AFTERMARKET ANALYTICS

Inventory Analyst 2.0

Guide

# Table of Contents

Document Scope

The emphasis of this document is to guide users (who will have varying permission levels) through the process of operating Inventory Analyst 2.0. The guide has separate sections to address different permission levels: (a) for all users, and (b) for organizational admins.

This document is predicated upon the user already belonging to an organization on the app. This guide will then walk users through various processes. The first is for all users, and shows how to edit a user on the organization. The next few steps are for organizational admins. The first of these is how to upload a part catalog as well as a part to vehicle catalog to the app. Next, the guide walks a user through the process of obtaining and modifying replacement rates. Following this, the guide will show users how to upload adjustment files both for county and vehicles. The next sections of the guide all deal with the rather involved process of creating selection filters. The latter are of three sorts: (a) regions, (b) vehicle, and (c) parts.
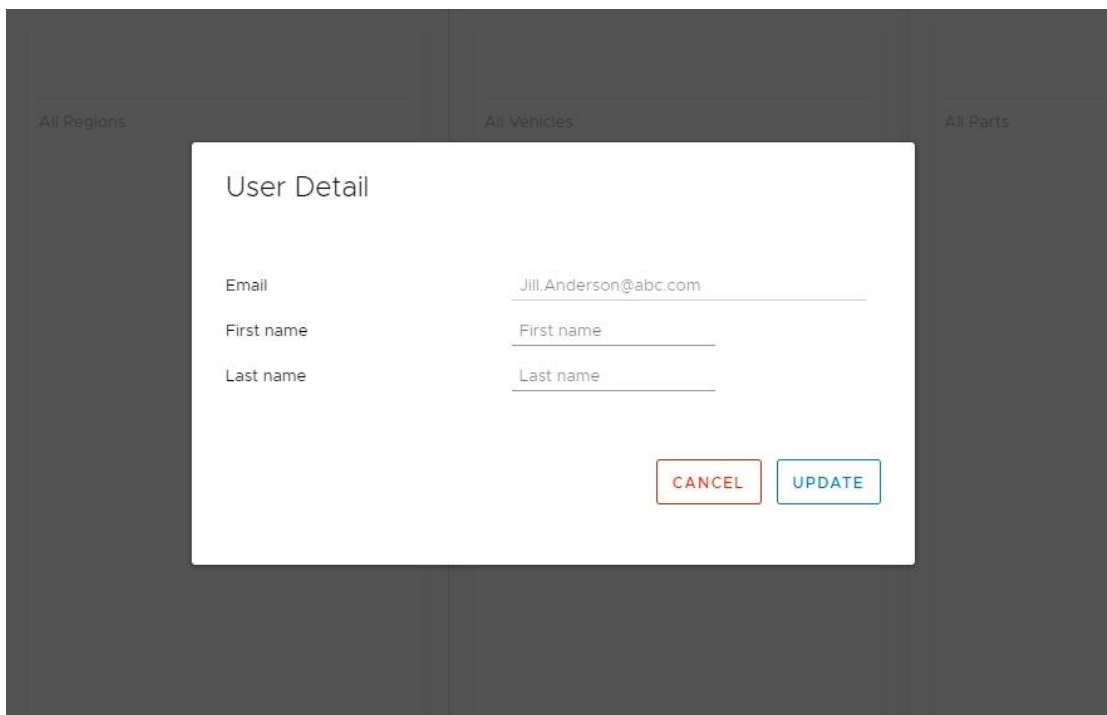
For All Users

Edit a user:

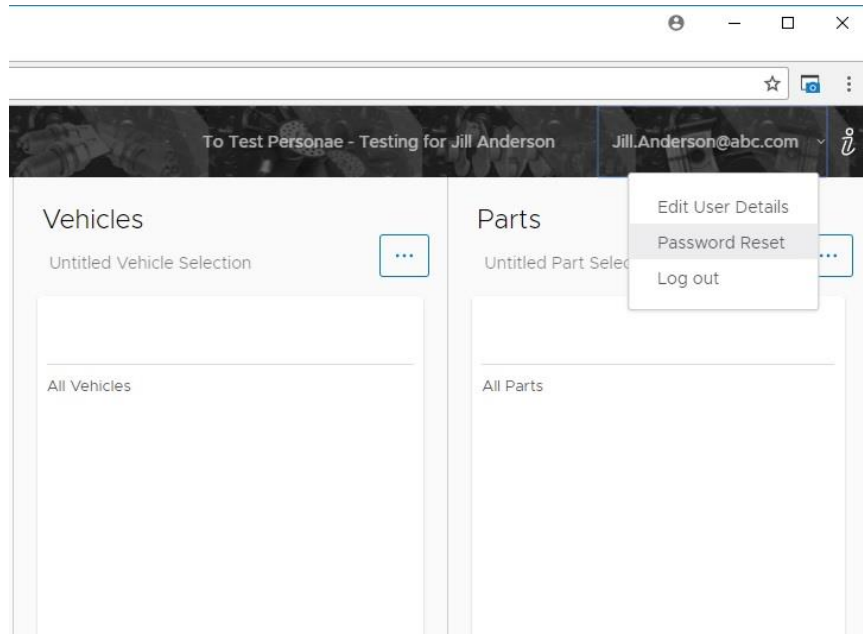From the header, open the dropdown by clicking on the displayed login email address.
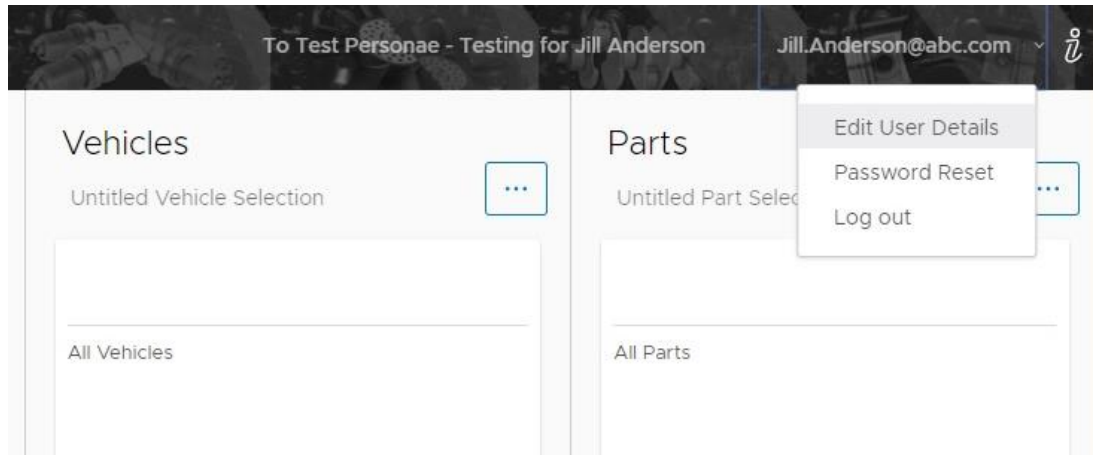
Then, select "Edit User Details." This will bring up the following display:
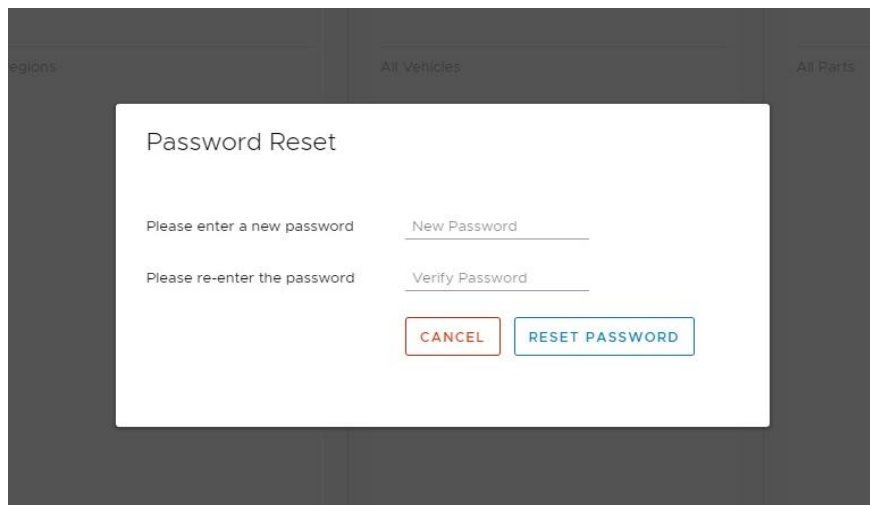

User enters email, first and last name into the form and clicks "Update."

Create a Password:

First, click the email address on the header:

Click "Password Reset" and user will see the following display:

Fill in the Password Reset form with desired new password and verify it in the second line and click "Reset Password."

For Organizational Admins

Uploading a Parts Catalog:

Firstly, upload a "Parts" catalog. Start the process by clicking "Admin" on the header. Then, select "Catalog" from the sidenav. Then select "Parts," as pictured below:
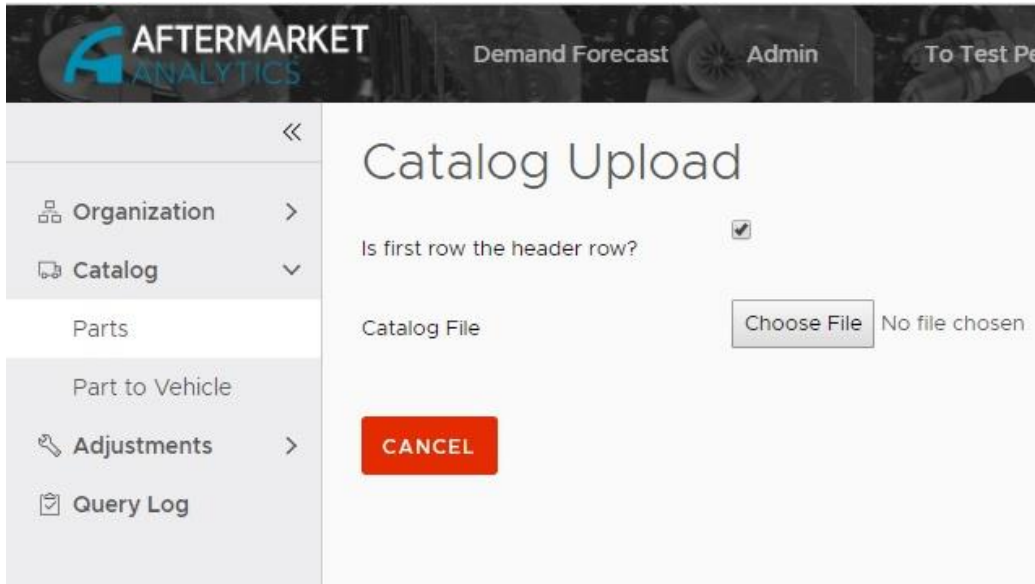
Then, click the "Choose File" button, and select and load an appropriate file using file explorer. A user then selects two of the radio buttons which appear upon uploading as detailed below:
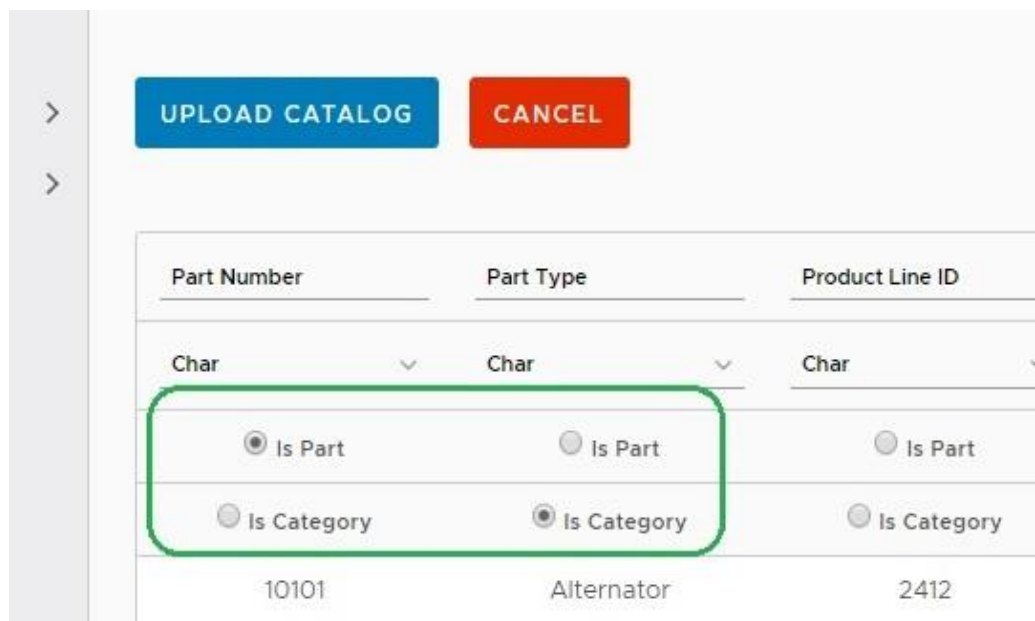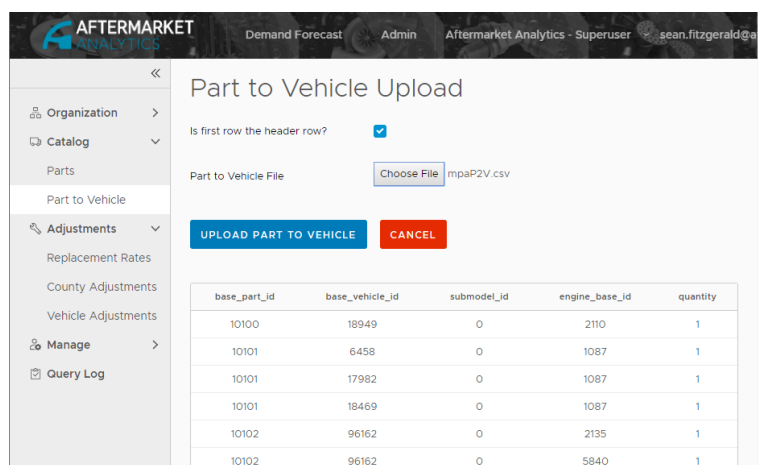
Then, scroll to the far right of the window, revealing the final two categories. The latter need to be altered in terms of their data type from "Char" to "Text" as pictured:

Once these final two columns have been changed to "text," click "Upload Catalog."

