

Version 25



Trapeze
Enterprise Asset Management

NAPA Hub

MAXQueue Module Guide

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Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

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The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

NAPA Hub – MAXQueue Module Guide

Version 25.x

February 2025

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1. Overview

The NAPA integration provides an interface with NAPA's Hub System (IBS Hub). This interface removes the need for double-entry for joint customers of our asset management system and NAPA's Integrated Business Service (IBS). The interface, if configured in whole, performs the services listed in the following sections.

Part Request

The integration sends applicable part data to the IBS Hub using an external end point managed by NAPA.

- Part requests include all part and work order information for the IBS Hub to create a NAPA work order to fulfill requested parts.
- Stock transfers for supply orders are also included in this service, and will send all part information for the IBS HUB to create a NAPA supply order to fulfill the requested parts.
- Purchase orders to NAPA are included if configured to send requests.

Part Update/Inquiry

Part updates are incoming events from IBS Hub to ensure part information is up to date prior to invoicing. This service creates parts and part related information when necessary, or updates part information in the application to make sure invoices are processed with current part data.

Invoice Request

Invoice requests are an incoming event from the IBS Hub to fulfill part work order issues, stock transfers, and purchase orders.

About the NAPA Hub Integration

The integration between the asset management system and NAPA's IBS Hub system allows for paperless workflow in your shop to increase efficiencies. When technicians place a work order parts request using the asset management system, the details of that order are passed through to the NAPA Hub point-of-sale (POS) system in real-time. NAPA's staff assists with researching the proper part, fulfilling the order, and having the part ready for the technician. If the part is not in the standing inventory, the NAPA staff member places the order and updates the inventory.

Additionally, all parts that are sold to your organization through NAPA's Hub point-of-sale system (whether to work orders, or directly to departments or account codes) are immediately viewable in the system as valid parts issue transactions. This eliminates any incorrect coding of issue transactions as your business rules defined in the system are still fully enforced in real-time.

The inventory is updated in real-time, which gives fleet managers an accurate view of the parts that are on hand (including quantity and price) at any time. This can be critical information to help the manager assess whether or not a vehicle should be taken out of service for repair.

Furthermore, the integration supports multiple storerooms and maintenance facilities with its parts transfer functionality. Inventory can be transferred from the central NAPA IBS location to a satellite facility's on-hand inventory, where the built-in inventory tracking of the system takes over.

The NAPA integration is designed to facilitate the following items:

Paperless communication with the NAPA parts counter

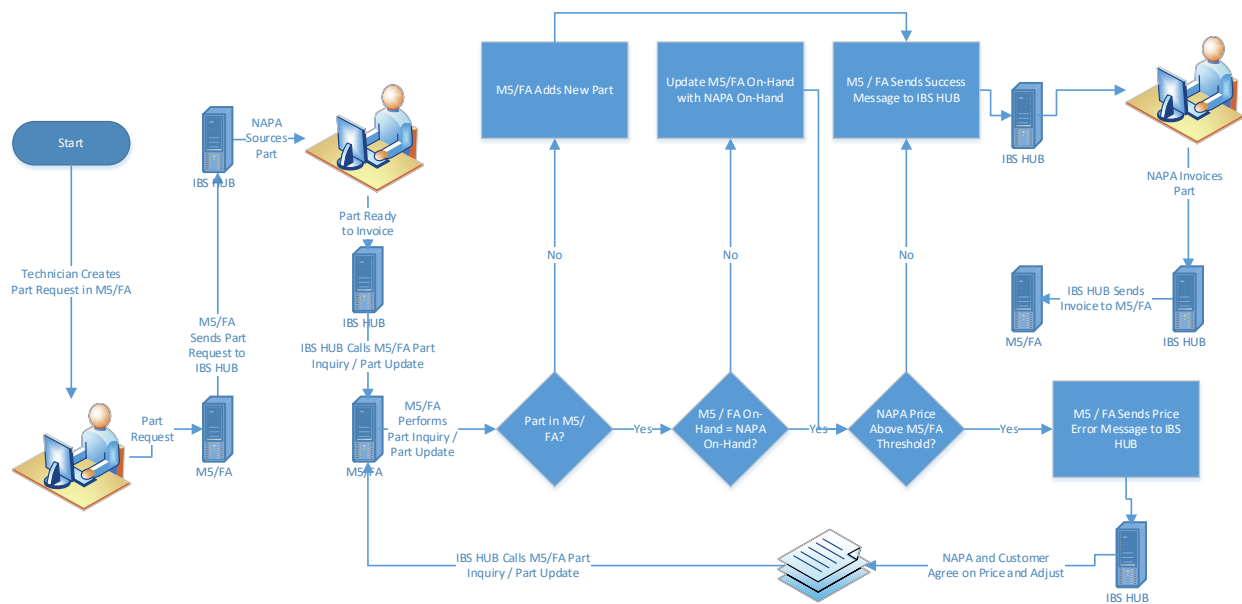
- Parts requests are sent electronically to the NAPA counter
- Parts issues (sales) are automatically posted to the internal system

Visibility into NAPA parts catalog: The NAPA parts catalog gives you information you need without having to try and find the information online. You can obtain this information straight from the catalog.

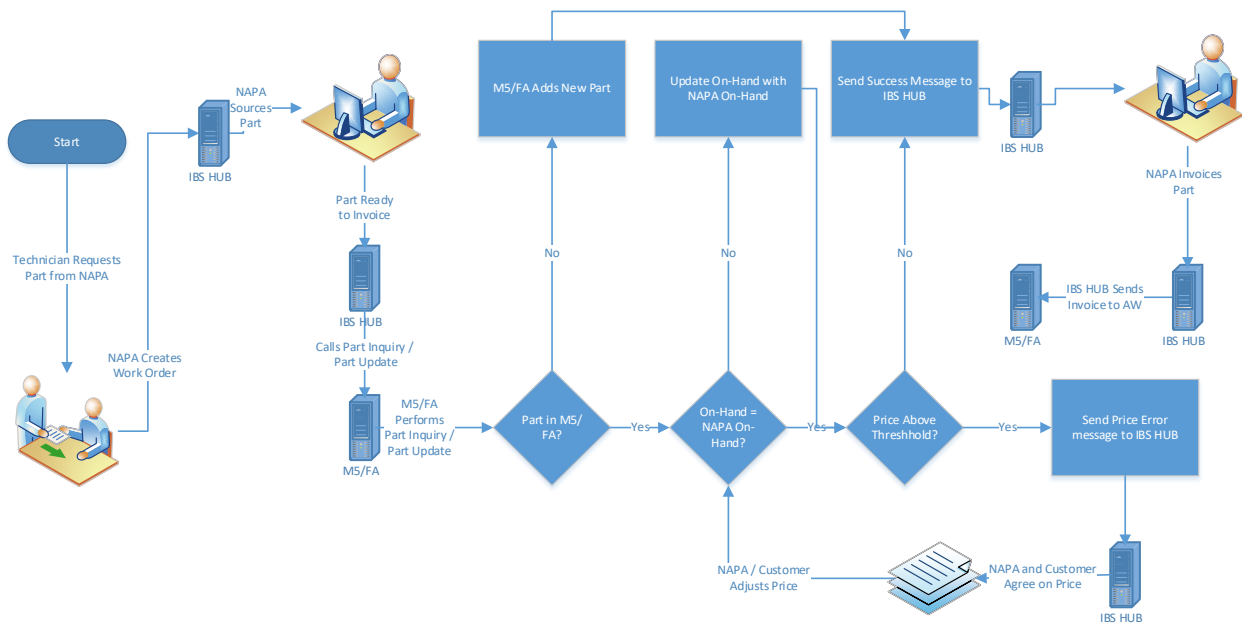
- Part numbers and descriptions
- On-hand quantities available at NAPA
- Current price

There are also periodic validations of NAPA invoices to ensure valid audits of charges, eliminating the need to manually reconcile your NAPA invoices. More specifically, the automated reconciliation process involves the system accepting NAPA invoices in a predefined standard electronic format, and verifying the costs against matching transactions within the application. Each invoice is linked to the corresponding parts issue record in the application,

which can be a direct issue, work order issue, request issue, or purchase order receipt. Valid matches are marked as reconciled. Any cost variance will be marked as requiring attention.



Integration Services with Integrated Part Request workflow



Integration Services without Integrated Part Request workflow

2. Updating NAPA

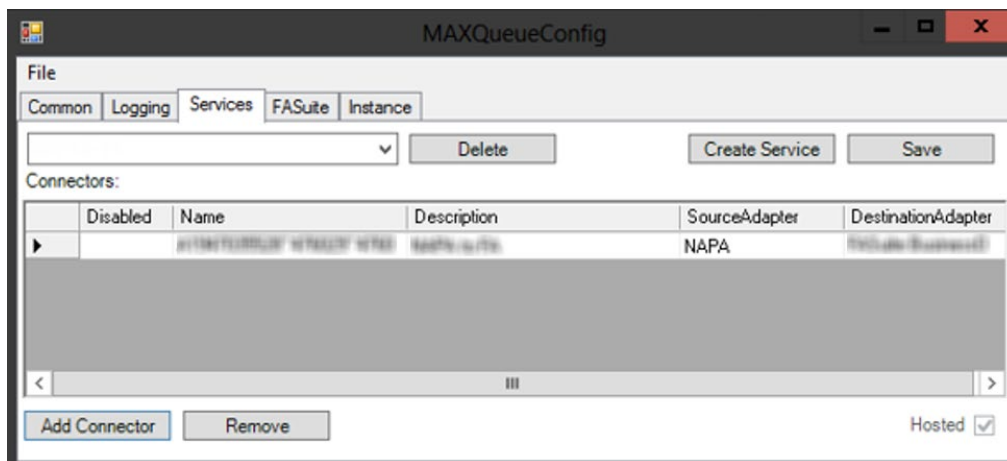
When you upgrade, be sure to perform the upgrade during a time when no NAPA part requests are being created by the shop. These part requests are normally sent to NAPA, and if any are made during the time the upgrade is happening, they will get missed. Incoming data from NAPA (POS transactions, etc.) is not affected by the outage during upgrades since the incoming information stays on NAPA's side until the system sends a request for them.

In general, it is best to perform an upgrade outside of regular business hours. Alternatively, take measures to ensure that no one can enter data (of the type that the integration manipulates) during that time.

- ⚠ Important: When upgrading, make sure no items are left in the queue for processing. Be sure all items are done processing before upgrading, otherwise that data may be lost or corrupted. Allow MAXQueue to complete all work before shutting down the service to upgrade.
- ⚠ When upgrading to 16.0.14, 17.0.11, 18.0.2, or 19.0 and higher while using the NAPA Hub integration, disable the legacy NAPA interface services. Once these services are disabled, follow the necessary steps for configuration.

