

ShopCAT™ Parts Catalog with Online Ordering (v.5)



ShopCAT/Management System Interface Guide

Copyright 2003 Snap-on Technologies, Inc., Mitchell Repair Information Company, LLC (MRIC) and Cooperative Computing Inc. All Rights Reserved

DISCLAIMER OF WARRANTIES: Although the information contained within this volume has been obtained from sources generally believed to be reliable, no warranty (expressed or implied) can be made as to its accuracy or completeness, nor is any responsibility assumed by Snap-on Technologies, Inc., MRIC, and Cooperative Computing Inc. or anyone connected with them for loss or damages suffered through reliance on any information contained in this volume. SPECIFICALLY, NO WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR ANY OTHER WARRANTY IS MADE OR TO BE IMPLIED WITH RESPECT TO THIS VOLUME AND ITS CONTENTS. In no event will Snap-on Technologies, Inc., MRIC, and Cooperative Computing Inc. be liable for any damages direct or indirect, consequential or compensatory, including, without limitation, lost profits, for any representations, breaches or defaults arising out of the use of this volume. Customer agrees to indemnify Snap-on Technologies, Inc. and Cooperative Computing Inc. and hold them harmless against all claims and damages, including without limitation, reasonable attorney's fees arising out of the use of this volume, unless such claims or damages result from the infringement of any copyright or other proprietary right of any third party. This document contains confidential and trade secret information of Snap-on Technologies, Inc., MRIC, and Cooperative Computing Inc. Any unauthorized reproduction, photocopy, or use of the information herein, in whole or in part, without the prior written approval of Snap-on Technologies, Inc., MRIC and Cooperative Computing Inc. is prohibited.

NOTE: This guide contains reference information about ShopCAT. The software described in this guide, as well as the guide itself, are furnished under the terms and conditions of a license agreement. The software consists of software options which may be separately licensed. It is against the law to copy the software on any medium or to enable any software options, except as specifically permitted under the license agreement. In addition, no part of this guide may be copied or transmitted in any form or by any means without the prior written permission of CCITRIAD. From time to time, CCITRIAD makes changes to its software products. Therefore, information in this guide is subject to change and the illustrations and screen images that appear in the guide may differ somewhat from the version of the software provided to you.

Microsoft is a registered trademark of Microsoft Corporation.

Windows is a trademark of Microsoft Corporation.

ShopCAT is a trademark of Cooperative Computing, Inc.

Names of all other products mentioned herein are used for identification purposes only and may be trademarks and/or registered trademarks of their respective companies.

Printed in USA

Introduction

System Requirements	1
Networking Requirements	2

Installing ShopCAT

ShopCAT Installation (Single User)	3
Licensing ShopCAT	7
Assigning the Catalog Features	7
Data Management Utility	8
Multi-User Installation.....	11
Before you Begin.....	11
Network Installation.....	12
Summary	14

Getting Started Using ShopCAT

Overview	15
System & Display Options	21

Using ShopCAT With Your Management System

Introduction.....	27
Setup	27
Importing Parts Information into Management System	27
Linked Vendor Setup	29
Parts Ordering	30
Summary	32



Chapter 1 Introduction

Welcome to the CCITRIAD ShopCAT/Management System User's Guide. This User's Guide tells you everything you need to know to install and setup ShopCAT and use it with your Management System.

The User's Guide is divided into four chapters:

Chapter 1 Introduction – Provides introductory information and minimum system requirements.

Chapter 2 Installing ShopCAT – Detailed Single-User installation instructions and additional information on installing ShopCAT in a multi-user environment.

Chapter 3 Getting Started Using ShopCAT – Tutorial-style lessons to get you up and running quickly using the ShopCAT program.

Chapter 4 Using ShopCAT with your Management System – Instructions on using ShopCAT with your Management System.

System Requirements

The following are the minimum system requirements for using ShopCAT with your Management System:

- Microsoft® Windows 98*, Windows ME, Windows 2000*, Windows XP
- 233 MHz Intel® Business class Computer
- 64 Megabytes (MB) Random Access Memory (RAM)
- 3.5" 1.44 MB diskette drive
- CD-ROM Drive
- DVD-ROM Drive (Repair users only)
- 15" Super VGA color monitor 800x600 resolution
- 8 Gigabyte (GB) hard disk drive or greater with at least 2 GB available
- Microsoft compatible mouse
- 1 Parallel port
- 1 Serial Port
- 56k modem
- Inkjet printer
- Iomega Zip Drive 100/250 MB (for backups)

- UPS (Un-interruptible Power Supply)

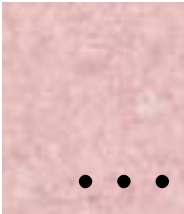
* **Note:** Windows 98 should be SE (Second Edition), Windows NT should be Version 4.0, Service Pack 6 (SP6), Windows 2000 should be Service Pack 2 (SP2). **Also, Please Note:** The minimum system requirements may not be compatible with future software releases.

Networking Requirements

- Windows 98*, Windows ME, Windows 2000*, Windows XP
- Required Network Card: 3-Com or Intel 10/100 Mb/sec
- TCP/IP is required as a network protocol. On a Windows NT, 2000, or XP system, ensure the box is checked for **Enable NetBios over TCP/IP**

Service Expert EZ Customers

- Service **Expert EZ Customers** - It is our **strong** recommendation that you install the ShopCAT catalog on a computer other than the one with your Service Expert EZ software installed. If that is not practical, please note the special installation considerations on Page 5.



Chapter 2

Installing ShopCAT

There are four steps to the installation process that must be followed in sequence:

1. ShopCAT Installation
2. Licensing
3. CatalogAssign
4. Data Management Utility

This chapter details the complete installation process. If you are licensed to use ShopCAT in a multi-user environment, review the installation procedure below and then carefully read the sections at the end of the chapter for special instructions for Network installations.

Network User's Note: Be sure to review the Multi-User special setup and installation instructions beginning on page 11 before you begin. Look for these notes in the installation procedure for special multi-user instructions.

ShopCAT Installation

To Install the ShopCAT Software:

1. Place the ShopCAT install CD in the computer's CD/DVD drive. The Installation Menu should start automatically. Choose **Install ShopCAT** from the menu.



Installation Menu

The Welcome screen displays.

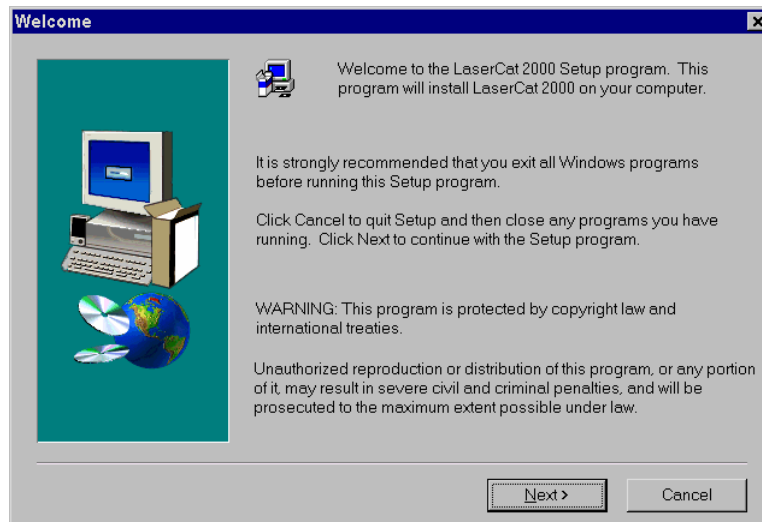
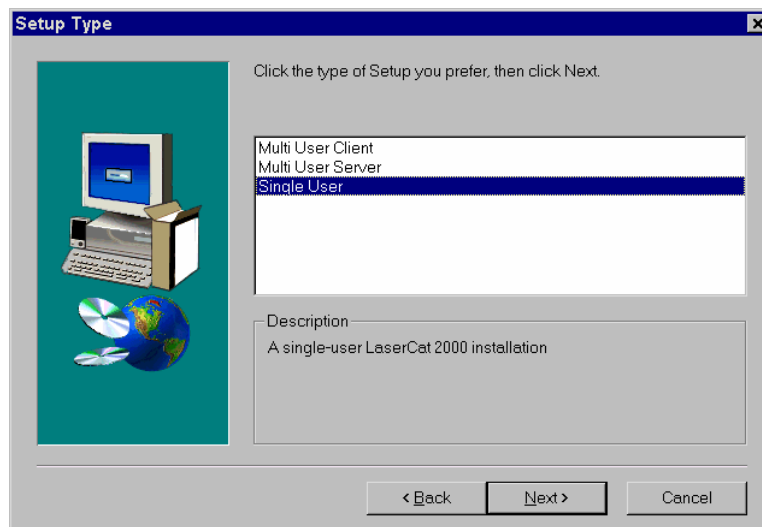


Figure 1 - Welcome Screen

2. Click **Next** to start the installation. The Setup Type dialog box asks you to specify your installation type.



Setup Type

3. Choose **Single User** installation then click **Next** to continue.

Network Users Note: Choose Server or Client installation depending on the workstation.