Upload Part to Vehicle:

Next, upload a "Part to Vehicle" file. To do this, go to "Catalog" and select "Part to Vehicle" from the sidenav. Click the "Choose File" button. Select an appropriate file to upload. Please note that the template for the data in the file to be uploaded must be formatted strictly as follows: (1) Part Number, (2) BaseVehicle ID, (3) Submodel ID, (4) EngineBase ID, (5) Qty (see below).

Then, click the blue "Upload Part to Vehicle" button, and user should see a message: "Part to Vehicle upload success."

Replacement Rates:

Next a user can obtain replacement rates, as well as change the coefficients of those rates. In order to do this, select "Adjustments" from the sidenav, and select "Replacement Rates." At this point, one needs to select from the dropdown "Part Category" in order to initiate the appearance of a graph.
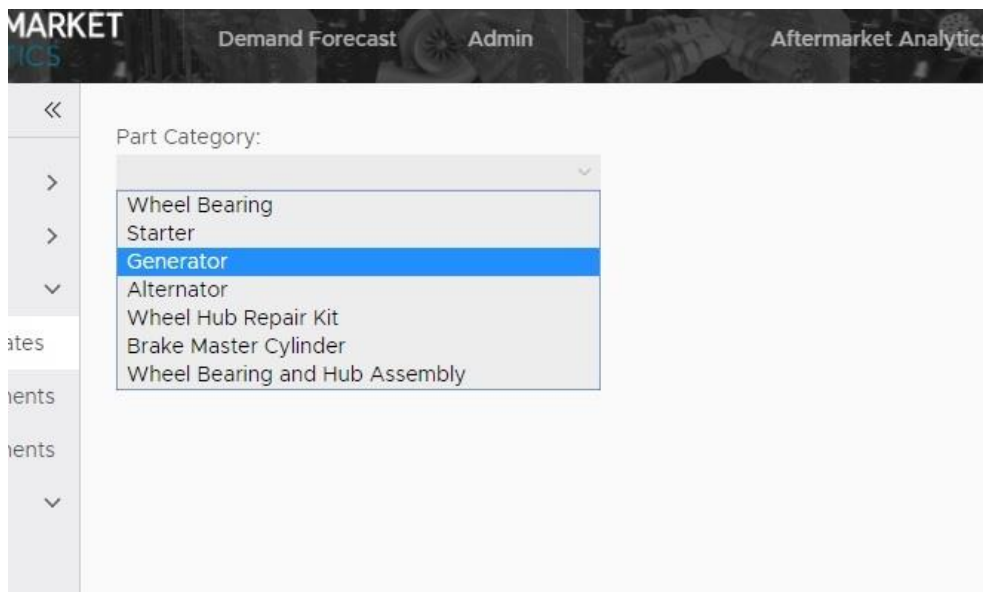
Select the desired "Part Category" which will bring up a display like this:
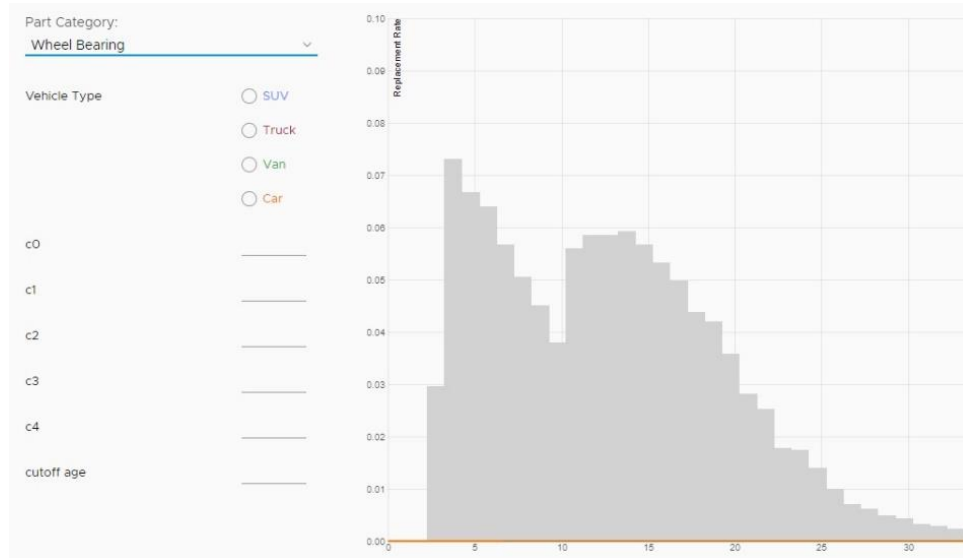
When on the above screen, select the desired "Part Category" from the dropdown.

Then a user may enter coefficients in either one of two methods. The first method is to drag the circular graph points (see figure below). The second is to manually enter coefficients into the lines provided (also see below).
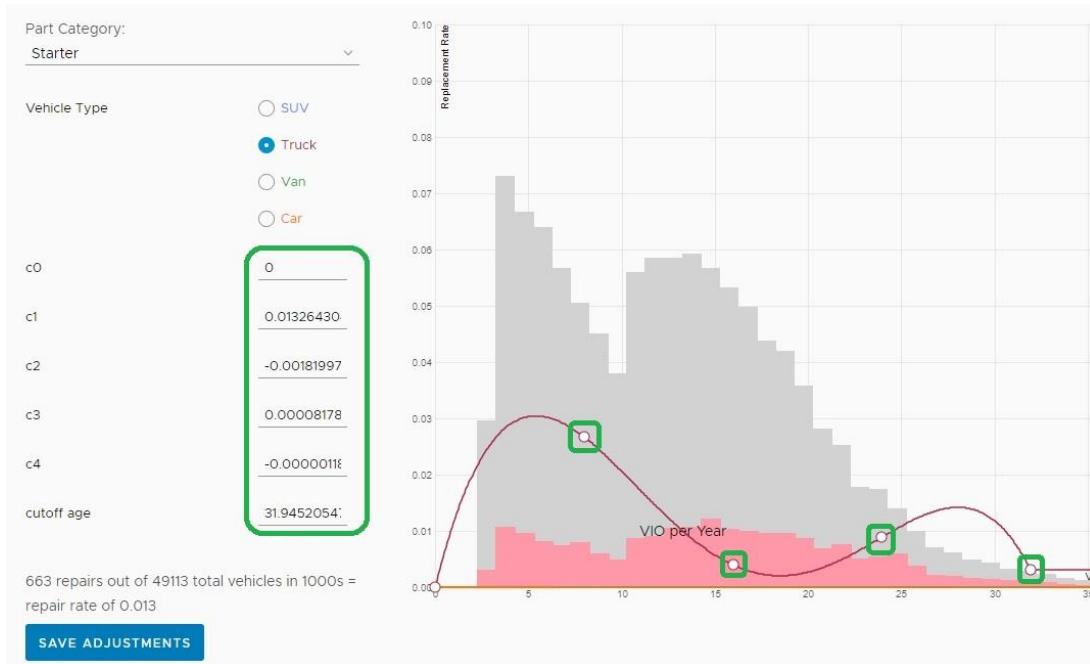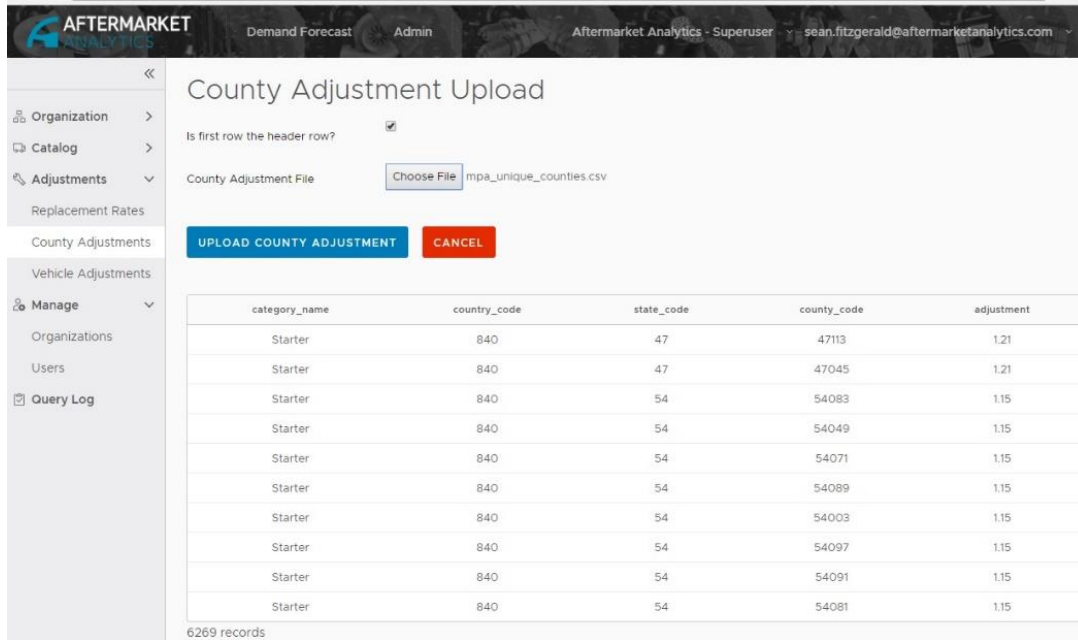
County Adjustment Files:

Next a user may upload county adjustment files. User initiates this process by clicking "Admin" on the header. Then, select "Adjustments" from the sidenav. This will open a dropdown. Select "County Adjustments."
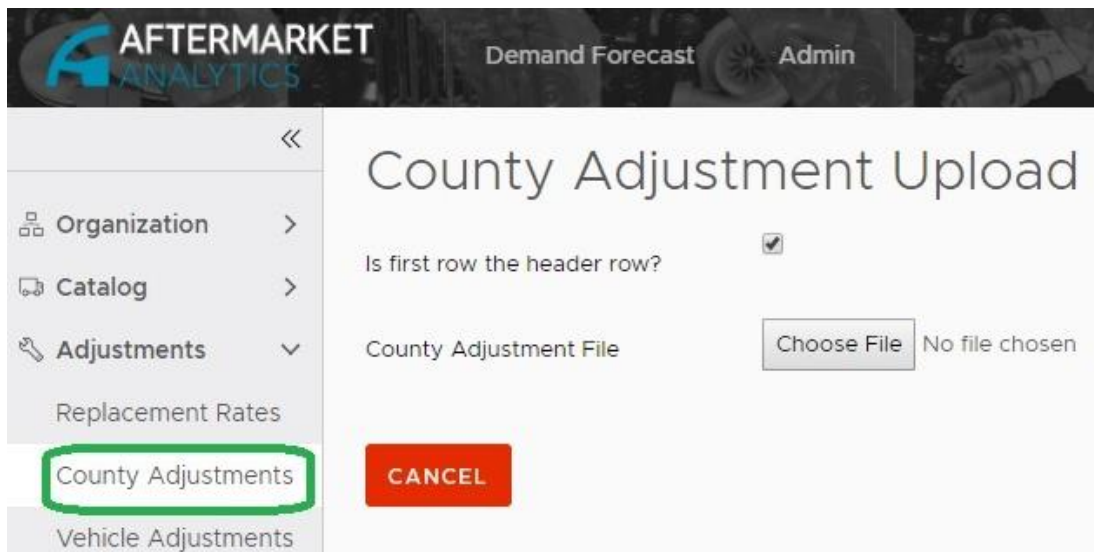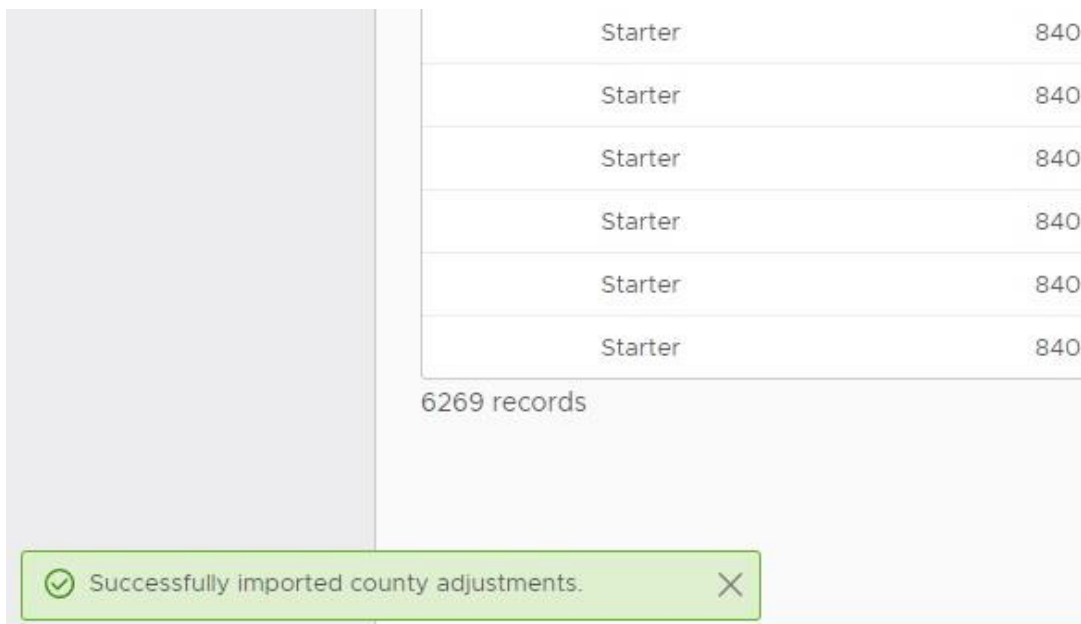
Next click the "Choose File" button, and select the appropriate County Adjustment file. At this point, the screen will show as follows:

This action prompts a message (see below): "Successfully imported county adjustments":

Vehicle Adjustment Files:

First select the "Admin" tab from the header. Then, on the sidenav, open a dropdown by selecting "Adjustments."
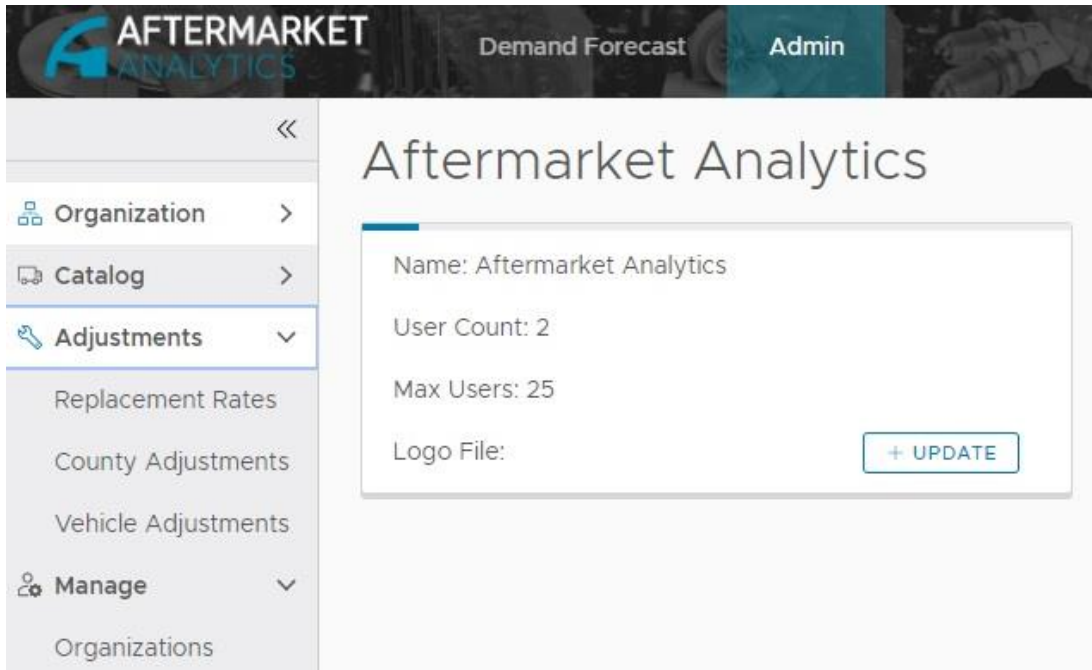
Select "Vehicle Adjustments" from the sidenav. Click the "Choose File" button, and select the appropriate vehicle adjustment file.
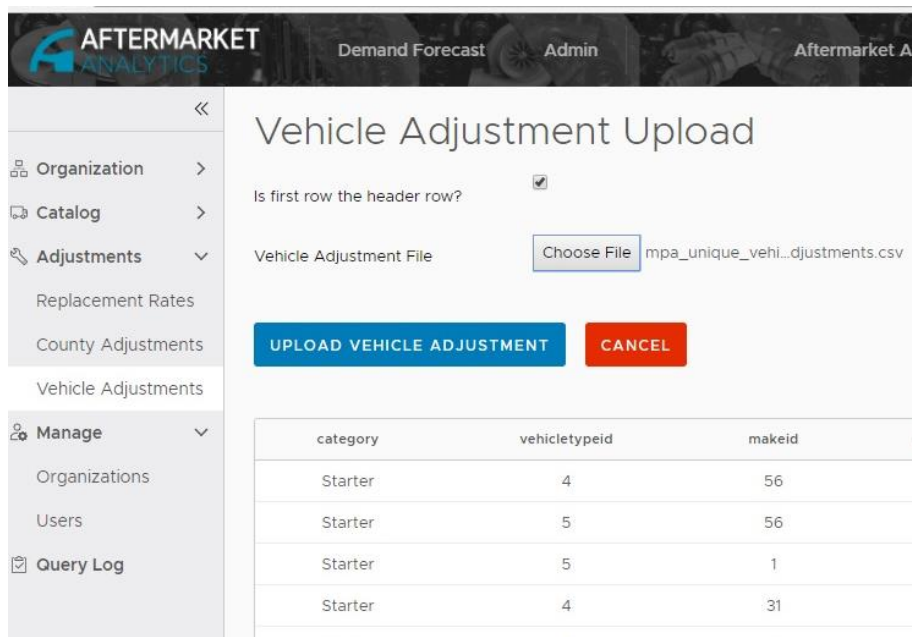
Click the "Upload Vehicle Adjustment" button. When the process of uploading is completed, a message will appear: "Successfully imported vehicle adjustments."

Starter 4
Starter 5
Starter 5
Starter 5
Starter 5
Starter 4

3250 records

✓ Successfully imported vehicle adjustments. ✕

Selection Files—Region Selector:

Create a selection filter for regions using the Region Selector. Start by clicking "Demand Forecast."

Then, on the sidenav, select "Build," thereby opening a dropdown. From the dropdown, select "Regions."
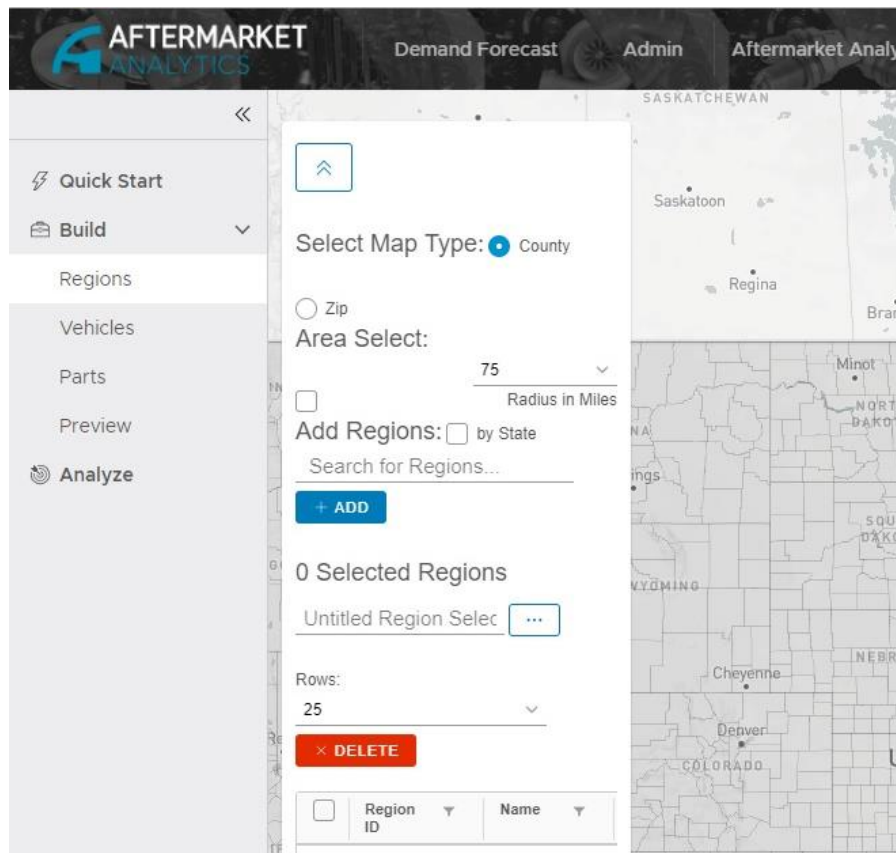
An alternative route to generating the same screen as the above is available on the home page. This is done by clicking the "more options," or "three-dots menu" adjacent to "Regions" (see below), and selecting "Build" from the dropdown.
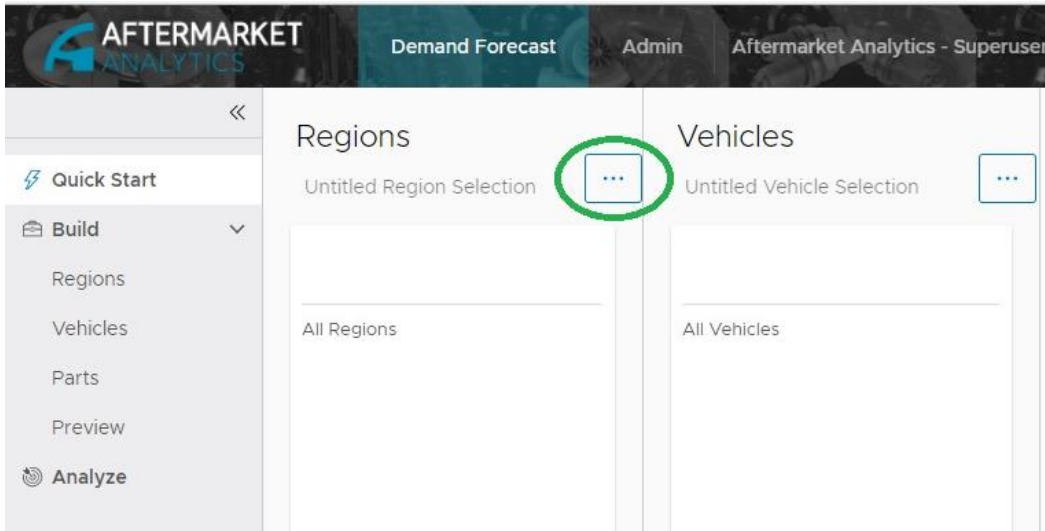
Once on the Regions Selector, a user can make a number of selections and entries.

