PARTSSOURCE®   ePartsFinder® User Guide

ePartsFinder® is the only multi-vendor enterprise medical parts procurement platform with workflow automation and governance built in. ePartsFinder® and ePartsFinder® Mobile provide instant pricing and availability via SmartPrice™ technology.

This User Guide provides assistance in the operation and use of ePartsFinder® by providing step by step and graphically highlighted examples.

Contents

Login

1. Open desired browser (Internet Explorer, Firefox etc.) and enter www.partsfinder.com and select *Enter* key. ePartsFinder® log in screen will display. Enter your User ID and Password then click Log In. The New Order screen will display or the default view selected in MyPartsSource.
   a. If this is the first time logging in, the End User License Agreement (EULA) will require review and acceptance.
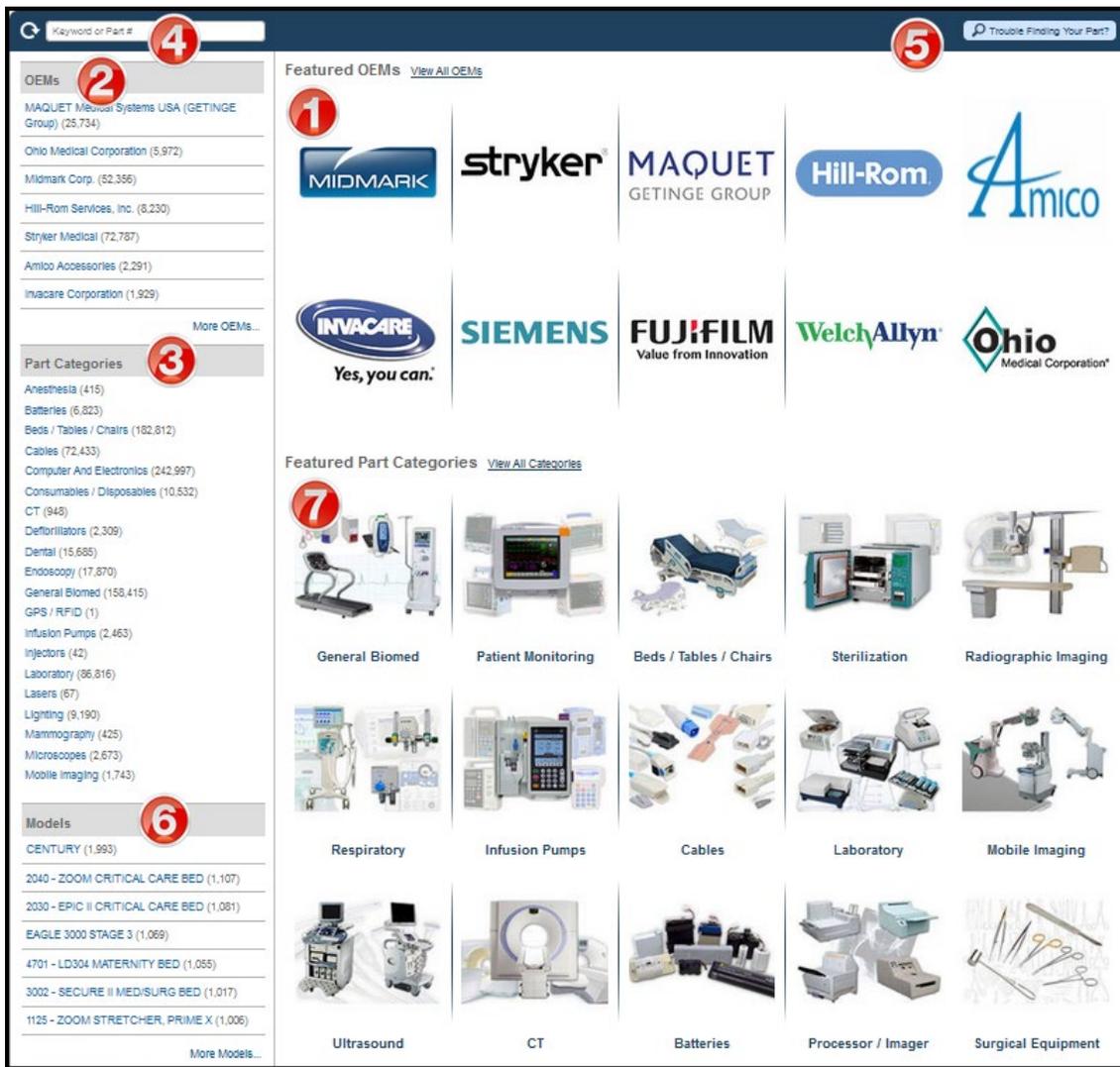
Catalog

The online catalog provides intuitive navigation and comprehensive smart search capabilities to request and purchase parts. Browse by OEM or categories and as you search, a "bread crumb" path is added which can be easily edited in order to pinpoint the search. Frequently purchased parts for each OEM or category as well as related part options are displayed.