You are asked to specify a Destination Location.

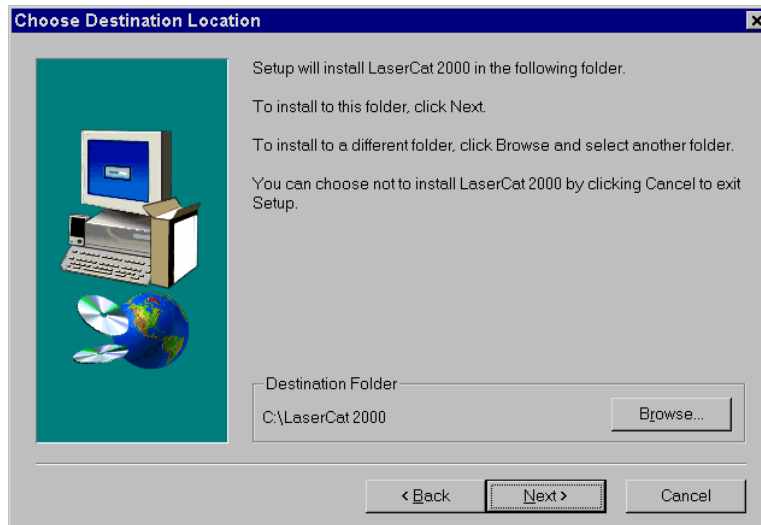


Figure 2 - Choose Destination Location

Indicate where ShopCAT is to be installed. If you are a Service Expert EZ expert user it is highly recommended that you not install ShopCAT on the same computer. Please read note below:

- **Service Expert EZ Customers**

It is our strong recommendation to install the ShopCAT catalog on a computer other than the one with your Service Expert EZ software installed. If that is not possible please note the following special installation considerations. The following special instructions do not guarantee proper software functionality.

- **CCITRIAD Service Expert EZ customers** should pay particular attention to the installation path for the ShopCAT catalog. If the computer that you are installing the ShopCAT catalog has a version of Service Expert EZ installed, the default installation path will incorrectly be changed the Service Expert EZ location. In these cases the user will need to select the "Browse" button and manually change the default path to C:\LaserCat 2000 (See above diagram). Failing to do so will over-write the Service Expert EZ license file causing the program to no longer work. It is also necessary to install a software patch which will create a new desktop icon from which to launch you Service ExpertEZ product. It is recommended that the customer work with technical support to install this patch. Please note that even after installing per these special directions users have reported issues.

With the exception of Service Expert EZ customers, as discussed above, CCI-TRIAD recommends installing to the default destination folder unless you are a Network user (see note below).

Network Users Note: For **Network Server** installations, install the program in the SRV-APPS shared directory using your shared local CD/DVD ROM drive as the data location.

For **Network Client** installations: The application location is the SRV-APPS (M:) folder on the Server. During installation, the Data location is (temporarily) the mapped CD-ROM/DVD Drive (P:) on the Server (SRV-CD).

It is highly recommended that you review the Network Installation information at the back of this chapter before attempting Network Setup.

- Click **Next** to continue. You are prompted to choose the Catalog Data Location.

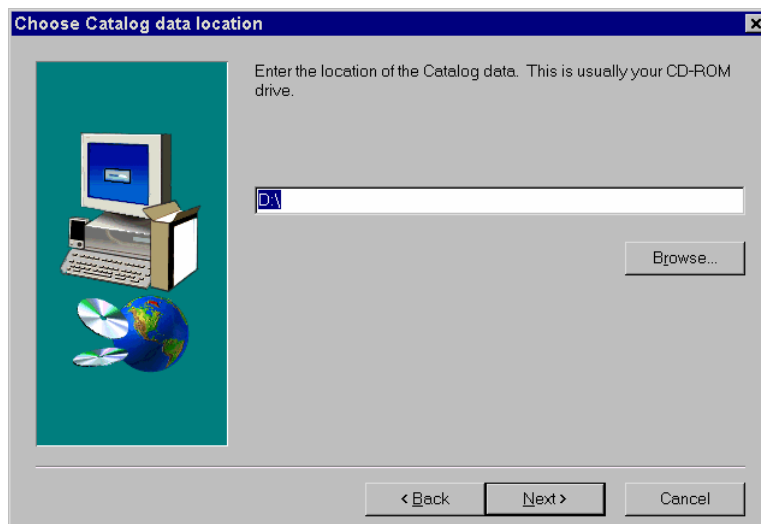


Figure 3 - Choose Catalog data Location

- Indicate the location of catalog data. Type the drive letter where the data is currently located (normally the local CD/DVD drive), then click **Next** to continue.

A status bar is displayed as files are copied to the hard drive. You are notified when all the files have been copied.

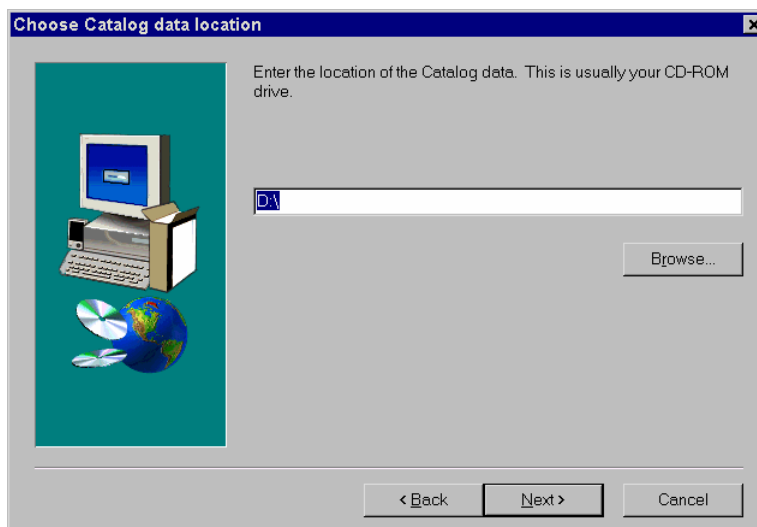


Figure 4 - Setup Complete

- Click **Finish** to complete the installation.

Network Users Note: Once you have finished installing on the server, remove the installation CD. You will need to use the CD to install to each of the Client Workstations. Put the Data CD/DVD in the Server's mapped data CD drive (SRV-CD).

Licensing ShopCAT

After installation, it is necessary to install the permanent license. If installing an evaluation copy, you will have 60 days before the permanent license is required. If you do not wish to license ShopCAT at this time you may skip to the Catalog Assign procedure.

You will receive a ShopCAT Key diskette that installs a permanent license to the hard drive, controlling what features can be used.

To License ShopCAT:

1. Put the key diskette into the floppy drive (on the server machine, if a network installation). Click Start, then Run. Type:

A:\mlicense

(where A: is the location of your floppy drive).

The mlicense program activates your license file allowing you access to the program.

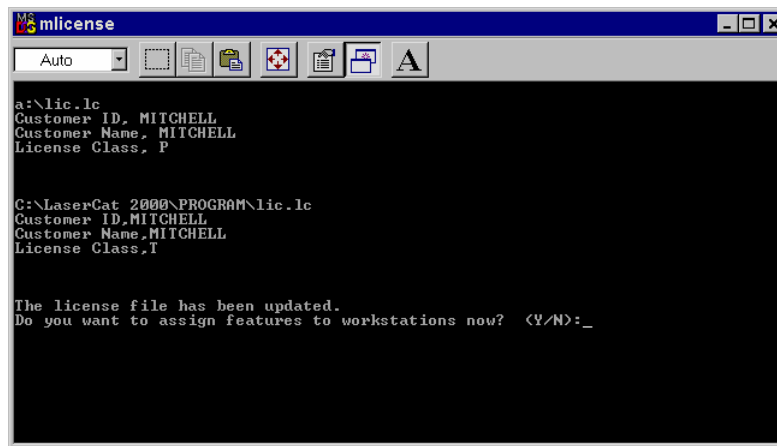


Figure 5 - mlicense

2. Press **Y** when you see the message "Do you want to assign features to workstations now?" to go to the Feature Assignment Program. Please be patient and wait for the completion message, the licensing process may take a considerable amount of time.

Network Users Note: Licensing takes place on the Server only, after all client workstations have been installed.