Firstly, one can select the "Map Type" either by leaving "County" selected or selecting the radio button adjacent to "ZIP Code" in order to make selections on the map via ZIP codes (see below):
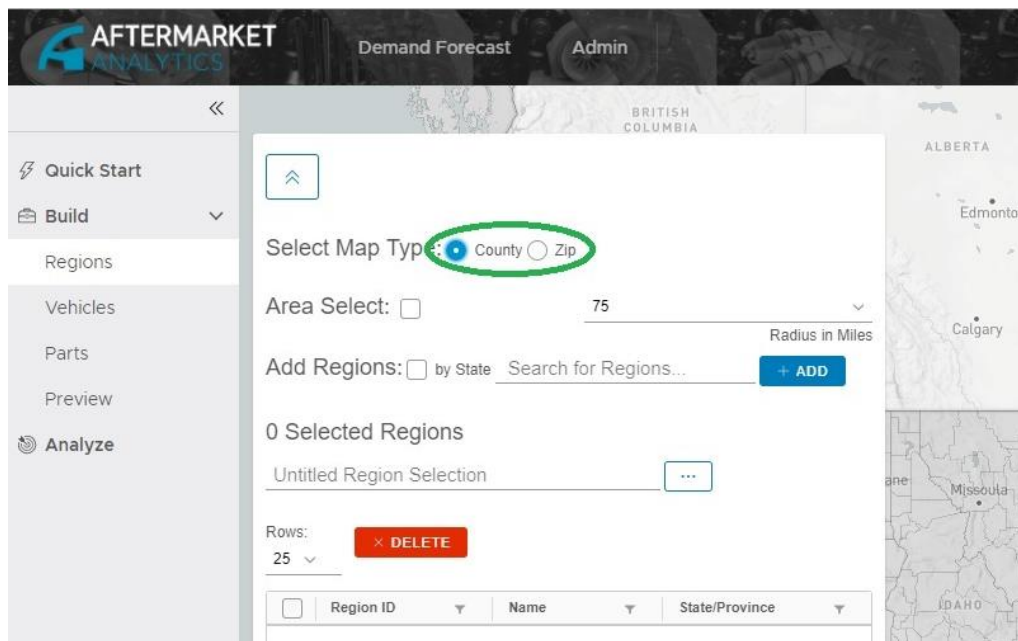
[Note: when rendering the map by ZIP code, there will appear many blank areas on the map, particularly in the western states. This is because these areas are governmentally owned and possess no ZIP codes (see below).]
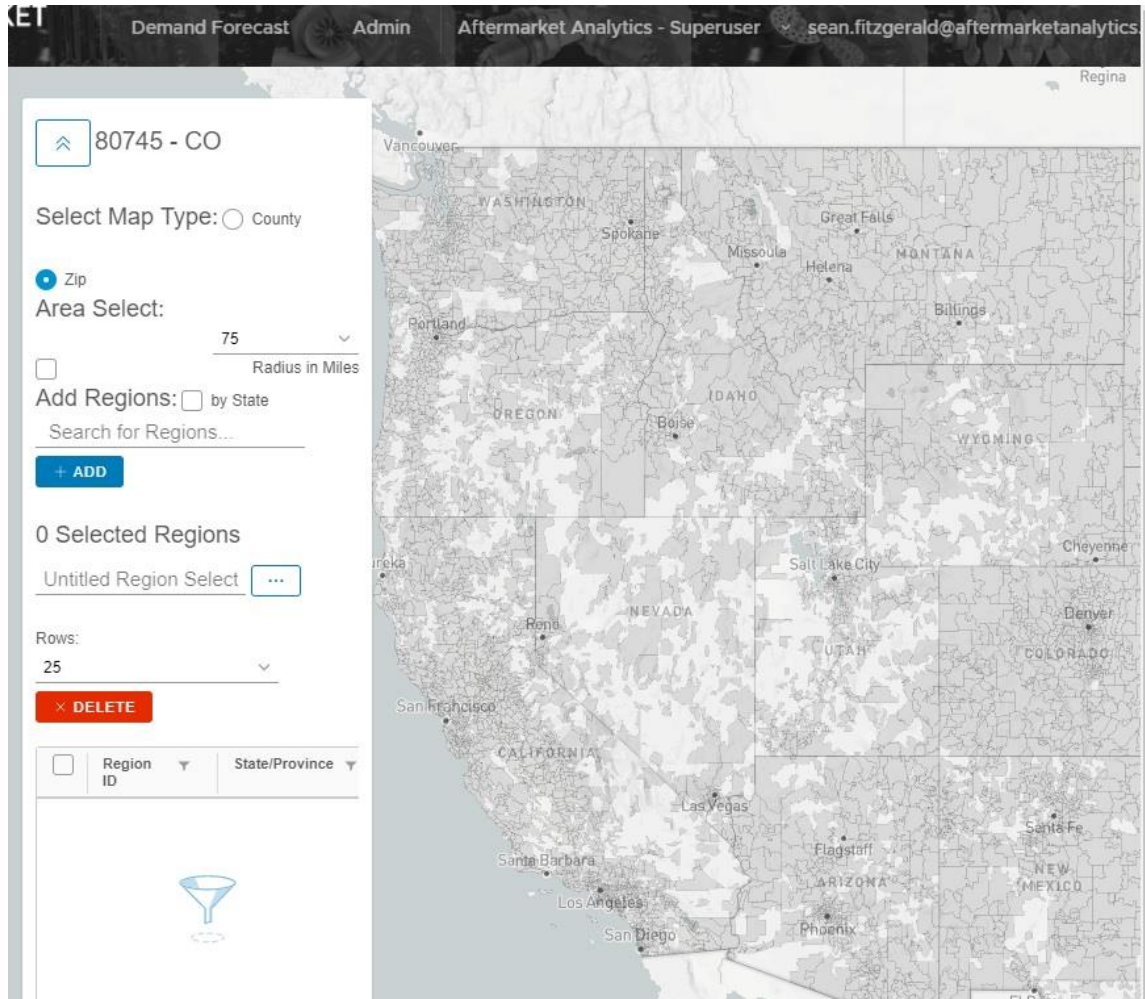
Next, user can select areas on the map via a number of methods (see screenshot under the following list):

(1) directly clicking on areas of the map (in order to select individual counties or ZIP code areas),

(2) using the "Area Select" feature, by choosing a radius to include in selection by specifying length of the desired radius of a search (using the adjacent dropdown), and

(3) searching regions via the "Search for Regions" line (please note that in addition to searching by county, a user can search by state also if user clicks the box next to "by State").

To illustrate (1) from the above list, here is the appearance of the map when one is selecting by county:
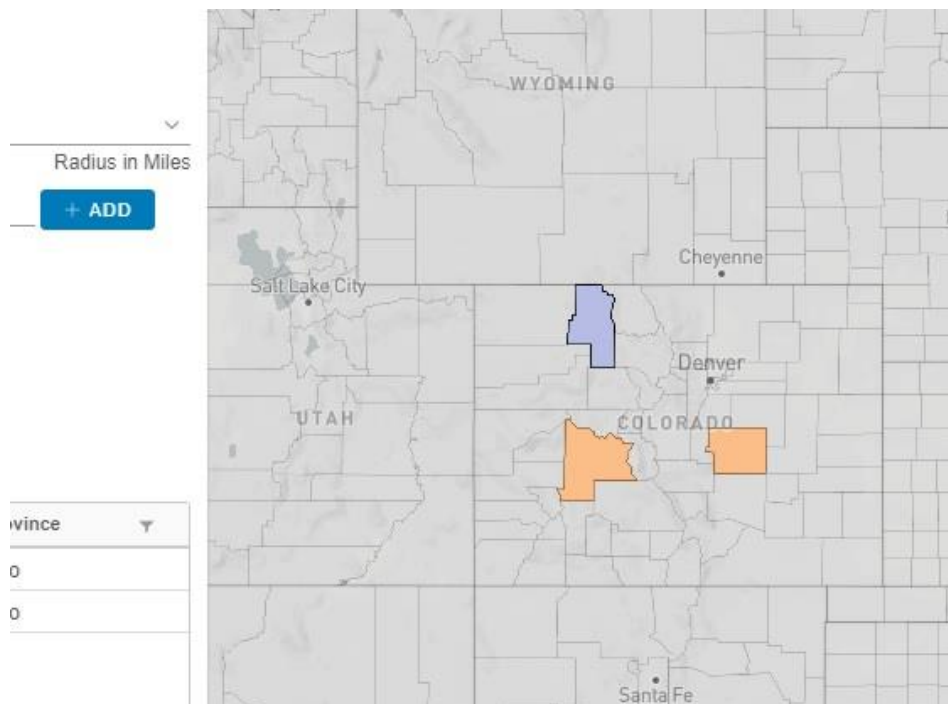
To illustrate (2) using the "Area Select" feature, refer to the following:

The dropdown is for selecting the width/height of a search area. Once user chooses the desired radius of the search, the appearance is as pictured below:

The third method from the above list, is the process of searching out specific states, counties or ZIP codes by filling out the "Search For Regions" query line. By way of illustration, here is the appearance when searching "by State":

Select Map Type: ● County ○ Zip

Area Select: ☐   75   ⌄
                    Radius in Miles

Add Regions: ☑ by State

ala   + ADD
Alabama   ▲
Alaska   ▼

Untitled Region Selection   ...

Rows: × DELETE
25 ⌄

☐   Region ▼   Name   ▼   State/Province
    ID

When searching by county, the "Search for Regions" line populates as follows:

Select Map Type: ● County ○ Zip

Area Select: ☐   75   ⌄
                    Radius in Miles

Add Regions: ☐ by State

A   + ADD
Alachua - Florida   ▲
Appling - Geogia
Atkinson - Geogia
Ada - Idaho   ...
Adams - Idaho
Adams - Illinois
Alexander - Illinois
Adams - Indiana   ▼

☐   Region ▼   Name   ▼   State/Province
    ID

When searching by ZIP code, the "Search for Regions" line appears as follows:

One can determine the number of rows will output by use of a dropdown:

User can prune the listed output in terms of counties or ZIP codes displayed. This is done by selecting individual ZIP's/counties using the checkboxes adjacent to said ZIP's/counties followed by clicking the "Delete" button:
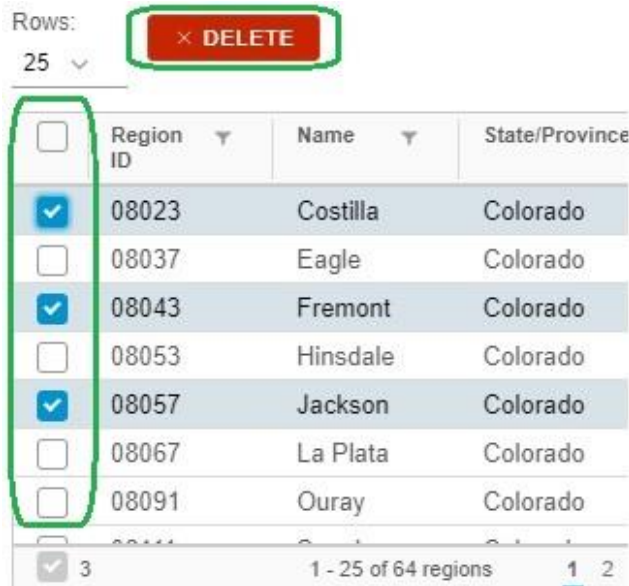
To clear all selections, user can click the More Options, or ellipsis menu and selecting "Clear" from the dropdown.

User can save the regions selection filter by first entering a title into the "Untitled Region Selection" line. Then user clicks the more options or ellipsis menu and selects "Save."