1. Click "Catalog" tab 🏠 (Found on the toolbar at the top)
    a. Researching part requests can be navigated by clicking on:
        i. ❶ Featured OEMs
        ii. ❷ OEM's (More OEMs….)
        iii. ❸ Part Category
        iv. ❹ Entering Keyword or Part #
        v. ❺ Trouble Finding Your Part
        vi. ❻ Models
        vii. ❼ Featured Part Categories

b. Example Navigation
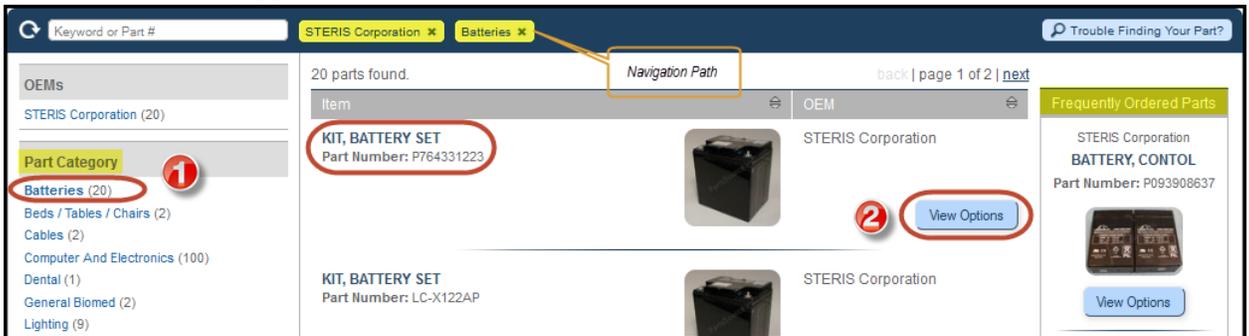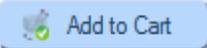   i. Click Steris from the ❶ OEMs or More OEMs... list

   ii. Select ❶ "Batteries" from the "Part Category"
       1. All available battery choices will display
       2. "Frequently Ordered Parts" are displayed on the right
       3. Path of navigation ("Bread Crumbs") displayed to the right of the Keyword or Part # field

   iii. Click on the ❷ **View Options** for the "Kit, Battery Set Part Number P764331223"

iv. By selecting [Add to Cart] the OEM Original or OEM Replacement can be added to the cart and ready for purchase.
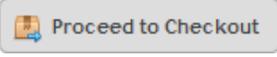
1. The default facility can be overridden by the Facility pull-down field
2. Additional Options can be requested by selecting "Click here for an eQuote"
3. "Also Consider" options are displayed below the presented purchase options
4. After the part request has been added to the cart and are ready to be purchased, click on the cart and complete the checkout detailed in the Checkout section.

Item	⇕	OEM	⇕
KIT, BATTERY SET Part Number: P764331223		STERIS Corporation	

Facility*: Aurora Health System ▾

OEMOriginal, 90 Day Warranty, Outright Purchase Typically available for Overnight Returnable: No	List Price: ~~$397.53~~ Your Price: $377.65 You Save: $19.88 (5%)	[Add to Cart]	
OEMReplacement, 12 Month Warranty, Outright Purchase Typically available for Overnight Returnable: Yes	List Price: ~~$397.53~~ Your Price: $84.89 You Save: $312.64 (79%)	[Add to Cart]	

Need an additional option? Click here for an eQuote

Also Consider:

STERIS Corporation
BATTERY, CONTOL
P093908637
View Options

New Order

The New Order tab provides the ability to request a quote by part number and add it to the Cart for purchase.

1. Click 🔳 New Order tab (found on the toolbar at the top)
   a. ❶ Enter desired Part Number and
   b. ❷ click the blue arrow ➡
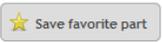   i. ePartsFinder® will look up the part number in the digital catalog and display the SmartPrice™, OEM, Description and part images.
   c. ❸ Select the pricing option
   d. ❹ Scroll down and click [🔳 Proceed to Checkout]
      i. Tip: If the Purchase order is not available, Check the ☑ Awaiting purchase order and click Request eQuote which will save the part to the eQuotes queue.