To disable the old NAPA services:

1. In the `\\MAXQueue\\Server` file folder, open the `MAXQueueConfig.exe` file.

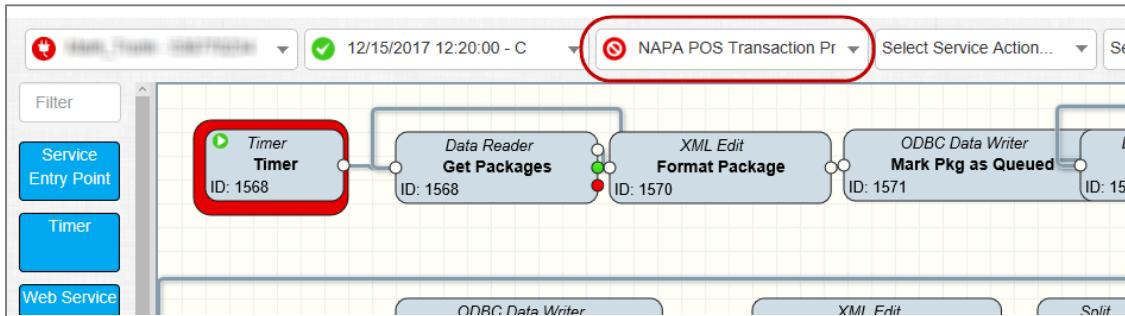


2. Choose the service to disable from the drop-down menu.
3. Click **Delete**.
4. Continue deleting the old NAPA services until complete.

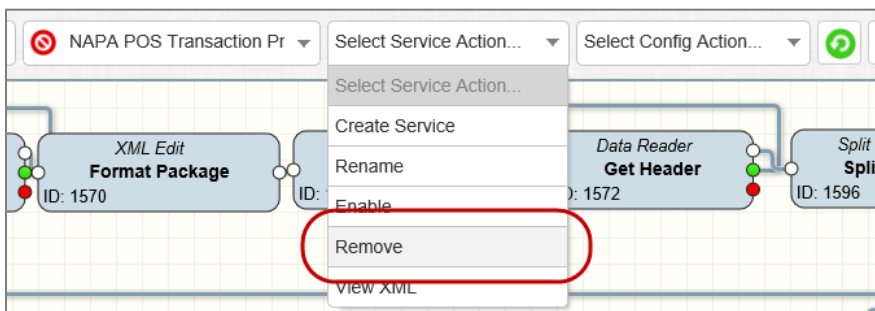
To disable the legacy NAPA services:

1. Open the Integration Designer or MAXQueue Designer.

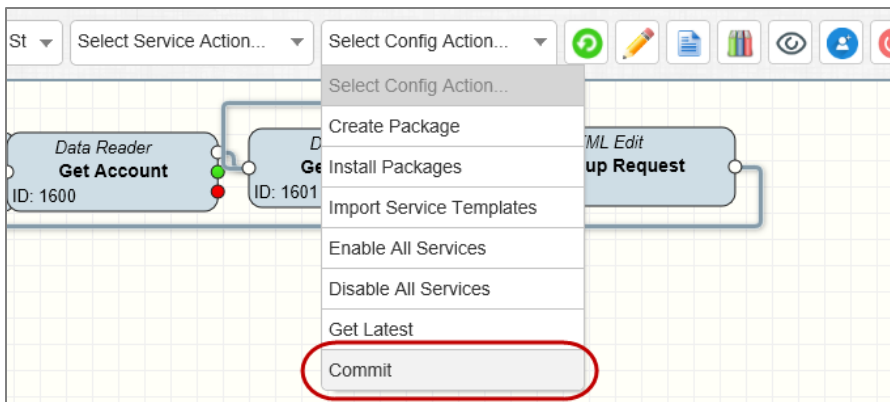
2. Select the NAPA service from the service drop-down. This process needs to be performed on all NAPA services, and must be completed one at a time.



3. Click the **Select Service Action** drop-down, click **Remove**.



4. Click **Ok** to confirm.
5. Continue deleting the legacy NAPA services until complete.
6. Click the **Select Config Action** drop-down and click **Commit** to save your changes.



3. NAPA Setup

With any new project, you must have the correct information. Email your NAPA contact for the following information.

- NAPA store number
- Customer number (the account to which the parts are billed)
- NAPA TAMS login credentials
- Test and production web service URLs (used in MAXQueue configuration)
- Parts inventory (loaded to the internal system)

Parts Inventory

Parts inventory must be formatted correctly before being entered into the system.

Line Abbreviation	Part Number	Description	Unit Price	Qty On Hand
1BG	7011	BG AC OIL/DYE	1.53	128.00
1CH	11EJ51DW1AA	VISOR HOLDER	5.32	2.00
1CH	11RF14DX9AB	VISOR CLIP	2.94	7.00
1CH	5168389AB	lower arm	130.62	2.00
1CH	6506132AA	PUSH FASTENERS	3.71	7.00
1CH	68088485AA	P/S FLUID	13.09	3.00

1. Internal part ID: (*Line abbreviation*)–(*part number*). This must be concatenated.

For example: *1BG-7001* (from line 1 above)

2. Internal part description: NAPA description
 - See the NAPA setup document for the remaining part configuration
 - Part Sync: MAXQueue configuration option to auto-update changes to the existing parts and auto-create new parts.

Testing

 Important: Like any interface, testing must be completed before going live.

NAPA corporate must be contacted to test the interface. They will give you a test store number to run requests through.

4. Configuration

⚠ Important: The internal system must be configured with the Inventory Pricing Method set as **Average**. If you are using last-in-first-out or first-in-first-out (LIFO/FIFO) you will have to switch. Since this is not a trivial change, please consult your organization and customer support contact when considering this change.

Each location in the internal system that is associated with a NAPA IBS store must be configured as being managed by NAPA. For more information on any help screen, refer to the help page for that screen using the **Help** button.

To configure the location:

1. Configure the NAPA Vendor.
 - i. Open the Vendors – Primary Information screen.
 - ii. Add NAPA Vendor if not present.
 - iii. On the Vendors – Primary Information screen, Store Locations tab, add the NAPA IBS Store IDs. The Store ID is supplied by NAPA.

The screenshot shows the 'Vendors - Primary Information' screen with the 'Store Locations' tab selected. The 'Vendor ID' field is set to 'NAPA VENDOR'. The 'Store Locations' table has one row with 'Store ID' highlighted by a red circle.

Row #	Delete	Store ID	Description
1	☐		

2. Configure locations to be externally managed by NAPA stores.
 - i. Open the Locations – Primary Information screen, Inventory tab.
 - ii. In the **Externally managed by vendor ID** field, select the NAPA vendor.

The screenshot shows the 'Inventory' configuration screen. The left sidebar has a menu with the following items: Basic Info, Functions, Work Orders - Options, Work Orders - Service Requests, Work Orders - More Info, Work Orders - Defaults, and Inventory (which is highlighted in orange). The main content area is titled 'Inventory' and includes the following fields and sections:

- Address ID for deliveries (dropdown menu)
- Address ID for invoices (dropdown menu)
- Criteria for conversion of parts from ON DEMAND - PROMOTABLE to STOCKED:
 - Ordered more than [] times within [] months on purchase orders with specified g
 - Issued more than [] units of issue in [] months
 - or more than [] units of issue in [] months
- Maximum unit price for automatic conversion of consumable parts to STOCKED []
- Minimum age of part at a location for EOQ calculation (months) []
- Parts receipt processing time (hours) []
- Externally managed by vendor ID** (dropdown menu, circled in red)
- External accounts for Work order issues (dropdown menu)
- Direct issues []

- iii. Select the store ID that is associated with this location.

⚠ Only one Location per NAPA Store ID is allowed.

Only configure the NAPA store ID for the internal location that is externally managed by a NAPA vendor. Locations receiving issues (such as part request work order locations) are not configured to be externally managed by a vendor and have no store ID. These internal locations do however have external accounts (NAPA customer IDs) configured (see below).

- iv. On the Inventory – More Info tab, you must check the **Allow issues from stock with insufficient inventory** option.

3. Configure locations with NAPA customer IDs (account ID).

NAPA customer IDs are provided by NAPA and allow NAPA to track pricing and purchase history. In the software, these customer IDs are typically defined as account IDs, and associated with a system location as an external account:

- i. Add external accounts for work order issues, direct issues, or transfers, depending on how a location is used.
- ii. Open the Locations – Primary Information screen, Inventory tab.
- iii. For each location being assigned a customer ID set the following, depending on the use of the location:
 - If the location is a work order location that will be receiving parts from the NAPA store location, then add the NAPA customer ID associated with work order issues to the **External accounts for: Work order Issues** field.



Note: If the customer ID has been previously added to the Accounts screen, you can select it from the drop-down list.

Inventory

Address ID for deliveries

Address ID for invoices

Criteria for conversion of parts from ON DEMAND - PROMOTABLE to STOCKED

Ordered more than times within months on purchase orders with specified purchase types

Issued more than units of issue in months

or more than units of issue in months

Maximum unit price for automatic conversion of consumable parts to STOCKED

Minimum age of part at a location for EOQ calculation (months)

Parts receipt processing time (hours)

Externally managed by vendor ID

External accounts for: Work order issues Direct issues Transfers

Store ID

ABC parameters for inventory counts

Count parts an average x times per year

Year type CALENDAR

Criteria for automatic calculation of ABC codes

Percent of issue value over the past 12 months

- If the internal location will be receiving parts via part transfers from the NAPA store location then add the NAPA customer ID (account ID) associated with transfers to the **External accounts for: Transfers** field.

Inventory

Address ID for deliveries

Address ID for invoices

Criteria for conversion of parts from ON DEMAND - PROMOTABLE to STOCKED

Ordered more than times within months on purchase orders with specified purchase types

Issued more than units of issue in months

or more than units of issue in months

Maximum unit price for automatic conversion of consumable parts to STOCKED

Minimum age of part at a location for EOQ calculation (months)

Parts receipt processing time (hours)

Externally managed by vendor ID

External accounts for: Work order issues Direct issues Transfers

Store ID

ABC parameters for inventory counts

Count parts an average x times per year

Year type CALENDAR

Criteria for automatic calculation of ABC codes

Percent of issue value over the past 12 months



Note: If the customer ID has been previously added as an internal account in the Account screen, you can select it from the drop-down list.



Note: The customer ID is only used when sending POS requests (see the exception below). Since direct issues do not originate in the system (no POS request) the external accounts on this screen for Work order issues and transfers are the only fields that would ever be configured (external account for direct issues is unused at this time). When NAPA issues the POS transactions the associated customer ID is provided. MAXQueue does a simple validation check to ensure that the customer ID is one that is found in the internal system.

The customer ID provided in part update request is provided to NAPA Hub only for validation (simple authentication that the request being made is using an active customer ID), while pricing, etc., is based on store ID. Given that the customer ID has no business use, the assumption exists that all configured customer IDs are valid and any one of those can be used to submit the part update request.

4. Configure Enterprise Purchasing to enable purchase orders.

If the integration is enabled to use purchase orders to produce part request within the NAPA Hub, the global setting for **vars.UsePurchaseOrders** must be set to **Y**. Additionally, a purchase order status must be created and configured to qualify purchase orders to be sent to IBS Hub. Using the Enterprise Purchasing Statuses screen, create a new status specifically to flag a purchase order to be sent to IBS Hub. The status must be an item state of OPEN, and flagged to be used on purchase orders.

The screenshot displays the 'Enterprise Purchasing Statuses' configuration screen. At the top, there are two input fields for 'Status ID', both containing the text 'SEND TO NAPA HUB'. Below this, the 'Basic Info' section is visible. It includes a 'Description' field with the text 'SEND TO NAPA HUB' and an 'Item state' dropdown menu with options 'PENDING', 'OPEN' (selected), and 'CLOSED'. To the right of the 'Item state' dropdown is a 'Used on' section with a list of checkboxes: 'Purchase orders' (checked), 'Requisitions', 'Requests for bid/quote/proposal', 'Responses to RFB/Q/P', and 'Invoices'.