User can also load saved selection filters using the "Load" selection on the ellipsis menu. Doing so will prompt a dialog wherein user may select any and all desired selection filters.
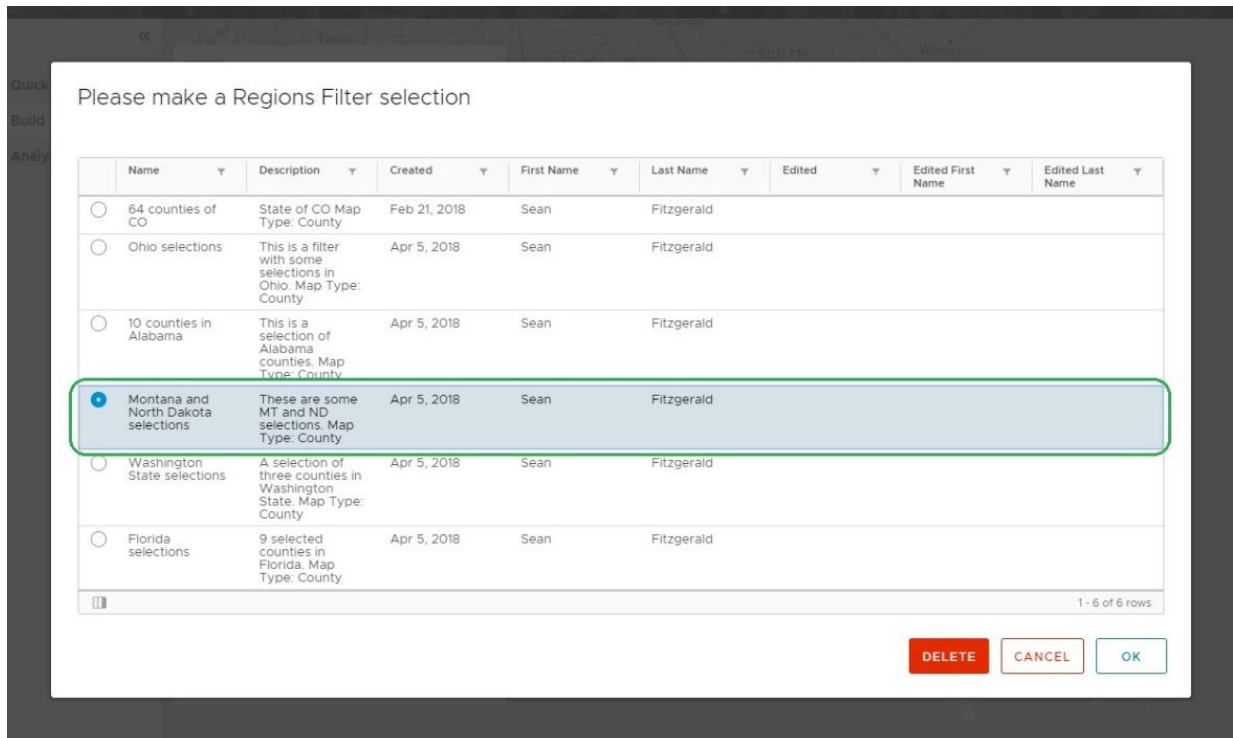
Once user has selected the desired selection filter, as pictured above, user may click the "OK" button to open selected filter.

At this point, user will see all selections populate a list:

8 Selected Regions

Montana and North Dakota selections [...]

Rows:
25 ∨

× DELETE

	Region ID ▼	Name ▼	State/Province ▼
☐	30083	Richland	Montana
☐	38053	McKenzie	North Dakota
☐	30109	Wibaux	Montana
☐	38033	Golden Valley	North Dakota
☐	38087	Slope	North Dakota
☐	30021	Dawson	Montana
☐	30085	Roosevelt	Montana
☐	38007	Billings	North Dakota

1 - 8 of 8 regions

Selection Files—Vehicles Selector:

Create a vehicles selection filter in one of two ways. The first way is to go to the more options or ellipsis menu on the home page, and selecting "Build."
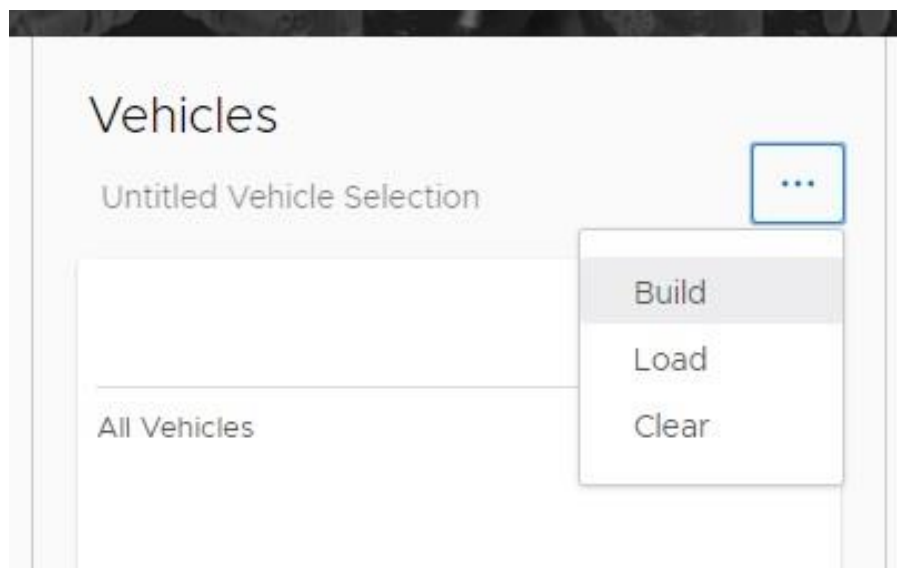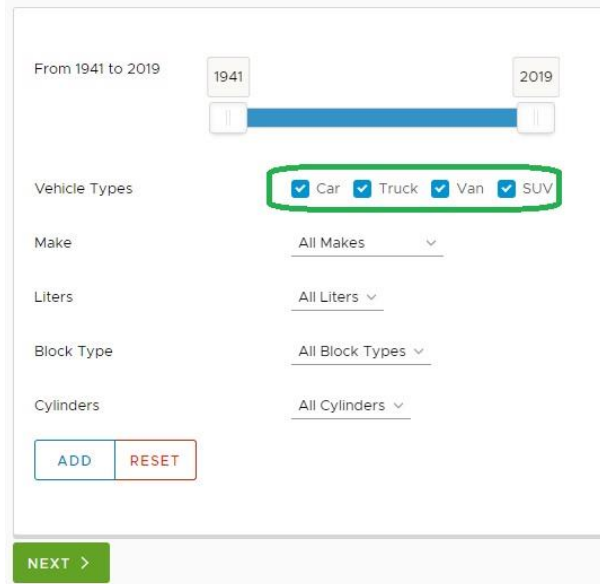
Alternatively, go to Demand Forecast > Build > Vehicles.
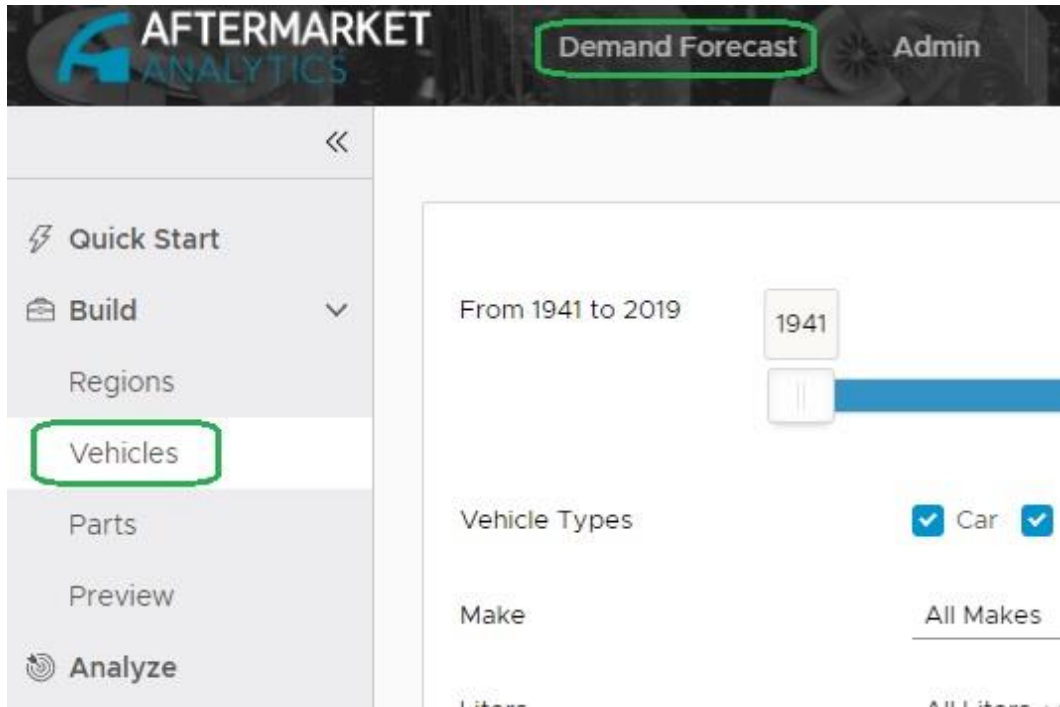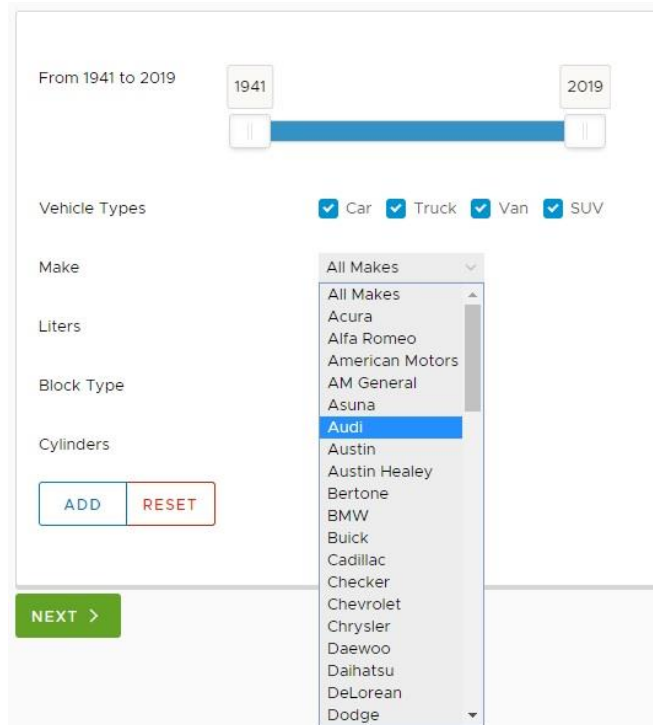
To build a query, first select a desired time frame by using the age range slider:
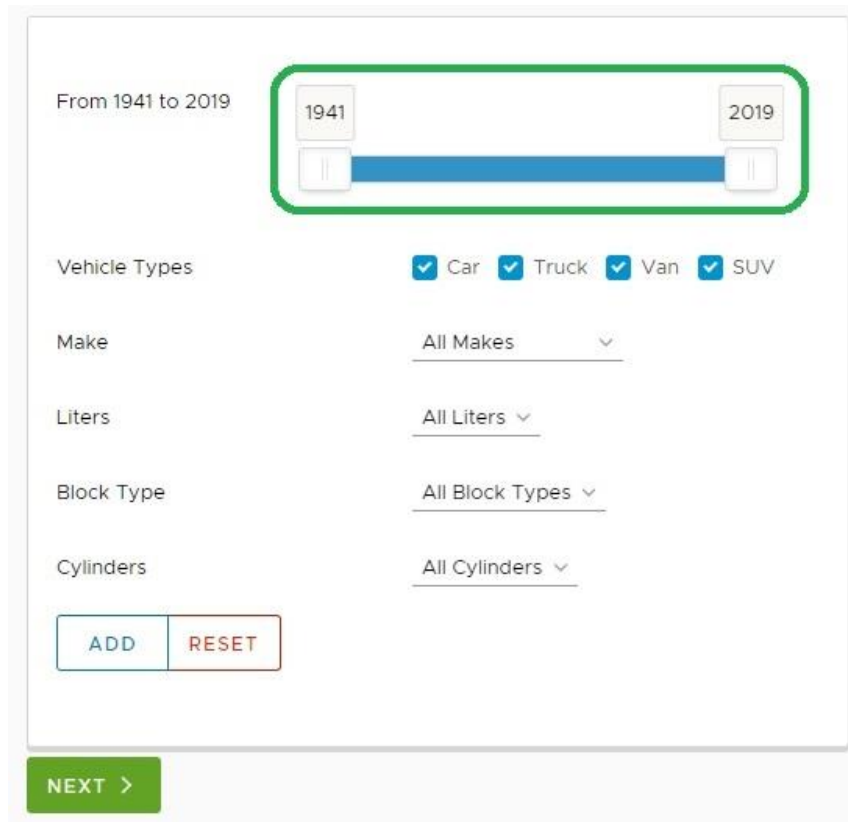
Select desired "Vehicle Types" by checking or unchecking the checkboxes adjacent to "Car," "Truck," "Van" and/or "SUV."
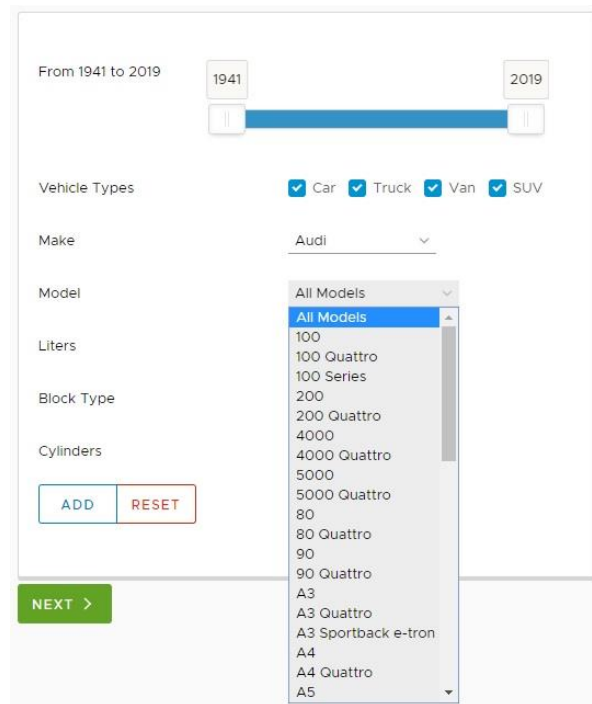
Select desired make from the dropdown labeled "All Makes," or else do not make a selection which will default to "All Makes" in the query.
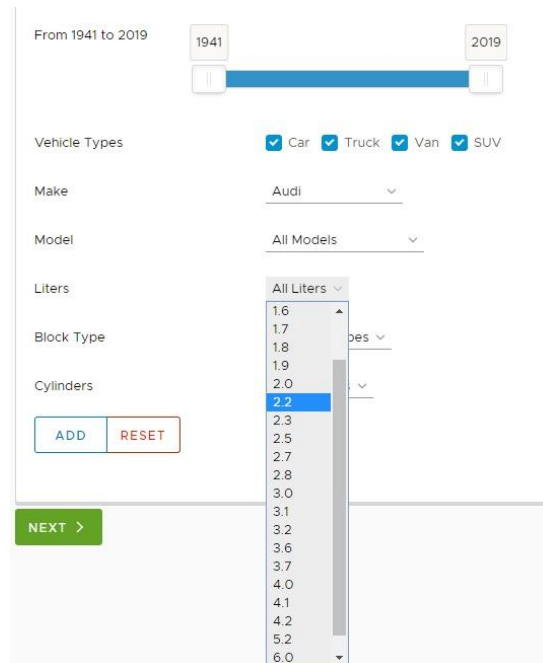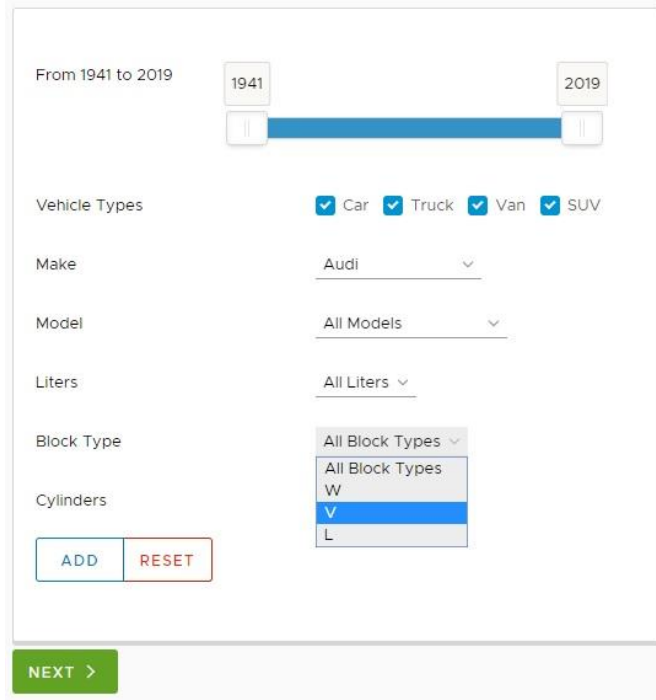
Making a selection (aside from the "All Makes" default) invokes an "All Models" dropdown.