   e. If a SmartPrice is not available scroll down and click [✓ Request eQuote]. Your PartsSource Inc. account manager will provide an eQuote which you can review and purchase.
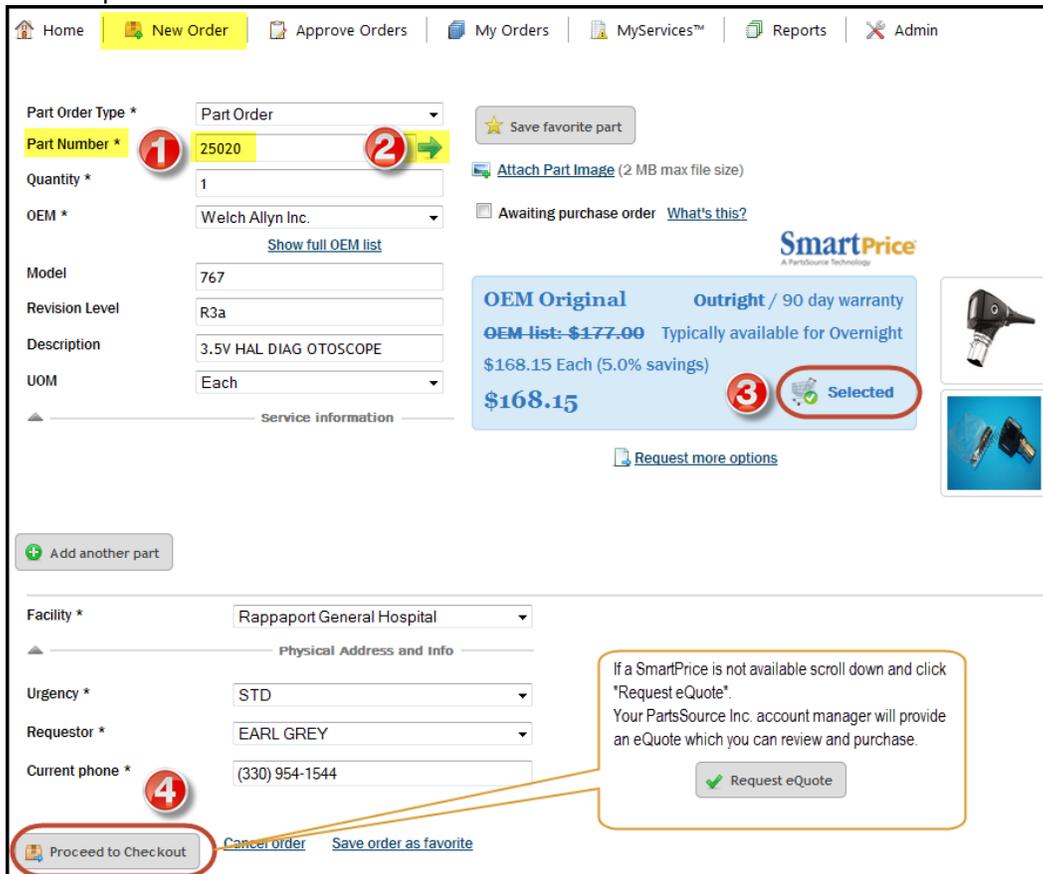
🏠 Home	🔳 New Order	📋 Approve Orders	📄 My Orders	📄 MyServices™	🗐 Reports	✖ Admin

Part Order Type * Part Order
Part Number * ① 25020 ② ➜
Quantity * 1
OEM * Welch Allyn Inc.
Show full OEM list
Model 767
Revision Level R3a
Description 3.5V HAL DIAG OTOSCOPE
UOM Each
Service information

⭐ Save favorite part
🖼 Attach Part Image (2 MB max file size)
☐ Awaiting purchase order What's this?
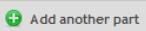
SmartPrice®
A PartsSource Technology

OEM Original   **Outright** / 90 day warranty
OEM list: $177.00   Typically available for Overnight
$168.15 Each (5.0% savings)
$168.15   ③ 🛒 Selected

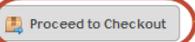🔲 Request more options

➕ Add another part

Facility * Rappaport General Hospital
Physical Address and Info
Urgency * STD
Requestor * EARL GREY
Current phone * ④ (330) 954-1544

