Mercury Electronic Parts Catalog (EPC)

User Manual

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Mercury Electronic Parts Catalog

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Section 1 - Mercury Electronic Parts Catalog User Manual (EzParts 5)

Welcome

Welcome to Mercury Marine's online EzParts Electronic Parts Catalog.

Mercury Marine, along with Systems Online SCT, Inc., has merged their EzParts 5 software with the Mercury online electronic parts catalog.

Mercury Marine's online electronic parts catalog is intuitive, customizable, and will enhance the customer's experience with the dealership. The tools that can be utilized here will minimize expenditures resulting in maximizing the relationship between Mercury Marine, the dealer, and the customer. It is an intuitive tool where the sales department and the service department professionals can search for parts, technical information, service and sales documentation. The information contained in this user manual will provide a description of the functions, capabilities, and step-by-step procedures for getting started on customizing your specific needs.

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Features of EzParts 5

The main advantages of EzParts 5 are listed below:

- The application interface has changed to become more intuitive and user-friendly. All the functionality is logically distributed among the parts of the main window and can be easily found.
- EzParts 5 uses the MS SQL Server data storage engine which increases the speed of the search process and resources which are loading in the application.
- The search tool allows quick navigation to any part number, schematic, model, note, or any other documentation and resource in the database.
- Search tabs allow for multiple searches at the same time.
- View multiple resources at the same time by using the Pin feature.
- Notes can be printed with their corresponding schematic and parts list.
- The user can add notes with two levels of importance.
- Schematics and parts lists can be saved and e-mailed in different formats such as PDF and Microsoft Office formats.
- The user has the ability to turn on or off the parts information or price columns for viewing on the screen and printing.
- Service department professionals can quickly share information by referring to the resource, document, or schematic in the navigation tree using the Copy/Paste Reference option.

Opening EzParts

Open the EzParts program by double-clicking the EzParts icon on the desktop.

User login window
a - Options
b - Login
c - Password
d - Save password
e - Ok
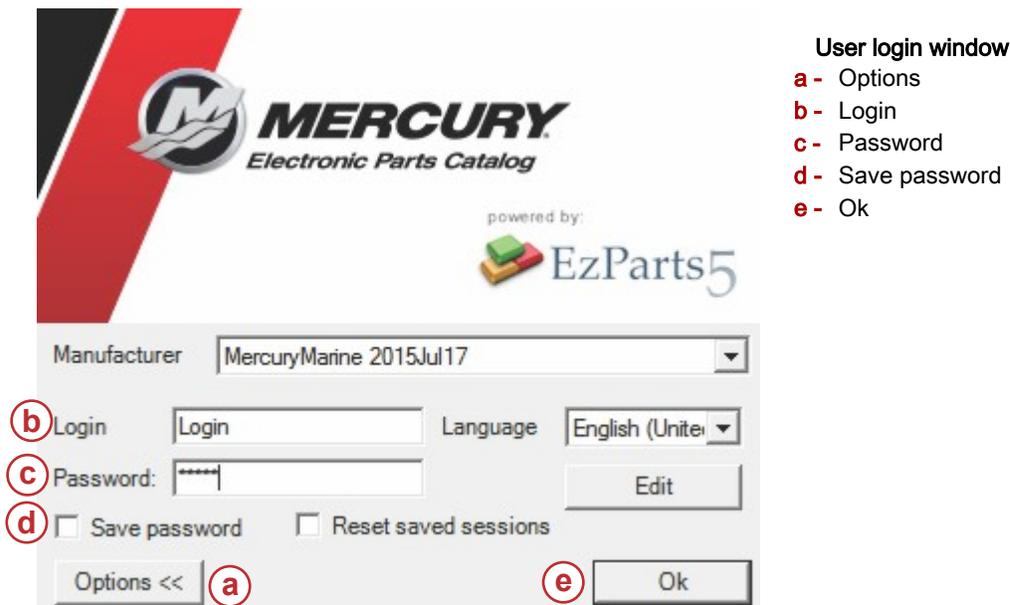
1. Click the **Options** button to display additional options of the **Login** window.
2. Type your login provided by Mercury Marine into the **Login** field. The login is case sensitive and must be typed exactly as it is provided.
3. Type the password provided by Mercury Marine into the **Password** field. The password is case sensitive and must be typed exactly as it is provided.

4. If you want the program to remember your password, left click to select the **Save password** check box. If this box is not selected the password must be entered every time EzParts is opened.

5. Click the **Ok** button to login to the program.

NOTE: *If you have the Save password box selected, you can skip steps 2–5 the next time you log in.*

Main Window Overview

The EzParts main workspace window consists of the following areas:
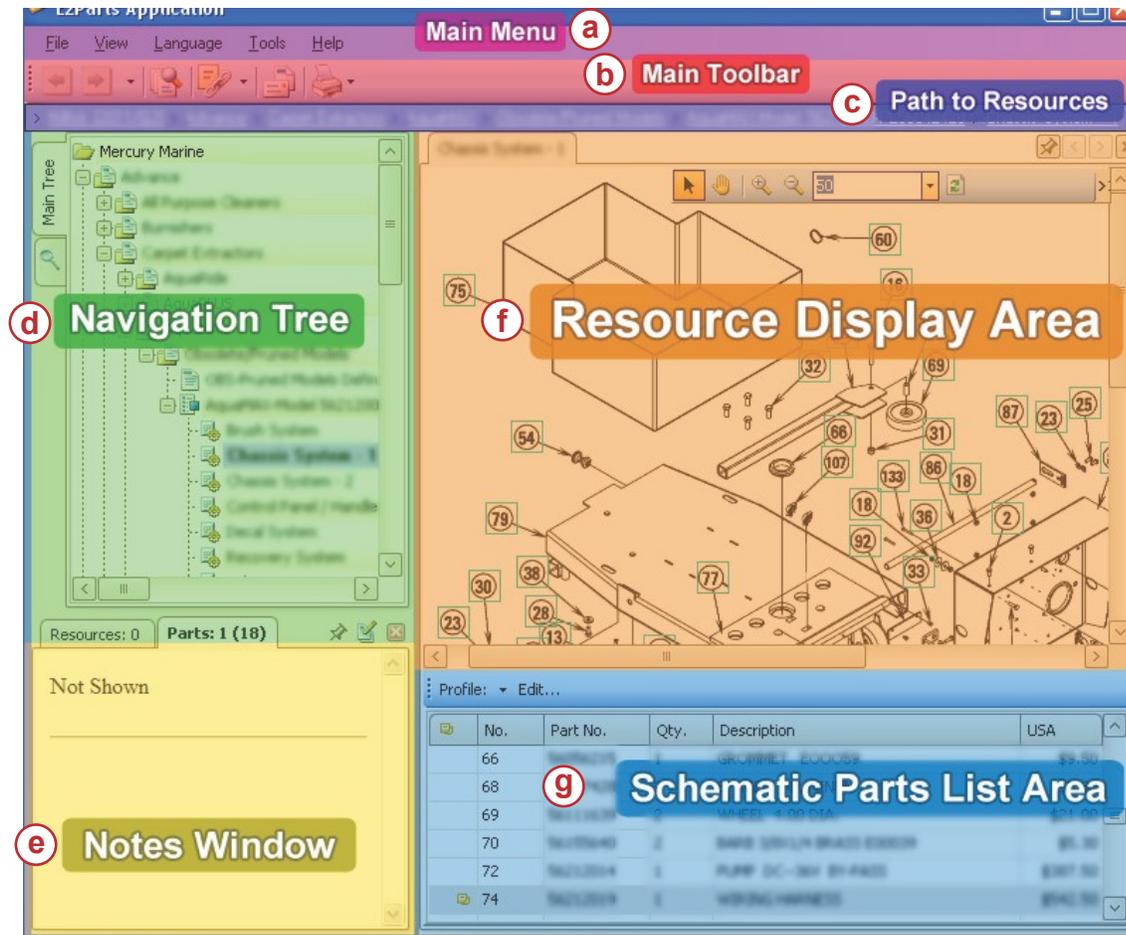
Main window
a - Main menu
b - Main toolbar
c - Path to resources
d - Navigation tree
e - Notes window
f - Resource display area
g - Schematic parts list area

- The **Main Menu** bar displays a list of available menu items.
- The **Main Toolbar** bar displays a set of buttons that are frequently used for performing common functions.
- **Path to Resources**. After a resource is selected in the **Navigation Tree**, the path to it will be automatically displayed in the **Path to Resources** bar under the **Main Toolbar**.
- The **Navigation Tree** shows a hierarchical structure and corresponding data. When you select a schematic or resource in the **Navigation Tree**, the program displays the relevant data on the upper right side of the window called **Resource Display Area**.
- The **Notes Window** displays all the notes for the currently displayed resource, schematic, or selected part.

- The **Resource Display Area** shows different types of schematics, documents, and other resources depending on your selection in the **Navigation Tree**.
- The **Schematic Parts List Area** contains a table with the parts information for the currently viewed schematic.

Main Menu

The **Main Menu** bar contains the following menu items:

1. **File menu**
   - **Copy Reference** - This option copies a reference of the selected resource from the **Navigation Tree** to the clipboard. This information can then be pasted onto a document such as an e-mail or instant messenger and then can be opened by another EzParts program user. The information transmitted to another EzParts program user can find the resource by using the **Paste Reference** function. **Ctrl+Shift+C** is a keyboard shortcut to perform the function also.
   - **Paste Reference** - This option selects the specific resource in the **Navigation Tree** from the reference stored in the clipboard. The resource reference can be obtained from the **Copy Reference** function or from a correspondence from another EzParts program user location. The reference begins with **EzParts5://**. A keyboard shortcut to perform this function is **Ctrl+Shift+V**.
   - **Close** - This option closes the EzParts application.

2. **View menu**
   - **Show Notes** - This option displays or hides the **Notes** window. If no resource is displayed in the **Resource Display Area** then this option is disabled.
   - **Show Tree** - This option displays or hides the **Navigation Tree**.
   - **Show Parts List** - This option displays or hides the **Schematic Parts List** window. If no schematic is opened in the **Resource Display Area**, this option is disabled.

3. **Language menu**
   - If the database contains multilingual resources, the **Language** menu item will show you the list of available languages for the program interface, resources, and parts information. You can select a preferred language here.

4. **Tools menu**
   - **Options** - This option allows you to adjust the application settings according to your needs.

5. **Help menu**
   - **Content** - This option displays the help files.
   - **About EzParts** - This option shows information about the version of the EzParts application, the date when the EzParts database expires, and Systems Online SCT Inc. contact information.

Main Toolbar

The **Main Toolbar** provides quick access to the frequently used items from the menu.

Backward and Forward Buttons - These buttons move the focus on the **Navigation Tree** to previously viewed resources like a web browser's backward and forward buttons. After the desired resource is selected, press the **Enter** key on the keyboard to open the resource. Also you can use **Alt+<** and **Alt+>** to move the **Navigation Tree** focus. Click the arrow next to the Backward and Forward buttons to see the list of previously viewed resources and navigate to the desired view.

Search Button - This button opens the **Search** tab, where you can search for parts, schematics, documents, models, notes, and serial numbers.

Bookmarks Button - This button opens the options window to the bookmarks section so you can edit your bookmarks and allows you to view resources or schematics bookmarked in the **Navigation Tree**. Click on the arrow near the **Bookmarks Button** and select bookmark from the bookmarks list to navigate to the desired resources or schematics in the tree.

Print Button - This button opens the **Print and Send** window that will allow you to print, fax, save, and e-mail the selected resource.

Pick Lists - This button opens the **Pick Lists** window that allows you to create pick lists with required items in specific quantities based on their availability in the **Parts Dictionary.**

Navigation Tree

The **Navigation Tree** is located in the upper left section of the main window and is displayed on the Main Tree tab. It organizes resource information pertaining to the item and corresponding data in a hierarchical format, allowing an intuitive manual search through models, documents, and schematics and opening them in the **Resource Display Area**.

- The **Navigation Tree** is set up like a standard Windows tree and is navigated the same.
- Click the **±** sign, use the right and left arrow buttons, or double-click on the **Navigation Tree** item to expand or collapse the tree branches.
- Double-click on the **Navigation Tree** item or press the **Enter** key on the keyboard to finish your navigation and display the selected resource in the **Resource Display Area**.
- Each resource type of the **Navigation Tree** has its own icon.
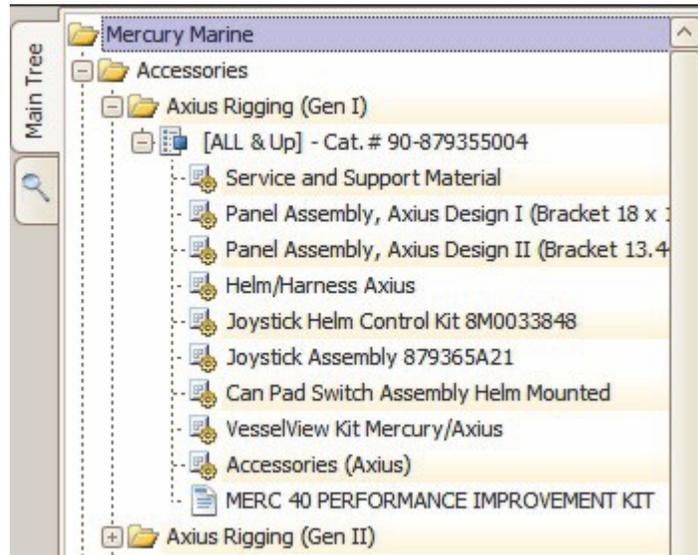
Navigation Tree

The **Image Type** icon signifies the product type or a model group.

The **Model Type** icon signifies grouping elements for schematics and documents which belong to the one model.

The **Schematic Type** icon signifies images with hot spots and additional parts lists.

The **Document Type** icon signifies simple images, technical and service documents in PDF, Word, or Excel format.

Context Menu of Navigation Tree

The following options are available by right clicking on any specific resource in the **Navigation Tree:**

- **Add Bookmark** - This option creates a link to the resource in the **Bookmark** tool on the main toolbar that will allow you to quickly navigate to this resource by selecting it from the **Bookmarks** drop-down list.
- **Copy Path** - This option copies the path of the selected resource in the **Navigation Tree** to the clipboard. This information can then be pasted in another program such as an e-mail or instant messenger to be transmitted to another EzParts user so that they can find the resource by navigating through the **Navigation Tree**.
- **Copy Reference** - This option copies a reference of the selected resource from the **Navigation Tree** to the clipboard. This information can then be pasted in another program such as an e-mail or instant messenger to be transmitted to another EzParts user so that they can find the resource by using the **Paste Reference** function. You can also use **Ctrl+Shift+C** on the keyboard to perform the **Copy Reference** function.
- **Paste Reference** - This option selects the specific resource in the **Navigation Tree** from the reference stored in the clipboard. It can be obtained from the **Copy Reference** function or from correspondence from another EzParts user via e-mail or instant messenger. The reference begins with **EzParts5://**. You can also use **Ctrl+Shift+V** on the keyboard to perform this function.

- **Print and Send** - This option opens the **Print and Send** window that will allow you to print, fax, save, or e-mail the currently viewed schematic or several schematics from the current model resource.
- **Show Notes** - This option shows the **Notes** window if it is not displayed on the screen.
- **Collapse All** - This option folds all the columns in the **Navigation Tree** which are currently opened.

Resource Display Area

The **Resource Display Area** presents views of schematics, images, models, and documents depending on your selection in the **Navigation Tree**.

To see the schematic view of the **Resource Display Area**, double-click the 🔧**Schematic Type** of the resource in the **Navigation Tree**. The schematic with hot spots will be displayed in the display area.
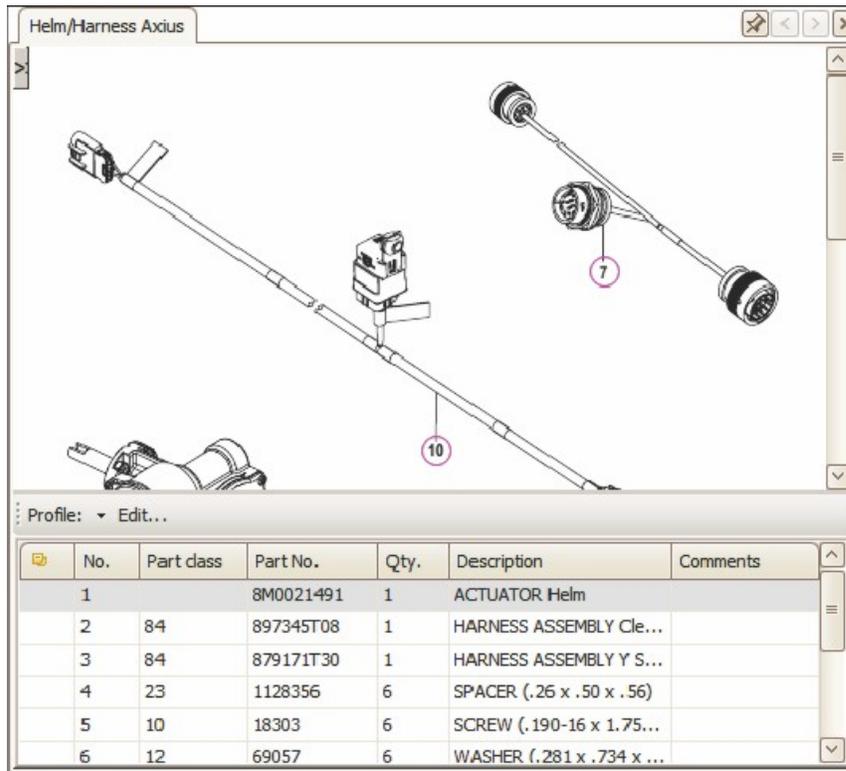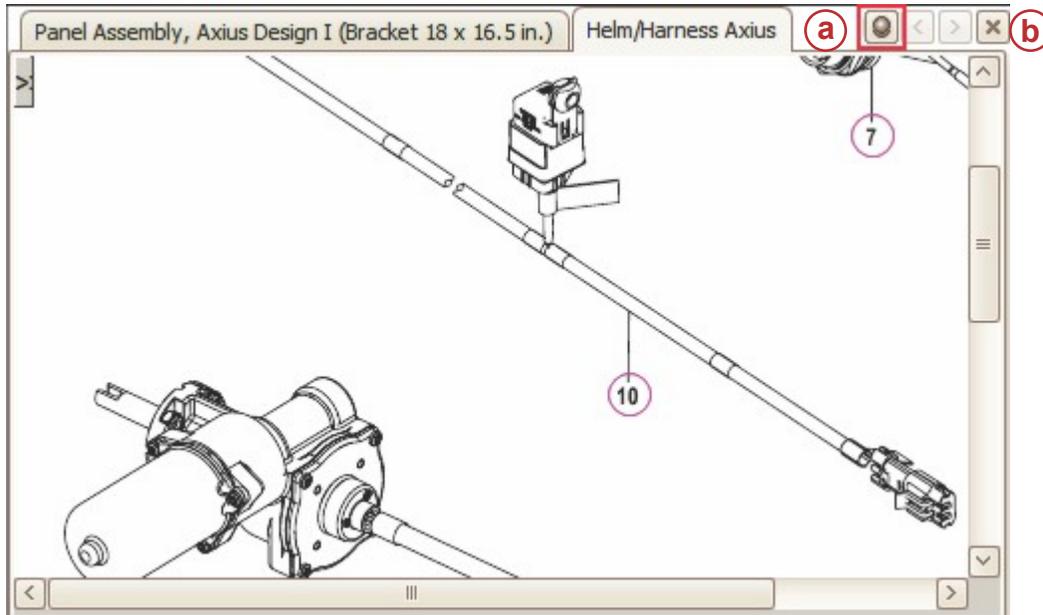

Schematic view

- Hot spots on schematics are linked to parts in the **Schematic Parts List** area. If you click a number on the opened schematic, a corresponding part is highlighted in the **Schematic Parts List**. To perform a multiple selection of hot spots, hold down the **Ctrl** key on the keyboard and select the hot spots you need.
- In the top left corner of the display area you can see the minimized **Zoom Toolbar**. Click the **> Arrow** button to maximize the toolbar.
- The toolbar will help you to browse through the selected schematic so you can simply change its zoom or scroll it.
- PDFs will be opened in the **Resource Display Area** by Adobe Reader; other documents are opened by the program they are intended for.
- Make the **Resource Display Area** bigger by hiding the **Navigation Tree** and **Schematic Parts List**. To do this, go to the **View** main menu and clear the **Show Tree** and **Show Part List** options.

Viewing Multiple Resources at the Same Time

Selecting a new resource in the **Navigation Tree** will, by default, replace the old display in the **Resource Display Area**.

To work with multiple resources simultaneous, you must use the **Pin** icon, in the upper right corner, on the current tab before opening the next resource.

The new resource will be opened in its own tab. To close a pinned tab use the **X** icon to the right of the **Pin** icon.

The pin button in the resource display area

a - Pin icon
b - Close icon

Context Menu of Resource Display Area

The following options are available by right clicking in the **Resource Display Area** but only when a schematic resource is being displayed there:

- **Print and Send schematic** option opens the **Print and Send** window that will allow you to print, fax, save to hard drive, or e-mail the currently viewed schematic or several schematics from the current model resource.

- **Show Notes** option shows the **Notes** window if it is not displayed on the screen.

- **Copy Reference** option copies a reference of the selected resource from the **Navigation Tree** to the clipboard. This information can then be pasted in another program such as an e-mail or instant messenger to be transmitted to another EzParts user so that they can find the resource by using the **Paste Reference** function. You can also use **Ctrl+Shift+C** on the keyboard to perform the **Copy Reference** function.

Zoom Toolbar

Zoom Toolbar is only available if a schematic resource is displayed in the **Resource Display Area**. You can show or hide the **Zoom Toolbar** by clicking on the **> Arrow** button or move it in the **Resource Display Area**.

Pointer Tool - icon turns your mouse pointer from the hand tool to pointer tool. Use it to select a single hot spot by clicking on it or multiple hot spots by dragging the clicked mouse over the area where the hot spots are located.

Move Tool - icon turns the mouse pointer into the hand tool. Hold the left mouse button down and drag it across the screen in order to scroll through the schematic.

Zoom In, Zoom Out - Use these buttons to enlarge or decrease the schematic size.

Zoom drop-down - Use this drop-down list to select a schematic size. This zoom only affects the current schematic being viewed.

Reload - This button refreshes the content of the **Resource Display Area** and parts list.

Previous/Next Schematic - These buttons move the view to the previous/next schematics in the **Navigation Tree**.

Schematic Parts List

The **Schematic Parts List** area displays a part list table for the currently selected schematic in the lower right section of the main EzParts window. It contains columns of part numbers, descriptions, prices, quantity, and comments.

1. Parts in the **Schematic Parts List** are linked to hot spots on the schematic in the **Resource Display Area**. Use the **Ctrl** and **Shift** keys on the keyboard to select multiple parts in a parts list.
   - The **CTRL** key allows selecting certain parts in a parts list. Hold down the **Ctrl** key while clicking items in a parts list to select them.
   - The **Shift** key allows selecting a range of parts in a parts list. Click on the first item then hold the **Shift** key while you click on the last item in a parts list. This will select all of the parts between the first and the last.