Assigning the Catalog Features

The Feature Assignment Program assigns catalog features to individual workstations and must be run before running catalog. If you have a ShopCAT Key diskette, running it will prompt you to run the CatalogAssign program and you're done with licensing.

If you do not have a ShopCAT Key diskette, you must run CatalogAssign independently before you can open ShopCAT. When you get the ShopCAT Key diskette and run it, you must redo CatalogAssign by answering yes to the question "Do you want to assign features to workstations now?"

To Run the Feature Assignment Program (without Key Diskette):

Open Windows Explorer and go to the directory where ShopCAT is installed, normally the "C:\LaserCat 2000\program" directory. Find a file called "CatalogAssign", then double click it to open the Feature Assignment program.

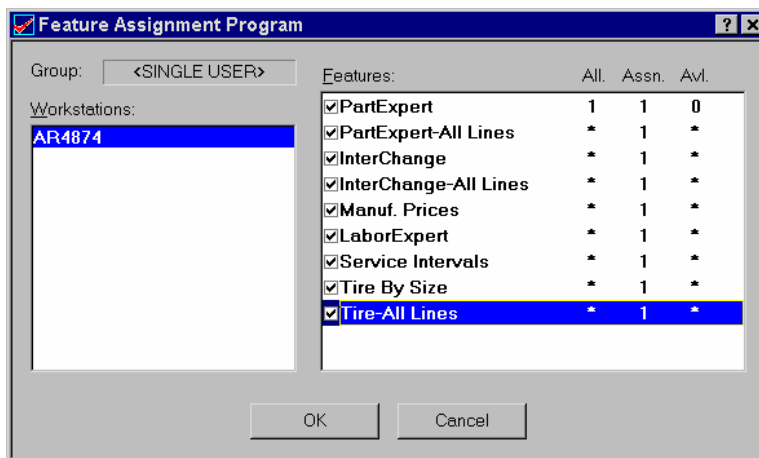


Figure 6 - Feature Assignment Program

Initially the dialog box displays with no features selected. Choose the desired features and click **OK**.

Network Users Note: The Multi-User Catalog Features Assignment dialog box is a little different than the single user dialog box in that a two-paned display allows you to select each system workstation and specify unique features access.

Data Management Utility

Normally, the data is downloaded to the hard drive to make lookups faster and to free up the CD/DVD drive on the machine. The Data Management Utility is used to download catalog data to the hard drive.

Before running the Data Management Utility, ensure that catalog is installed on the machine. Insert the ShopCAT Data CD or DVD into the CD/DVD drive.

To copy data to hard drive:

1. Double click the Data Management Utility icon on the desktop to open the Data Management Utility dialog box.

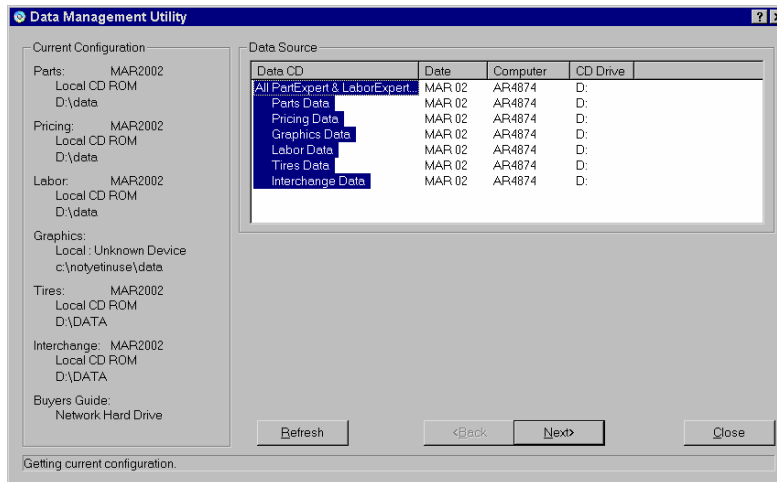


Figure 7 - Data Management Utility (1)

- The data from the CD/DVD drive is highlighted. To download specific pieces of data, hold down the control key and click desired item(s). To download everything, leave everything highlighted.
- Click **Next** to continue.

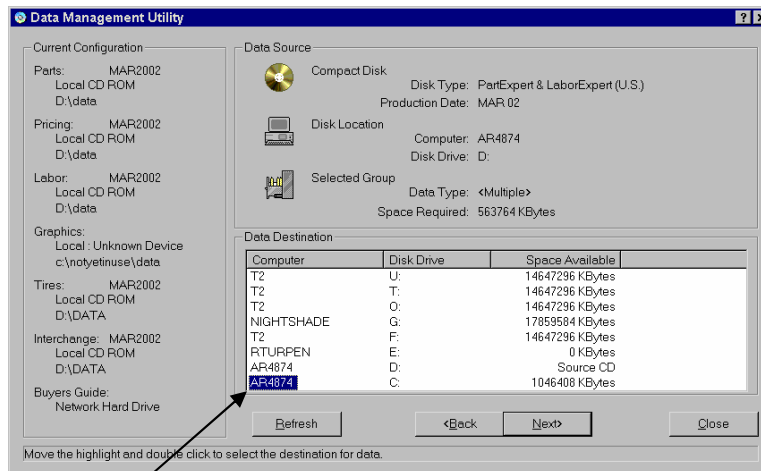


Figure 8 - Data Management Utility (2)

- Select the **local C drive**, then click **Next** to continue. Source and destination information is displayed.

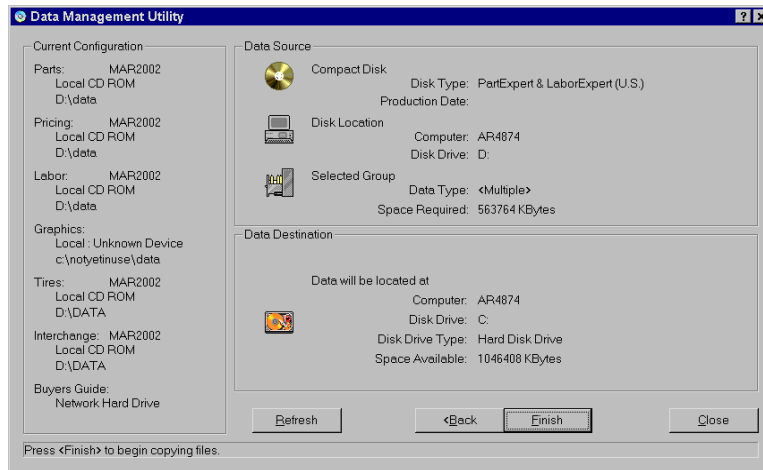


Figure 9 - Data Management Utility (3)

5. Click **Finish** to continue. The exit confirmation dialog box instructs you to make sure all users are out of the catalog.

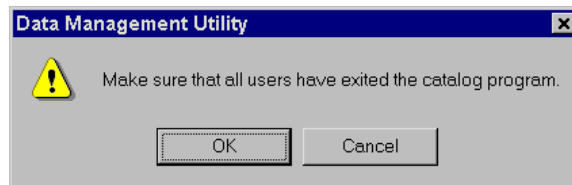


Figure 10 - All User's Exited?

6. Ensure nobody is running catalog, then click **OK**.

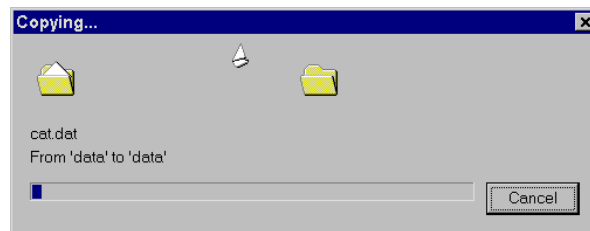


Figure 11- Copying Data

The Data Management Utility copies data from the first CD to the hard drive, taking 10 – 15 minutes.

Note: the time remaining indicator is for each file downloaded, not the whole download process.

You are informed when the Data Management Utility has finished copying the files on the CD.

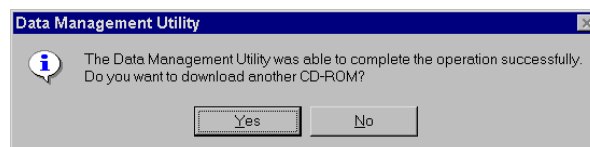


Figure 12 - Download Another CD-ROM?

7. To copy all files on both CD's to the hard drive (recommended), click **Yes**. For DVD users, the process ends here. Click **No** to close the Data Management Utility program.

Once all files are copied to the hard drive, you are ready to use ShopCAT.

Network Users Note: Data is copied to the Server's SRV-DATA drive. Workstations data mappings will automatically be updated when you copy the data to the Server's hard drive.