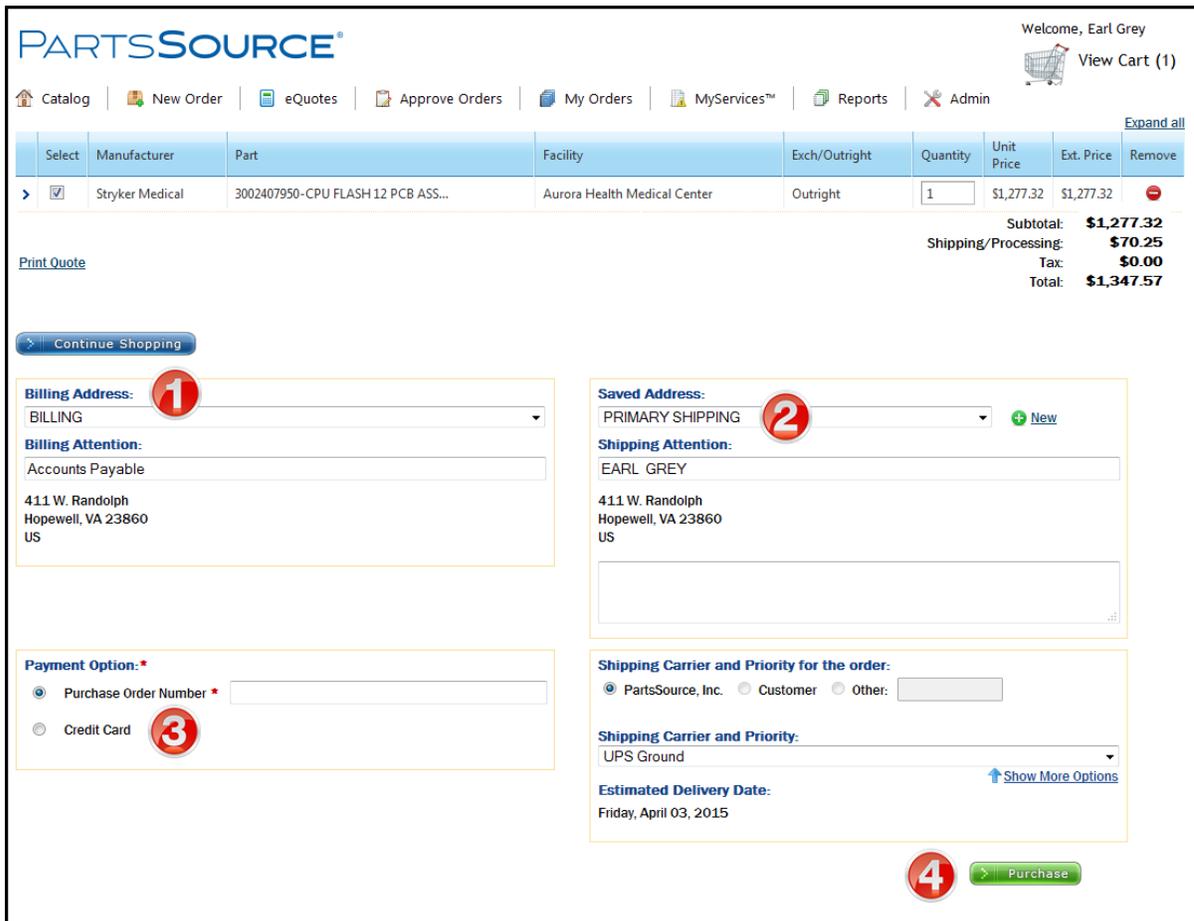[🔳 Proceed to Checkout]   Cancel order   Save order as favorite

If a SmartPrice is not available scroll down and click "Request eQuote".
Your PartsSource Inc. account manager will provide an eQuote which you can review and purchase.
[✓ Request eQuote]

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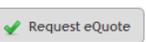
Checkout

Provides the ability to purchase one or more parts with the same purchase order or credit card and if required, alter the shipping carrier and priority.

1. ❶ Review the Bill To information
2. ❷ Review Ship To information & Shipping Carrier and Priority
3. ❸ Enter Purchase Order or select Credit Card
4. ❹ Click Purchase [> Purchase]
   a. If a required field has not been completed look for the red asterisk * which indictes fields that must be completed before proceeding to Purchase.

5. Order Confirmation will display which can be printed, exported (e.g. PDF), saved and or emailed.

Adding Multiple Parts to an Order

1. After completing the entry of the first part and selecting the pricing option (e.g. OEM Original) click the [⊕ Add another part]

2. The first part will be summarized and collapsed. A new set of fields will display and the second part request can be entered (following instructions on page 5, section 1 "New Order", once complete click [✓ Part complete] and proceed to checkout or click [⊕ Add another part]
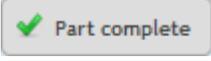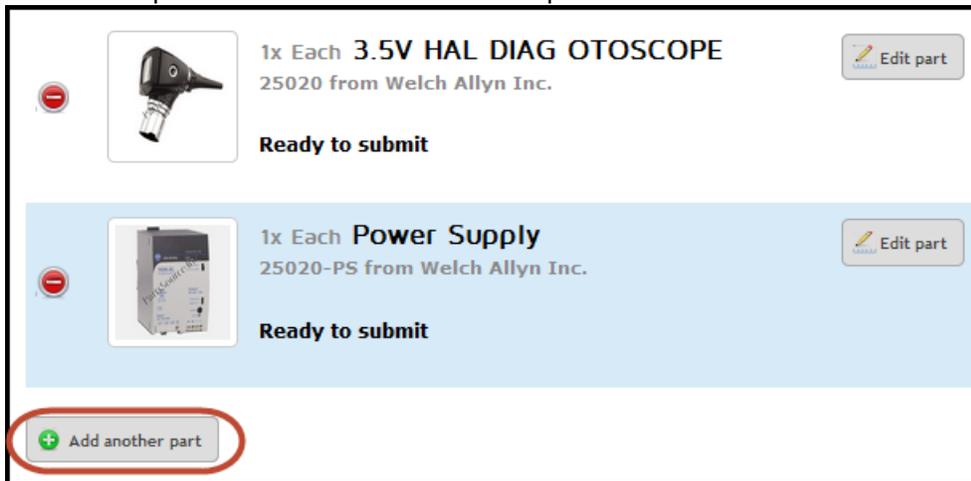
Favorite Part (Saving & Loading Favorite Parts)