2. Superseded, remanufactured, or related and discontinued parts can be identified in the **Schematic Parts List** by color coding. You can see the number of the supersession by clicking on the plus sign near the superseded part.

    • **Red** signifies discontinued parts.

    • **Blue** signifies superseded parts.

The ![icon] icon in the **Schematic Parts List** signifies that the part in that row has a note attached to it.

Parts can be printed, faxed, e-mailed, and saved with the corresponding resource and parts.

Context Menu of Schematic Parts List

The following options are available by right clicking on any part in the **Schematic Parts List**:

1. **Search for** - Right click on the part number or description in the **Schematic Parts List** and select Search from the context menu. The Search window will open in a new tab and automatically run the search for the selected part number or description.

2. **Print and Send parts list** - This option opens the **Print and Send** window that will allow you to print, fax, save, or e-mail the parts list for the currently viewed schematic or several schematics from the current model resource.

3. **Notes**

    • **Show Parts Notes** - This option shows the **Notes** window if it is not displayed on the screen.

    • **Copy Notes** - This option is used to copy notes that are attached to the selected part.

    • **Paste Notes** - This option is used to add previously copied notes to the selected part.

4. **Copy Part Number** - Use this option to copy the part number of the selected part to the clipboard so that it can be pasted into another program (e.g., Notepad, Instant Messenger, Word, Excel, Email, etc.).

5. **Copy**

    • **Description** - Use this option to copy the description of the selected part to the clipboard so that it can be pasted into another program (e.g., Notepad, Instant Messenger, Word, Excel, Email, etc.).

    • **All as Text** - Use this option to copy the part numbers and descriptions of all the parts of the current schematic parts list to the clipboard so that it can be pasted into another program (e.g., Notepad, Instant Messenger, Word, Excel, Email, etc.).

    • **All as XML** - Use this option to copy parts information of the current **Schematic Parts List** in XML format to the clipboard so that it can be pasted into another program compatible with xml.

    • **Reference** - This option copies a reference of the selected resource and part number from the **Navigation Tree** to the clipboard. This information can then be pasted in another program such as an e-mail or instant messenger to be transmitted to another EzParts user so that they can find the resource with the selected part number by using the **Paste Reference** function.

6. **Look up Additional Info** - This option will retrieve additional information about the selected part on the Internet if Mercury Marine supports this function. The link to the web page should be specified in EzParts **Options**. If Mercury Marine does not support this function, you can use it to call any web page that is beneficial to your company.

Profiles (Off-line Application Only)

The columns in the **Schematic Parts List** can be shown/hidden and changed instantly by creating **Profiles**.
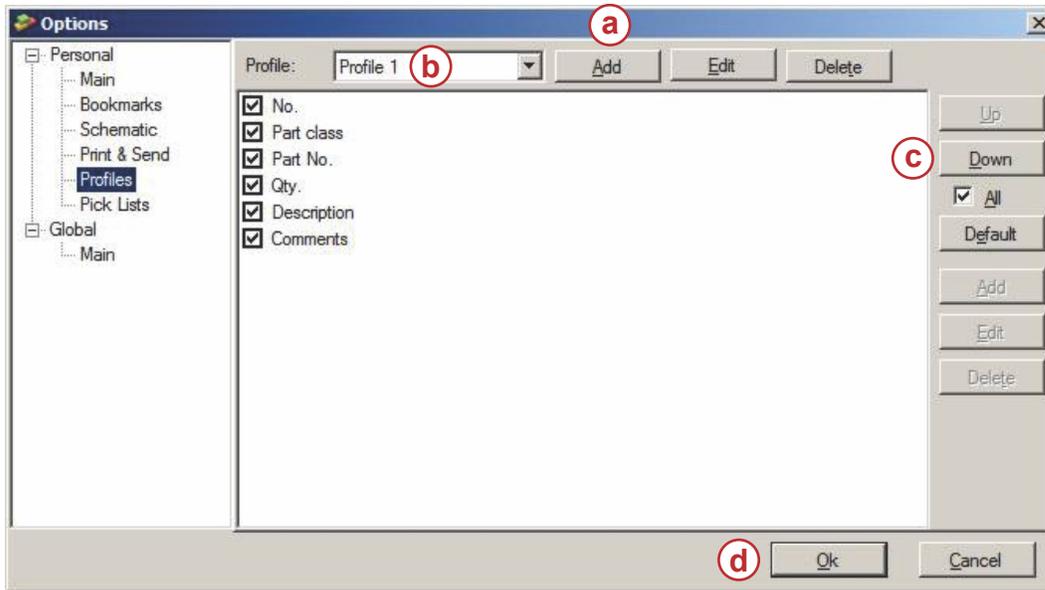
Profiles window
a - Add button
b - Name field in the profiles window
c - Down button
d - Ok button

How to add a new profile:

1. Open **Profiles** section of the **Options** window in one of the following ways:
   - Click the **Edit** button on the **Parts List** bar.
   - Select **Tools > Options > Personal > Profiles** from the main menu.
2. Click the **Add** button at the top of the window. The **Profile** window will appear.
3. Type the name of the new profile into the **Name** field in the **Profiles** window.
4. To add a new column to the **Schematic Parts List**, and show your own pricing there, select the **Use external database for Prices** check box in order to connect to the external schematic parts list with pricing.
5. Click the **Ok** button to save the changes. The check boxes with the column names of the **Schematic Parts List** will become active.
6. Turn on or off the columns, by clicking on the appropriate check boxes.
7. Use the **Up** and **Down** buttons to change the order of columns in the **Schematic Parts List**.
8. Click the **Ok** button on the **Options** window to save the changes.

How to edit an existing profile:

1. Open **Profiles** section of the **Options** window in one of the following ways:
   - Click the **Edit** button on the **Parts List** bar.
   - Select **Tools > Options > Personal > Profiles** from the main menu.
2. To change the name of the existing profile, select it from the **Profile** drop-down list, and click the **Edit** button near it. The **Profile** window will appear.
3. Type a new name for the profile into the **Name** field on the **Profile** window.
4. To add a new column to the schematic parts list and show your own pricing there, select the **Use external database for Prices** check box to connect to the external schematic parts list with pricing.
5. Turn the schematic parts list columns on or off by clicking on the appropriate check boxes.
6. Click the **Default** button to restore the original view of the schematic parts list (all columns are selected).
7. Use the **Up** and **Down** buttons to change the order of columns in the Schematic Parts List.

8. Click the **Ok** button on the **Options** window to save the changes.

Custom Price Column (Off-line Application Only)

In EzParts you can add your own custom price column to the OEM database and display it on the Schematic Parts List. The Price List must be in ODBC, Excel, Access, or SQLite formats. Your company part numbers must match the OEM part numbers exactly and the part and price columns must be labeled in your file for this function to work correctly.

The following is an example of the source file:

NUMBER	PRICE
9278389	23
5447656	3.5
6546654	2.4
6769599	27.9

How to add a custom price column to the Schematic Parts List

1. Open the **Profile** window using one of the following ways:
   a. Click the **Edit** button on the **Parts List** bar.
   b. Select **Tools > Options > Personal > Profiles** from the main menu.
2. Select a profile from the **Profile** drop-down list. If you have not created a profile, then refer to the **Profiles** article.
3. Click the **Edit** button at the top of the **Options** window. The **Profile** window will appear.
4. Left click the **Use external database for Prices** check box to select it. The **DB Connection** field will become enabled.
5. Connect to the external database using one of the following;

Browse

Explore

   a. Click the **Browse** button to connect to any ODBC compliant database. **ODBC** stands for **Open Database Connectivity** and EzParts will communicate with any Business System that is compliant with **ODBC**. Please contact your Business System Provider or your IT Department for instructions on how to establish an **ODBC** connection to your business system.
   b. Click the **Explore** button to connect to external price lists in the Excel, Access, and SQLite formats. The **Open File** window will appear.
   • Select Excel, Access, or SQLite file format from the **Files of type** drop-down list.
   • Navigate to the price list file on your hard drive and click the **Open** button.
   • Click the **Ok** button on the **Profile** window.
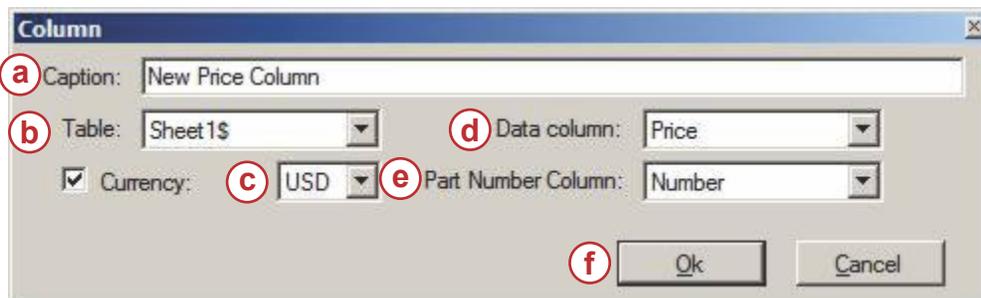
Column window
a - Caption field
b - Table field
c - Currency drop-down list
d - Data column field
e - Part Number Column drop-down list
f - Ok button

   • Click the **Add** button at the right side of the **Options** window. The **Column** window will appear.
   • Enter the name of the new price column into the **Caption** field. It will be displayed on the **Schematic Parts List** in the database.
   • In the **Table** drop-down select the number of the sheet (if it is an Excel file) or the name of the table (if it is an Access file).
   • Select an appropriate currency abbreviation from the **Currency** drop-down list.

- From the **Data column** drop-down list select the name of the column with prices.
- From the **Part Number Column** drop-down list select the name of the column which contains the list of part numbers.
- Click the **Ok** button on the **Column** window.

6. Click the **Ok** button on the **Options** window. The new entry will be added to the **Schematic Parts List** table.

Notes

A note is a text attached to a specific resource or part which gives additional information about that resource or part.
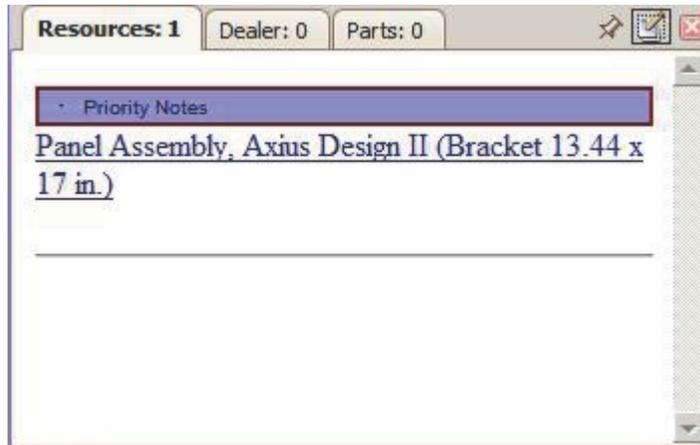
Notes window

There are three types of notes in EzParts and they are displayed in the **Notes** window:

1. **Resources** - These are notes provided by the manufacturer to give additional information about the resource being displayed in the **Resource Display Area**. The number of notes for the displayed resource is noted in the **Resources** note tab.

2. **Dealer** - These notes can be created and managed by the user and attached to the resource being displayed in the **Resource Display Area** to remember or share information about that resource with coworkers. The number of notes for the displayed resource is noted in the **Dealer** note tab. If the dealer note tab is missing, then a note database has not been created.