Multi-User Installation

Note: most reported installation problems occur when installing on a multi-user network. Please become very familiar with the install process described herein before beginning the installation. The network must be properly configured prior to install. The person performing the installation must have basic networking knowledge as network setup and administration is not discussed below. Network related issues should be referred to a qualified network administrator.

This section briefly describes steps to install ShopCAT in a multi-user environment. Because most of the basic steps are similar to single-user installation, with minor variations, just a basic overview is provided in this section. Read the instructions in each dialog box and refer to the single-user installation procedure for specifics on any dialog box.

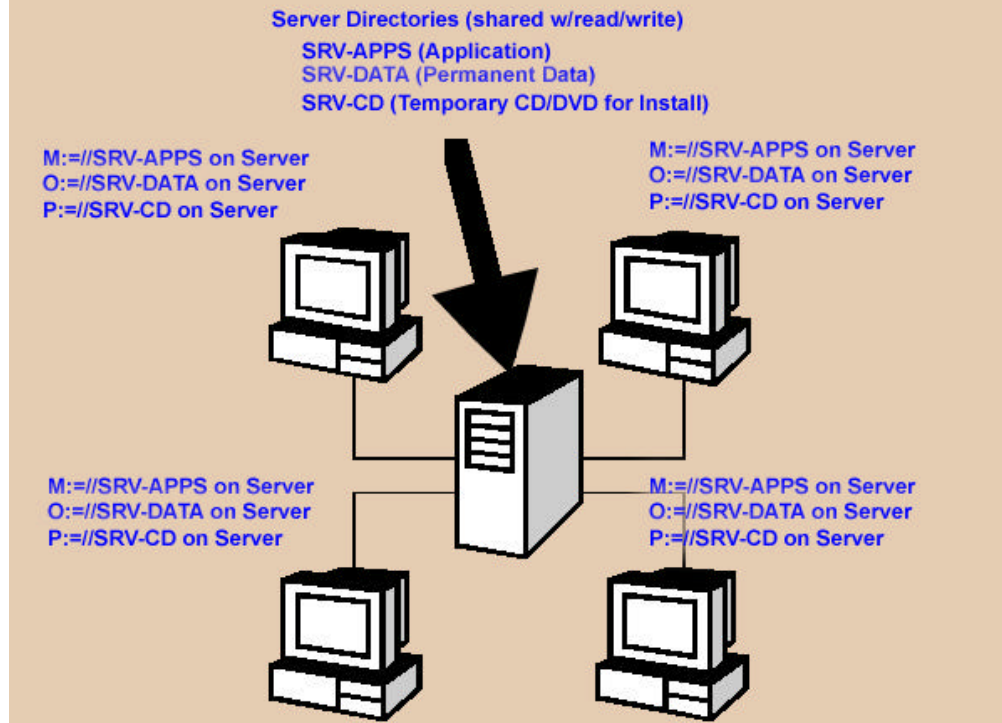
Before you Begin

Complete the following before running the ShopCAT installation in a multi-user environment.

Note: if you are unfamiliar with any of the steps below, it is highly recommended that you acquire the assistance of a network administrator in performing multi-user setup. It will save you time and aggravation.

- **Check for NetBios** - On a Windows NT, 2000, or XP system, ensure the box is checked for "**Enable NetBios over TCP/IP**". For more information on how to check this setting, please reference the Network Administrator User's Guide.
- **Network Neighborhood** - Ensure the server and clients in the same workgroup can see each other. If the computers cannot see each other, they will not appear on the CatalogAssign screen to assign features. To correct any network errors, please contact a network administrator.
- **Drive Sharing** – Ensure the applications and data directories on the server's hard drive and server's CD-ROM or DVD drive are shared with Full Access, including Read/Write privileges.
- **Drive Mapping** – On **each client**, map the applications and data directories on the server's hard drive and the server's CD or DVD drive. Write down the assigned drive letters for later reference during client install. The illustration below shows a typical mapping scheme.

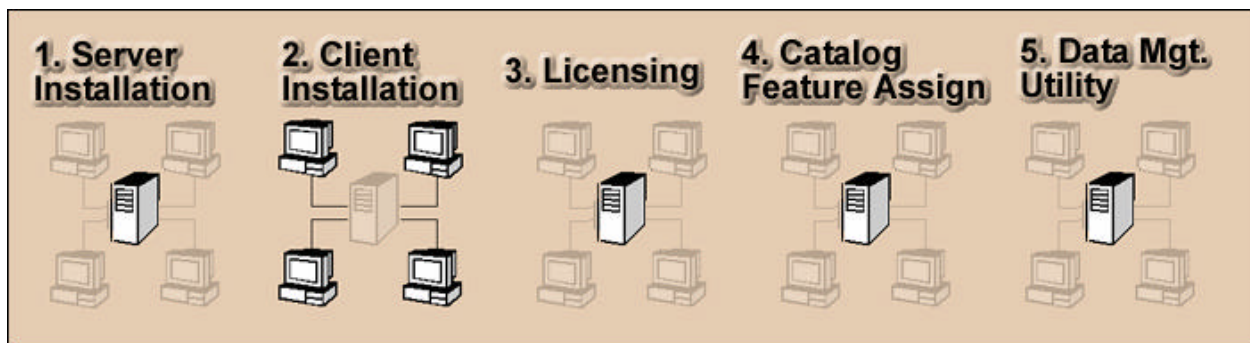
Network Pre-Configuration



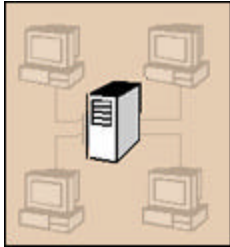
Note: For additional information on mapping drives, please refer to the Mitchell Network Administration document.

Network Installation

There are five steps to the installation process that must be followed in sequence. Each of these steps is discussed briefly below.



For more specifics on the individual dialog boxes, refer to the single user installation procedures earlier in this chapter.

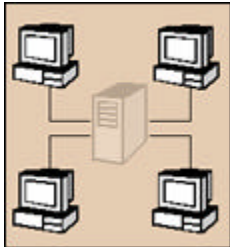


1. Server Installation

Install the ShopCAT software on the Server workstation in the **SRV-APPS** shared directory using the ShopCAT Installation CD. The procedure is very similar to single user installation except that you will specify that it is a **Multi-User Server** installation when prompted. Do not copy the Catalog data to the hard drive until all Client Workstations have been installed.

Once you have finished installing on the server, remove the installation CD. You will need to use the CD to install to each of the Client Workstations. Put the Data CD/DVD in the Server's mapped data CD drive (SRV-CD).

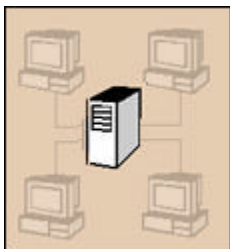
Note: Be sure to install the Application in the SRV-APPS shared directory using your shared CD/DVD ROM drive as the data location. You won't copy the data to the Server's hard drive until later in the installation process.



2. Client Installation

Install the ShopCAT software on each of the client workstations using the ShopCAT Installation CD. The procedure is very similar to single user installation except that you will specify that it is a network client installation when prompted. You will also specify the application path and data locations on the server's hard drive.

Note: The application location is the SRV-APPS (M:) folder on the Server. The Data location is (temporarily) the mapped CD-ROM/DVD Drive (P:) on the Server (SRV-CD). The Data mappings for the Client workstations will automatically be updated when you run the Data Management Utility (DMU) in step #6.

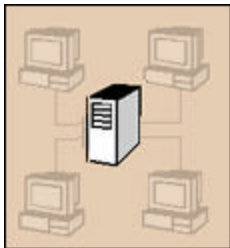


3. Licensing

You should have received a **ShopCAT Key** diskette that installs a permanent license to the hard drive, controlling what **features** can be used and **how many client stations** on which ShopCAT can be run. Insert the diskette in the floppy drive of the Server and run x:\mlicense. The client workstations will have their licenses automatically updated.

Choose Yes (Y) when prompted to perform Catalog Features assignment (Step 4).

Note: Licensing only needs to be performed once, on the Server, after all the client workstations have been updated.



4. Catalog Features Assignment

Once you have finished licensing, you will be prompted to perform Catalog Features Assignment. The Multi-User Catalog Features Assignment dialog box is a little different than the single user dialog box in that a two-paned display allows you to select each system workstation and specify unique Features permissions for it.