1. Saving Favorite Part:
   Provides the user the ability to save frequently requested parts for future loading of the New Order form without having to re-key the request in.
   a. After entering a ❶ Part Number and searching❷ the digital catalog the [☆ Save favorite part] button ❸ displays
   b. Click the [☆ Save favorite part]
   c. ☆ Part saved as favorite will display
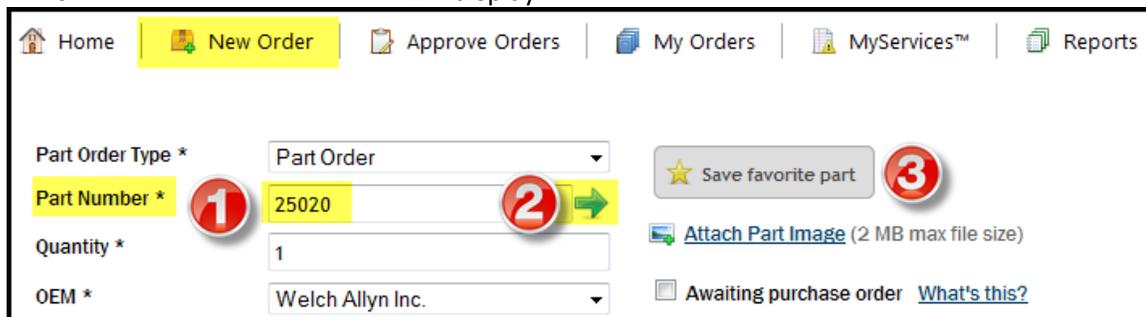
2. Load Favorite Part:
   Enables the user the ability to recall frequently requested parts without having to re-key the part number and details each time.

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a. After selecting the [New Order] tab clicking the [Load favorite part] will display the saved favorite parts list.
b. Select a favorite part to add to the order by clicking on the details or image.
  i. To remove a part from the Favorite Parts list click on the ⊖ image.

Favorite parts

Select a favorite part to add it to your order.

GE Healthcare

ROTOR CONTROL BOARD
46-232786G2B from GE Healthcare
AMX 4 PLUS / EACH

Hill-Rom Services, Inc.

HEAD HYDRAULIC CYLINDER
SA1741 from Hill-Rom Services, Inc.
CENTRA 850 / EACH

MAQUET Medical Systems USA (GETINGE Group)

HUMIDIFIER BRACKET ASSY
6523935 from MAQUET Medical Systems USA (GETINGE Group)
SERVO I / EACH

MAINTENANCE KIT 5000H, ...
6532621 from MAQUET Medical Systems USA (GETINGE Group)
SERVO I / EACH

Favorite Order (Saving & Loading Favorite Orders)

1. Saving Favorite Order:
   Provides the ability to save multiple parts as a favorite order (e.g. PM Kit)
   a. After entering 2 or more parts on the New Order screen scroll down to the bottom of the screen and select the hyperlink Save order as favorite .
   b. Save Favorite Order dialog box will display, enter the Name and Description then click Save. This group of parts is now saved as a Favorite Order.

Save favorite order

Name

Otoscope PM Kit

Description

Includes Otoscope head and Power Supply

Cancel   Save

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2. Loading Favorite Order:
   Provides the ability to select one or more saved favorite orders to automatically load the New Order screen.
   a. Hover over the New Order tab and click the Load Favorite Order sub tab.

   b. A list of Favorite Orders will be displayed.
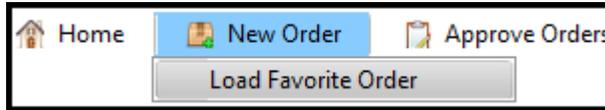

   c. Click the Favorite Order hyperlink (e.g. Otoscope PM Kit) and the New Order screen will automatically populate all the parts saved in the Favorite Order ready for selecting the purchase options and Checkout.

Service Information

1. Additional information can be associated with each part request such as Asset ID, Work Order, Cost Center etc. Additionally, these fields can be selectively set to be required fields to be completed.
2. To access the service information fields, click the arrow to the left of the Service Information text which will expand the window and provide access to completing any or all fields
3. Any text entered into the Notes field is also displayed to your PartsSource Inc. account manager.

