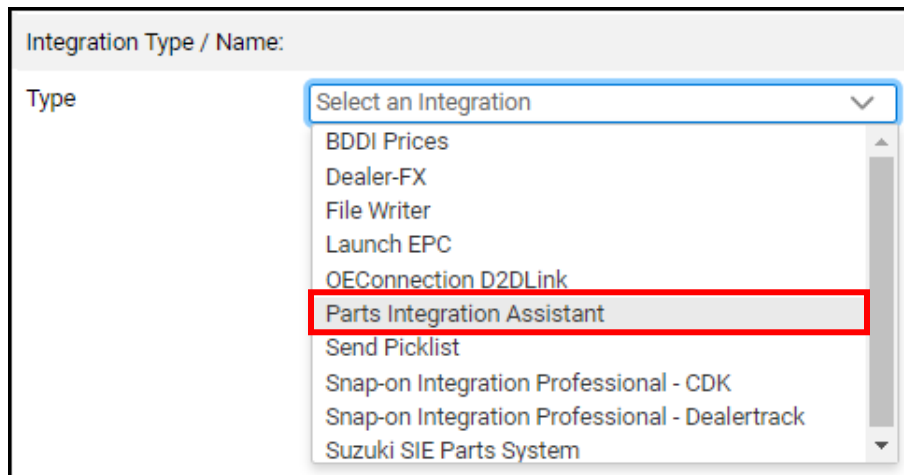


Application: Snap-on EPC 5


DMS: ERAccess (Docking method)

Configuring Snap-on EPC 5 for Integration

1. The **Integration Assistant** is seamlessly integrated into EPC 5, streamlining the setup of the integration you need.
 - A. Click on **Settings** and select the **Integration Settings Menu**
 - B. Click on **New**
 - C. Select "**Parts Integration Assistant**" from the **Type** drop-down menu.



2. Configure Integration within Snap-on EPC 5.

- A. Click the **Launch PIA** button. 
- B. The **PIA 3rd Party Application Configuration** window displays.
 - In the **Display Name** field, enter a descriptive name for the integration that identifies the system you're integrating with. For instance, we'll use "**ERAccess**".

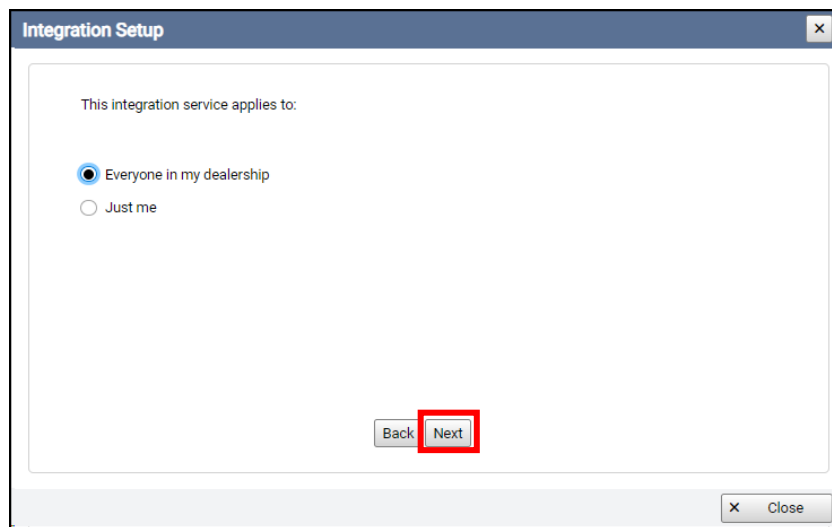
- In the **Window Title** field, type the name shown in the DMS **window title bar**. In this example, we'll use "ERAccess". (**NOTE:** The window title is case-sensitive. If the title is long, you can enter just the first word or any part of it, but the more specific, the better.)
- In the **Where do you want PIA to display?** section, select the radio button for the side of the DMS window where you want the PIA window to dock.
- Click the **Next** button.