5. Configuring MAXQueue Services

MAXQueue needs to have the following services configured based on the organization's requirements. See the sections below for configuration requirements.

- NAPA – Part Request
- NAPA – Part Update Request
- NAPA – Invoice Request
- NAPA – Part Issue Notify
- NAPA – Reconciliation

Global Variables

Within the MAXQueue Designer, the following global variables (shared between all services) are required and must be configured:

- **vars.WebServiceTimeoutMilliseconds:** Web service timeout, defaulted to 90000, be mindful of short timeout settings, recommended as defaulted
- **vars.NewPartProductCategory:** Product Category to assign to new parts created by the interface
- **vars.NewPartLocPreferredVendorID:** Vendor ID to assign to new parts created by the interface
- **vars.NewPartClassificationID:** Part Classification ID to assign to new parts created by the interface
- **vars.NewPartCoreSuffix:** Part Suffix to use for new core parts created by the interface (used generally as the suffix code for all core parts)

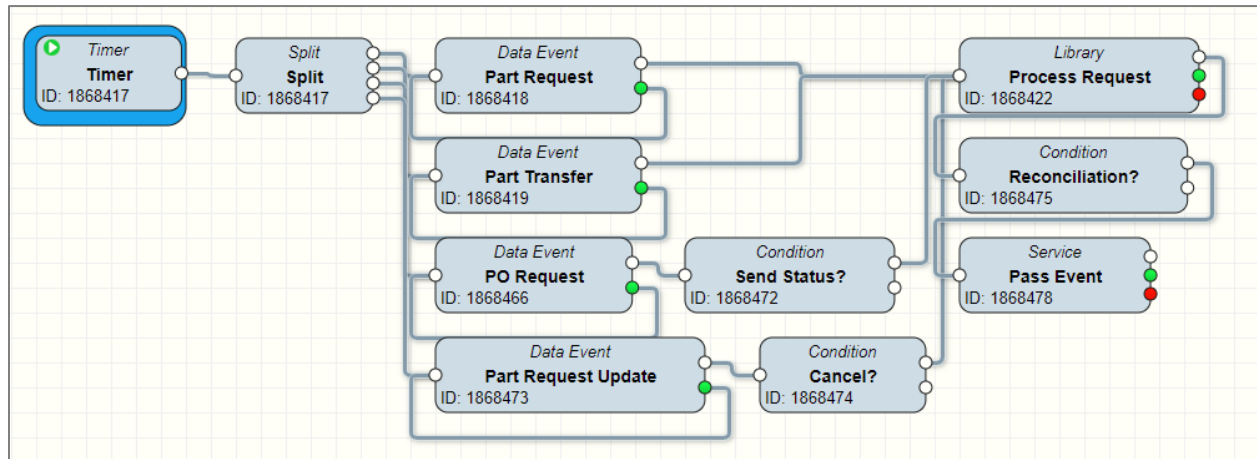


Note: It is important to set this number to another integer other than the primary part suffix of **0**.

- **vars.NewPartCoreDescPrefix:** Prefix to add to Part Descriptions for new core parts created by the interface
- **vars.MAXQueueURL:** NAPA user name for web service login
- **vars.NAPAUsername:** NAPA User Name
- **vars.NAPAPassword:** NAPA Password
- **vars.FAUser:** Asset management application User name
- **vars.FAPass:** Asset management application Password

- **vars.SyncNFIParts:** Y or N. If Y NFI parts are synced in the asset management application (original functionality).
- **Vars.UsePurchaseOrders:** Y or N. Y will qualify purchase orders to be used within the NAPA integration.
- **vars.Reconciliation:** Y or N. Y will enable the reconciliation process.
- **vars.EnableNAPALocationFunctions:** Y or N. Y will enable NAPA location level functions.

NAPA – Part Request



Variables

Within the MAXQueue Designer the following service level variables will need to be configured:

- **vars.defaultZeroQuantityToOne:** Options are Y or N. Setting this to Y defaults the quantity to 1, if 0 is entered on a part request.
- **vars.PartIssueRequestServiceURL:** The part request IBS HUB end point URL.
For example <https://esbtest.genpt.com/IBSWorkOrder>.
- **vars.CustomerName:** Customer name to be sent to IBS HUB.
- **vars.SendPOStatus:** Status that is used to qualify a PO to be sent to the NAPA Hub.
- **vars.AllowRequestReturnsToHub:** Y or N. Y will allow qualified return request to be sent to NAPA Hub.
- **vars.AllowRequestCancelsToHub:** Y or N,. Y will allow qualified cancel request to be sent to NAPA Hub.

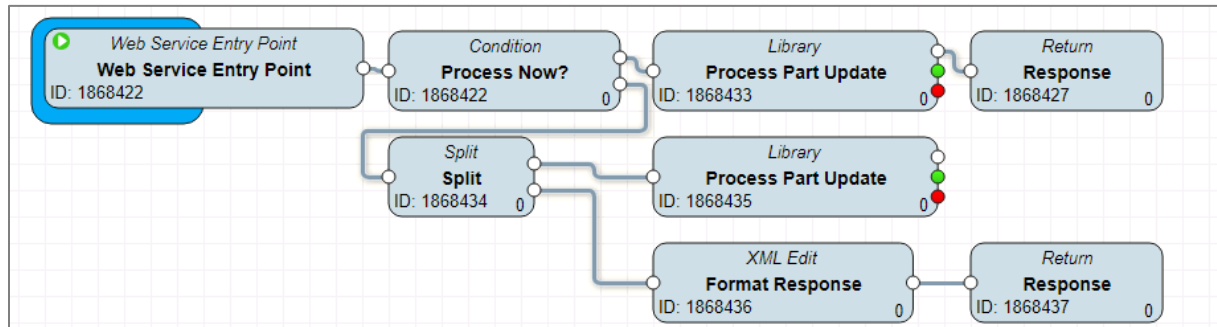
Timer Adapter

This is set to run every 1 minute by default.



Note: Increasing the frequency potentially adds delays to requests being sent to IBS Hub, and decreasing the frequency adds processing overhead to the MAXQueue server.

NAPA – Part Update Request



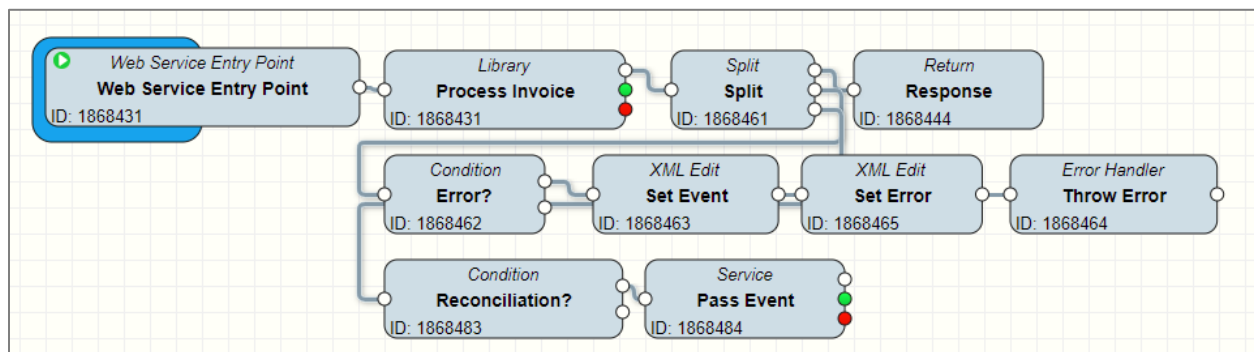
Variables

Within the MAXQueue designer configure global instance variables, this service does not contain any service level variables.

Web Service Entry Point

This uses a web service entry point so triggering the service is determined by part updates coming from NAPA IBS Hub.

NAPA – Invoice Request



Variables

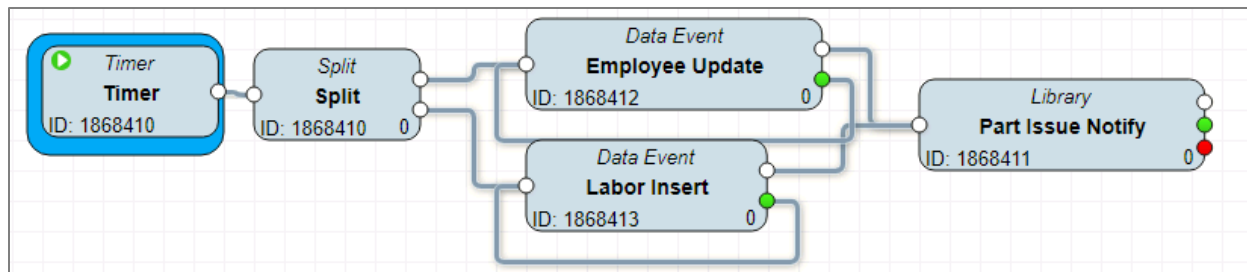
Within the MAXQueue designer the following service level variables will need to be configured:

- **vars.UseWorkOrderFinishDateTime:** Y or N, if Y will use the work order finish date for part issues if work order is in WORK FINISH status.
- **vars.DefaultWAC:** Default WAC to be used on work order part issues.

Web Service Entry Point

This uses a web service entry point so triggering the service is determined by part updates coming from NAPA IBS Hub.

NAPA – Part Issue Notify



Variables

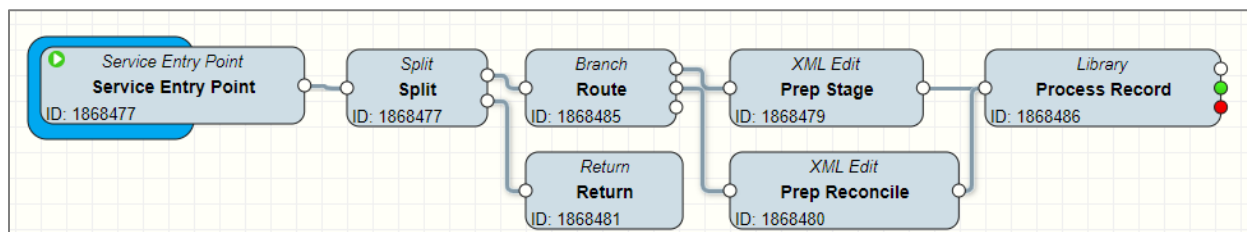
Within the MAXQueue Designer, the following service level variables need to be configured:

- **vars.RealTimeLabor:** Set to Y for real time labor. Options are Y or N.

Timer Adapter

Set to run every 1 minute. This is the recommended frequency, but can be adjusted as needed.

NAPA – Reconciliation



Variables

Within the MAXQueue designer, configure the global instance variables. This service does not contain any service level variables.

Service Entry Point

This uses a service entry point that is called by the Part Request and Invoice Request services within the NAPA IBS Hub.