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eQuotes

1. The eQuotes tab has 5 sub tabs:
   a. eQuotes
   b. Pending Orders
   c. Orders Shipped
   d. Repairs
   e. Back Orders
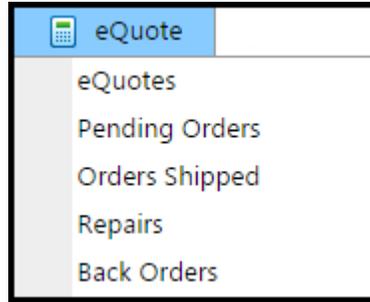
eQuotes

1. Has three sections: Recent Activity, eQuotes & Pending eQuotes
   a. Recent Activity:
      Provides the user with up-to the minute information on part request and orders.
      i. Selecting any of the listed items will automatically take you to the appropriate queue (e.g. Clicking on the Exchanges expiring 10 days hyperlink will display the Exchange queue)
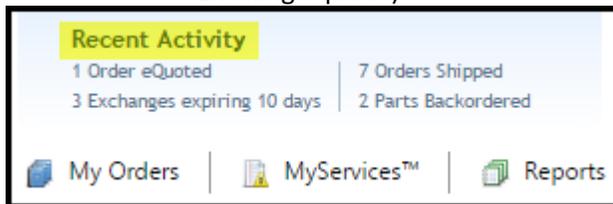
   b. eQuotes Queue:
      i. All part request that have been quoted or set to Awaiting Purchase Order are displayed.

      ii. Clicking the arrow to the left of the Ref # or the Ref # will expand the details of the part request and display the pricing options
      iii. Clicking on the Add To Cart link adds the part to the cart ready for Checkout

   c. Pending eQuotes:
      i. These are part request that are waiting for PartsSource Inc. to quote, once they are quoted they will automatically move to the eQuoted queue.

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Pending eQuotes					Expand all
Ref # ▾	Order #	Part Description	Requestor	Facility	Date Entered
❯ 1736464	1224587	Power Supply	STEVE ELERBY	Aurora Health System	5/7/2014 8:50 AM EDT

Pending Orders

1. Displays orders of statuses from Requested →eQuoted, Submitted for Approval or Submitted for Punchout (Lawson).
2. Part request with the status of "One or More Parts Available" can be selected and purchase options are available and can be added to the Cart.

Pending Orders					Expand all
Order No	Company	Date Entered	Requestor	Status	
❯ 1224592	Riverside Regional Medical Center	5/7/2014 11:42 AM EDT	STEVE ELERBY	Submitted for Approval	
❯ 1224588	Rappaport General Hospital	5/7/2014 8:51 AM EDT	EARL GREY	One or More Parts Available	
❯ 1224587	Aurora Health System	5/7/2014 8:49 AM EDT	STEVE ELERBY	Requested	
❯ 1224586	Aurora Health System	5/7/2014 8:49 AM EDT	STEVE ELERBY	One or More Parts Available	
❯ 1224564	Aurora Health System	5/5/2014 9:01 AM EDT	STEVE ELERBY	Submitted for Approval	
❯ 1224544	Aurora Health System	5/2/2014 1:08 PM EDT	STEVE ELERBY	Submitted for Approval	

Orders Shipped

1. Displays orders that have shipped the current day and also can select the Last 7 Days

Orders Shipped	Today ▾									
	Today									
Order No	**Line**	Past 7 Days us	**Tracking Number**	**Company**	**Urgency**	**Date Entered**	**Manufacturer**	**Model**	**Part Number**	**Qty**
1224599	1736478	Shipped	1ZXX05920190486434	Aurora Health System	STD	5/9/2014	GE Healthcare	AMX 4 PLUS	46-232786G2B	1

Repairs

1. Displays Repairs that have been purchased but not yet returned.

Repairs									
Order No	**Line Item Ref No**	**Status**	**Company**	**Urgency**	**ETA Date**	**Date Entered**	**Manufacturer**	**Model**	**Part Number**	**Qty**
1224412	1736280	Repair	Riverside Regional Medical Center	STD		4/15/2014	Welch Allyn Inc.	SURETEMP PLUS 670	25020-PS	1

Back Orders

1. Ordered Parts that have been placed on Back Order
2. Back Orders can be filtered by company and exported out as a Microsoft Excel CSV file
3. Clicking on the Ref No displays the full part details

Back Orders									
Filter: (Choose company) ▾									
📄 Export these results to Microsoft Excel									
Order No	**Line Item Ref No**	**Status**	**Company**	**Urgency**	**ETA Date**	**Date Entered**	**Manufacturer**	**Model**	**Part Number**	**Qty**
1224585	1736461	Completed	Riverside Regional Medical Center	STD	6/7/2014	5/7/2014	MAQUET Medical Systems USA (GETINGE Group)	ALPHASTAR	6640044	1
1224410	1736278	Completed	Rappaport General Hospital	STD	5/30/2014	4/15/2014	Hill-Rom Services, Inc.	GPS 881 STRETCHER	47087	1

4.