3. **Parts** - These are notes provided by Mercury Marine to give additional information about the part selected in the parts list table. The number of notes for the highlighted part is noted in the **Parts** note tab. The number in the parenthesis ( ) is the number of parts associated with the selected resource that have notes attached to them.

Notes on Notes:

1. Priority notes will alert the user to very important information about the resource. It is denoted with an exclamation mark and pops up in a window that the user must acknowledge by clicking the **Ok** button to continue working in EzParts.

2. By default, the **Notes** window will appear or disappear depending if the selected resource has an attached note or not. This behavior can be modified in the program's **Options** window.

3. The icon in the **Schematic Parts List** signifies that the part in that row has a note attached to it.

4. If the **Notes** window is hidden it can be shown in one of four ways:
   - Select **Show Notes** from the **View** menu.
   - Right click on the **Navigation Tree** and select **Show Notes**.
   - Right click on the **Resource Display Area** and select **Show Notes**.
   - Right click on the **Schematic Parts List** and select **Notes > Show Part Notes**.

5. Notes can be searched, printed, faxed, e-mailed, and saved with the corresponding resource and parts.

Dealer Notes Database

If you do not have a **Dealer** tab on the **Notes** window, you should create or connect to an external database where the dealer notes will be stored using the following steps:

1. Close EzParts and run it again using one of the following ways:
   - Double-click on the **EzParts** icon on the Desktop.
   - Left click the **EzParts** icon located in the start menu under the EzParts folder.

2. The **Login** window will appear. Click the **Options** button on the **Login** window.
3. Click the **Edit** button. The **Edit Manufacturers** window will appear.
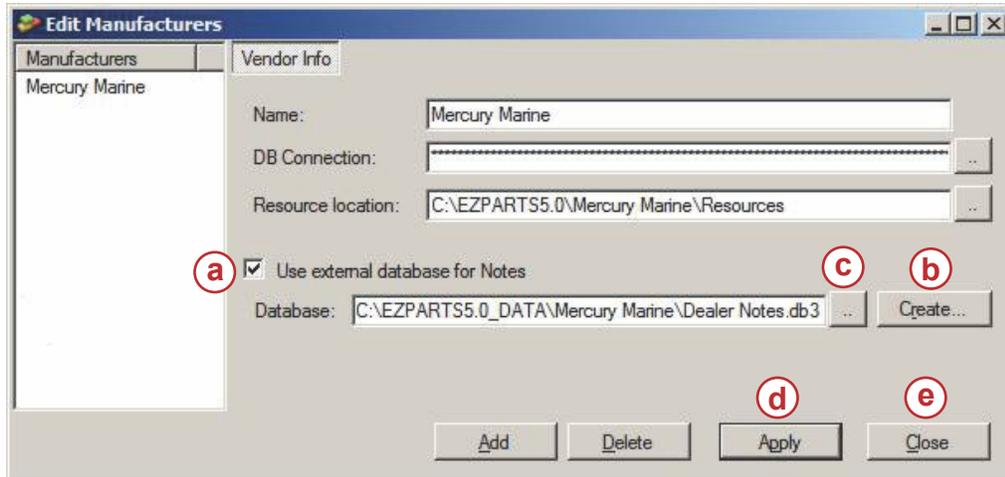
Edit manufacturers window

a - Use external database for Notes check box
b - Create button
c - Browse button
d - Apply button
e - Close button

4. Left click the **Use external database for Notes** check box to enable it.
5. Click the **Create** button to create a new database for the dealer notes or click the **Browse** button shown as an **Ellipsis (...)** if you would like to connect to the existing database with dealer notes.
6. Navigate to the location where you would like to create a new database or select the existing one.
7. If you are creating a new database, enter the file name and click the **Save** button. If you are selecting the existing database select the ***.db3** file and click the **Open** button.
8. Click the **Apply** button on the **Edit Manufacturers** window to save the changes.
9. Click the **Close** button on the **Edit Manufacturers** window to return to the **Login** window.
10. Click the **Ok** button on the **Login** window to log into EzParts.

Create a Dealer Note

EzParts allows users to add their own notes to any schematic, model, or resource in the **Navigation Tree**. These notes are called dealer notes and are displayed on the Dealer tab of the **Notes** window. **Dealer** notes are separate from the resources and parts notes and are not overwritten when the database is updated.

Use the following steps to add a dealer note to the resource:

1. In the **Navigation Tree** select a schematic, model, or other resource to which you want to add a dealer note.
2. Click on the **Dealer** tab in the **Notes** window.
   a. If the **Notes** window is not displayed on the screen then select **Show Notes** in one of the following ways:
      • Select **Show Notes** from the **View** menu.
      • Right click on the **Navigation Tree** and select **Show Notes**.
      • Right click on the **Resource Display Area** and select **Show Notes**.
      • Right click on the **Schematic Parts List** and select **Notes → Show Part Notes**.
   b. If you do not have **Dealer** tab in the **Notes** window then you should create or connect to an external database where the dealer notes will be stored.
3. Click the **Edit** button on the **Notes** window. The **Note Editor** window will appear.
4. Type the note title in the **Title** field on the **Note Editor** window. This step is optional.
5. From the **Visual Style** drop-down list, select one of the following templates:
   a. **Default Note Type** - This note type will be displayed in the **Notes** window when the resource it is attached to is selected.

    b.   **Priority** - This note will pop-up in front of the **Resource Display Area** when the resource is selected. The user will have to acknowledge the note by clicking the **Close** button to continue to work in EzParts.

6.   Specify the note text. The text can be presented as a simple text, link to the resource, link to the external resource on the Web. Type your note and add any required links and images.

    a.   **Text** - The **Note Editor** functions as a standard word-processing program when it comes to formatting and organization of your thoughts.
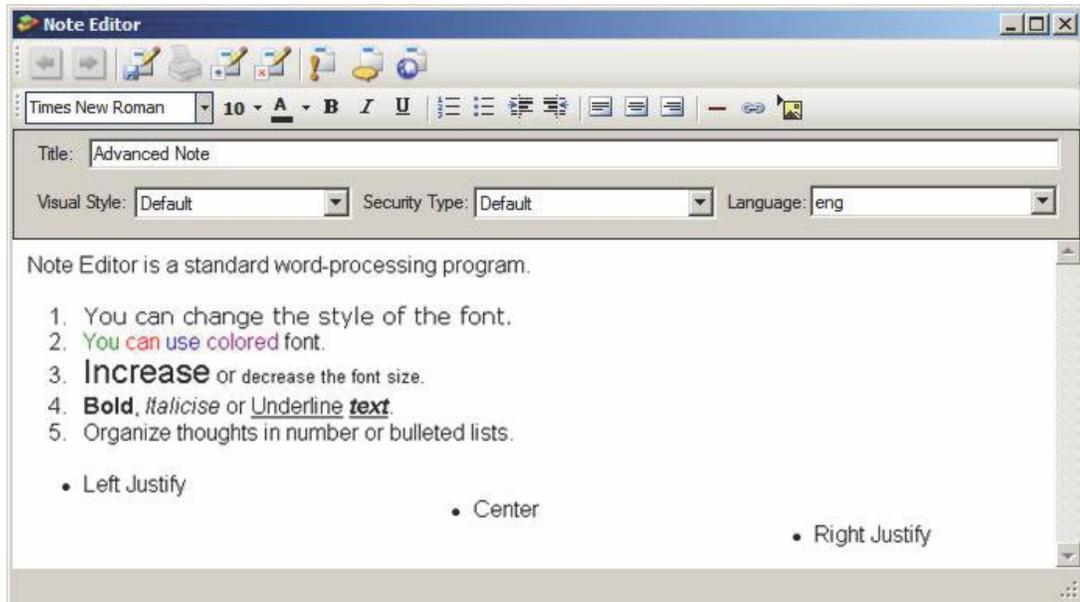
Note editor window

    b.   **Link to EzParts resources**

- **Drag and Drop method**
- Select the resource you want to link with the left mouse button and hold.
- Drag the mouse from the **Navigation Tree** to the **Note Editor** window and release the mouse button.
- Edit the title if you want to make changes.
- Click the **OK** button on the **Edit Link** window to insert the link into the **Note Editor**.
- **Copy Resource method**
- The resource to be linked must be copied into the clipboard with the **Copy Reference** function before you start to create the note.
- Click in the text area of the **Note Editor** and paste the data.
- Press **Ctrl+Shift+V** on the keyboard.
- Right click in the text area of the **Note Editor** and select **Paste** from the context menu.
- Edit the title if you want to make changes.
- Click the **Ok** button on the **Edit Link** window to insert the link into the **Note Editor**.

    c.   **Link to a Web page**

- Click on the **Hyperlink** button on the **Note Editor** window toolbar. The **Edit Link** window will appear.

a - Protocol field
b - Link field
c - Title field
d - Ok button

- Select either **http**: or **https**: from the **Protocol** drop-down list. This denotes that the website will be secure.
- Type or paste the web page's url into the **Link** field. You will find this information in your web browser's address bar.
- Type text to describe the web page in the **Title** field. This will be the text to represent the link in the note.
- Click the **Ok** button on the **Edit Link** window to insert the link into the **Note Editor**.

7. **Insert Image**
   a. Click on the **Image** button.
   b. Click the **Browse** button on the **Picture** window.
   c. Select the image and click the **Open** button.
   d. Type text in the **Alternate Text** field if you want to label the image.
   e. Click the **Ok** button on the **Picture** window to insert the image into the **Note Editor**.
8. After the note is complete, click the **Save** button on the toolbar of the **Note Editor** window.
9. Close the **Note Editor** window using the **X** button in the upper right corner of the window. Dealer notes will be displayed on the **Dealer** tab of the **Notes** window.

Edit a Dealer Note

1. In the **Navigation Tree** select the resource which has a dealer note to be edited. If the **Notes** window is not displayed on the screen then select **Show Notes** in one of the following ways:
   a. Select **Show Notes** from the **View** menu.
   b. Right click on the **Navigation Tree** and select **Show Notes**.
   c. Right click on the **Resource Display Area** and select **Show Notes**.
   d. Right click on the **Schematic Parts List** and select **Notes → Show Part Notes**.
2. Click on the **Dealer** tab on the **Notes** window.
3. Click the **Edit** button on the **Notes** window. The **Notes** window will appear. All the dealer notes attached to the selected resource will be listed.
4. Select the note to be edited and click the **Edit** button. The **Note Editor** window will appear.
5. Change the information in the note.
6. Click the **Save** button on the toolbar of the **Note Editor** window to save the changes.
7. Close the **Note Editor** window using the **X** button in the upper right corner of the window.
8. Close the **Notes** window. The updated note will be displayed on the **Dealer** tab of the **Notes** window.

Delete a Dealer Note

1. In the **Navigation Tree** select the resource which has a dealer note to be deleted. If the **Notes** window is not displayed on the screen then select **Show Notes** in one of the following ways:
   a. Select **Show Notes** from the **View** menu.
   b. Right click on the **Navigation Tree** and select **Show Notes**.

    c.   Right click on the **Resource Display Area** and select **Show Notes**.

    d.   Right click on the **Schematic Parts List** and select **Notes → Show Part Notes**.

2.   Click on the **Dealer** tab on the **Notes** window.

3.   Click the **Edit** button on the **Notes** window. The **Notes** window will appear. All the dealer notes attached to the current resource will be listed.

4.   Select the note to be deleted and click the **Delete** button.

5.   Click the **Yes** button to confirm you wish to delete the note. Use the **No** button if you want to abort the delete change.

6.   Close the **Notes** window.

Search Process

The search function of EzParts allows users to find resources in the database with minimum efforts. Searches can be performed for models, parts, schematics, documents, notes, and serial numbers. Furthermore, several search windows with different search text can be opened at once so you can see what search queries match your needs best and navigate to the resources and parts from search results.

Search for Resources

1.   Click the tab with the magnifying glass on the **Navigation Tree** area or the **Search** button on the **Main Toolbar** to open the **Search** tab.

2.   The **Search** tab contains the **Search** and **Serial** sections. Select one of these sections depending on your search query:

    a.   The **Search** section is displayed by default. Use this section to search for models, parts, schematics, notes, and documents.

        •   Enter a search text into the **Search for** field. It can be a part number, title of a note, or name of a model, schematic, or document as shown in the **Navigation Tree**.

- Make your search more specific by using the drop-down list on the **Search** tab.
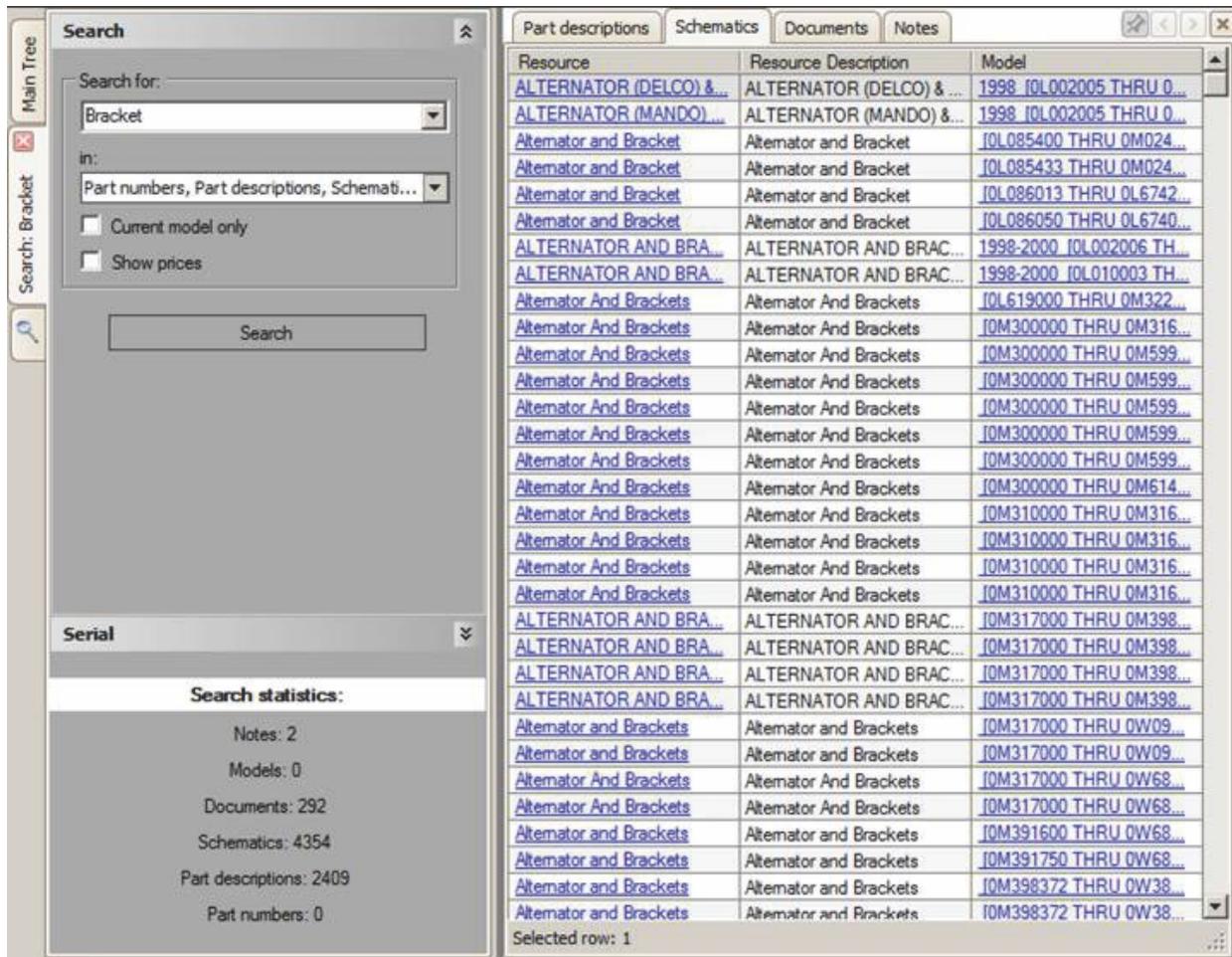
Search window

- **All** - The search is performed for all types of resources in the database: parts, schematics, documents, models, and notes.
- **Parts** - The search is performed for parts.
- **Schematics** - The search is performed for schematics.
- **Documents** - The search is performed for documents mainly in PDF format.
- **Parts Bulletins** - The search is performed for parts bulletins.
- **Service Bulletins** - The search is performed for service bulletins.
- **Models** - The search is performed for models.
- **Notes** - The search is performed for note titles and text.
- Select the **Current Model Only** option to search for parts in the model which is currently selected in the **Navigation Tree**.
- Select the **Show Prices** option to display the price columns for parts in search results.

b. Select **Serial** section to perform search for serial numbers.

- Select series from the **Series** drop-down list.
- Enter serial number into the **Serial** field.

3. Click the **Search** button or press the **Enter** key on the keyboard to start the search process.

Search by Product Line/HP/Year

1. Click the tab with the magnifying glass on the **Navigation Tree** or the **Search** button on the **Main Toolbar** to open the **Search** window.
2. Select Product Line/HP/Year Search from the drop-down list under the **Search for** field.

3. Select the desired Product Line, HP Group or Displacement, and Year.

   NOTE: HP Group and Displacement are optional and are product specific.

4. Select **Search** or press **Enter** on the keyboard.

Search for Schematics

Use the following steps to search for schematics:

1. Click the tab with the magnifying glass on the **Navigation Tree** or the **Search** button on the **Main Toolbar** to open the **Search** window.

2. Enter the schematic name taken from the **Navigation Tree** into the **Search for** field.

3. Select **Schematics** from the drop-down list under the **Search for** field.

4. Click the **Search** button or press **Enter** on the keyboard to start the search process. The program will find all schematics which match your search criteria.

5. The search results will be displayed on the **Schematics** tab. Click either schematic name or the name of the model to navigate to the schematic in the **Navigation Tree** and display it in the **Resource Display Area**.
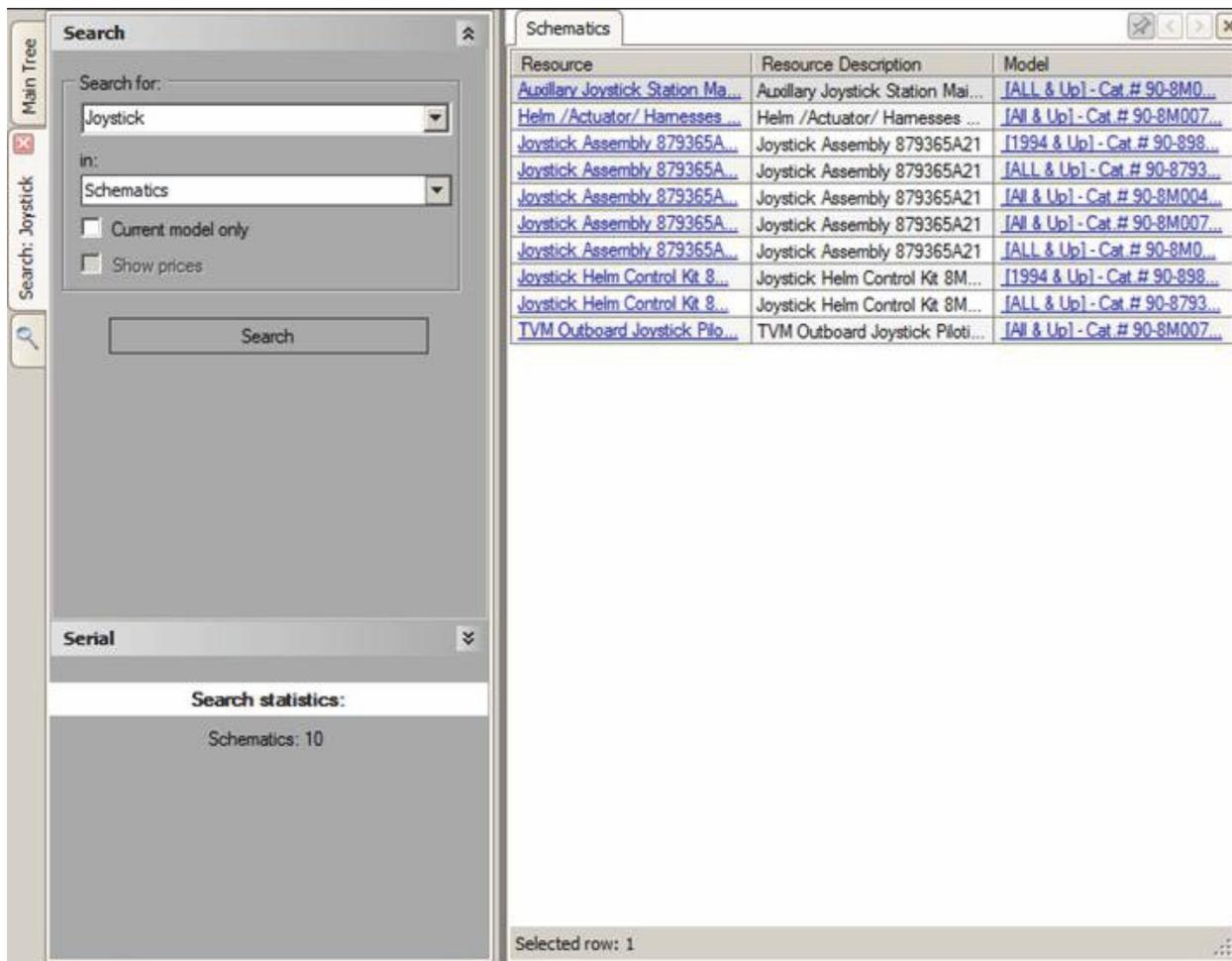
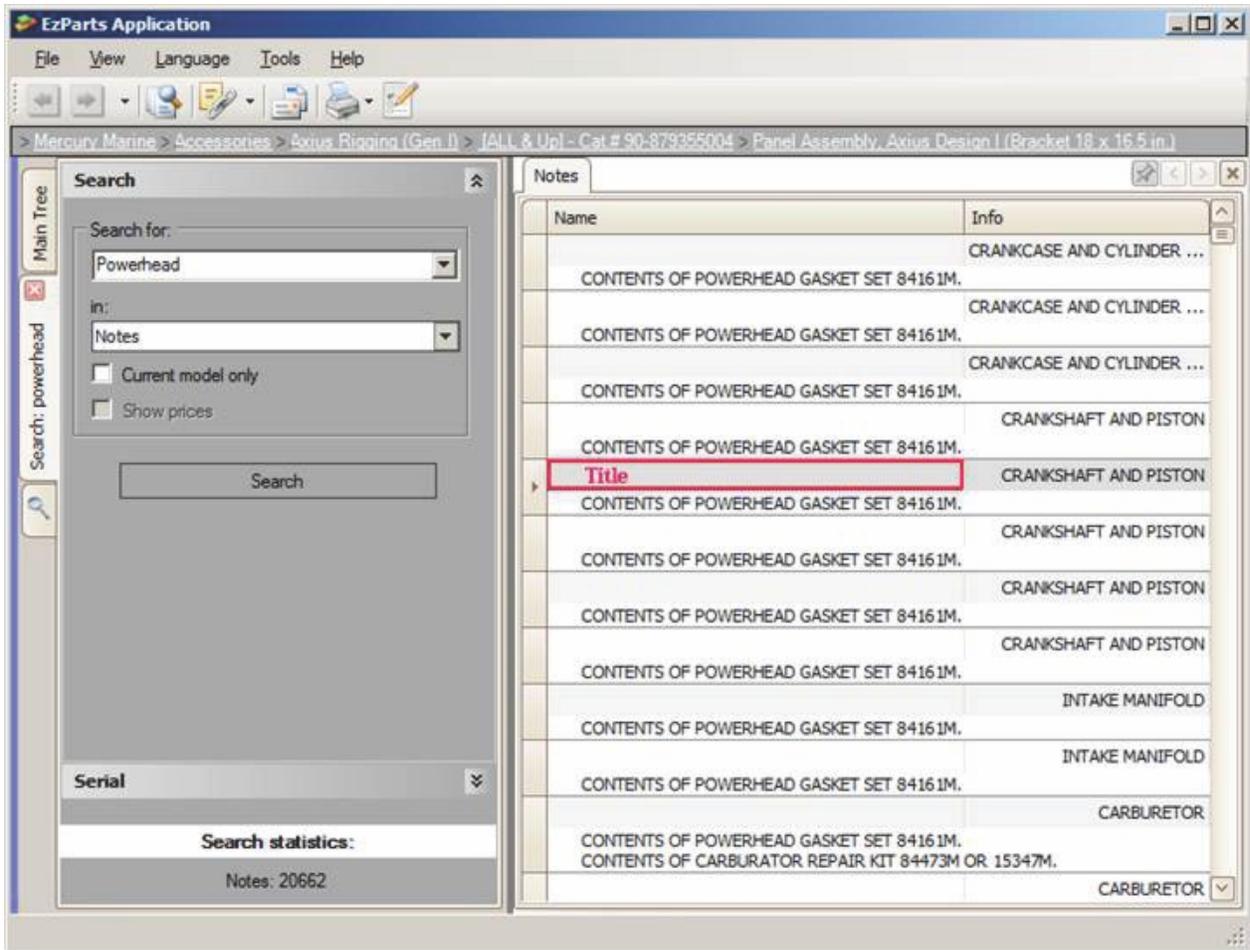Search results for schematics

Search for Parts

Use the following steps to search for parts:

1. Click the tab with the magnifying glass on the **Navigation Tree** or the **Search** button on the **Main Toolbar** to open the **Search** window.

2. Enter the part number into the **Search for** field.

3. Select **Part numbers** or **Part descriptions** from the drop-down list under the **Search for** field.

4. Check **Current Model Only** to search for parts in the model which is currently selected in the **Navigation Tree**. If no model is selected currently, this option is disabled.

5. Check **Show Prices** to see the price columns in search results.

6. Click the **Search** button or press **Enter** on the keyboard to start the search process. The program will find all parts which match your search criteria.

7. The search results will be displayed on the **Part numbers** or **Part descriptions** tab. Click on a part to see schematics and models in the **Part found in resources** section.

8. Click on the resource link in the **Part found in resources** section and you will be brought to the schematic with needed part in the **Navigation Tree**.

9. Click on the model link in the **Part found in resources** section to navigate to the corresponding model in the **Navigation Tree**.

Search results for parts

Search for Notes

Use the following steps to search for notes:

1. Click the tab with the magnifying glass on the **Navigation Tree** or the **Search** button on the **Main Toolbar** to open the **Search** window.
2. Enter the note title/text into the **Search for** field.
3. Select **Notes** from the drop-down list under the **Search for** field.
4. Click the **Search** button or press the **Enter** key on the keyboard. The program will find all notes, which match your search criteria.

5. The search results will be displayed on the **Notes** tab. Each search result line is divided into two sections: note title and note text. Double-click on the note title to display a schematic or a part with this note.


Search results for notes

Search for Serial Numbers

Use the following steps to search for schematics using serial numbers:

1. Click the tab with the magnifying glass on the **Navigation Tree** or the **Search** button on the **Main Toolbar** to open the **Search** window.

2. Click on the **Serials** section to perform a search using serial numbers.

3. Select series from the **Series** drop-down list.

4. Enter serial number into the **Serial** field.

5. Click the **Search** button or press **Enter** on the keyboard.

6. The search results are displayed on the **Models** tab at the right side of the window. Click on the model name to navigate to it in the tree.
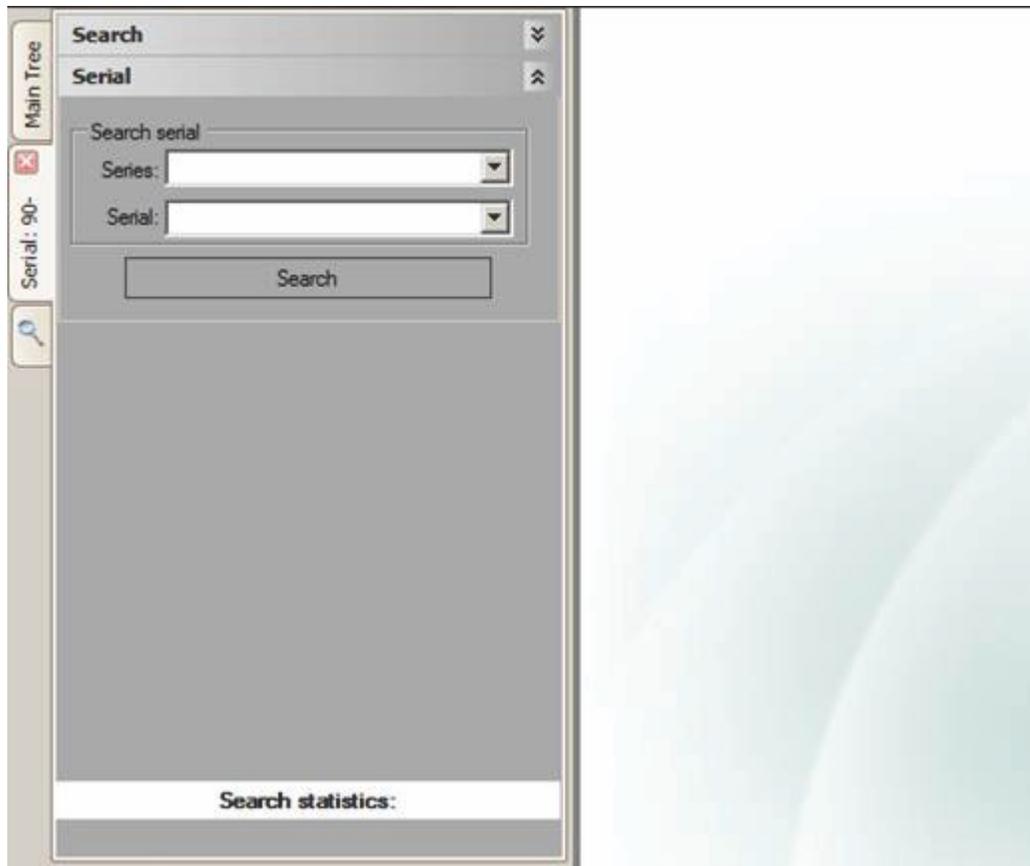
Serial number search window

Export Part Search Results

Use the following steps in order to export parts search results:

1. Right click on the parts search results at the right side of the main EzParts window.
2. Select the **Export parts to HTML** option from the context menu. The **Export to HTML Document** window will appear.
3. Specify the name of the file in the **File name** field.
4. Select the location to which you would like to save the search results.
5. Click the **Save** button.

Print Process

The EzParts application offers powerful functionality for printing, e-mailing, and saving schematics, parts lists, and supporting documentation, including PDF format. This functionality can be found on the **Print and Send** window to simplify the process.

In EzParts you can print, e-mail, or send resources and schematic parts lists using one of the ways below:

1. Click the **Print Tool** on the **Main Toolbar**.
2. Select the **Print and Send** option from the context menu of the **Navigation Tree**.

3. Select the **Print and Send** schematic option from the context menu of the **Resource Display Area**.
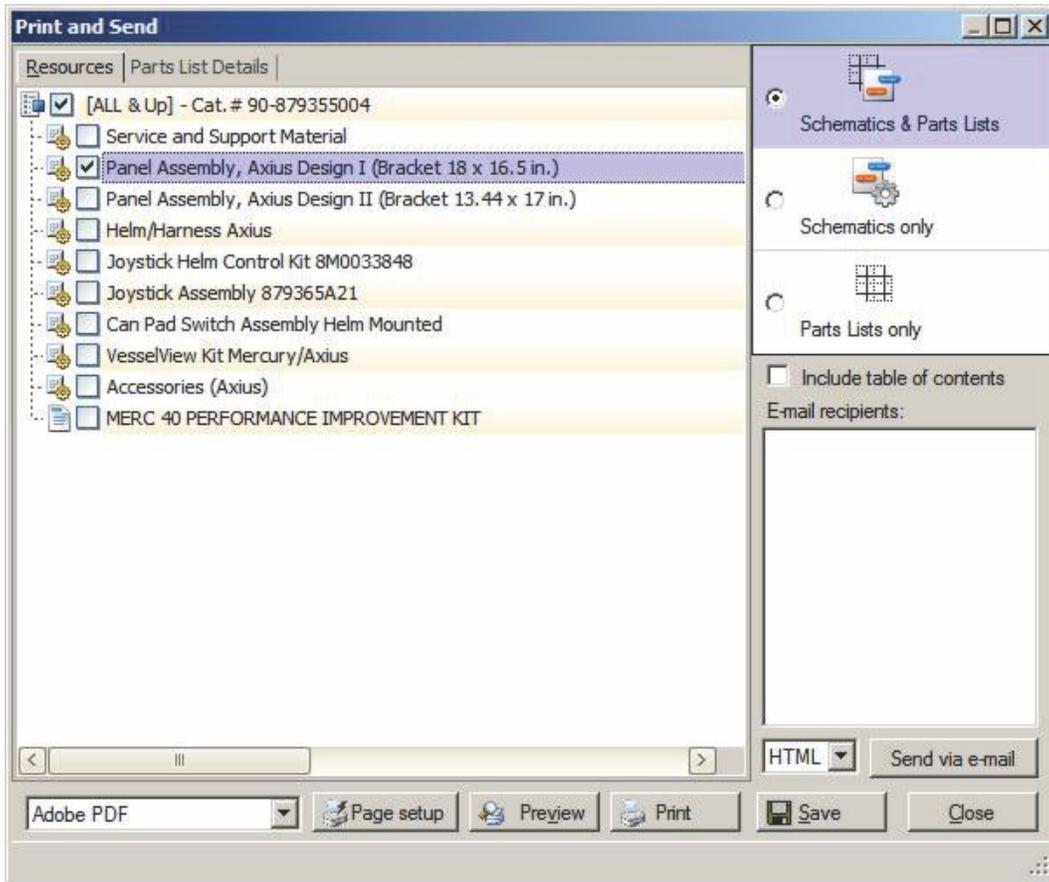
Resources tab of the print and send window

4. Select the **Print and Send** parts list option from the context menu of **Schematic Parts List**.
5. **Resources Tab**
    a. Left click to select additional Schematics or Documents to include with the e-mail or print job.
6. **Parts List Details Tab**
    a. Notes options
        • **Print Schematic Notes** - Select this option to print, e-mail, or save all notes attached to the schematic.
        • **Print Parts Notes** - Select this option to print, e-mail, or save all notes attached to the schematic parts list.

 b. **Include columns** - Displays the list of columns of the currently selected profile. If the **Parts List** is being printed, then this will select columns that will be printed, e-mailed, or saved with the schematic. You can select a different profile from the **Profile** drop-down list, uncheck the columns that you do not want to print, e-mail, or save and change the order of columns using the **Up** and **Down** buttons.
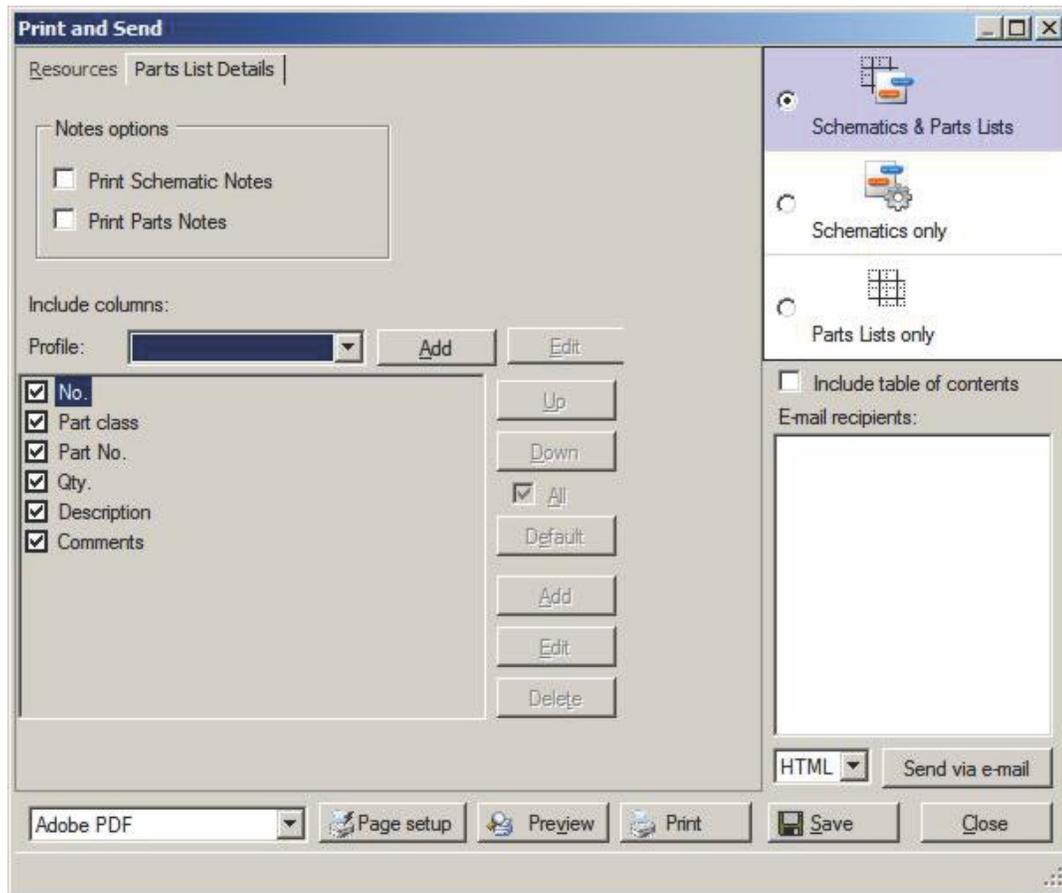
<p align="center">Parts list details tab of the print and send window</p>

7. **Common Functions**

 a. **Print Type** - Select the type of the resources to print, e-mail, or save. Depending on the **Print Type**, the application will choose the types of the resources to be printed, e-mailed, or saved.

  • **Schematics and Parts Lists** - Select this option to print, e-mail, or save the image of the schematic and the parts list attached to it.

  • **Schematics only** - Select this option to print, e-mail, or save only the image of the selected schematic resource.

  • **Parts Lists only** - Select this option to print, e-mail, or save only the parts list of the selected schematic resource.

 b. **Include table of contents** - Select this check box for the program to generate table of contents for the printed resources.

 c. **E-mail recipients** - Enter the e-mail address of the person to receive the e-mail.

 d. **E-mail Format** - Select the format the resources will be sent in.

 e. **Send via e-mail** - Click this button to e-mail selected resources or schematic parts lists to the specified recipients.

 f. **Printer drop-down list** - Select the printer, or fax from the drop-down list. All the printers installed in your system are displayed there.

 g. **Print setup** - Click this button to open the **Page Setup** window where you can set up additional parameters for printing.

 h. **Preview** - Click this button to preview the selected resources or schematic parts lists with the set print parameters.

 i. **Print** - Click this button to send selected resources or schematic parts lists to the printer.

 j. **Save** - Click this button to save selected resources or schematic parts lists to any location on your hard drive.

 k. **Close** - Click this button to close the **Print and Send** window.

Print Resources, Schematics, and Parts Lists

To print resources and schematic parts lists, use the following steps:

1. Click the **Print Tool** on the **Main Toolbar** to open the **Print and Send** window in one of the following ways:

2. On the **Resources** tab of the **Print and Send** window select the resources to be printed. Only documentation in PDF format, schematics, and schematic parts lists can be printed. Images of groups and models cannot be printed.

3. Select the type of resources to be printed:

    • **Schematics and Parts Lists** - Select this option to print the image of the schematic and the parts list attached to it.

    • **Schematics only** - Select this option to print only the image of the selected schematic resource.

    • **Parts Lists only** - Select this option to print only the parts list of the selected schematic resource.

4. On the **Parts List Details** tab of the **Print and Send** window configure the printing settings of notes and schematic parts list columns.

    • **Notes options**

        • **Print Schematic Notes** - Select this option to print all notes attached to the schematic.

        • **Print Parts Notes** - Select this option to print all notes attached to the schematic parts list.

    • **Include columns** - Displays the list of columns of the currently selected profile. These selected columns will be printed with the schematic. You can select a different profile from the **Profile** drop-down list, uncheck the columns that you do not want to print, change the order of columns using the **Up** and **Down** buttons on the current one.

5. Select the printer from the drop-down list of available printers.

    • **Print Setup** - Click this button to open the **Page Setup** window where you can set up additional parameters for printing.

    • **Preview** - Click this button to preview the selected resources and schematic parts list before printing. Only schematics and parts lists can be previewed using this option (documents cannot be previewed from the **Print and Send** window).

6. Select the format of the resources and schematic parts lists from the drop-down list under the **E-mail recipients** section. This function defines the format in which the resources and schematic parts lists will be printed.

7. Click the **Print** button on the **Print and Send** window to print the selected resources and schematic parts lists.

Pick Lists

The **Pick Lists** function of EzParts is used for creating lists of required items in specific quantities based on their availability in the **Parts Dictionary**. The pick lists can be exported to external applications and saved in the CSV, DAT, TXT formats.

Online Application

1. Select the Pick lists.

2. Select Pick list name.

3. Select Export button.

NOTE: Three files will be saved in the following formants; CSV, DAT, TXT. Depending on your browser settings your pick list will automatically save to your default browser path or you will be prompted to select a path to where you would like save the files.

Off-line Application

1. Specify the settings for the pick list export to the CSV, DAT, TXT formats:

a. Go to **Tools > Options** on the Main Menu of EzParts. On the opened **Options** window, select **Personal > Pick Lists** to specify the path where the pick list will be exported to.
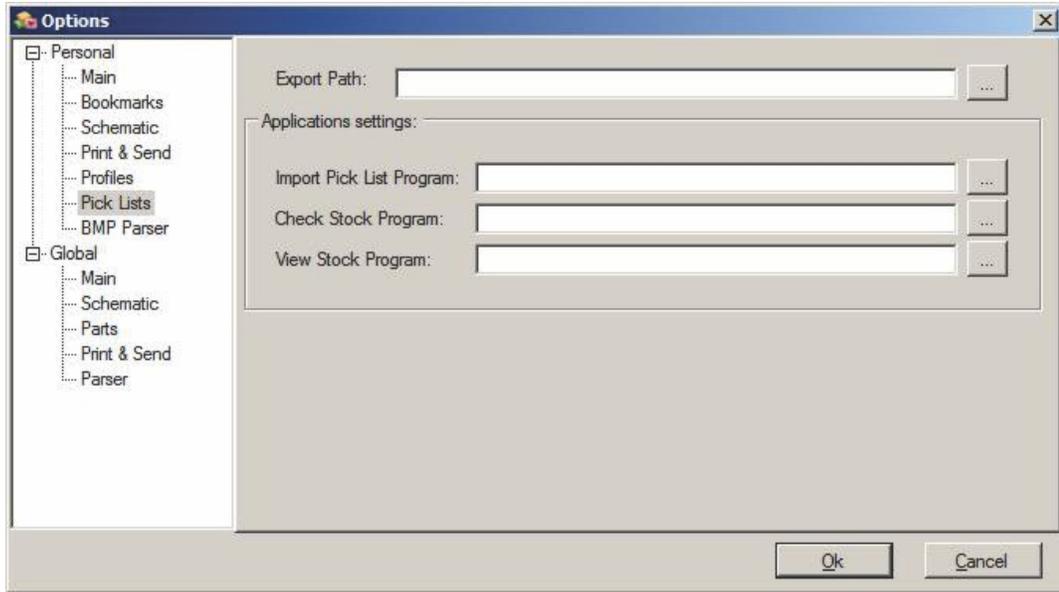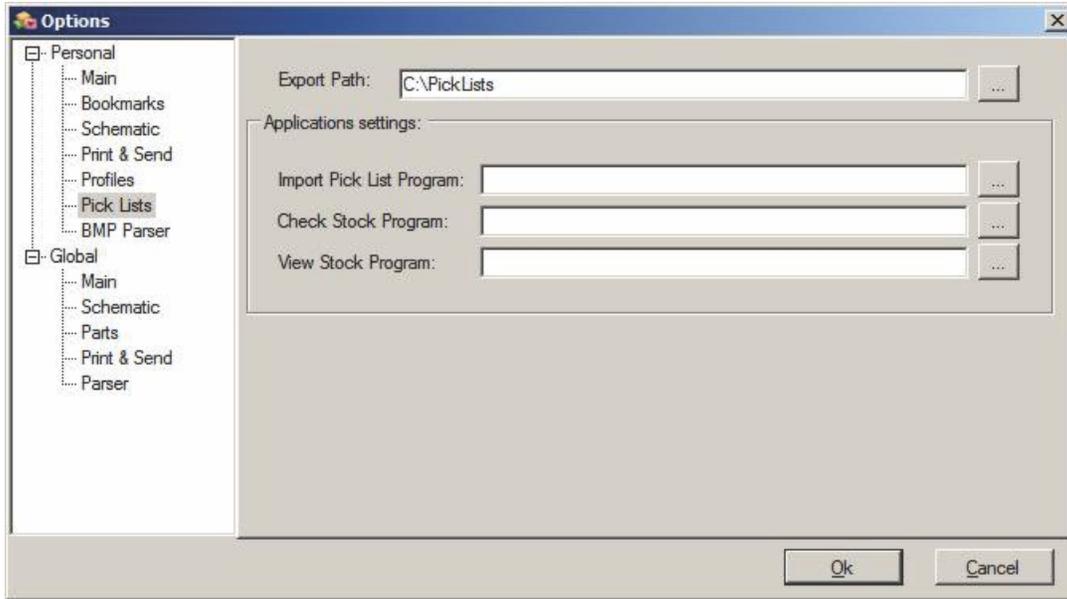

Pick lists options

b. Click the **Browse** button at the end of the **Export Path** field. The **Browse For Folder** window will open.
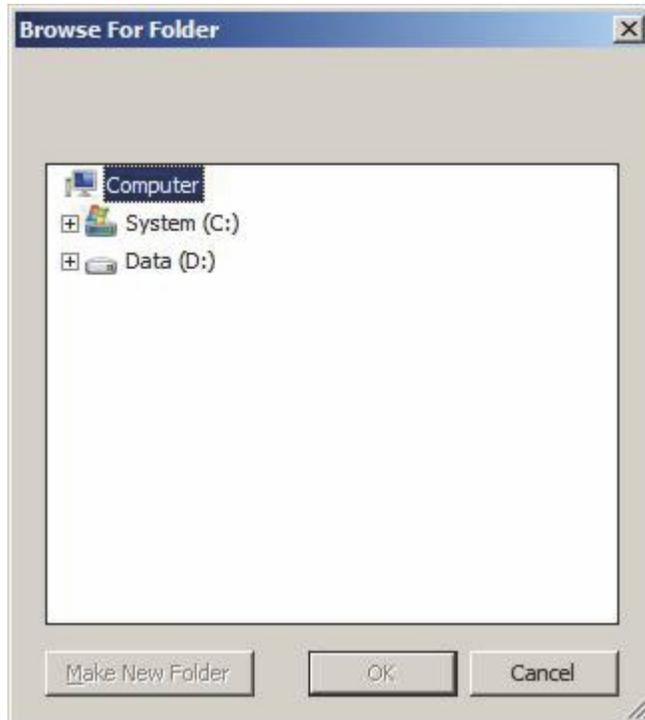
Browse For Folder

c. Navigate to the folder where the exported pick list will be saved to and click **OK**. The path will be specified in the Export Path field.
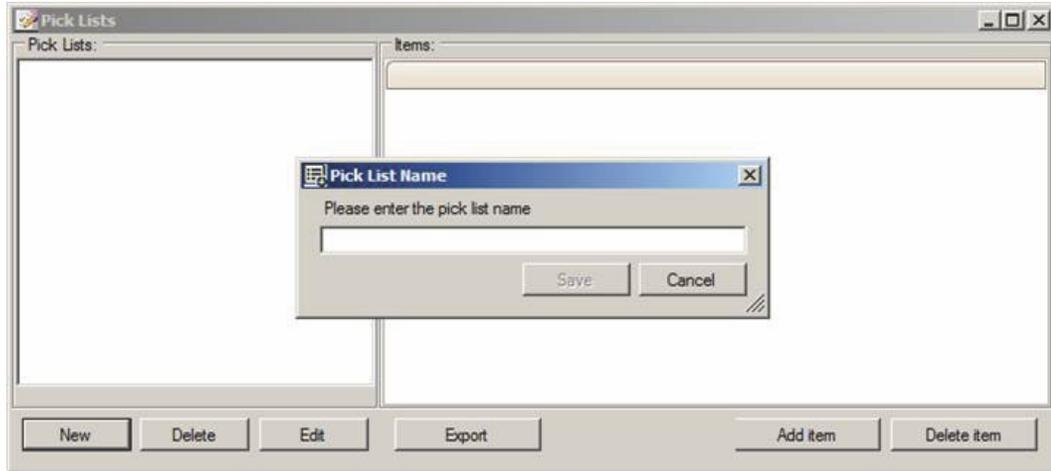

Pick lists export path

d. On the **Options** window click **OK** to save the changes and close the **Options** window.

2. Click the **Pick Lists** button on the **Main Toolbar** to open the **Pick Lists** window.
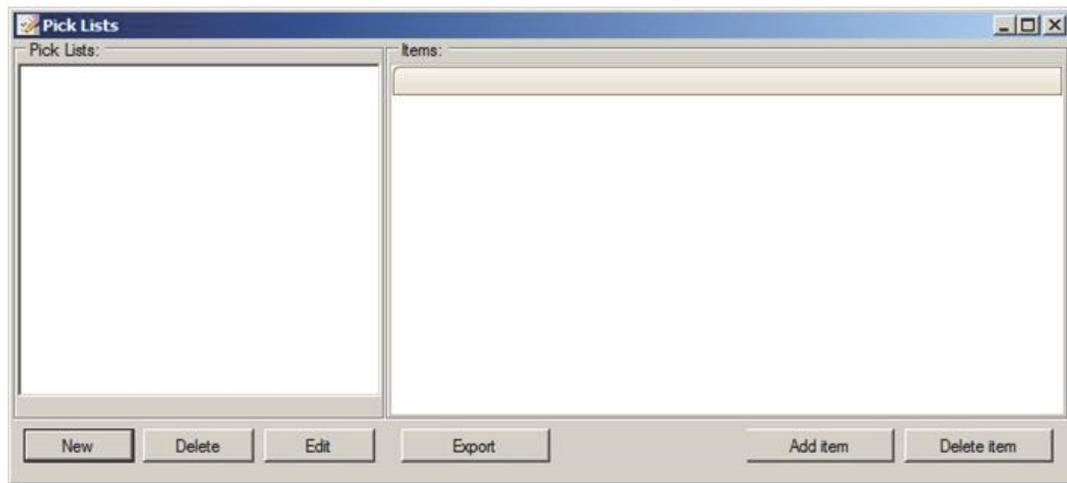
Pick lists window

3.   Click the **New** button at the lower left part of the window to create a new pick list. The **Pick List Name** window will be displayed.

Pick list name adding

4.   Enter a pick list name in the **Please enter the pick list name** field of the **Pick List Name** window and click **Save**. The pick list will be added in the **Pick Lists** section and selected as the default.

5.   Click **Add item** in the lower right part of the **Pick Lists** window to add items to the selected pick list.
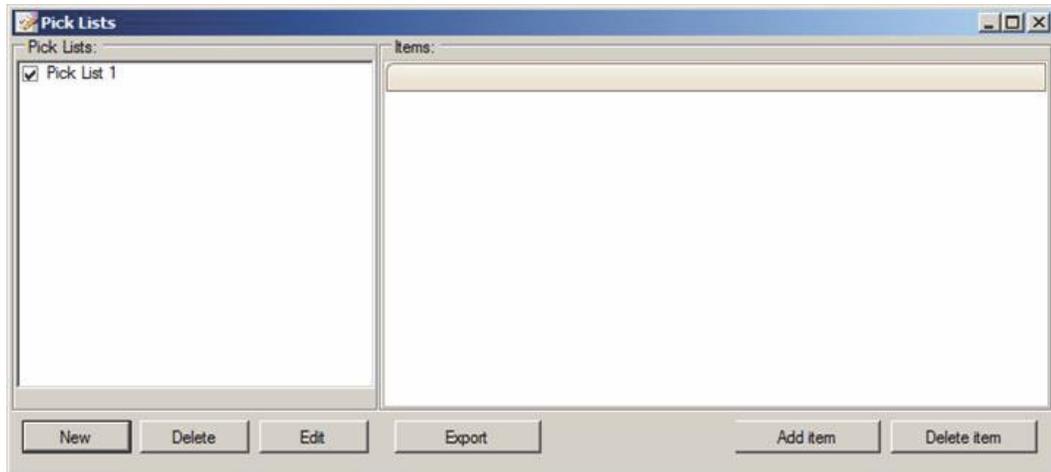
Added pick list

6. On the opened **Search for part** window find a part to be added to the pick list by entering the part number in the **Part Number** field.
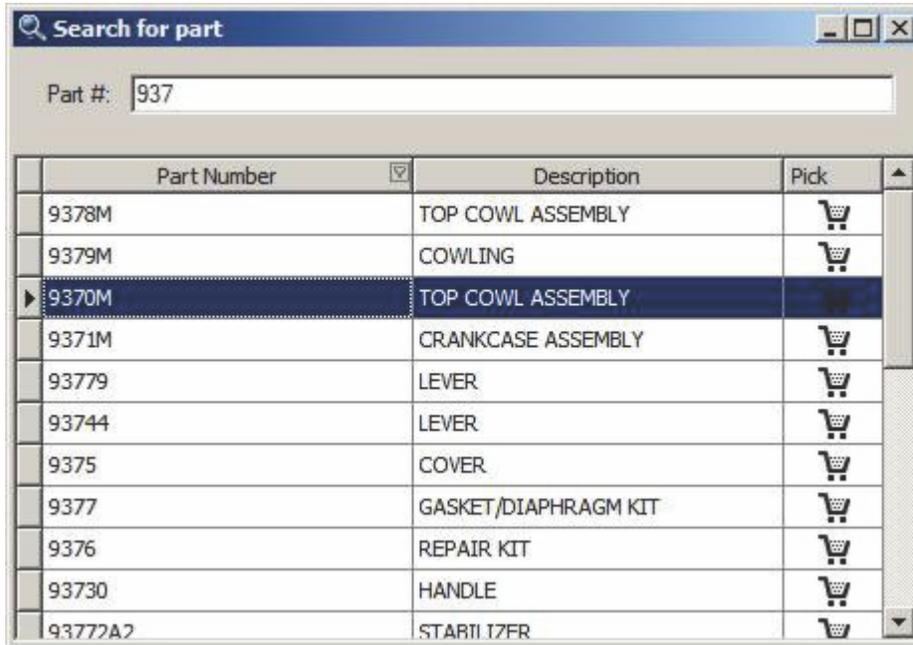
Filtered search for part window

7. Click the **Pick** button next to the required part. The **Add item to picklist** window will open.

Adding item to pick lists

8. Specify the item quantity in the **New Qty** field of the **Add item to picklist** window. The pick list can be changed in the **Pick List** drop-down list if it is needed.

Editing item quantity for pick list

9. Click **Add** to add the item to the pick list. You will be returned to the **Search for part** window. You can add more parts or close the window to return back to the **Pick Lists** window. On the Pick Lists window the **Qty** field can be edited by clicking it in the **Items** section.

Added item to pick list

10. On the **Pick Lists** window click **Export** to export the selected pick list to the CSV, DAT, TXT formats in the folder specified in the **Export Path** field in **Step 1**.

Notes on Pick Lists:
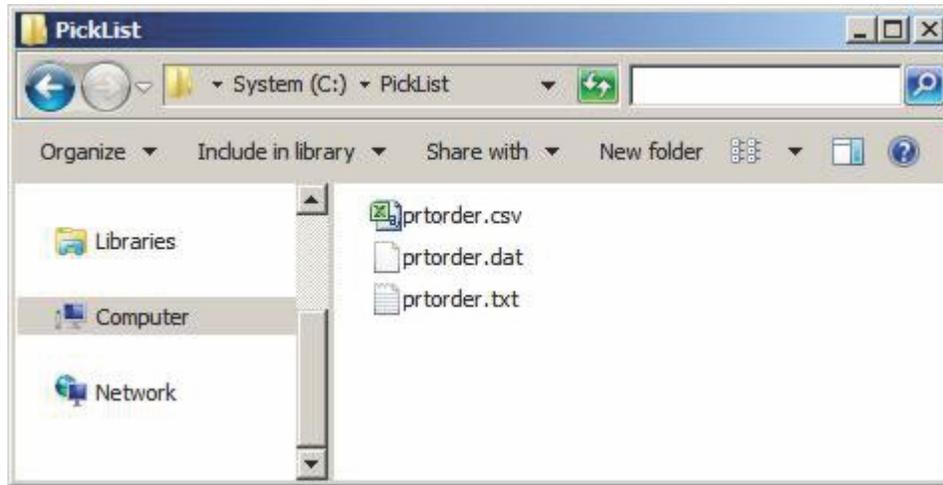
Exported pick list folder

- An item can be added to the pick list from the **Schematic Parts List** by right clicking an item and selecting **Add to pick list** from the context menu. The default pick list will be selected in the **Pick List** drop-down list.
- To make a pick list default, right click the needed pick list and select **Set list as default** from the context menu. It will be checked.

For More Help

- Read the Help file accessed from inside the EzParts program pressing **F1**.
- Contact MercNET Customer Service at 800-556-4327 | mercnet_support@mercmarine.com