6. Other Information

- Do not use the user specified during configuration for login or activity. This user should be dedicated to MAXQueue only.
- The integration assumes the Inventory pricing method is set as **Average**. This field is found on the Parts – Setup – Options screen, General tab.
- Receiving locations must be set up so that the Locations – Primary Information screen, Inventory – More Info tab option called **Automatically receive parts transferred to this location** is checked. This results in auto-receipt when posting the NAPA POS transaction relating to a previous part transfer.
- For internally-originating part transfer request issues, the following types of transactions are not supported:
 - Core charges
 - Freight charges
 - Returns
- Freight charges are applied in the Hub and added to the invoice results in a not-from-inventory (NFI) part Issue for part **FRT**.
- Delivery charges are applied in the Hub and added to the invoice results in an NFI part issue for **DEL**.
- Service charges are applied in the Hub and added to the invoice results in an NFI part issue for **SVC**.
- Telephone charges are applied in the Hub and added to the invoice results in an NFI part issue for **TEL**.
- Other charges are applied in the Hub and added to the invoice results in an NFI part issue for **OTH**.
- Core charges from NAPA result in part issues of specially defined core parts. Cores are defined in the internal system using the standard NAPA part number, along with a user-defined core suffix and a description that is prefaced by the core description prefix. Both of these are defined in the MAXQueue designer global variables. Core charge line items issued from NAPA result in these NAPA core parts being relieved from inventory (inventory count for these NAPA core parts will mimic the standard NAPA part inventory count).
- Items posted in the internal system make reference to the NAPA invoice number in the Comments field of the transaction.
- The integration assumes the part issues from NAPA IBS to customer are tax exempt and include no adjustments.

- The integration assumes that the account IDs are not required for a direct issue (for example, direct issue can be for **Equip** or **Dept** without specifying an account).
- The integration assumes that the internal system to NAPA request updates are not supported (updates to part request are not pushed over to TAMS).
- The integration assumes internal system to NAPA returns are not supported (ignored by interface).
- The integration assumes internal system to NAPA requests of 0 quantity are automatically changed to a quantity of 1 before being sent to NAPA only if the **vars.defaultZeroQuantityToOne** is set to **Y**.
- Assumes work order ID and task codes cannot exceed 30 characters.
- Assumes work order location cannot contain “-“ or “^”.
- Assumes fractional part quantities are not supported. The software must be configured so that parts being shared with NAPA are not fractional from the setup.
- Assumes that if using purchase orders, Enterprise is the current parts management method.

7. Application Workflows

NAPA – Part Request

The part request workflow encompasses three main outbound to NAPA transactions. These include part requests created using a NAPA configured location, stock transfers from a NAPA configured location, and purchase orders made for an internal configured location using the vendor or store ID from a NAPA configured location.

- Part Request:** The work order location determines the location to which the part is being issued. Use the part ID or a comment to identify the part needed from the NAPA IBS Hub. In this example, FIL-1212 is entered in the Part ID field to request the oil filter using the NAPA part ID. A comment can be used if the NAPA part ID is unknown, or a system part ID can be used. The task ID is required, and the quantity requested, which cannot be 0 unless service configuration converts 0 quantity to 1.

Location ID: NAPA NAPA LOCATION: Request ID: 452
Employee ID: SYSADMIN SYSTEM ADMINISTRATOR Date and time entered: 09/04/2018 11:06

Parts Information

Work order ID: AUTO 2015 66 Equipment ID: MINIVAN-1
2011 CHEV UPLA==METERS: 1-1 MILES; 2-0 N

Row #	Line item type	Part ID	Part suffix	Description	Comments	Task ID	Quantity	Date required	Not from inventory
1	PART	FIL-1212	0	FIL; FIL	AV TESTING	002-001	2.00	09/05/2018	☐

- Stock Transfer:** This contains a **From location ID** that is a NAPA configured location, and a **To location ID** that is a system configured location. The employee ID information is used to populate the requestor information on the part request. Equipment ID is optional but if it is populated, equipment information is sent to NAPA as part of the request.

Transfer ID: 4

Basic Info

Description: OIL FILTERS FOR SUV'S Work order ID: 0 0

From location ID: NAPA NAPA LOCATION: Equipment ID: SUV-1
To location ID: AUTO AUTO MAINTENANCE 2015 FORD ESCA SPORT UTILITY-COMPACT-4 PASS-
Intended for location ID: AUTO AUTO MAINTENANCE Equipment serial number:
Address ID for deliveries: FLEET SUV-1
111 SOUTH MAIN, CLAYTON Part request ID: 0
Employee ID: TECH SHOP TECHNICIAN Priority ID:

- Purchase Order:** This contains a vendor and store ID combination that is mapped to a NAPA configured location. The location of the purchase order is an internally configured location. Line items are entered for the parts request, and limited to STOCK or NON-STOCKED parts. Once the purchase order has been finalized and is ready to be sent to the IBS Hub, the main purchase order status is updated to the status configured in the **vars.SendPOStatus** value.

Purchase order ID:

Basic Info

Location ID	AUTO AUTO MAINTENANCE	Date and time	
Purchase type	SPECIAL ORDER SPECIAL ORDER	Requested	10/25/2018 10:43
Description	AV PO	Ordered	10/25/2018 10:54
Vendor ID	NAPA NAPA VENDOR; ;	Needed by	___/___/___ :__
Store ID	960001075	Expected delivery	10/24/2018 21:00
Currency ID	USD U S DOLLARS	Completed	___/___/___ :__
Account ID	231 GENERAL SERVICES AGENCY	Closed	___/___/___ :__
		Expected lead days	N/A
Status	SEND TO NAPA HUB	Gross total amount	49.21
Approval		Sales tax amount	3.94
by	at ___/___/___ :__	Discount amount	0.00
		Shipping amount	0.00
		Calculated total cost	53.15
		Total received cost	0.00

Parts list for transfers and purchase orders contain a known part ID, either a NAPA part ID or an internal system part ID. This workflow assumes the part requested is a known part in one of these systems. Quantity is sent with the expected price as the current issue price from the part location record.

Transfer ID:

Parts List

Status to apply to line items: ☐ Apply status to line items

Row #	Delete	Transfer status	Part ID	Part suffix	Manuf	Manufa	Qty on hand	Quantity requested
1	☐	REQUEST TRANSFER	FIL-1060	0			0.00	20.00

Part requests by comment are fulfilled by NAPA with a NAPA part ID.

- Part request with an internal system part ID can be fulfilled with a NAPA part ID if different, and a cross reference is created.

- Part requests Part IDs can be overwritten by the incoming invoice Part IDs as they will take precedence during the fulfillment process.

Part Requests Information

The parts request process starts when a new part line item is created. The following items are required for this process:

- The request is from a NAPA-configured location.
 - The request line item is not **COMPLETE** when the service processes the request.
 - The request line item is not a return.
 - The request line item is not for a zero quantity, unless the setting to default zero to one is not set to **Y** (vars.defaultZeroQuantityToOne).
 - The request was not previously sent to NAPA. This means that the Issue Comment field on the part request line item is not set as **SENT NAPA IBS HUB**.
 - For returns, the above information is required, and the return flag must be set to **Y**, the part/quantity to be returned must have been previously issued, and the status is **PENDING**. The following items are required workflow for returns.
 - The return must be done after the original requested part has been posted by NAPA.
 - The return must be for the same part ID, suffix, and task code on the same request as the original item.
 - The return must be for the same amount as the original request, or a lower amount for partial returns.
-  **Note:** If multiple requests are fulfilled for the same part ID/suffix/task code, multiple part returns requests may be required.
- If the return process does not find the originating request, for example the workflow above was not followed, then the part will not be sent to NAPA and the issue comment will be updated with the following message: **FAILED SENT NAPA IBS HUB: NO ORIGINATING REQUEST**.
 - The user must make a new return request with the corrected values, and if desired, un-check the return checkbox and delete the failed transaction.

The parts request process:

1. The system sets the MAXQueue Error location filter to the requesting work order location, which is used in the MAXQueue portal location filtering.
2. All line items on the request are packaged into one request and sent off to NAPA IBS Hub. Additional line items that are added to a request generate a new request with the same part order ID and header information.
3. Once the response is received from NAPA, the request line Issue Comment value is updated to contain **SENT NAPA IBS HUB**, plus the success or unsuccessful response description is updated. Regardless of being successful or not, the request line is disqualified to be sent again.

 Important: Do not alter the **Issue Comment** field. Changing this field could result in errors.

4. If a part request line needs to be canceled, update the request line with the action set to CANCELED. A cancel request is sent to NAPA, and the line is completed with the **Issue Comment** value set to **SENT NAPA IBS HUB: CANCELED**.
5. If a part request line needs to be returned, a new request line following the same process is created for an existing part issue with the return flag set to **Y**, and the status set to pending. An invoice is sent back from NAPA to complete the return process and ISSUE the parts return.

Part Stock Transfer Breakdown

This process starts when a new stock transfer line item is created on the stock transfer screen (insert into the TRF_LINE table). The following items are required for this process:

- The sending location of the transfer is from a NAPA-configured location.
- Transfers from NAPA to NAPA locations are disqualified. These transfers are ignored.
- Transfers from internal to internal locations are disqualified. These transfers are ignored.

The part stock transfer process:

1. The MAXQueue Error location filter is set to the transfer receiving location, which is used on the MAXQueue portal.
2. One line item is sent per request. These transactions are not bundled. If you make a stock transfer with multiple line items, each line will produce its own part request event to send to NAPA.

Part Purchase Order Information

This process starts when a new purchase order is created with part line items of requested parts. Once the purchase order has been finalized and all parts for the purchase order have been entered, the main status of the purchase order is set to the value configured in **vars.SendPOStatus**.

- The NAPA location is derived from the vendor/store ID set on the purchase order. These values must be mapped to a NAPA configured location.
- **vars.SendPOStatus** must match the main status.
- All part line items are bundled into a request and sent to NAPA IBS Hub. The external comment value is then updated to SEND TO IBS HUB.
- The MAXQueue Error location filter is set to the purchase order requesting location, which is used on the MAXQueue portal.

Key Request Values sent to NAPA IBS Hub

- The part order ID contains one of the following:
 - PART_ISSREQ ^ ID (Part request, tag delimiter, Work Order ID (LOC-WOYear-WONumber))
 - PART_TRFREQ ^ ID (Stock transfer, tag delimiter, transfer ID)
 - PART_REPO ^ ID (Purchase order, tag delimiter, purchase order ID)
- The request type contains **WO** for a part request, or **TRANS** for a stock transfer, or **REPO** for a purchase order.
- Request type information contains work order information for the part request:
 - Work Order Number
 - Technician ID (Employee ID)
 - Technician Name (Employee Name)
- Request type information contains the transfer information for a stock transfer:
 - From Location (NAPA location)
 - To Location (internal system location)
 - Requester ID (Employee ID)
 - Requester Name (Employee Name)
 - Transfer ID
- Request type information contains the purchase order information:
 - Purchase order number.
 - From Location (NAPA location)
 - To Location (internal system location)
 - Requester ID (employee ID)
 - Requester Name (employee name)
- Asset Identifier (Equipment ID)
- VIN - Serial Number
- Make - Year - Model
- Part Identifier which is a combination of the transaction type (PART_ISSREQ, PART_TRFREQ, PART_REPO) a delimiter, a transaction ID, and the group row ID. (example: request ID of 123 with group row 0 will become PART_ISSREQ^123^0)

NAPA – Part Update Request



Note: Some part updates are ignored if vars.SyncNFIParts is not set to **Y**, along with any incoming parts that are not stocked (using StockStatus value in the part update request) where StockStatus is not equal to **ACTIVE**, **TRUE**, or **Y**.

The part primary record is created or updated with the part ID and suffix determined by the incoming NAPA part number, and line abbreviation with a suffix of 0 for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.

In the below examples, the NAPA line abbreviation is **FIL** and the NAPA part number is **1515**, which results in an internal system part ID of **FIL-1515**. Since this is a non-core part, the suffix is set to **0**. If a part is a core part, then the suffix is determined by the vars.NewPartCoreSuffix global setting variable.

- The keyword is derived from the NAPA line abbreviation. If a keyword does not exist the integration creates one.
- The short description uses the NAPA part description value. If that is passed in as an empty value, the system instead uses the NAPA line abbreviation. In the below example, the description uses the value **OIL FILTER**.
- Product category uses the global setting variable value for vars.NewPartProductCategory. In this example the value is set to **NAPA**.
- Part classification ID will use the global setting variable value for vars.NewPartClassificationID, In this example the value is set to **MF**.
- Core flag and suffix is determined by the update request value for **CorePrice**, if a core price exists we will update or create a new core part primary record.
- The **Controlled substance** checkbox is determined by the update request value for **HazardousMaterial**. If the value is set to true, then the **Controlled substance** checkbox on the Parts – Primary Information Screen, Basic Info tab is checked.

The screenshot displays the 'Basic Info' section of a web application. At the top, there is a header bar with 'Part ID' (FIL-1515), 'Part suffix' (0), and a search icon. Below this, a search bar contains 'FIL; OIL FIL' and a button labeled 'New part/location/inventory'. The main content area is titled 'Basic Info' and contains several input fields and checkboxes. The 'Keyword' field has 'FIL' entered. The 'Short description' field has 'OIL FIL' entered. The 'Product category ID' field has 'NAPA' entered, and the 'Part classification ID' field has 'MF' entered. The 'VMRS code' field is empty. The 'Date and time added' field shows '02/25/2016 11:53'. There are checkboxes for 'Tire', 'Core', 'Controlled substance', and 'Item is fabricated/rebuilt without a core'. A 'Kit type' dropdown menu is set to 'NONE'. At the bottom, there is a section for 'Associated file' with fields for 'Path and file name' and 'Description'.

The part location record is created or updated with the part ID and suffix determined by the incoming NAPA part number, and line abbreviation with a suffix of 0 for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.

- Inventory Location ID uses the NAPA store ID, and maps to whatever location contains this value. It is best practice to have a one-to-one relationship of Store IDs mapped to internal system location IDs.
- Unit of measure is determined by the update request value for UnitofMeasure. Usually this value is set as **EACH**. If the unit of measure does not exist, the integration creates it.
- Stock status is determined by the update request value for StockStatus that comes from NAPA. If the value is set as **Active**, **True**, or **Y**, then the stock status is set to **STOCKED**, otherwise it is set to **PROHIBITED**. Keep in mind that vars.SyncNFIParts is used for non-stocked parts, meaning that if this is set not set to **Y** then no part creation or updates occur.

- Preferred vendor ID uses the global setting variable value for vars.NewPartLocPreferredVendorID. In the examples below from the Parts – Location Information screen (Basic Info and Purchasing Info tabs), these fields are set to **NAPA**.

Part ID: FIL-1515 Part suffix: 0 Inventory location ID: NAPA NAPA LOCATION

Basic Info

Keyword: FIL Date and time added: 02/25/2016 11:53

Short description: OIL FIL

Product category ID: NAPA NEW NAPA PART

Part classification ID: MF BASE NAPA ITEM

Unit of measure: EACH EACH

Quantity on hand: 0.00

Current unit price: 3.9900

Value on hand: 0.00

Quantity on order: 0.00

Value on order: 0.00

Bins	Row #	Delete	Bin ID	Description	Primary	Last count qty	Last count date

Part ID: FIL-1515 Part suffix: 0 Inventory location ID: NAPA NAPA LOCATION

Purchasing Info

Manufacturer name:

Manufacturer part number:

Model:

Preferred vendor ID: NAPA NAPA VENDOR

Store ID:

Last vendor ID:

Last purchase order ID: Date:

Last purchase order unit price: 0.0000 Last receipt price: 0.0000

Preferred repairer:

Last repairer:

Last repair purchase order ID: Date:

Last repair purchase order unit price: 0.0000

Part adjustments for quantity at different price are created for the part ID and suffix which is determined by the incoming NAPA part number, line abbreviation and default suffix of **0** for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.

To qualify for the following adjustment type **QUANTITY AT A DIFFERENT PRICE**, the quantity and price coming in from the NAPA request must be different than what is currently in the application.

- Action is set to **CHANGE**.

- Adjustment type is set to **QUANTITY AT A DIFFERENT PRICE**.
- Quantity is determined by the update request value for **AvailQty**.
- Unit price is determined by the update request value for **UnitPrice**. This value is found on the Parts – Adjustments screen, Stock Transfers tab.

The screenshot shows the 'Stock Adjustment' form. At the top, there are fields for Location ID, Part ID, Part suffix, Adjustment ID, Manufacturer part number, and Manufacturer name. Below these, the 'Stock Adjustment' section contains an 'Action' dropdown (ADD, SUBTRAC, CHANGE) and an 'Adjustment type' dropdown (QUANTITY ONLY, VALUE ONLY, QTY AT A DIFFERENT PRICE, UNIT PRICE ONLY). The 'QTY AT A DIFFERENT PRICE' option is selected. Below the dropdowns, there are input fields for Quantity, Unit price, Value, Current values, Unit of issue, Bin ID, and Lot number. A red oval highlights the 'Unit price' field.

Part adjustments for quantity at different price are created for the part ID and suffix which is determined by the incoming NAPA part number, line abbreviation, and default suffix of 0 for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.

To qualify for the following adjustment type of UNIT PRICE ONLY, the price coming in from the NAPA request must be different than what is currently in the internal system.

- Action will be set to **CHANGE**
- Adjustment type will be set to **UNIT PRICE ONLY**
- Unit Price is determined by the update request value for **UnitPrice**. This value is found on the Parts – Adjustments screen, Stock Transfers tab.

This screenshot is identical to the one above, showing the 'Stock Adjustment' form. In this instance, the 'UNIT PRICE ONLY' option is selected in the 'Adjustment type' dropdown. The 'Unit price' field remains highlighted with a red oval.

- Unit of measure is determined by the update request value for UnitofMeasure, usually this value is passed in as EACH. If the unit of measure does not exist, it is created.
- Keyword is derived from the NAPA line abbreviation, if a keyword does not exist the integration creates it.

Part create and update event breakdown:

- The NAPA store number determines the part location.
- MAXQueue Error location filter is set to the requesting work order location, which is used on the MAXQueue portal.
- Part ID is derived from NAPA part number and line abbreviation if it contains a cross reference to an internal system part ID that is used.
- Part Suffix is defaulted to **0** unless it is a core, then uses core suffix setting.
- Part Keyword is set to NAPA line abbreviation.
- Part product category, classification ID, preferred vendor, core suffix, core description prefix id determined by service settings.
- Comparison of current part values determines if update is required: Short Description, Description, Part Classification, Product Category, Controlled Substance, Unit of Measure, Manufacturer, Manufacturer Part Number, Model, Preferred Vendor, and Stock-Status.

Part adjustment event breakdown

- Store number determines the part location.
- MAXQueue Error location filter is set to the requesting work order location, which is used on the MAXQueue portal.
- Part ID is derived from the NAPA part number and line abbreviation. This contains a cross-reference to an internal system part ID that is used.
- Part Suffix is defaulted to **0** unless it is a core, then uses core suffix setting.
- Qualifying requirements:
 - Current issue price differs from NAPA cost.
 - Quantity on hand differs from NAPA quantity.
 - Part ID, suffix, location combination must exist at a part location.
- Adjustment type is **QUANTITY ONLY** or **QTY AT A DIFFERENT PRICE** for obvious reasons.
- Quantity is validated and fractional values are ignored. Negative values are set to **0**.

NAPA – Invoice Request

Invoice types include, and are mapped to, the following request types:

- **WO (Work Order Part Issues):** Used for part request originating events or work order issues.
- **TRANS (Stock Transfers):** Used for part stock transfers from a NAPA location to a FA location.
- **EQ (Equipment Direct Issue):** Used for direct issues to an equipment.
- **DEPT (Department Direct Issue):** Used for direct issues to a department.
- **ACCT (Account Direct Issue):** Used for direct issues to an account.
- **REPO (Purchase Order Receipt):** Used for purchase orders to a location

Work Order Part Request Issue

The work order part request issue process uses the Parts Requests screen to issue parts to a work order (the fields described below). The Part Identifier value at the part order detail level contains the internal system related transaction information, and will conform to specific format requirements. The following is an example of the case of a part request that originated in the internal system.

PART_ISSREQ ^ ID ^ Group Row ID: (the transaction type and a concatenation of the ID and group row ID), in the following example this value would look like:

- PART_ISSREQ^515^0 for line item 1 or PART_ISSREQ^515^1 for line item 2.



Note: The application tracks group row IDs starting at the value of 0.

- Part ID and suffix is determined by the incoming NAPA part number, line abbreviation, and a default suffix of **0** for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.
 - In the below example for line item **1**, the NAPA line abbreviation is **AC** and the NAPA part number is **12** resulting in an internal system part ID of **AC-12**. Since this was a non-core part, the suffix is set to **0**.
- Task ID is passed in from the NAPA event using the **JobCode/CustomerTaskCode** value. This is a required field, and if this task ID is different than the one in the internal system, it will override the value and update it upon issue.
- Quantity is set from the invoice request **BilledQty** value from the received NAPA information. If the quantity is less than the requested quantity, the integration performs a partial issue. When the system does a partial issue, the system decrements the original line item by the issue amount and creates a new **COMPLETE** request line item for the partial amount. The original request can be fulfilled at a later time using the same invoice using the same part identifier.
- Request action is set to ISSUE.
- The notify checkbox is set to notify technician that parts have been issued or invoiced.



Note: The application validates this checkbox when updated, and the quantity must be available. Since this is not the standard workflow, it is not updated in the case that quantity is not available after issuing.

- Issue quantity is set from the invoice request **BilledQty** value from the received NAPA information.
- Unit of measure on the Parts Requests screen, Parts Information tab defaults from the parts location record.
- The Issue Comment field on the Parts Requests screen, Parts Information tab is populated using the extracted tag, which consists of the *{action type} – {date} – {invoice number}*. The action type is set as follows:
 - **COMPLETED** in the case the integration is fulfilling a full issue.
 - **RETURN** if the transaction is returning a part.
 - **PARTIAL ISSUE** if the integration is fulfilling a partial amount to the request.

In the example below both line items are completed on the date of 09/17/2018 on two different invoices, 482856 and 482859 respectively.

Work Order Part Request Issue Process

The integration performs the following items:

- Identifies work order part requests by the **WO ReqType** and the detail line item value RequestType of **Electronic**.
- Uses the NAPA store number to determine the issuing location.
- Determines the Request ID and group row ID by using the part identifier. PART_ISSREQ ^ ID ^ Group Row ID (Transaction type and a concatenation of ID and group row id), an example of this value would look like: PART_ISSREQ^515^0 for line item 1 or PART_ISSREQ^515^1 for line item 2.
- Note: The application will track group row IDs starting at the value of **0**.
- Determines the part description using information from the **InvoiceLineItemInfo/PartDesc** value.
- Determines core parts using the **InvoiceLineItemInfo/ CoreIndicatorFlag** value.
- Sets the MAXQueue Error location filter to the requesting work order location (which is used on the MAXQueue portal location filtering).
- Sets the task ID from part request Task Code. If the **JobCode/CustomerTaskCode** value is populated, it overrides the request value.
- Sets the WAC from the part request WAC.
- Sets the Issue date from the **/InvoiceInfo/InvoiceDate** value.
- Part ID is set from **PartNum** and **LineAbbreviation**, if a cross reference to an internal system part ID exists it will be used. If the NAPA part information does not use the matching request part information then a cross reference information is used (for instance, NAPA issued a different part). If no cross reference exists and requested part is a NAPA part use what was sent from NAPA, otherwise was probably a request by comment and use the part ID sent in from NAPA.
- Issue quantity is set from InvoiceLineItemInfo/BilledQty value.
- Issue price is set from InvoiceLineItemInfo/UnitPrice value plus any value found in InvoiceLineItemInfo/MisAdjAmt.
- NFI is set to N unless line item is a freight, telephone, delivery, service, or other charge (FRT, TEL, DEL, SVC, or OTH NAPA part line abbreviation).
- Return flag is set when PartInvoiceStatus equals RETURN or if the issue quantity is negative.

- The Comment value is set to EMP#: Requester ID INV#: Invoice Number.
 - Extracted tag (used on issue comment) is set to INV#: Invoice Number.
 - Before issuing the part, the interface performs the following processes:
 - The integration creates the part in the system if the part does not exist (Parts Primary, and Part Location).
 - Part Adjustment if issue price or quantity is different. The integration looks at the invoice received from NAPA, and updates the price in the system to match NAPA's invoice. The quantity is also update for the amount of items the invoice is set to purchase.
 - Update part if description is different.
-  Note: If part is not stocked and SyncNFIParts setting is not set to **Y**, part updates do not occur.

- The system uses the Parts Request screen is used to fulfill the part issue.

The item is a qualifying request if the request is not **COMPLETED**, or if the request is **COMPLETED** and is a return transaction.

The system allows the following:

- Partial issues, generating a new request line for the issued quantity (completing it) referencing the originating line item by setting the issue comment using the extracted tag. Then decrements the originating line item and sets it to the remaining amount while setting the issue comment to indicate a partial issue with the extracted tag.
- Full issues completing the line item and setting the issue comment to the extracted tag.
- Returns setting the issue comment to the extracted tag.

Work Order Part Direct Issue

- Work order ID is contained in the WorkOrderIdentifier value. This is required for work order part issues.
- vars.DefaultWAC configuration setting will be used on work order part issues, this is a required value.
- The NAPA store number determines issuing location.
- The part ID and suffix is determined by the incoming NAPA part number, line abbreviation, and a default suffix of **0** for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number.
 - In the below example from the Parts Issues and Returns screen for line item **1**, the NAPA line abbreviation is **AC** and the NAPA part number is **12** resulting in an internal system part ID of **AC-12**. Since this was a non-core part, the suffix is set to **0**.

Parts Issues and Returns											
Row #	WO location	-year	-number	Equipment ID	Task ID	Work accomplished code	Date	Not from inventory	Issuing location ID	Part ID	Part suffix
1	AUTO	2015	11	PICKUP-F450-1	001-003	REP	09/12/2018 09:09	☐	NAPA	FIL-1051	0

- Issue quantity is set from **InvoiceLineItemInfo/BilledQty** value.
- Unit of measure defaults from the parts location record.
- The comment is populated using the extracted tag, which consists of the requesting employee - and invoice number. In the following example employee MAXQEMP and invoice number 6536997 resulted in a comment of EMP#: MAXQEMP INV#: 6536997. This value also extends to the work order center parts transaction table.

Parts Issues and Returns													
Quantity issued	Unit price	Unit of	Core cr	Core unit	Part key	Fail/cause	Account ID	Bin ID	Position	Installed	Remove	Work class	Warranty/Repair Comments
2.00	13.9900		☒	0.00	FIL; FIL		425						NP EMP#: MAXQEMP INV#: 6536997

Work Order Part Direct Issues Process:

The system performs the following process for work order part direct issues.

- Identifies work order part direct issues by the **WO ReqType** and the detail line value RequestType of **Manual**:
- Determines the issuing location by using the NAPA store number.
- Sets the part description using the InvoiceLineItemInfo/PartDesc value.
- Determines which items are Core parts by using the InvoiceLineItemInfo/CoreIndicatorFlag value.

- Sets the MAXQueue Error location filter to the requesting work order location, which is used on the MAXQueue portal location filtering.
- Sets the task ID using the JobCode/CustomerTaskCode value that is received from NAPA. This value is required from NAPA.
- Sets the WAC from the vars.DefaultWAC configuration setting. This value is required.
- Sets the issue date from the /InvoiceInfo/InvoiceDate value.
- Sets the Part ID from PartNum and LineAbbreviation. If a cross reference to an integration system part ID exists, it is used.
 - If the NAPA part information does not use the matching request part information then a cross reference information is used (for example, NAPA issued a different part).
 - If no cross reference exists and the requested part is a NAPA part, the system uses what was sent from NAPA.
- Sets the Issue quantity from InvoiceLineItemInfo/BilledQty value.
- Sets the Issue price from InvoiceLineItemInfo/UnitPrice value, plus any value found at InvoiceLineItemInfo/MisAdjAmt.
- NFI is set to **N** unless line item is a freight, telephone, delivery, service, or other charge (FRT, TEL, DEL, SVC, or OTH NAPA part line abbreviation).
- Return checkbox is set when PartInvoiceStatus is set as RETURN, or if issue quantity is negative.
- Sets the Comment value to EMP#: Requester ID INV#: Invoice Number.

Before issuing the part, the interface performs the following processes:

- Creation of part if it does not exist (Parts Primary, and Part Location).
- Part Adjustment if issue price or quantity is different.
- Update part if description is different.



Note: If part is not stocked and SyncNFIParts setting is not set to Y, part updates do not occur.

- The system then uses the Parts Issues and Returns screen to fulfill the work order part issue.

Stock Transfers

Transfers uses the Parts - Stock Transfer screen to send parts to a system location. The Part Identifier value at the part order detail level will contain the system related transaction information and will conform to specific format requirements. In the case of a stock transfer that originated in FA the value will look like the following:

PART_TRFREQ ^ ID ^ Group Row ID (transaction type and a concatenation of ID and group row id), in the following example this value would look like: PART_TRFREQ^90^0 for line item 1.



Note: the application will track group row id's starting at the value of 0.

- Part ID and suffix is determined by the incoming NAPA part number, line abbreviation and a default suffix of 0 for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number, in the below example for line item 1 the NAPA line abbreviation was 'BAT' and the NAPA part number is '7575' resulting in a FA part ID of 'BAT-7575'. Since this was a non-core part the suffix is set to '0', if a part is a core then suffix is determined by the 'vars.NewPartCoreSuffix' global setting variable.
- Transfer quantity is set from 'InvoiceLineItemInfo/BilledQty' value.
- Request action will be set to 'SEND PARTS OUT'.



Note: due to location setting of '**Automatically receive parts transferred to this location**' the transfer status will be set to receive parts in automatically.

Row #	Delete	Transfer status	Part ID	Part suffix	Manuf	Qty on hand	Quantity requested	Quantity deferred	Transfer quantity	Quantity received
1	☐	RECEIVE PARTS IN	BAT-7575	50		65.00	2.00	0.00	2.00	2.00

- Transfer date is set from '/InvoiceInfo/InvoiceDate' value.
- Transfer User ID is set from the 'vars.FAUser' configuration setting.
- Comment will be populated using the extracted tag, which consists of the requesting employee - and invoice number. In the following example employee MAXQEMP and invoice number 6536999 resulted in a comment of EMP#: MAXQEMP INV#: 6536999.

Comments

EMP#: MAXQEMP INV#: 6536999

Stock Transfer Break Down:

- Store number determines issuing location.
- PART_TRFREQ ^ ID ^ Group Row ID (stock transfer contains concatenation of ID and group row id), an example of this value would look like: PART_TRFREQ^90^0 for line item 1.



Note: the application will track group row id's starting at the value of 0.

- Status set to 'SEND PARTS OUT'.
- Transfer date is set from '/InvoiceInfo/InvoiceDate' value.
- Comment value is set to 'EMP#: Requester ID INV#: Invoice Number'.
- Issue quantity is set from 'InvoiceLineItemInfo/BilledQty' value.
- Issue price is set from 'InvoiceLineItemInfo/UnitPrice' value, plus any value found at 'InvoiceLineItemInfo/MisAdjAmt'.
- Extracted tag (used on comment) is set to 'INV#: Invoice Number PID#: Part Identifier'.
- MAXQueue Error location filter is set to the requesting work order location, which is used on the MAXQueue Portal.
- Part ID is set from 'PartNum' and 'LineAbbreviation', if a cross reference to an FA part ID exists it will be used. If the NAPA part information does not use the matching request part information then a cross reference information is used (e.g. NAPA issued a different part).



Note: regardless of part cross reference existing or not, the part ID cannot be altered on a transfer as per application requirements, cross reference must match.

- Before issuing a part the interface validation performs:
 - Part Adjustment if issue price or quantity is different.
 - Update part if description is different.
- Part Transfer is updated for the part, quantity, and main comment value.

Direct Issues

Direct parts issue

Direct Issues

Row #	Equipment ID	Department ID	Account ID	Date	Document number	Not from	Issuing location ID	Part ID	Part suffix	Return	Qty on	Quantity	Unit price	Emplo	Part id	Unit of	Comments
1	SUV-1			09/20/2018 10:55	482986	☐	NAPA	1CH-NEWAIVPART12	0	☐		1.00	35.0000		1CH; EA		EMP#: INV#: 482986

- Request Type of (EQ, DEPT, ACCT) using the 'ReqType' value determines what issue id is used. EQ = Equipment ID, DEPT = Department ID, ACCT = Account ID.
- The invoice Date will be used to set the date value.
- Document number will be populated with the invoice number from the NAPA invoice.
- Store number determines the issuing location ID.
- Part ID is set from 'PartNum' and 'LineAbbreviation', if cross reference to FA part and part matches the requested part information that is used. If the napa part information does not use the matching request part information then the xref information is used (e.g. NAPA issued different part). If no cross reference exists and requested part is a napa part use what was sent from NAPA.
- Issue quantity is set from 'InvoiceLineItemInfo/BilledQty' value.
- Issue price is set from 'InvoiceLineItemInfo/UnitPrice' value, plus any value found at 'InvoiceLineItemInfo/MisAdjAmt'.
- Comment value is set to 'EMP#: Requester ID INV#: Invoice Number'

Direct Issue Break Down:

- Invoice Type of (EQ, DEPT, ACCT) determines what issue id is used. EQ = Equipment ID, DEPT = Department ID, ACCT = Account ID.
- Issue date is set from '/InvoiceInfo/InvoiceDate' value.
- Document Number is set to the Invoice Number.
- NFI 'N' unless line item is a freight, telephone, delivery, service, or other charge (FRT, TEL, DEL, SVC, or OTH NAPA part line abbreviation).
- Store number determines issuing location.
- MAXQueue Error location filter is set to the requesting work order location, which is used on the MAXQueue Portal.
- Part description is using 'InvoiceLineItemInfo/PartDesc' value.
- Part ID is set from 'PartNum' and 'LineAbbreviation', if a cross reference exists to a FA part the cross reference is used.