My Orders

A powerful data-mining and reporting tool for requests just entered to as far back as 2002:

1. My Orders will display by default the last seven days of all requests statuses. Custom date ranges can be used by selecting the ❶ From: and/or To: date field.
2. Most commonly used search criteria are displayed on the top two rows❷ ; Date Range, Requestor, Status and Facility. If any of the fields are changed simply click the ❸ Search button to update the search results
   a. Additional search criteria are available by selecting the❹ Show Advanced Search link.

3. Columns can be moved, added and sorted. To add additional columns click ❺ Choose Columns
   a. Columns can be added or deleted by "Right Mouse Selecting" the column header or selecting Choose Columns link and scrolling down to Columns and checking / un-checking columns desired (Arrows on top and bottom of the columns box enable scrolling through all choices). As columns are checked they are added at the far right column, to rearrange columns, drag selected column header to desired location. Keep in mind only columns displayed will be exportable.
      i. Once the desired columns are selected and displayed they can be saved by selecting the ❻ Save Column Layout link.
4. Search Results can be exported as a CSV file by selecting the ❼ Export to Excel link.
   i. Data exported is based on what is displayed in the grid. Additional data can be exported by adding the required data columns.
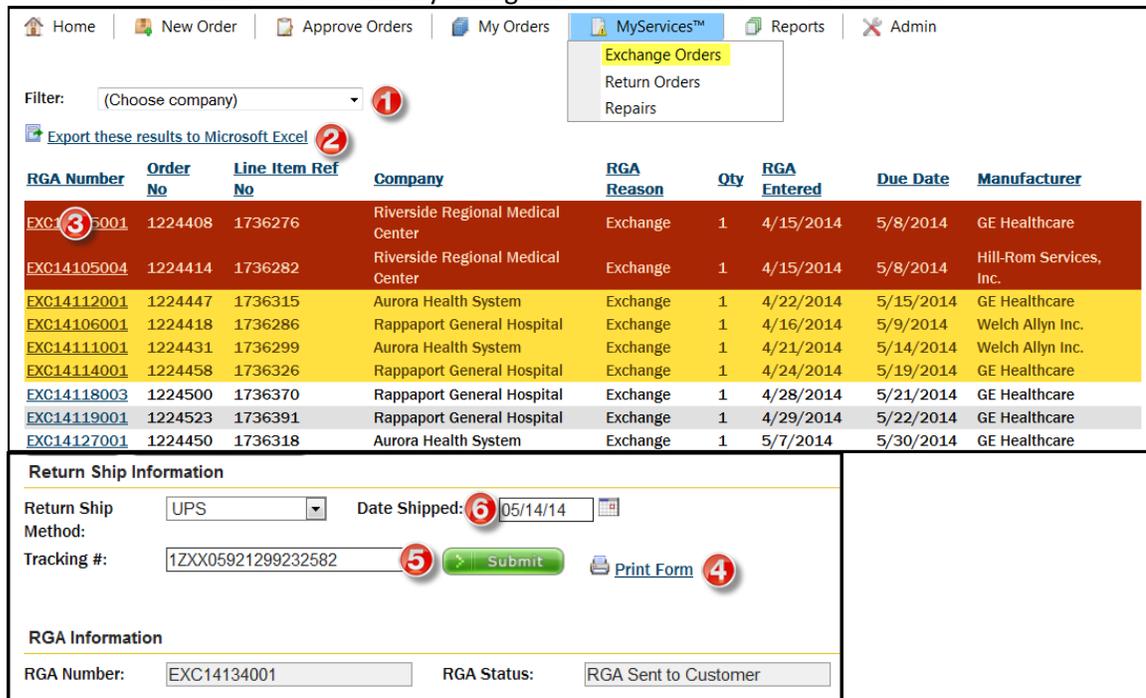
MyServices

My Services is a collection of reminders and actions that are required to avoid Add Bills, process return requests and return for Depot Repair items.

Exchanges

1. Displays a list of parts purchased on exchange that the core return is still outstanding.
2. Each Exchange RGA is highlighted to indicate nearness to the due date to avoid Add-Bills.
   a. White or grey highlighting indicates 10 or more days till the due date
   b. Yellow highlighting indicates due now or within next 5 days
   c. Red highlighting indicates past due 5 days or more (Add Bill sent)
3. Exchange RGA's can be ❶ filtered by company and also ❷ exported to Microsoft Excel for further disposition.

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4. Clicking on the ③ Exchange RGA Number will display the Exchange details and provide the ability to re-print the Packing Slip and Return Label.
   a. Clicking on the ④ 🖶 Print Form link will display the Packing Slip and Return Label that can then be printed.
   b. The ⑤ Shipping Carrrier Return Ship Method and ⑥ Tracking # are pre-populated if provided by PartsSource Inc.
   c. Once the Exchange Core has been shipped back to PartsSource Inc. the Date Shipped can be completed and the 〉 Submit button clicked.
      i. The Exchange will be cleared from the queue and the status at PartsSource Inc. will be electroncially changed from "Customer" to "In Transit".

Returns

Displays a list of Return request and Due date before the return request expires. Return details, return Ship information and printing Packing Slip and Return label is identical to Exchanges.

Repairs

Displays a list of Repair request that require the part/equipment to be returned for repair and due date to facilitate the repair. Return details, return Ship information and printing Packing Slip and Return label is identical to Exchanges.

Reports

Displays and enable printing and exporting Customer Summary reports of parts shipped for one or more facilities and date ranges.
   1. Reports can be filtered by ❶ Facility/Company and ❷ Date Range.

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2. Exported out as ③ PDF or Excel file.
3. Clicking on the ④ **Generate Report** will display the report results based on the selected filtering (Last 7 Days, Last 30 Days, Month to Date, Year to Date or Custom).
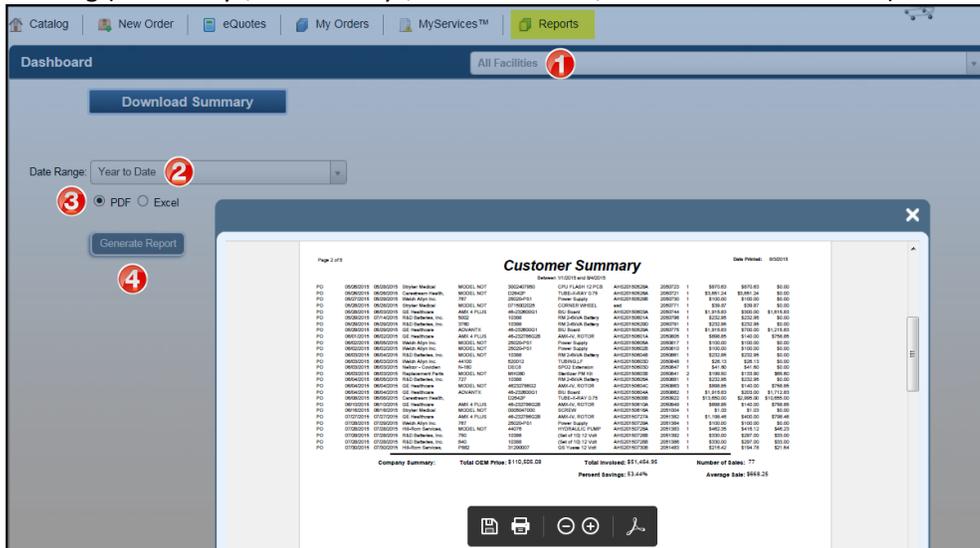
MyPartsSource

Provides access to:

1. Help
   a. Video of the New Order screen and process
2. FAQ
   a. Listing of frequently asked Questions
3. Release Notes
   a. As ePartsFinder® is updated a listing of the changes are provided
4. Feedback
   a. Displays a feedback form that enables the user to formally provide feedback to PartsSource Inc.
5. Notification Options
   a. Selectable list of e-mail events the user wants to receive
   b. Ability to add additional email recipients
6. Settings (Default)
   a. Landing Page
   b. Facility
   c. Shipping Address
   d. Shipping Priority
   e. Credit Card Settings
      i. Provides the ability to edit ad remove any references to the saved credit cards
7. Change Password
   a. Note, if you use the ePartsFinder™ plug-in with your CMMS or ERP, please ensure your local admin synchronizes your passwords.
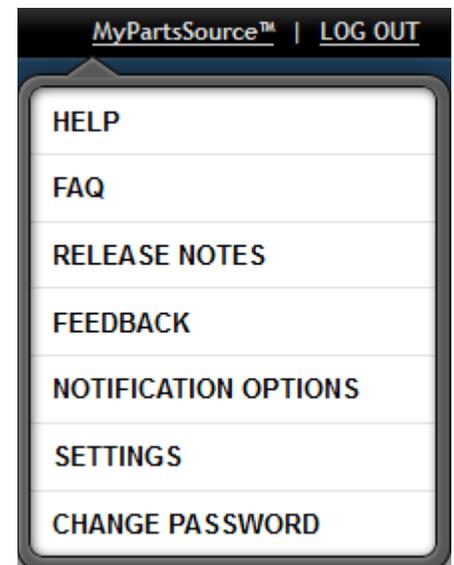
Any questions, comments or feedback on this document please contact PartsSource Inc. Client Services at 877-497-6412

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