The screenshot shows a dialog box titled "PIA 3rd Party Application Configuration". It contains two text input fields: "Display Name" and "Window Title", both containing the text "ERAccess". Below these fields is a section titled "Where do you want PIA to display?" with four radio button options: "Top" (selected), "Bottom", "Left", and "Right". To the right of these options is a question mark icon and a square box. At the bottom right of the dialog, there are two buttons: "Next" and "Cancel".

- C. In the **Select Part Format** window, select the format in the **Available Parts Formats** column that applies to you and use the arrow button to move it to the **Selected Parts Formats** column. Click the **Finish** button to return to the **Integration Setup** pane.



- Select "**Everyone in my dealership**" if you want all users on a server system or web application to see the same Integration Session. (**NOTE:** With this option, you don't need to set up Integration on other PCs—they will already be listed.)
- Select "**Just Me**" if you're using a standalone system or want the Integration Setup to apply only to your PC.



D. Select the appropriate radio button, then click **Next**.





E. Click the **Finish** button to complete the process and save your changes. You should now see **ERAccess** listed in your **Configured Integrations** screen. Click the "X" in the upper right corner to exit.

Workflow

1. Adding and Sending Parts using Snap-on EPC 5.
 - A. Find the required part number in EPC.
 - B. Left click the **plus symbol**  to the left of the part number you wish to select.
 - This will place a check  in that box.

- The selected part will appear in the **Picklist** at the bottom of EPC 5. (**NOTE:** You may need to hit the maximize button  then minimize button  to view the Picklist)


2. Removing Parts from Snap-on EPC 5 Picklist

- A. Click the **minus symbol**  next to an individual part number to remove one item at a time from the Picklist.
- B. Click the **Clear button**  to delete the entire Picklist.

3. Transferring Part Numbers into ERAccess from Snap-on EPC 5

- A. Open **ERAccess** and log into the DMS system.
- B. In the Picklist, the **Send To:** drop-down should show **ERAccess**.



- C. Click the **Send to Selected Integration** button  in the Picklist to send parts to ERAccess.
 - All parts listed in the Picklist will be listed in the window docked to ERAccess

D. Transfer a single Part Number to ERAccess.

- Make sure you're at the **Part Number prompt** in ERAccess (see illustration below).
- To add a part number to ERAccess, either **double-click the part number** in the **Parts Integration Assistant** window or select the part and click the **"Single-Line"** icon.

E. Transfer multiple Parts to ERAccess.

- Be at the **part number prompt** in ERAccess (see illustration below).



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- To send multiple parts to ERAccess, **click a part number** and then click the **“Multiple-Line”** icon to include the part selected and all listed below it. Alternatively, **hold CTRL and click each part** you want to send, then click the **“Multiple-Line”** icon.

The screenshot shows two windows. The top window, 'Parts Integration Assistant 4.2.2.0', has a table with the following data:

Part number	Description	Quantity
F1AZ 6731-BD	Filter Assy - Oil	1
FC4Z 9601-B	Element - Filter	1
FC4Z 18125-A	Shock Absorber Assy	2

The bottom window, 'ERAccess - R1PZ4', shows a terminal-style interface with the following text:

```
NOV 12, 2019 COUNTER SALES Store 06 ERA QA Test 776/2205 2525
INVOICE# CUST # NAME PHONE PAY CTR# PL
1 1 REYNOLDS MOTOR STORE1 937-485-2000 CHARGE 10 1
LN# PART# / DESCRIPTION QORD QSHP SALE CORE EXTENDED TC PL
-----
1 FO
AVAI LIST COMP ASSOC
BN1 TRADE STS SRC COMPNT
BN2 COST GRP ALTER GP%
NEW# OLD#
REMARKS TOTAL
(Q=INQ)(R=REPAIR INFO)(CI=CUST INFO)(V=VEHICLE INFO)
```