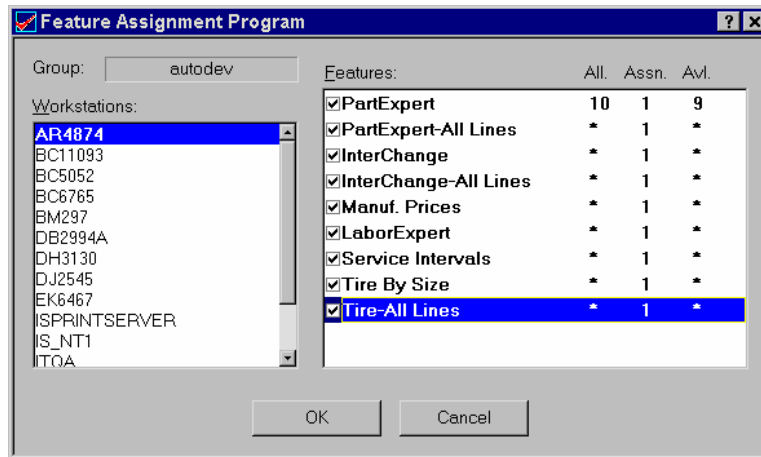
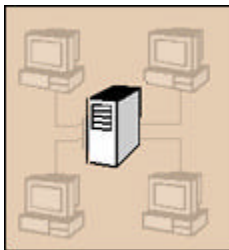


Figure 13 - Multi-User Features Assignment

Assign features for the **Server** and **each workstation** and click **OK**.

Note: Catalog Features need to be assigned for all workstations, on the Server.



5. Data Management Utility

Click the Data Management Utility icon on the Server's desktop to run the Data Management Utility. Be sure to copy both Data CDs (if applicable) to the SRV-DATA location on the Server (O:). The Client workstations data settings will automatically map to the new data location.

Once you have completed all 5 steps, you are ready to run the ShopCAT application.

Note: Workstations data mappings will automatically be updated when you copy the data to the Server's SRV-DATA (O:) location.

Summary

Once you have installed ShopCAT, you are ready to learn how to use the program. The next chapter provides tutorial-style training on using the most important program features.



Chapter 3

Getting Started Using ShopCAT

• • • • •

This chapter begins with some overview information on the ShopCAT user interface and then progresses to some hands-on practice exercises. It is recommended that you read through the introductory information and complete the practice exercises before working in ShopCAT.

Overview

ShopCAT information databases are logically organized and supported by a user interface that, with a minimum of practice, is easy to operate. Practice exercises are provided covering:

Screen layout – screen appearance and design.

Part and labor lookups – how to find part and labor application information.

All Lines – accessing part information for any manufacturer(s).

Smart Index – how ShopCAT can help with difficult to find parts... a great feature for less experienced users.

InterChange – how to cross reference parts between manufacturers.

System & Display Options – how to customize ShopCAT look and feel.

Graphics – how to access part diagrams.

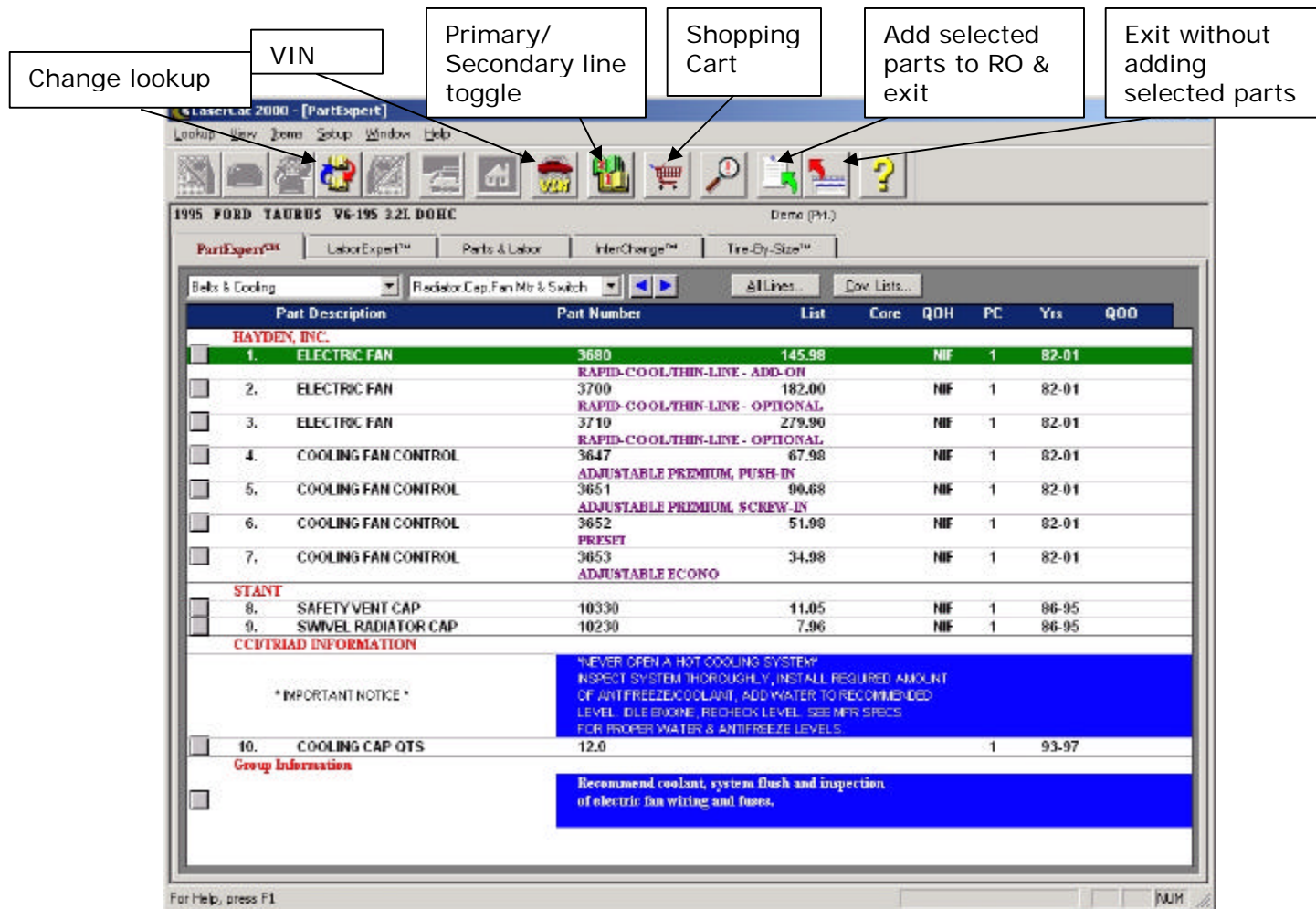
Tire by Size – tire fitment, information, plus sizing.

Miscellaneous information – navigation tips and shortcuts that increase user efficiency.

Screen Layout

The ShopCAT main screen is shown below. You will have been prompted to select a part and labor category and group prior to reaching this screen. Please become familiar with the general layout.

Like all Windows products, ShopCAT typically offers several different ways to navigate: mouse, hot keys, and drop down menus. While the tutorial will focus on use of the mouse, experience will determine which method(s) best serves the user.



Lesson 1 - Part & Labor Lookup

This lesson covers:

- **A typical Part & Labor lookup**
- **Part Categories & Groups** - Parts are organized by categories & groups.
- **Specific Conditions** – Vehicle options that determine application fitment. Examples: engine size, body style, with or without power steering, etc.
- **Labor additional items** – extra charges for “in the way” components or additional

service. LaborExpert shows these charges directly below the main labor operation, making it much easier to remember to include in the estimate.

1977 Chevrolet Impala 350 CID 5.7L - Look up Fuel Pump

To Create an RO for the specified vehicle:

1. Click on the 'CCITRIAD' button.
2. Select Category - click 'Fuel & Emission.'
3. Select Group - click 'Fuel Pump, Tank & Turbo System.'
4. Click the 'OK' button to advance to the vehicle selection window.

Vehicle information has been automatically passed to the catalog from the repair order.

5. Answer 'Station Wagon?' Specific Conditions question 'No'.
6. Click the 'OK' button to advance to the parts window.

Fuel Pump and related parts will be displayed.

Click the grey box at the far left of the line to select a part or labor item.

7. Click the LaborExpert tab. View line 7 – R&R Pump, Fuel.

Labor information will be displayed. Note the additional times for *Air Pump Interference* and *Drain & Refill Tank*.



Note: At any time after one or more part and/or labor items are selected, clicking the **Shopping Cart** icon will open a quick estimate summary with job totals (not including tax).

All Lines

- **All Lines** - provides access to all manufacturers' lines and products.


1. Click the **PartExpert** tab.
 2. Click the **All Lines** button.
 3. Click on the box beside ACDelco.
 4. Click **OK**.
- ACDelco fuel pumps are displayed.

Smart Index

- **Smart Index** – find the right parts and labor, without knowing vehicle technology.

To Create an RO for a 1986 Chevy Pickup C10- Lookup Idler Arm



1. Click on the 'CCITRIAD' button.
2. Click on the 'Part Description' tab in the Parts & Labor Lookup window.
3. Type 'idler' in the description field.

4. Click on the magnifying glass button next to the description field to narrow the search (not necessary in this case, but could be for "bearing"). 
5. Click on 'Idler Arm' from the list.
6. Click the 'OK' button to advance to the parts window.
7. Answer Specific Conditions questions, ½ ton, no power steering, no 4 wheel drive.
8. Answer Specific Conditions - Labor 'No'.
Part options are shown.
9. Click the LaborExpert tab.
Idler arm labor is shown, including interference item(s).

Speed Buttons

- **Change lookup** – add parts to your search without reentering the vehicle.
- **VIN button** – view important VIN information.
- **Primary/secondary lines** – toggle between the parts you most want to sell and your secondary lines.
- **Coverage lists** – select a different supplier part list to view.

Using Speed buttons on an RO for a 1996 Ford Taurus G - V6-182 3.0L OHV

1. Click the CCITRIAD button.
2. Click the Part Category Ignition & Engine Filters.
3. Click the Eng Filters & PCV group.
4. At the Specific Condition window click the 'VIN Info' button.
5. Since the engine is an SFI, according to the chart it would be VIN U, click the 'Close' button.
6. Specific Conditions - click 'U Eng Code.'
7. Click the 'OK' button to advance to the parts window.
8. Answer any specific conditions that may be required.
9. Toggle the 'Pri/Sec Lines button' and the economy filters are displayed. 
10. Click the 'Change Lookup button' to select more parts while vehicle remains the same. 
11. Click on the 'Cov. Lists' button. Select a different list.
You may alternate between various suppliers while looking up a part.

ExpertKeys

- **ShopCAT allows use of ExpertKeys and other shortcuts to facilitate speedy catalog navigation.**

There is a function key for nearly every button discussed above. They are:

F4	VIN Info
F5	Specific conditions
F6	Primary/Secondary toggle
F8	All Lines
F10	Manufacturers Prices
F11	Setup System Options
F12	Setup Display Options

<u>P</u> artExpert...	Ctrl+P
<u>L</u> aborExpert...	Ctrl+L
P <u>a</u> rts & L <u>a</u> bor...	Ctrl+B
<u>I</u> nterChange...	Ctrl+I
<u>T</u> ire-By-Size...	Ctrl+T

Hot keys are also available for a number of functions. As shown in the example below, a hot key is typically the Alt or Ctrl key pressed simultaneously with a designated letter from the description of the desired function.

Consult your ShopCAT pull down menus or Help for more options.

InterChange

- **InterChange delivers OEM-to-aftermarket and aftermarket-to-aftermarket cross reference. It also includes non automotive lookups like marine, lawn & garden, agricultural, truck. Highlight a filter from the previous Taurus lookup**

1. Click the **Interchange** tab.
2. Click **Lookup**.

In the **Interchange Part Type Selection** box, select **All** in both windows. Click **OK**.

3. View filter part numbers from different manufacturers.
4. Click **All Lines**.
5. Select one or more alternate manufacturers.
6. Click **OK**.

View part number crossovers for selected manufacturers.

Need Carburetor Kit and Float, Customer only has carburetor tag # 17080130

Enter carb # 17080130 in part number field.

Press 'Lookup' button.

Customer has spark plug from lawnmower part # CJ8

Enter spark plug # CJ8 in part number field.

Press 'Lookup.'

Water Pump for Cummins Diesel Engine

Enter casting# 40238 in part number field.

Press 'Lookup.'

System & Display Options

- **Display Options** – change Font settings, Part Display options, Labor Display options, Tire display options.
- **System Options** – add or edit Manufacturer Coverage Lists, Default Coverage Settings, Tire Coverages, Messages, Categories & Groups, and other preferences.

To Setup Options:

- From the Menu Bar click **Setup**, then **Display Options**. The following options are available:

Font Settings - from the 'Fonts & Colors' tab, click the 'Set' button.

You can set the font and colors just like other Windows programs.

Parts Display Options - click the 'Parts' tab.

Desired columns of information to display and the calculated Sell price can be set from here.

Labor Display Settings - click the 'Labor' tab.

The labor guide elements to display and the calculated Labor Rate can be set from here.

Tire Display Settings – click the 'Tire' tab.

The tire information elements to display can be set from here.

Return to Setup Options - from the 'menu bar' click [Setup], then 'System Options.'

Parts & InterChange Coverages - click the 'Parts & InterChange Coverages' tab.

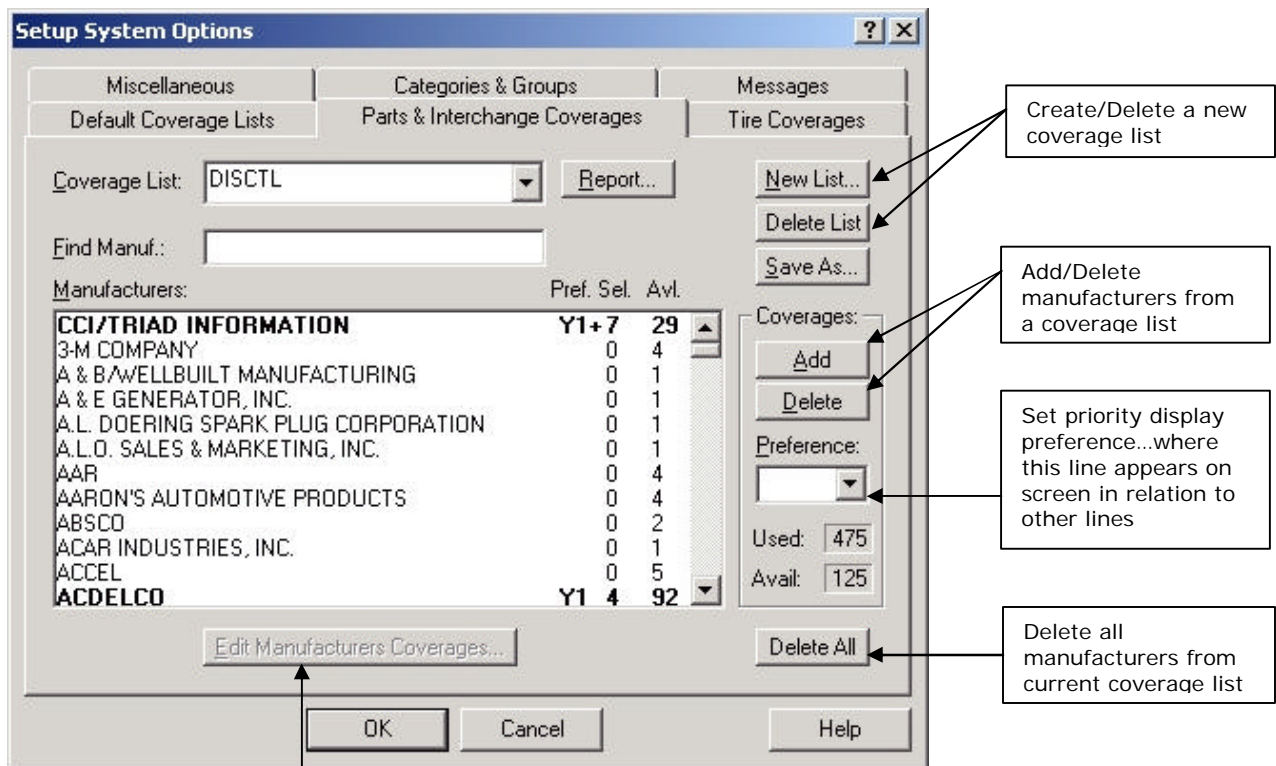
It is very easy to add manufacturers to a coverage list by following the procedure below:

1. Add a Manufacturer to a 'Coverage List' - In the 'Find Manuf' field, type 'wag.'
2. Click on the first 'Wagner' manufacturer.
3. Press the 'Add' button to add the selected manufacturers to the coverage list.

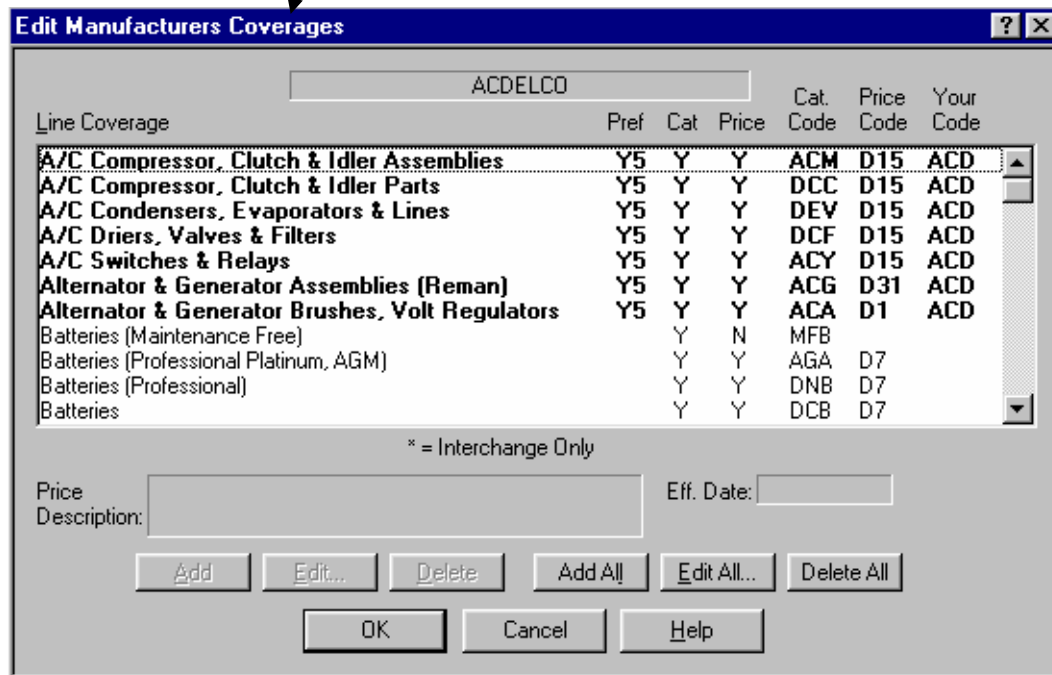
Note: manufacturers may not be added to the "Demo" coverage list.

Changing Default Coverages - click the 'Default Coverage List' tab.

Select a 'Default Coverage List' (the list that opens when starting the application) by clicking on the list then pressing 'OK'. Tire coverages work the same way.



Add or remove lines within a manufacturer's coverage, reset line priorities,



Note: Manufacturer product lines and coverages are generally determined by your supplier and provided to you in a quick, easy download.

System & Display Options (cont.)

The following is a quick tour of additional system and display options.

Click the 'Categories & Groups' tab.

From this box, you can add parts and labor categories to your catalog and/or rearrange which part groups are located in which categories, all so that part lookups flow as logically as you would like.

Click the 'Message' tab.

Edit the messages that appear with Part and Tire lookups in the blue box at the bottom of a screen. These messages can say anything you want. They are typically used as warnings or sales reminders. Each message is linked to a particular group and will only be displayed when that group is being looked up.

Click the 'Default Coverage List' tab.

Select the supplier's list that you want to automatically come up whenever you start ShopCAT. Remember, coverages are easy to change "on-the-fly." Just click the "Cov. Lists" button.

Click the 'Miscellaneous' tab.

Review the available options and determine which ones work best for you.

Close the 'Setup System Options' box.

Using the vehicle from any RO, click the 'CCITRIAD' button. Select any labor category and group. Click the 'LaborExpert' tab. Right click any labor operation. Click 'Customize Labor' in the drop down box, then click 'Add.'

From this box (Customize Labor Item), labor times can be modified to suit the user's experience and a note can be added to the revised listing. Clicking 'Substitute' creates a replacement listing. Clicking 'Alternate' creates an additional listing next to the original. In either case, the estimate time appears in a different color to indicate that it is not a LaborExpert time.

Graphics

- **ShopCAT displays pictures of selected parts groups to make it easier to identify the parts you need. Double click a yellow highlighted part line to reveal a diagram.**

Start an RO for a 1996 Ford Explorer V6-245 4.0L OHV:

1. Click on the 'CCITRIAD' button.
2. Select Category - type 'Ex' in the 'Category' field and the cursor should stop on 'Exhaust & Clutch.'
3. Select Group - click 'Exhaust System Parts.'
4. Click the 'OK' button to advance to the parts window.
5. Answer Labor Specific Conditions 'Yes'.

6. Viewing a Graphic - double click any yellow highlighted line with the description of 'Catalog Diagram #.'

Diagrams can be printed as well as faxed (if you have a printer or fax software).


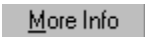
Viewing a 1985 Chevrolet Citation 4-151 2.5L - Power Brake Booster Graphic:

1. Select Category – 'Brakes & Wheel Bearings' (either arrow down list or type 'brake').
2. Select Labor Group - Brk Mstr Cyl, Lt Sw, P/Bstr, Abs.
3. Click 'OK' button.
Notice that 2 Brake Boosters are listed.
4. Double click 'Catalog Diagram #' or right click it and select 'Display Diagram.'

Tire by Size

- **Tire lookup – lookup tires by size or by vehicle.**
- **Re-sort – show tires on screen in whatever order you choose.**
- **More info – view a list of tire specifications.**
- **Plus Sizing – view tire plus sizes with the push of a button.**

A. 1998 Buick Regal V6-3800 3.8L:

1. In Parts and Labor Lookup, select *Tire* Category - Part Group: *Tire & Wheel Fitment*.
2. Press 'OK'.
3. Select Tire Size from results: P215/70R15 (std).
4. Double Click on the highlighted tire size.
5. Select Desired Speed Ratings: ALL, then click 'OK'.
6. Click 'Re-Sort' button and sort by Ascending Price. 
7. Select any tire.
8. Click 'More Info' button to display additional tire data. 



[Click on the ? in the upper right corner of the More Info window for context sensitive Help \(then click desired data field for additional information\).](#)

B. 96 Dodge 3500 Pickup V8 360 5.9L

1. Select Tire Fitment Category - Part Group: Tire & Wheel Fitment.
2. Click 'NO' for 'All-Wheel Drive?'
3. Double-click a highlighted tire size to go to Tire-By-Size.
4. Click 'All' in the Specific Conditions window to select all speed ratings.
Available truck tires will be displayed.

C. P205/70R15

1. Begin in Tire-By Size tab.
2. Type 'P205' in the lookup window.
3. Scroll down to and select P205/70R15.

1. Hit the 'Re-Sort' button and sort by Ascending Price. 
2. Hit the 'All-Lines' button and select BF Goodrich to view all available BF Goodrich tires in that size. 
3. Right click mouse and select "Tire Information" from the list. Click 'Close.'
4. Click the ? and select the Speed Rating field to view Speed Rating Information.
5. Right click mouse to view X2 and X4 selling prices.

D. P195/75R14

1. Select P195/75R14 from tire size list.
2. Hit the '+' button to increase to Plus One sizes.
3. Hit the '+' button again to view the 'Plus Two' Sizes.
Plus Sized tires will be displayed with a warning to ensure proper fitment.

Catalog Information

- **Catalog Release Info – catalog number and date of latest data shown in catalog.**
- **Catalog Manufacturers Info - helpful manufacturer information.**

Catalog Release Information

With the catalog open to a part lookup:

1. Click on the View menu at top of screen.
2. Click on Catalog Release Info.

Catalog Manufacturers Info

With the catalog open to a part lookup:

1. Click on the View menu at top of screen.
2. Click on Catalog Manufacturers Info.

Data Management Utility

Two CDs or one DVD are sent to ShopCAT Clients quarterly. They contain updated data and licensing renewal. Users should take care to update promptly when the CDs or DVD are received. The Data Management Utility (DMU) is the program that installs the data from the CDs or DVD onto the user's hard drive. Instructions on running the DMU on both standalone and multi-user systems can be found in the [Installation Manual](#).

Quiz

To test your ShopCAT efficiency, find the answers to the following questions. Use the Demo Coverage List.

- 1) What is the part number for a Standard Motor Products MAP sensor for a 1993 Dodge Intrepid V6 3.5L with power steering and automatic transmission? _____
- 2) What is the Niehoff part number for the same part and vehicle in question 1? _____
- 3) How much labor time is called for to R&R the starter on a 1996 Buick Riviera V6 3.8L? _____
- 4) What is the part number for the first Denso listing that will interchange with an R45TS? _____
- 5) How many bolt holes does the Fel-Pro TOS18640 transmission pan gasket for a 1988 Ford LTD V8-302 have? _____
- 6) What is the standard tire size for a 1997 Chevrolet Cavalier? _____
- 7) What is the UTQG of the Pirelli P2000 tire that fits the above Cavalier? _____
- 8) What are the interference items that increase the labor charge for R&R Belt on a 1996 Chrysler New Yorker V6 3.5L? _____
- 9) What part number is displayed as a secondary line in the lookup for question #5? _____
- 10) What is the message that appears in the blue box on every screen for front springs? _____



Chapter 4

Using ShopCAT with your Management System

Introduction

The Management System Parts Catalog interface allows you to build management system estimates, check prices, and order parts from your local supplier using the **CCITRIADsm ShopCAT™** catalog—the most complete and widely used parts catalog.

