

Detailed Listing of Dealer Options

Name: Name provided by the customer file on Counterpoint. This name can be changed as necessary.

Order Branch: This is the default order branch for the customer. Invalid branch numbers can cause zero-stock scenarios. (Default is set in website maintenance)

Counterman No: The counterman number that will be used when creating invoices sent by this customer. (Default is set in website maintenance)

PO Required: Forces a PO to be entered on all orders submitted.

On-hand Quantity: Option to show or suppress the display of the on-hand quantity.

Interchange Data: Option to show or suppress the display of the interchange data in the part detail screen as well as allow interchange searches via the **FastPart** search.

Account Status: Option to show or suppress the **Account Status** link under the **utilities** menu. When activated, this shows a snapshot of the customer's current account status as well as shows the past 12 months statements. Also, you can limit who has access to this screen by setting the **Password** field.

Always ask Engine Version: This option makes it so that the user is always asked which engine they would like to select, even when it doesn't have any effect on the parts that are shown.

Part search default: The option selected here will be the default search type used in the **FastPart** search. Whenever they enter a part and hit the enter key, this search type will be used.

Price Level 1, 2, 3: Select 2 of these price levels to be shown, along with the customer's net price. The price levels correspond to prices 1, 2, & 3 in counterpoint, and you can change the displayed headings by entering something in the text fields next to the Y/N options. Note, that only 2 of the 3 can be selected.

Autoecat first page: This allows you to change the default landing page for autoecat users. The page selected here will be the first page they see when logging in.

Contact Phone: This phone number will show in the top menu bar, next to **Contact**.

Create Comments: This allows the user to create specific comments on either parts or applications within the catalogue. They can be set to create either public (seen by all of a sponsors customers) or private (seen only by the autoecat user who creates them) or both types.

Replenishment Cycle: This sets the replenishment cycle used in the stocking list, found under the stock order screen.

Buyers Guide: This option allows you to suppress the display of the buyer's guide for part numbers.

Preferences (AMS Only): Allows the user access to the catalogue preferences.

Change Password (AMS Only): Allows the user to change their autoecat password.

View All Data: This option presents the user with a **View All Data** button when doing interchange lookups when no parts matching your preferred lines show up.

Part Search: Option to allow the suppression of the **FastPart** bar.

Single Vendor: This option overrides a user's preferences and function the catalogue in such a way as the vendor entered is the only vendor in the catalogue.

Billing Type (AMS Only): Not Applicable

Change Catalogue Comments: Deprecated

Multiples View: This option either turns on or off, the full-screen multiples display that allows users to select multiple subgroups at once.

Catalogue Compressed View: This option collapses all subgroup headings when looking up product. Each subgroup can then be clicked on to expand to see part numbers.

Transaction: This is the Counterpoint transaction type that will be created when this user submits orders.

Quotes Allowed: This allows the user to gain access to the ability to save shopping carts as quotations

Branch Detail: This option will suppress the display of the branch drop-down menu showing on-hands.

Web access from Counterpoint: This option determines whether the customer has been set to order remotely. If this option is set to No, the shopping cart screen will have a **Save Query To Invoice** button vs. a **Submit Order** button.

Part Search Quick Return: This option will return the user to the part search screen, with parts, when adding an item to the cart. If set to N, they will be placed back at their home screen.

Search Only Inventory: When set to Yes, this option hides all non-stocked items when application parts are first shown. To access non-stocked items, the user must click the product group heading.

Purchasing Allowed: This option activates the shopping cart.

Branch Inventory View: This sets the on-hand quantity that is shown. Default & Branch both show your default branch, Corporate will show all branches in one total

Sort Parts By Position: This option will allow you to sort parts by position, and then by ranking, and then by name. If set to No, parts are sorted by ranking and then name.

Contact Email: This option is for future use.

View Comments: This option selects which type of user comments this user can view. This is to be used in conjunction with the **Create User Comments** option. (Default is none)

View All Interchanges: This option allows a user to see all interchange results, by default.

Labor Guide (AMS Only): This option is for future use.

Stock Check: Deprecated

Special Orders: This option will activate a free-form text line on Purchase orders that will show up as comment lines in counterpoint.

Gap Analysis (AMS Only): Not Applicable

Super User (AMS Only): Not Applicable

Expiry Date (AMS Only): Not Applicable

Search Buying Group Warehouse: This option allows the user to do warehouse lookups for approved warehouses.

Trading Partner: This activates **TradeX**, which is a feature that allows autoecat sponsors to search one another's inventory when they do not have the product in stock.

Revision #2

Created 2018-09-28 15:42:15 UTC by Admin

Updated 2022-01-25 05:56:51 UTC by Jim