

ProgiParts Direct: Installation and Training

Here are the suggested steps for installing/training dealerships:

- Explain **how ProgiParts works**:
 - The appraiser/collision shops import estimates into the software.
 - Availability and price information is returned for all types of parts from suppliers of recycled, OEM and aftermarket parts.
 - The collision shops order parts.
 - The parts are shipped.
- Go to www.progi.com/progiparts and click the “Online Access” for Auto Dealer link and, once on the login page, click the “**Trainer’s page**” link at the bottom left.
- Download and install** the ProgiParts Direct software **on more than one computer**.
- Run the software** and login as demo/demo (user name/password).
- Show how to access the **online help**.

Confirmation Request

- Open ProgiParts Direct’s main window** by double-clicking on the icon (bottom right).
- Double-click on the confirmation request** which appears in the top portion.
- Explain that in a “real life” case, when a new request comes in, an alert sounds and appears at the bottom right of the screen. The user then clicks on the alert to proceed instead of performing the two preceding steps.
- Select “View and take in charge”**. This is an example of what happens when a person opens a request already being handled by someone else.
- The confirmation web page will appear: explain the information in the header, emphasizing the end time for confirmation.
- Show how to confirm a part** and enter or correct its list price and OEM part #.
- Explain various **scenarios of part availability**:
 - Available, delivery within the standard delay of 48 hours.
 - Available, delivery at a later specified date.
 - Back Order, unknown delivery date.
 - Back Order, delivery at a later specified date.
 - Discontinued.
- Also explain that notes can be added.
- Indicate that the name of the salesman can be changed, then **click “Submit”** to send the

information to the appraiser/collision shop.

- Point to the “Confirmation successfully sent” notification** and explain that, if there had been an error, it would be noted in red in this space. *(In this demo version, there is no validation, so no error is possible.)*
- Explain that the collision shop **may send another request for the same file**. This happens when the collision shop adds parts to a file. In this case, information that was already entered by the dealer is already filled out and can be corrected if needed.

Order

- Open ProgiParts Direct’s main window** by double-clicking on the icon (bottom right).
- Double-click on the first order** which appears in the bottom portion.
- In the window that appears, show the list of messages. **Select “List of parts ordered” and click “Show message document”**.

Order Webpage

- Explain the header information**. Point to the ProgiParts number and the order number, and explain that they should appear on the delivery order.
- Explain the list of parts ordered**. At this point, they should start their process for delivering the parts to the collision shop.
To simplify accounting, we suggest that the parts be invoiced within their internal system, in an account grouping all ProgiParts shops (although with different shipping addresses).
- IMPORTANT: the dealer’s invoice should not be sent to the collision shop, because that is not the official invoice. The ProgiParts system will generate the official invoice** and will forward it to the collision shop and insurance company in PDF format. If the dealer’s invoice is sent to the collision shop as a delivery slip, it must state “This is not an invoice”. We suggest that the dealer has a stamp made.

ProgiParts Direct software

- Show the dealer how to return an **acknowledgment message** to the collision shop. (Click “Add a message” next to “Show message document” in ProgiParts Direct.)
- They can also **archive** the request using the cabinet drawer icon.

Online Access

- Explain that, for the parts to be paid, **they must enter the invoice information on the ProgiParts website**. To reach the website, they can either:
 - o click on the [“ProgiParts website”](#) link in ProgiParts Direct’s main window;

- visit www.progi.com/progiparts and click “**Online Access**” next to Auto Dealer.

*For carrying out the demo, please login from the **Trainer’s page** (login is demo/demo).*

- Select the file in the “**Recent Files**” list by clicking its link.
- Click the link “**Enter a new invoice for this order**”. Explain:
 - They must enter their invoice number and date. (This will facilitate their accounting when we return the payment.)
 - Select the parts billed on this invoice, review the information, click “**Confirm**”.
 - Explain that the same process can be done for another invoice for other parts for the same order.
- Explain that **an invoice or a credit can be corrected** (or cancelled) before 8pm, when it is accounted for in ProgiParts’ system. The user should use a similar process to do this:
 - locate the file on the website;
 - select the invoice entered;
 - correct the information as needed;
 - click “**Confirm**” again to save the changes, or click “**Cancel**” to cancel the invoice!

Order Modification

- Open ProgiParts Direct’s main window** by double-clicking on the icon, then double-click on the **order modification** in the bottom portion.
- Click “**Show message document**”. The modification web page appears.
- Explain the header information. In this case, **there is a part added**. Explain that the list of parts already ordered is just for reference – there is no change for those. For the new part, they must go through the same process as for the initial order.

Order Cancellation

- Open ProgiParts Direct’s main window, then double-click on the **cancellation**.
- Select the cancellation, then click “**Show message document**” to open the web page.
- Explain the parts should not be sent to the client. If they already were, they should be brought back.
- If they were already invoiced*, they should be credited in the dealer’s system as well as on the ProgiParts website. The process is similar as for adding an invoice:
 - Locate the file on the website (it should appear in the list awaiting a credit);
 - use the “**Add a credit**” link;
 - select the parts to credit;
 - enter the amount at list price (discounts are automatically updated);

- specify the reason for the return;
- click “Confirm” at the bottom.

Labour Credit Request

- Open ProgiParts Direct’s window, double-click on the **labour credit request**.
- Select the credit request, then click “Show message document” to open the web page.
- Explain the header information, and point the requested amount and comments.
- Select the special message and click on the part’s picture to show the larger version.
- The credit must be entered on the ProgiParts website** (as well as in the dealer’s system). The process is similar as for a part return:
 - locate the file on the website (it should be in the “awaiting a labour credit” list);
 - use the “Add a credit” link;
 - select the parts on which the credit will be applied;
 - enter the amount to be credited at list price;
 - **select “Labour credit” in the list of reasons;**
 - click “Confirm” at the bottom.
 - *It is important to select “Labour credit” as the reason, since it will return the amount to the collision shop, instead of the insurance company.*

The training is now complete. Don’t forget to...

- Give the dealer their login information, to use on the real website.
- Correct the login information entered in the ProgiParts Direct software:
 - **Double-click on the icon** to open ProgiParts Direct’s main window.
 - **Select “Tools” in the top menu, then “Options.”**
 - **Correct the login and password** info.
 - Click “Ok”.

If there are communication errors, there may be a typo in the login info entered: try entering it again. You can contact us in case of problems.
- Show **once more** how to access the **online help**.
- Visit the dealership’s **accounting department** to explain the Network Fees
- Congratulations, **your dealer is now ready to go!**

Our contact info: 1-855-310-6343 or progiparts@progi.com