Select engine size from the dropdown labeled "All Liters," or else do not make a selection which will default to "All Liters" in the query.

Next, select block types from the dropdown labeled "All Block Types," or else do not make a selection which will default to "All Block Types" in the query.
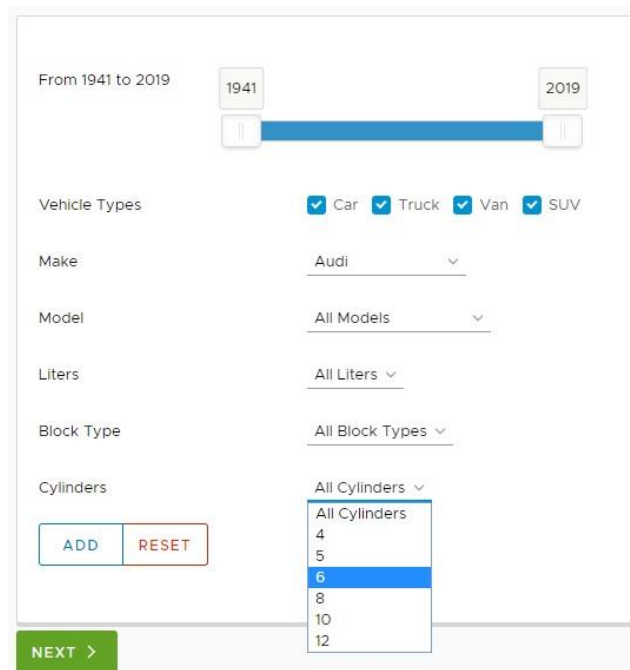
Next, select the number of cylinders from the dropdown menu:
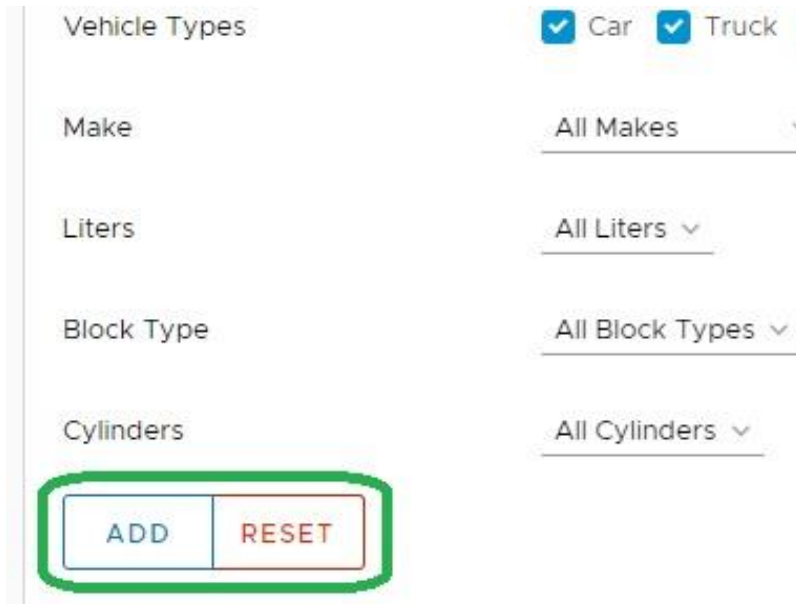
Note that if user does not specify the number of cylinders, the query defaults to "all cylinders."

To begin the process of adding selections to the search filter, click the "Add" button. Alternatively, to clear all query parameters, click the "Reset" button.
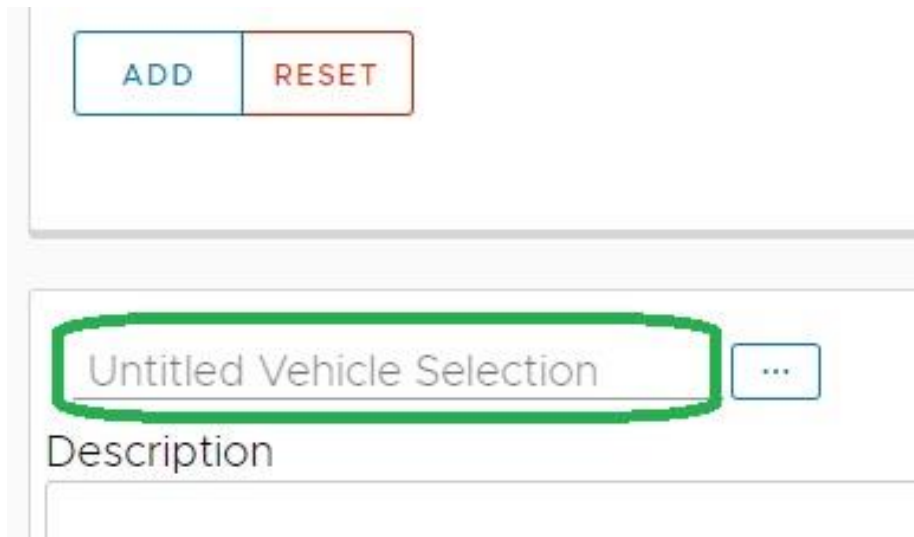
Add the preferred title under which to save your selection filter in the line "Untitled Vehicle Selection":

Add a description of the selection filter into the box marked "Description":

In order to save a selection filter, open the ellipsis menu and select "Save":
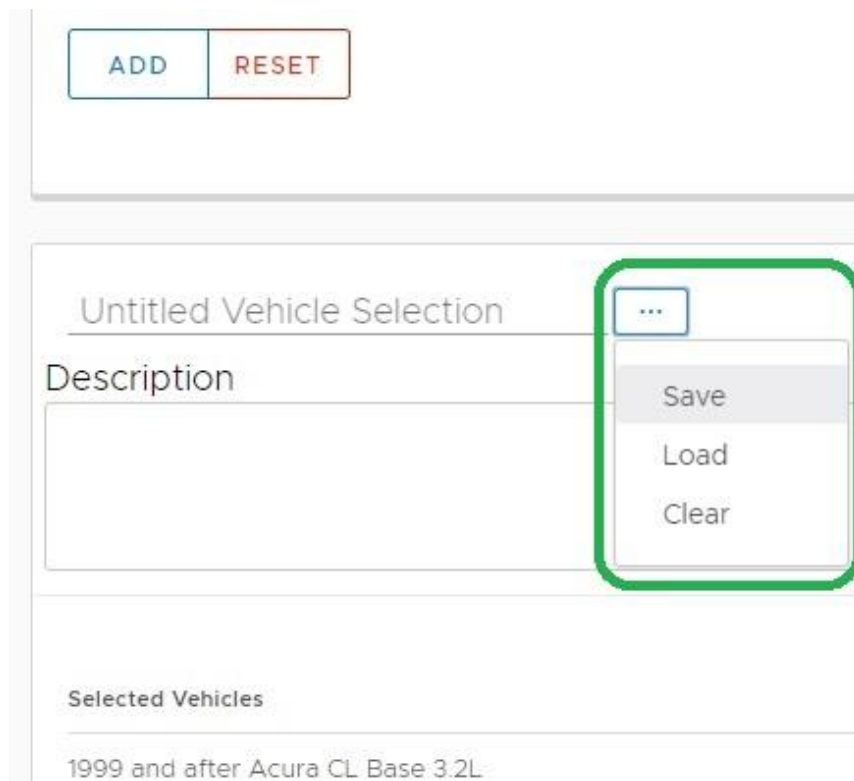
A dialog will appear:
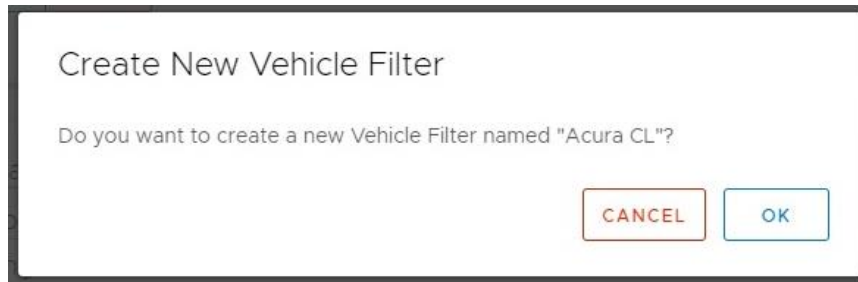
Select "OK" and a message will appear (see below):
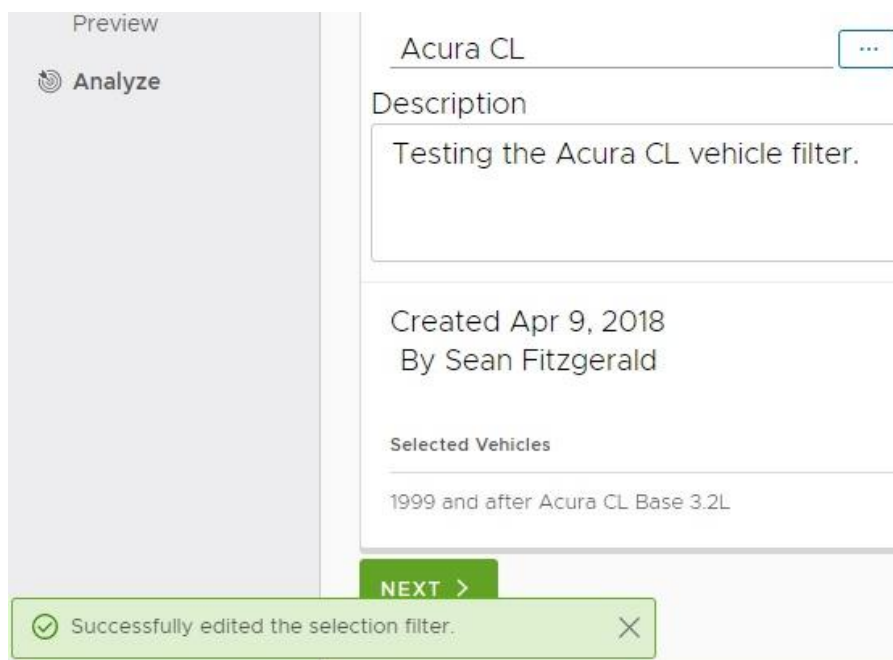
In order to open a selection filter, use the ellipsis menu and select "Load." At that point, a dialog ("Please make a Vehicle Filter selection") as follows:
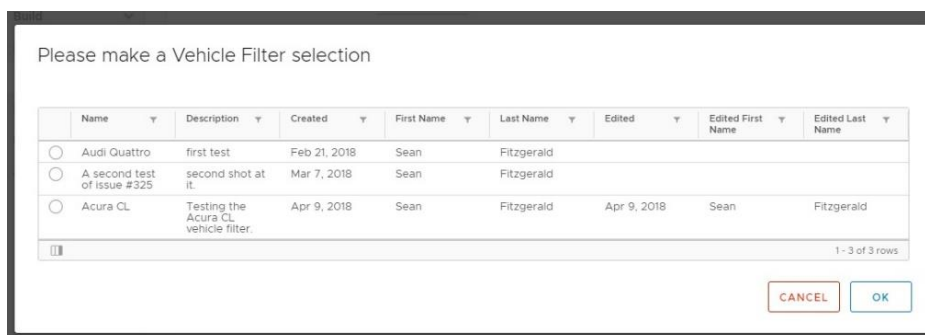
Use the radio buttons to the left of each filter in order to select one of the filters:
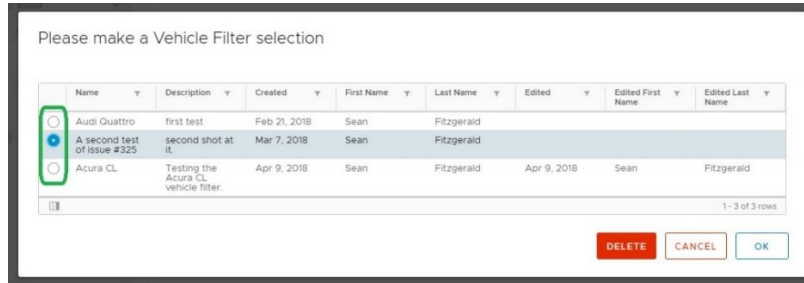
Once user makes the desired selection, user can click the "OK" button. Alternatively, if user wishes to delete a filter, select the "Delete" button.