Setup

Before you can use ShopCAT with Management System, you must have installed the Management System software and the CCITRIAD ShopCAT software. Once both programs have been installed, you are able to begin.

When opened, Management System looks for the ShopCAT software on your computer. If Management System finds the software, you are able to add ShopCAT parts to your Management System orders. To conduct price and availability checks and order parts from participating vendors, you must complete the linked vendor setup process.

Importing Parts Information into Management System

ShopCAT parts are added to your Management System orders by selecting the CCITRIAD in the Management System Order screen. Once you have added ShopCAT parts to your order, you can conduct price and availability checks and order parts from within Management System.

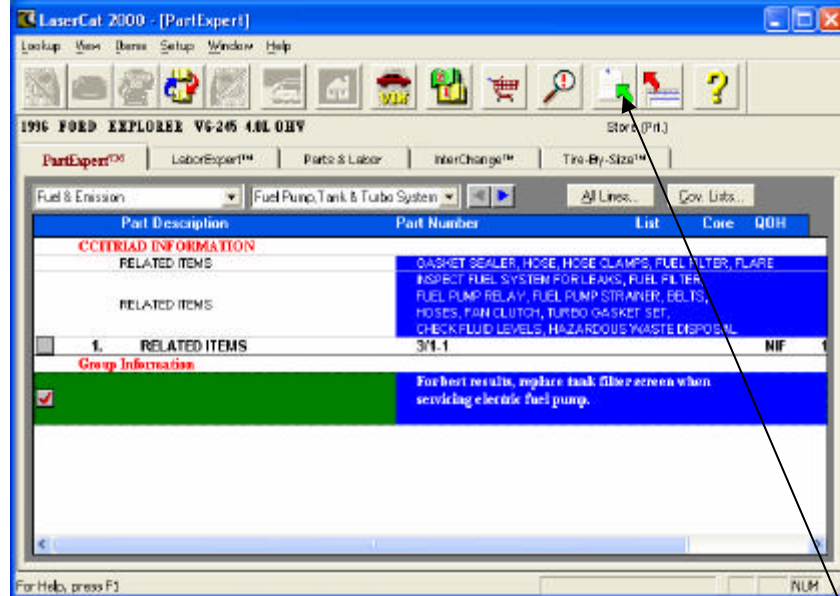
To add ShopCAT Parts to an Order:

1. In the Management System Order Panel, choose the **CCITRIAD** icon.



Order Panel

ShopCAT opens (**Note:** you may be asked to make additional vehicle selections).



ShopCAT

2. Choose Parts and/or Labor items and choose the **Green Arrow** to Exit Catalog. The Enter Cost of Parts dialog box displays.

P/N	Desc	Qty	Cost	Sale
10/4-4	RELATED ITEMS	1.0	0.00	0.00

Enter Cost of Parts

This dialog box allows you to enter your parts cost for use in your Management System profitability calculations.

3. Enter a cost and click **Done**. The Parts and/or Labor items are transferred to your order.

Linked Vendor Setup

The linked vendor setup process allows you to define the link between Management System and a specific distributor. This link is necessary for the program to be able to pull availability and pricing data from the distributor and order parts. Linked Vendor Setup is conducted in the Add/Edit Vendor Dialog box in Management System.

To setup a Linked Vendor for Parts Ordering:

1. Choose **Vendor Setup** from the Setup menu to open the Vendor Setup dialog box.

Code	Vendor Name
1ST CHO	First Choice
4 M T	4-M Tire
A T	Astro Tran
ABM	Autobahn Motorcars
BARN	Barneys Auto Supply
BATT	Interstate Battery
BB	B&B Radiator-Muffler
BIG O	Big-O Tire Co.
BT	Bechtel Towing
CC	Cash And Carry
CHAP	Chapperal
CHEV	Friendly Chevrolet

2. Click on the **Vendor** you want to link to and choose **Edit** to open the Edit Vendor dialog box.

Edit Vendor

3. Choose **Setup Link**. The EZ Connect Vendor Link dialog box displays. (**Note:** if you have multiple Parts Catalog software programs installed, you will be asked to choose one.)

EZConnect Vendor Link

4. Complete the fields in the dialog box. Once you have set up the Vendor, you can choose **Initiate MCL Update** to electronically download the Manufacturer Coverage List (MCL). This list controls the display of data in the CCITRIAD catalog.
5. Click **OK**. Setup for the linked vendor is complete.

Parts Ordering

Once you have set up linked vendors and downloaded coverage lists to your system, you are able to order parts from those vendors.

To order parts from a Linked Vendor:

1. Start an Estimate or Repair Order. Using the Vendor's coverage list, create a list of the parts you wish to price and/or order by looking them up in CCITRIAD's electronic catalog and posting them to the order.
2. Choose **Parts Ordering**.

The screenshot shows the 'Order Panel' window. At the top, it displays customer and vehicle information: 'Setick, Tom 1996 Ford Explorer (846 G) [5673475357] Home: 619-222-3777 Cellular: 619-333-0997'. Below this are tabs for 'Customer', 'Vehicle', 'Order', 'Revision', and 'History'. The 'Order' tab is active, showing a 'Repair Order # 050493'. The main area contains a table with columns: 'Time', 'Description', 'Qty', 'Sale', 'Extended', 'Rate', 'Part No.', and 'Tech Name'. The table lists several items: 'Engine Oil - Castrol' (5.00, 2.00, 10.00, 0.00, 10w40c), 'Oil Filter - Fram Double Gu' (1.00, 6.11, 6.11, 0.00, D68a), 'LDF' (0.30, 18.00, 18.00, 60.00), 'Rotax Tires' (0.30, 18.00, 18.00, 60.00), and '2-Wheel Alignment Check' (0.00, 48.00, 48.00, 60.00). At the bottom, there are buttons for 'Convert to Invoice', 'Parts Ordering', 'Options', 'Detail', 'Fax', 'Print', and 'Exit'. A summary section shows 'Parts: 18.41', 'Labor: 84.00', 'Sub Total: 100.11', 'Haz Mat: 4.00', 'Supplies: 0.81', 'Tax: 1.31', and 'Total: 106.23'.

Order Panel

The Parts Ordering screen displays.

The screenshot shows the 'Parts Ordering Estimate' window. It contains a text box with instructions: 'Tag all parts that need to have a current cost check, then press the 'Price Check' button. The 'Order Parts' button can then be used to order those parts which have an appropriate status. The list price will be calculated based on your Price Matrix and the sell price will be based on the customer discount. After executing a Price Check, pressing the Ok button will cause the order to be updated according to your selection.' Below this is a dropdown menu 'Please Select Linked Vendor' with 'JCON (JCON) <Link>' selected. The main area is a table with columns: 'Tag', 'Part No.', 'Description', 'Line', 'Quantity', 'Cost', 'Sale', 'List', 'Condition', 'Qty Avail', and 'Core'. The table has one row: '+ 22460 MUFFLER WAL 1.00 75.50 125.83 125.83'. At the bottom are buttons: 'Price Check', 'Order Parts', 'Clear All', 'Tag', 'Cancel', and 'Ok'.

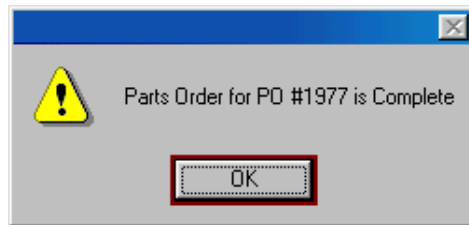
Parts Ordering

2. Tag all the parts you want added to your Purchase Order and click **Price Check** to conduct a price and availability check on the parts. (**Note:** You must conduct a price and availability check before you can order.)

The Parts Catalog interface dials up the Vendor and retrieves price information. Once you have successfully received this information, The Tag column changes from a "+" to a "P".

3. Click Order Parts to initiate the Purchase Order.

The Parts Catalog interface dials up the Vendor and places the order. You are notified when the order is complete.



Order Complete

A new Purchase Order is created and can be tracked in Management System like any other PO. Users of Management Systems without the Purchase Order module can access PO information via a transaction file at:

C:\Program Files\Common Files\Mric\Log Files

Summary

This chapter “bridges” the gap between the Management System and ShopCAT documentation, describing how to add ShopCAT parts and labor information to your Management System orders and create Purchase Orders with participating vendor.