- Return flag is set when 'PartInvoiceStatus' equals 'RETURN' or if issue quantity is negative.
 - Issue quantity is set from 'InvoiceLineItemInfo/BilledQty' value.
 - Issue price is set from 'InvoiceLineItemInfo/UnitPrice' value, plus any value found at 'InvoiceLineItemInfo/MisAdjAmt'.
 - Comment value is set to 'EMP#: Requester ID INV#: Invoice Number'
 - Before issuing the part the interface validation performs:
 - Creation of part if it does not exist (Parts Primary, and Part Location).
 - Part Adjustment if issue price or quantity is different.
 - Update part if description is different.
-  Note: If part is not stocked and SyncNFIParts setting is not set to 'Y', part updates do not occur.

- Direct Issue screen is used to fulfill transaction using the above set values.

Purchase Order Issues

Purchase order invoicing uses the Enterprise Purchasing Receipts screen to fulfill purchase order lines, and transfer NAPA part inventory to the requesting location. The Part Identifier value at the part order detail level contains the system related transaction information, and conforms to specific format requirements. In the case of a purchase order line item, the value looks like the following:

PART_REPO ^ ID ^ Group Row ID (transaction type and a concatenation of ID and group row ID). In the following example this value would look like: PART_REPO^AUTO-2015-0000032^0 for line number 1.

 Note: the application will track group row IDs starting at the value of 0.

- If the line item type is a stocked part, the part ID from the original purchase order is used. If it is a non-stocked part, then the incoming part ID is used.
- Part ID and suffix is determined by the incoming NAPA part number, line abbreviation and a default suffix of 0 for non-core parts. Part ID is a concatenation of the line abbreviation and the NAPA part number. In the below example for line number 1, the NAPA line abbreviation of **BAT** and NAPA part number of **7575** results in an internal part ID of **BAT-7575**. Since this is a non-core part the suffix is set to **0**. If a part is a core then suffix is determined by the **vars.NewPartCoreSuffix** global setting variable.
- Quantity receiving is set from the InvoiceLineItemInfo/BilledQty value.

- Unit price is set from the InvoiceLineItemInfo/UnitPrice value, plus any value found at InvoiceLineItemInfo/MisAdjAmt.
- External comment value is set to **EMP#: Requester ID INV#: Invoice Number**, and external status is set to **INV#: Invoice Number**.
- MAXQueue Error Location filter is set to the purchase order location, which is used on the MAXQueue portal.

Purchase order ID: AUTO-2015-0000032 AV 06TEST NAPA Line number: 1

☐ Fully receive all line items for receiving location on purchase order Receipt ID: 1 ☐ New purchase order and/or new line item

Basic Info

Date and time	11/08/2018 07:55	Status	CLOSED
Purchase type ID	SPECIAL ORDER	Qty receiving	4.00 ☐ Return
Receiving location ID	AUTO AUTO MAINTENANCE	Unit price	93.8800 Default: 11.2300
Line item type	STOCK PART	Discount pct	0.000 Net price: 93.8800
Part ID	BAT-7575	Unit of measure	1
Part suffix	0	Bin ID	
Part description	BAT; BAT	Qty ordered	
Other ID		Qty remaining	
Description		PO location ID	AUTO
		Vendor ID	NAPA
		Store ID	960001075

Row #	Action	WO location	-year	-number	Qty issue	Task ID	Work accomplished code	Equipme

8. Location Function Settings

Application locations and NAPA locations can be configured to enable and disable workflows. The global setting that enables this feature is `vars.EnableNAPALocationFunctions`. By setting this value to **Y**, this makes the integration look at each location to verify if certain applicable settings have been enabled to continue processing, and to error when applicable.

In addition to enabling this within the MAXQueue integration, location attributes must be added to the application. Using the Location Attributes screen, enter the following attribute IDs (these will be used on the Location Primary information screen on the attributes tab).

- **NAPA PRWO:** Enable part requests for work orders when added to a location.
- **NAPA ERROR PRWO:** Enable MAXQueue errors for part request work orders to pass disqualified work order requests to the MAXQueue portal.
- **NAPA PRTRANS:** Enable part requests for transfers when added to a location.
- **NAPA ERROR PRTRANS:** Enable MAXQueue errors for part request transfers to pass disqualified transfer requests to the MAXQueue portal.
- **NAPA PRPO:** Enable part requests for purchase orders when added to a location.
- **NAPA ERROR PRPO:** Enable MAXQueue errors for part request purchase orders to pass disqualified purchase order requests to the MAXQueue portal.
- **NAPA PSWO:** Enable part invoicing on work orders when added to a location.
- **NAPA PSTTRANS:** Enable part invoicing on transfers when added to a location.
- **NAPA PSPO:** Enable part invoicing on purchase orders when added to a location.
- **NAPA PSPO NOTE:** Enable new notes for purchase order invoices that do not qualify due to location settings. This adds a note containing invoice number, price, and quantity to the purchase order line.
- **NAPA PSDI:** Enable part invoicing on direct issues when added to a location.
- **NAPA IS:** Enable part synchronization for a NAPA location. This also applies to invoicing and forces not-from-inventory (NFI) part issues if the part has not been PROMOTED.

Location Attributes

Search

Reload

Sort

Select Filter

Select Sort

Row #	Location attribute ID	Name
1	NAPA ERROR PRPO	NAPA ERROR PART REQUEST PO
2	NAPA ERROR PRTRANS	NAPA ERROR PART REQUEST TRANS
3	NAPA ERROR PRWO	NAPA ERROR PART REQUEST WO
4	NAPA IS	NAPA INVENTORY SYNC
5	NAPA PRPO	NAPA PART REQUEST PO
6	NAPA PRTRANS	NAPA PART REQUEST TRANSFER
7	NAPA PRWO	NAPA PART REQUEST WO
8	NAPA PSPPO	NAPA PART SALE PO
9	NAPA PSTRANS	NAPA PART SALE TRANSFER
10	NAPA PSWO	NAPA PART SALE WO

Basic Info

Location attribute ID

NAPA PRPO

Basic Info

Name

NAPA PART REQUEST PO

Application locations can enable or disable specific part requests workflows. Work order, stock transfers, and purchase orders workflows each have their own specific attribute that require it to exist at the application location for a transaction to be sent to NAPA IBS Hub. In addition to the part request attributes, there is an associated error attribute that can be added to the location if it is desired that the failed part request is sent to the MAXQueue portal. Regardless of the error setting, the failed transactions are logged to the associated log file.

As an example configuration, if LOC1 is expected to do work order and purchase order requests but not stock transfers within the NAPA integration, and it is important to see any failed stock transfer requests in the MAXQueue portal, the LOC1 primary information attribute section must have NAPA PRWO, NAPA PRPO, and NAPA ERROR PRTRANS added.

Attributes				
Row #	Delete	Attribute ID	Name	Text value
1	☐	NAPA PRWO	NAPA PART REQUEST WO	
2	☐	NAPA PRPO	NAPA PART REQUEST PO	
3	☐	NAPA ERROR PRTRANS	NAPA ERROR PART REQUEST TRANS	

Application locations can enable or disable invoicing workflows. Work order, stock transfers, and purchase order invoicing can be enabled by adding the associated attribute to the Location – Primary Information screen, Attributes tab. If an invoice for any of the disabled functions is sent to the NAPA Hub integration, the event will fail to process, and an associated message is sent back to NAPA noting that the location does not allow invoicing of the type as per configuration. The message will also be passed to the MAXQueue portal for visibility.

 This error is not reprocess-able.

As a continuation of the configuration example for LOC1, in addition to the attributes above, the location would want to allow part invoicing for work orders and purchase orders but not allow invoicing for stock transfers. The LOC1 location on the Locations – Primary Information screen Attributes tab will need to have NAPA PSWO, and NAPA PSPO.

Attributes				
Row #	Delete	Attribute ID	Name	Text v
1	☐	NAPA PRWO	NAPA PART REQUEST WO	
2	☐	NAPA PRPO	NAPA PART REQUEST PO	
3	☐	NAPA ERROR PRTRANS	NAPA ERROR PART REQUEST TRANS	
4	☐	NAPA PSWO	NAPA PART SALE WO	
5	☐	NAPA PSPO	NAPA PART SALE PO	

NAPA locations can be configured to enable or disable inventory synchronization. If a NAPA location is not configured to do inventory synchronization then no part updates are processed. This requires that invoicing from that NAPA location will be not-from-inventory (NFI). If a NAPA part for the location has been PROMOTED (that is the application will track the part), then a part location record must be created for that NAPA location for the part to be issued. If the part is promoted and an invoice is trying to issue it, it will perform a part update and issue it from the NAPA stock.

The part promotion process is managed manually and is not part of the integration. The invoice request service will only qualify a promoted part as having a part location record for the NAPA location. If location functions are enabled, then all NAPA locations that are expected to have inventory synchronization must have the location attribute of NAPA IS.

9. Reconciliation

The reconciliation process stores data related to part requests going out to NAPA and updates data as invoicing has been processed. The intention is to track requested data versus invoiced data. This process also tracks unsuccessful transactions in relation to status codes for the web responses that indicate it was successful or unsuccessful. The interface uses two database tables to store this information. The table names are MAXQ_NAPA_REC_MAIN and MAXQ_NAPA_REC_LINE. These tables are dynamically created by the integration when the first time the reconciliation process is called. It performs a database check, and if the table or view does not exist, they are created, and data definition language commands are output to a reconciliation log in the MAXQueue log directory. In addition to these two tables, a view is created (RPT_MAXQ_NAPA_RECON) along with necessary permissions for Ad Hoc reporting to access this data.

For the standard workflow of a request originating from the application, and an invoice request from NAPA tied to that request, an insert will happen at the request stage and an update at the invoice stage. In this case the system tracks response codes to indicate it was successful. The system then compares the part requested vs part billed, requested price vs billed price, and quantity requested vs quantity issued. It is important to understand that part IDs do change for valid reasons since the original part may be incorrect and updated at the invoice stage. Also, the quantity requested may be incorrect at the request stage, and prices are not static. Regardless of the valid cases above, these transaction will not be reconciled in the reports, but further review is up to the report reader.

In the cases where the system has manual invoices or direct issues, an insert happens at the invoice processing stage. It is assumed that these have been vetted by personnel involved and the part, price, and quantity is correct. They are automatically reconciled and noted as a manual transaction.

Additionally the process will track success of transactions using the response messages, this means we will know if NAPA failed to process a request, or if the application failed to process an invoice. The failed transaction report would track this.

Three main reports exist as an Ad Hoc report:

- Reconciliation report: Time Periods (week, month, year, and duration) – report on invoice transactions.
- Reconciliation report: Invoice totals – report on total invoices and total costs for duration.
- Reconciliation report: Unsuccessful Transactions – report on failed transactions.

Ad Hoc Reporting Setup



Note that since the integration dynamically creates database objects that the service needs to process at least one record before the view is accessible in the Ad Hoc reporting module.

The integration package is shipped with a reporting directory that contains a folder called FAQuery and all associated standard reports. These reports must be added to the installed reporting Ad Hoc instance within the FAQuery directory.

To add reports:

1. Create a new folder. The name of the folder is the display name of the folder group so choose the name wisely.
2. Copy the reports files into the new folder.
3. Once the files are in place, log in to the Ad Hoc Query module and add special permissions for the RPT_MAXQ_NAPA_RECON view.