User may also edit categories by clicking the show/hide columns button:
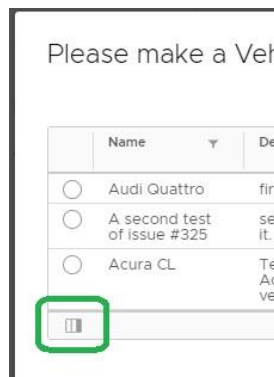
Selecting the button should invoke the following appearance:
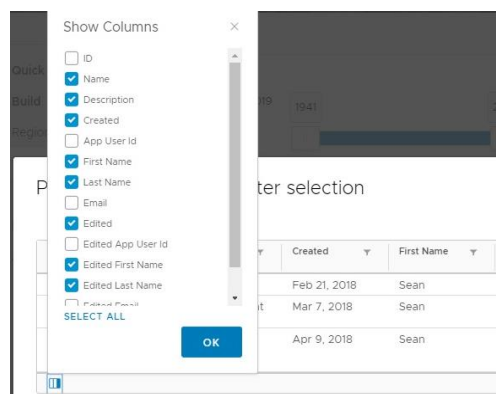
Add or subtract displayed columns by checking or unchecking (respectively) the checkboxes adjacent to property in question.

Selection Files—Parts Selector:
Create a selection filter specific to parts by using the Parts Selector:
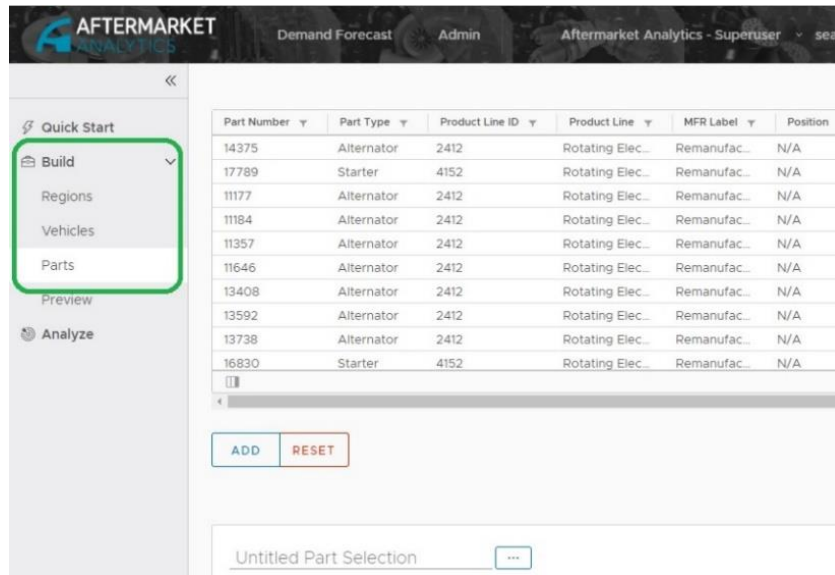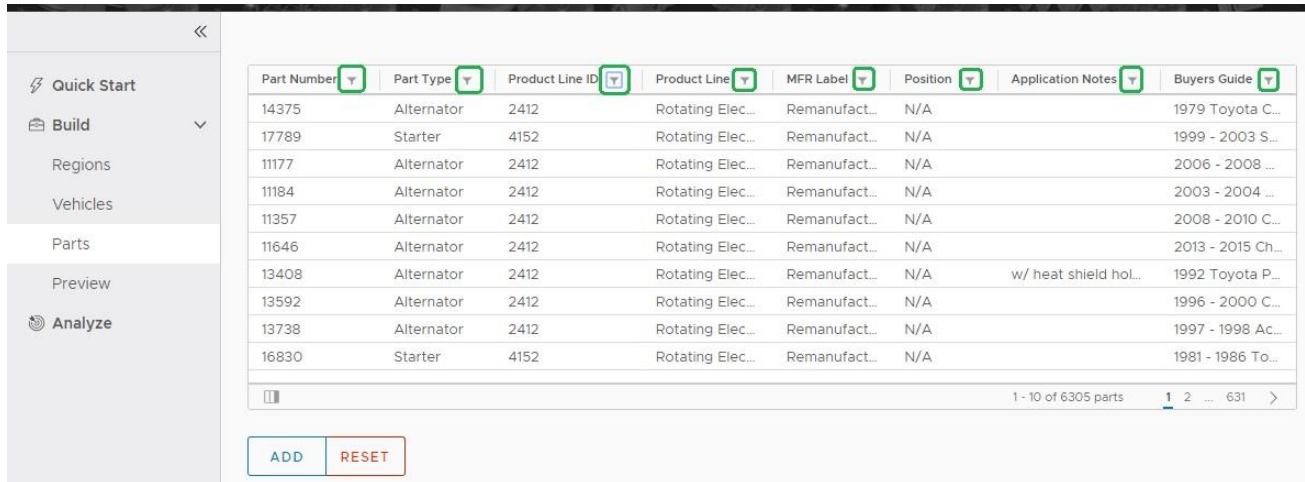
Modify which columns appear with the show/hide columns button:
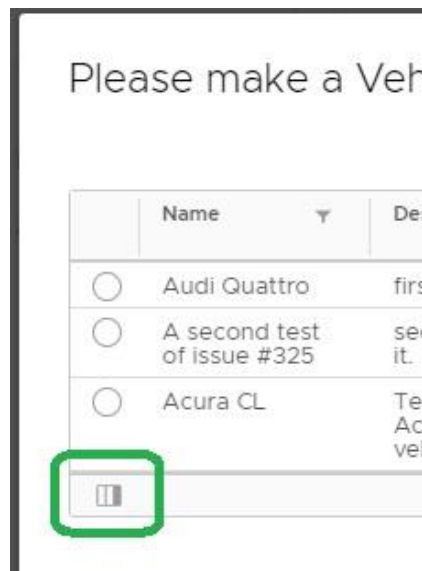
Small funnel icons (see highlighted symbols below) appear to the right of each search parameter:

Select the funnel icon in order to filter by certain terms:

Use one of two methods of selecting desired term(s) by which to filter searches. One is to type the desired search term into the provided entry line:

The second method is to place a checkmark adjacent to the desired search term:

Having made desired selection, click the "x" in the upper right (see below) in order to close the filter window.
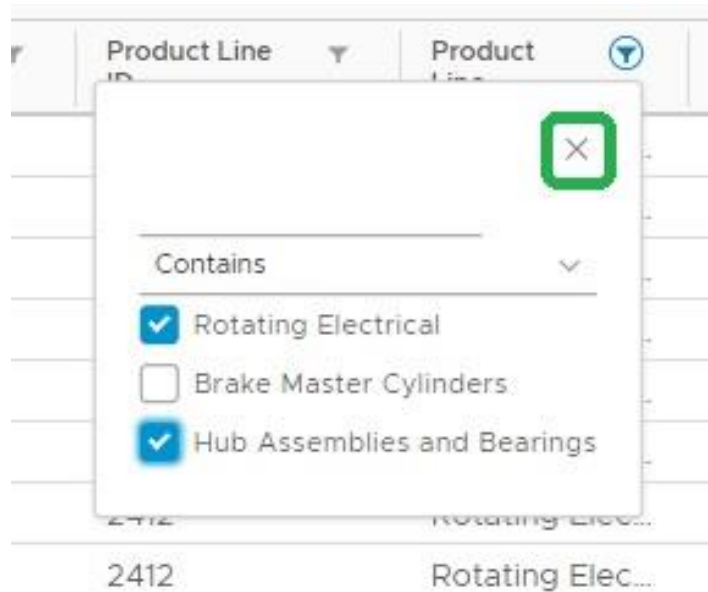
Make selections from the displayed list and click the "Add" button by adding the displayed items to the overall query:
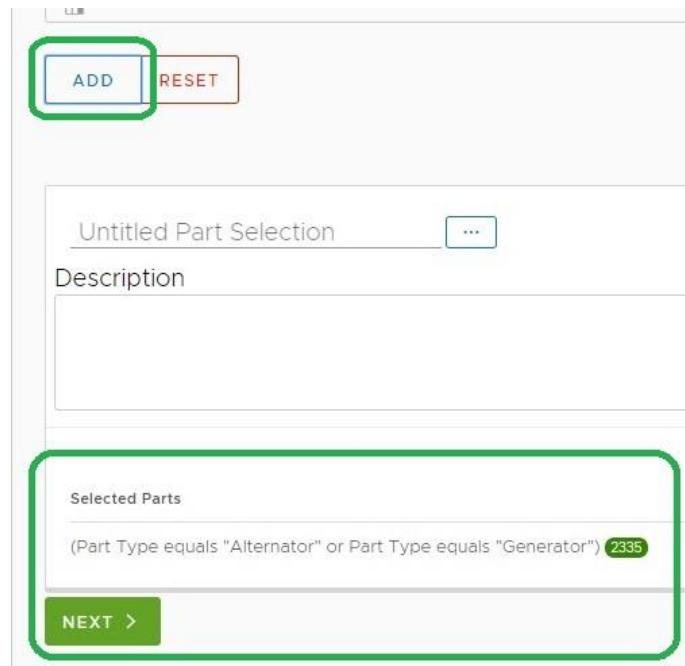
Click "Next" button to go to the "Preview" page:

Click the "Run Demand Estimate" button to get a display similar to the following:
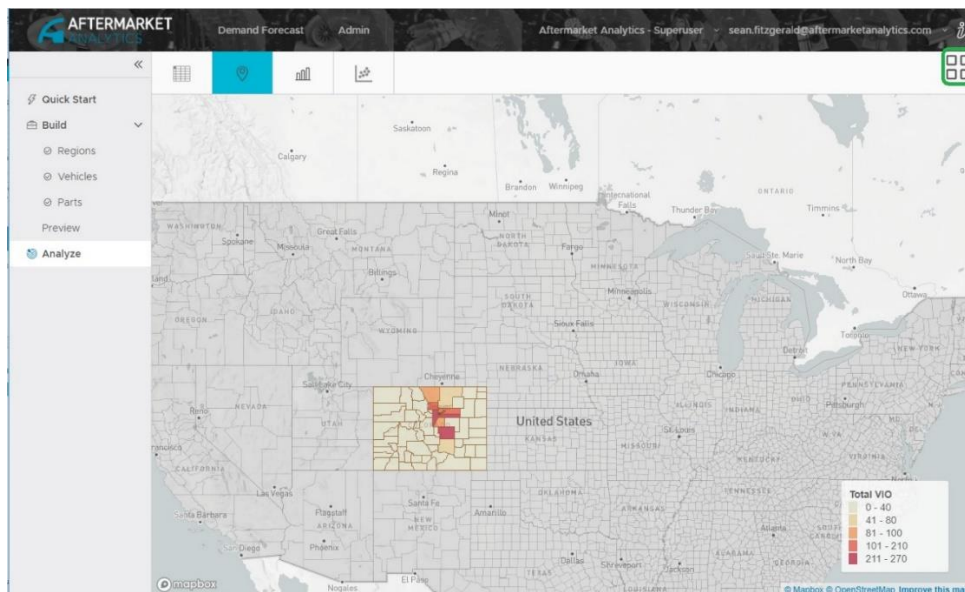
In order to view any of the above four windows in a singular fashion click the appropriate expand buttons:
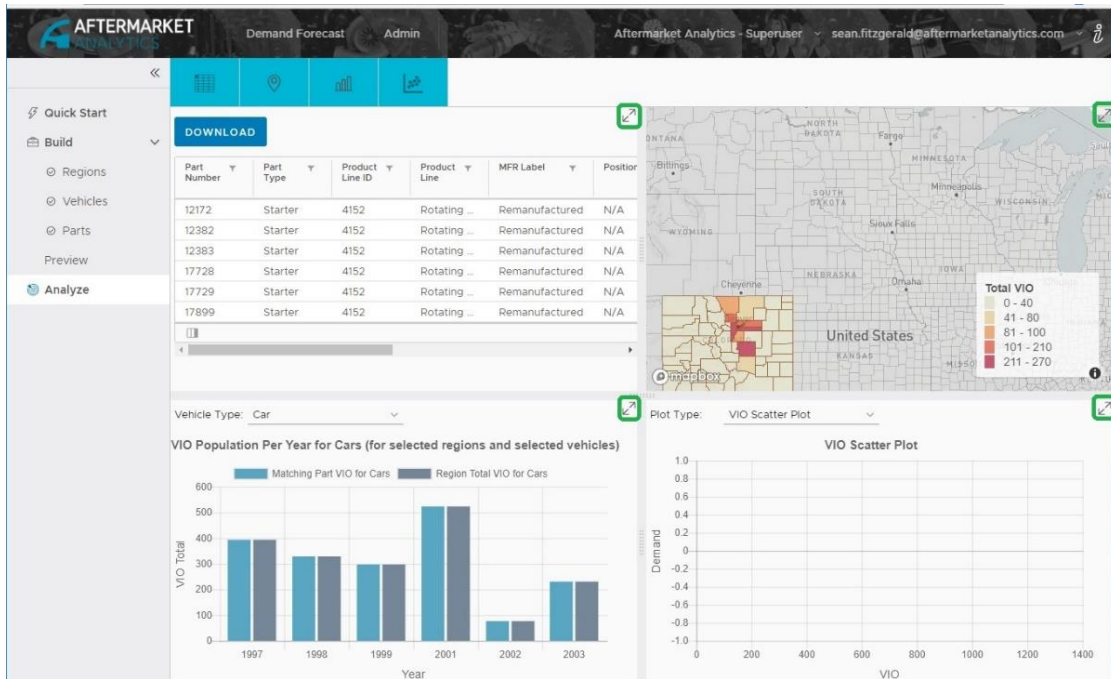

Clicking the expand button on, for example, the regions map, will create a screen similar to the one which follows:
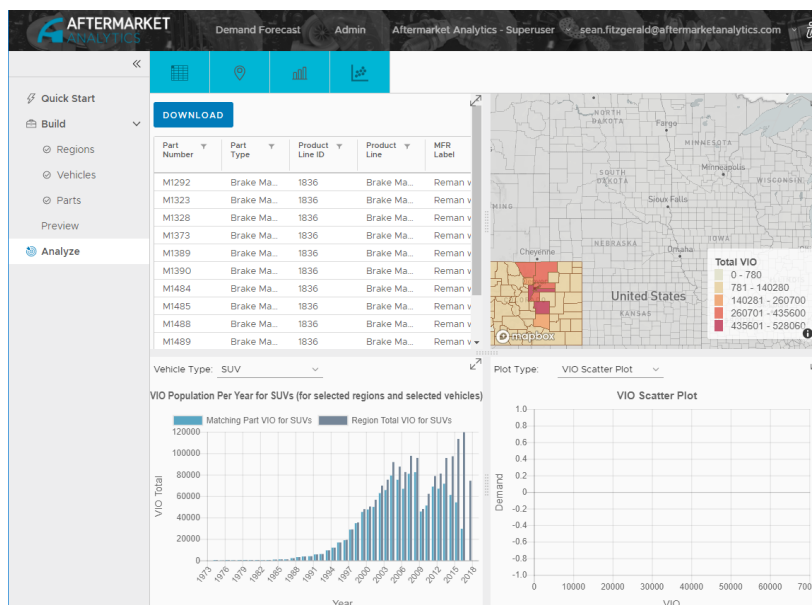
Note the highlighted foursquare view button in the top right of the above picture. Select that button in order to re-create the foursquare view.

Toggle through the various expanded views using the view buttons at the top of the display, as shown in the following:
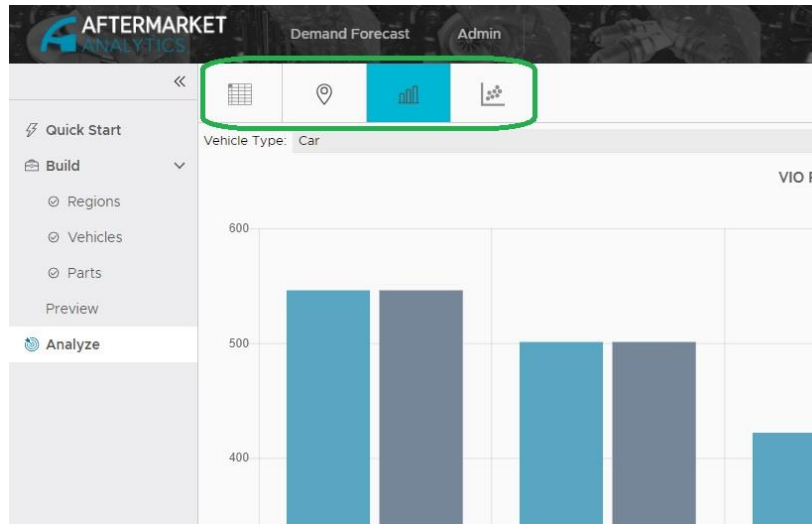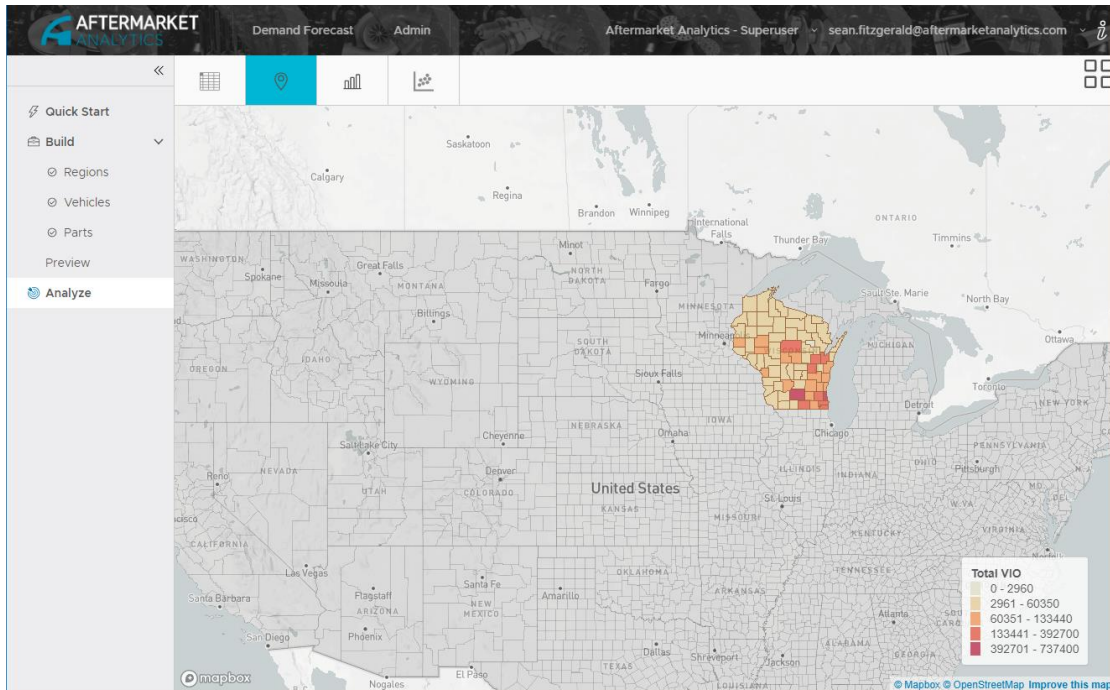

Demand Estimate Results:

The four types of display are: (1) Table, (2) Map, (3) Histogram and (4) Scatter Plot. The four-square appearance should appear similar to the following:

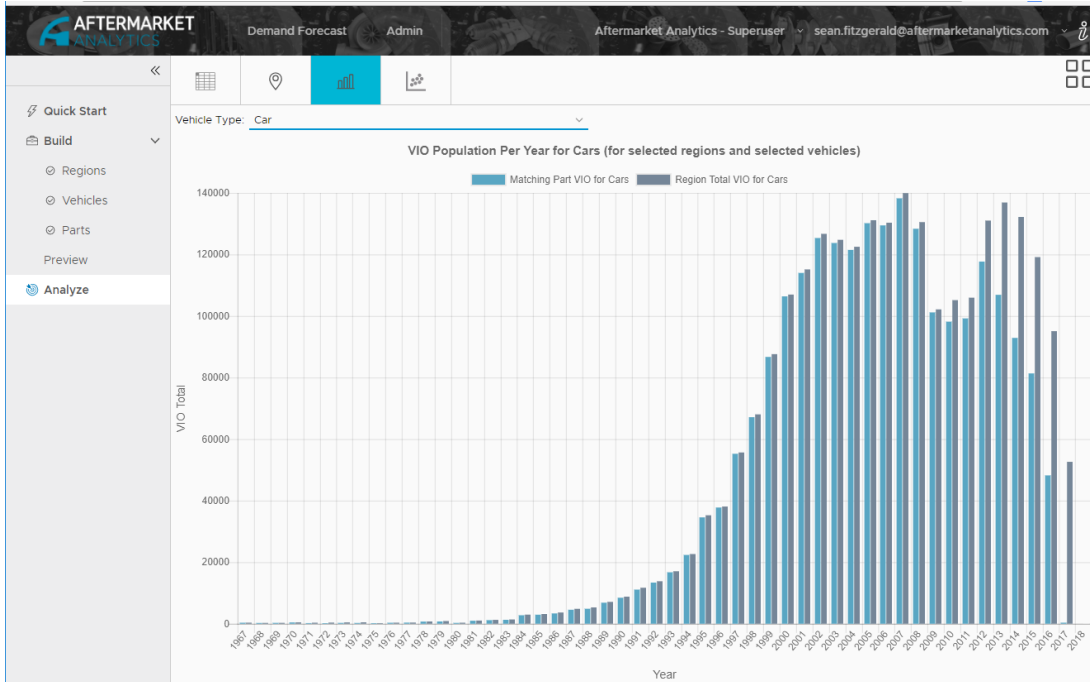View the full screen version of each as follows, firstly the table of results:

The regions results (here with the state of Wisconsin selected):

The histogram displays as follows:

The scatter plot will display similarly to the following, depending upon Plot Type selected: