these items is an exact match, it is displayed in the Details page.

By Supplier Order Number

STEPS

1. Select **Tools | The Parts Wizard | Quick Find by Supplier Order number** from the menu.
2. In the window that appears, type the Supplier Order Number you wish to find. The Parts Wizard will search the supplier catalogs for an exact match.

If an item is found, it is displayed in the Details page of the Product Information / Search Results Form.