For more information, refer to the *Ad Hoc Query Administrator Guide: Section 3. Administrator Information* for adding permission for the view.

Select a Table or View

Table Search:

Table Name
AA_MAIN
AA_NOTES
AAINV_AALIST
AAINV_CRITERIA
AAINV_MAIN
AAREQ_MAIN
AAREQ_NOTES
AASTAT_MATN

View Search:

View Name
RPT_MAXQ_NAPA_RECON

Or Enter a Custom Table or View

Table or View:

4. With the view selected add any applicable user groups or user IDs that would need to have access to the reports and update the file.

Select Users and or Groups for: **RPT_MAXQ_NAPA_RECON**

User
Search:

User ID
MAINT
MFR
MGR
PURCH
STORE
SUPER
SYSADMIN
USERSETUP

Group
Search:

Group
MAINTENANCE
MANAGER
PURCHASING
STOREKEEPER
SUPERVISOR
SYSADMIN
USERSETUP

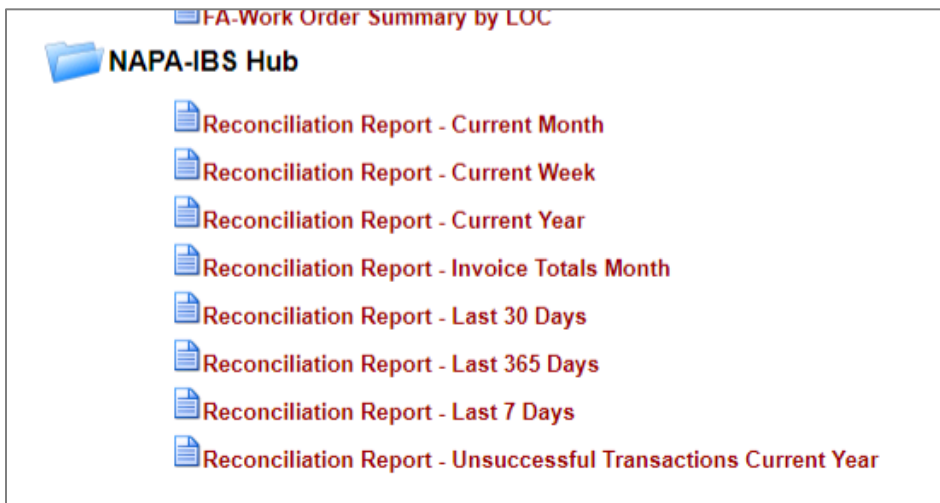
SYSADMIN ✕

Back

Update File

Current Special Permissions			
	Table or View	Users	Groups
	RPT_MAXQ_NAPA_RECON		SYSADMIN ✕

Once these steps have been completed you will see a new reporting group in the Ad Hoc Query module using the folder names configured above.



Ad Hoc Report Overview

The following sections describe the information contained within the NAPA queries.

Reconciliation reports

These queries are grouped by invoicing from TAMS (a NAPA work order for a specified request group). A NAPA invoice could include numerous invoices sent to the application.

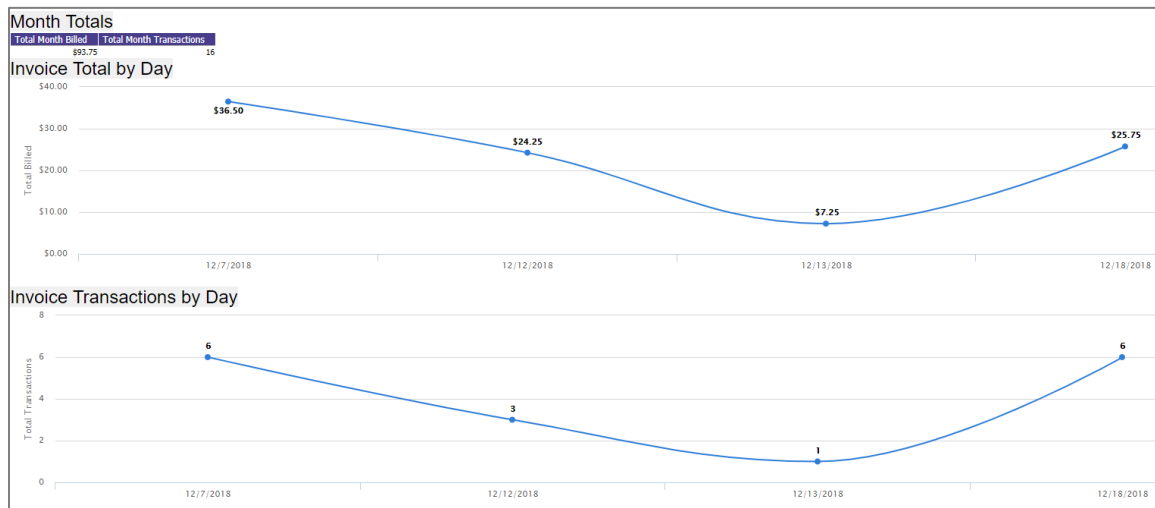
The event source defines the originating transaction:

- PART_ISSREQ: Work Order part request.
- PART_TRFREQ: Stock Transfer request.
- PART_REPO: Purchase Order request.
- Manual: Direct issue to a work order or a direct issue to a department, account, or equipment.

Customer Number: 09876 NAPA Store: 777001992 H Event Type: REPO IBS Reference ID: 5119799 Parent Rec ID: MFLOC1-2016-0000008		Invoice Header												
Transaction Date	Event Status	Event Source	Event Type	Reference ID	Invoice Number	Issue Part ID	Quantity Billed	Issue Price	Requested Part ID	Requested Price	Requested Quantity	Reconciled Part	Reconciled Price	Reconciled Quantity
12/12/2018 12:03:00 PM	Successful	PART_REPO		5119799	2227255	FL-1516	1.00	4.25 FL-1515		6.00	1.0			
Customer Number: 123456 NAPA Store: 777001992 H Event Type: WO IBS Reference ID: 5547778 Parent Rec ID: MFLOC1-2016-5		Event source										Reconciliation Status		
Transaction Date	Event Status	Event Source	Event Type	Reference ID	Invoice Number	Issue Part ID	Quantity Billed	Issue Price	Requested Part ID	Requested Price	Requested Quantity	Reconciled Part	Reconciled Price	Reconciled Quantity
12/7/2018 9:15:00 AM	Successful	PART_ISSREQ		5559632	6536999	FL-1515	2.00	5.00 FL-1515		5.00	2.00	✓		✓
12/7/2018 9:15:00 AM	Successful	PART_ISSREQ		5559632	6536999	FL-1516	1.00	6.00 FL-1516		6.00	1.00	✓		✓
12/7/2018 10:05:00 AM	Successful	PART_ISSREQ		5559666	6537000	FL-1517	1.00	3.50 FL-1517		0.00	1.00	✓		✓

Invoice Totals

- Month Totals: Total Billed, Total Transactions (includes returns and cancellations).
- Total invoice by day: Total billed quantity by day.
- Total transactions by day: Total Transactions by day.



Unsuccessful Transactions

If a transaction was successfully sent to NAPA but the invoice processing failed, these transactions are listed in this report.

▼ Customer Number: 33568 NAPA Store: 777001992 H Event Type: ACCT IBS Reference ID: 5559788 Parent Rec ID: N/A										
Transaction Date	Event Status	Event Source	Event Type	Reference ID	Invoice Number	Issue Part ID	Quantity Billed	Issue Price	Requested Part ID	Requested Pr
12/5/2018 10:10:43 AM	Unsuccessful	Manual	Manual	5559788	6537295	FIL-1515	1.00	5.00	FIL-1515	
12/5/2018 10:10:43 AM	Unsuccessful	Manual	Manual	5559788	6537295	FIL-1516	1.00	6.00	FIL-1516	

10. Error Processing

Contrast to previous versions of NAPA integrations the IBS Hub interfaces handle errors in the application that is responsible. This translates to errors existing in the MAXQueue portal if the issue can be handled within the application and then reprocessed or for informational purposes only which require remediation and cannot be reprocessed.

Part Request

Part requests are sent over to the IBS Hub with the required information, unsuccessful transactions in IBS Hub are identified in the log files and for part requests the issue comment field. Although certain errors in part request may be thrown to the MAXQueue portal, these are limited to HTTP errors. As an example you may see a HTTP Error 401 (Unauthorized), which may mean you have incorrect NAPA credentials configured. You may also see HTTP Error 503 (Service Unavailable) meaning that something is wrong with the NAPA IBS Hub end point. These errors require remediation within MAXQueue or on the IBS Hub side, once that has been resolved these error can be reprocessed.

Part Update

Part updates that error are done silently in MAXQueue in most cases. Part updates done prior to invoicing require a response message being sent back to IBS Hub, the response includes whether it was successful or not and if an error occurred, a descriptive error message is included in the response for remediation to be directed by the IBS Hub personnel. Errors will be logged in the appropriate log file.

Invoice Requests

Invoice requests errors are sent to the IBS Hub within the response, the response will include unsuccessful and a detailed error message. Errors will also be thrown in the MAXQueue portal, these errors are informational only, and they will include information about what IBS Hub invoice contains the transaction and the line item detail that errored. These cannot be reprocessed as remediation must be done within IBS Hub or in the application before the transaction can be successfully processed, furthermore for reconciliation the invoice must be passed from IBS Hub with a successful response back to complete the invoice. Reprocessing within MAXQueue would be out of this workflow.

Logging

Most application processing is logged in the MAXQueue log directory if any in depth technical investigations are necessary.

- Part Request Log Files:
 - IBSHUBPartRequest.log

- Part Update Log Files:
 - IBSHUBPartUpdate.log
 - IBSHUBFAPart.log
 - IBSHUBPartAdjust.log
- Invoice Request Log Files:
 - IBSHUBFAPart.log
 - IBSHUBPartAdjust.log
 - IBSHUBWorkOrderIssue.log
 - IBSHUBStockTransfer.log
 - IBSHUBDirectIssue.log
 - IBSHUBPOPartIssue.log
- Reconciliation Log File
 - IBSHUBReconciliation.log

MAXQueue Portal

Integration leverages the location level filtering for MAXQueue errors. Each workflow in the process determines the location ID relevant and this location can be used to filter on.



Note: It is possible that this value will not be set if the error occurs at a point when the location ID relevance has not been determined.

Location Filtering – Add locations to the MAXQueue Portal Settings.

AssetWORKS

Home Supervisor Technician Storekeeper **MAXQueue** FuelFocus Reporting Ad Hoc

MAXQueue Portal Settings

Filter the list of MAXQueue errors displayed by INSTANCE^SERVICE^CONNECTOR (wildcard % allowed)

... Add

Remove
Remove All

Filter the list of MAXQueue errors displayed by Location (wildcard % allowed)

... Add

CLT
PHL

Remove
Remove All

Cancel Save

AssetWORKS

Home Supervisor Technician Storekeeper FuelFocus Reporting Ad Hoc

MAXQueue Portal Settings

Filter the list of MAXQueue errors displayed by INSTANCE^SERVICE^CONNECTOR

Filter the list of MAXQueue errors displayed by Location (wildcard % allowed)

[NONE]
CLT
PHL

Cancel Save

Select Location ID

LOC_LOC_CODE Starts with:

A C N P

And contains:

Search Reset

5 item(s) found

loc_loc_code
[NONE]
AUTO
CLT
NAPA
PHL

Page 1 of 1