



***AutoPoint®*** Evolution  
Main Menu & Navigation Quick Start Guide

*Updated October 24, 2011*





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## Conventions Used in this Manual

The following are explanations of the notations used in this manual to describe an action:

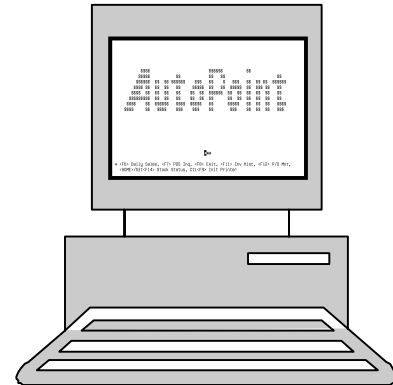
- A keystroke on the keyboard is described using the "<" and ">" characters. For example, the TAB key is displayed as "<TAB>". The function keys along the top of the keyboard are described as "<F5>" for FUNCTION key 5. Combinations of keys using the CTRL, SHIFT or ALT keys are described using prefixes to the key that must be pressed at the same time. For example, pressing the SHIFT and FUNCTION 5 keys is displayed as "SHIFT-<F5>".
- For instructions that describe following a menu structure, the "→" character separates the menu selections. For example, to get to the Stock Status Inquiry screen from the top "AM" menu, go to "6. Inquiries" → "1. Stock Status Inquiry". You can also jump to a particular program or menu from the "SELECT:" prompt by entering the menu entry numbers. In the Stock Status Inquiry screen example, you can enter "AM0601".
- Program names are described in all upper case. For example, the Stock Status Inquiry Screen is displayed as "AMSTOCKINQ". To bypass the menus and go into this program directly, enter the program name in upper-case at the "SELECT:" prompt in any menu, and press the <ENTER> key.
- Screen prints are included with the instructions to demonstrate what you can expect to see on the screen at a particular step in a procedure. Please note that your screen will not be exactly the same, and will be slightly different.



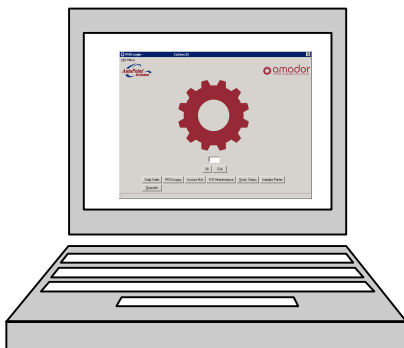
*Hi! I'm Amadorian, and you'll see me here and there throughout this document giving you important additional information.*

## Introduction

Remember the first word processing software packages that came out for the personal computers of the late 1980s? These programs revolutionized how documents were produced, which until then were typed out on a typewriter. These early word processors were a huge productivity improvement over having to use typewriters, but they weren't the easiest to use. They were text only, and what you saw on the screen bore little resemblance to what appeared on the printed page. You had to memorize dozens of keyboard commands, and most software packages included a keyboard overlay to help the user find all the commands needed to produce a document. It was still cumbersome, and was limited by the technology of the PC's operating system.



With the advent of operating systems with a graphical user interface (GUI) and the mouse to navigate the screen, programs had toolbars with icons and drop-down menus to select options and functions. Changing a font was as simple as point-and-click, and what you saw on the screen approximated what printed out. The GUI is now so entrenched in most people's experience of word-processing software, that going back to a text-only display and keyboard commands is unthinkable.



In much the same way as the evolution of word processing software, **AutoPoint®** has evolved over the years as a character-based interface to the latest (and last) version 4.5. The text-based version was highly optimized for text-only terminals and low network speeds. Today, GUI is the norm, and high-speed Internet is available just about everywhere. **AutoPoint®** has made the leap from a text-only user interface to a graphical one, and this newest version is appropriately named "**AutoPoint®** Evolution".

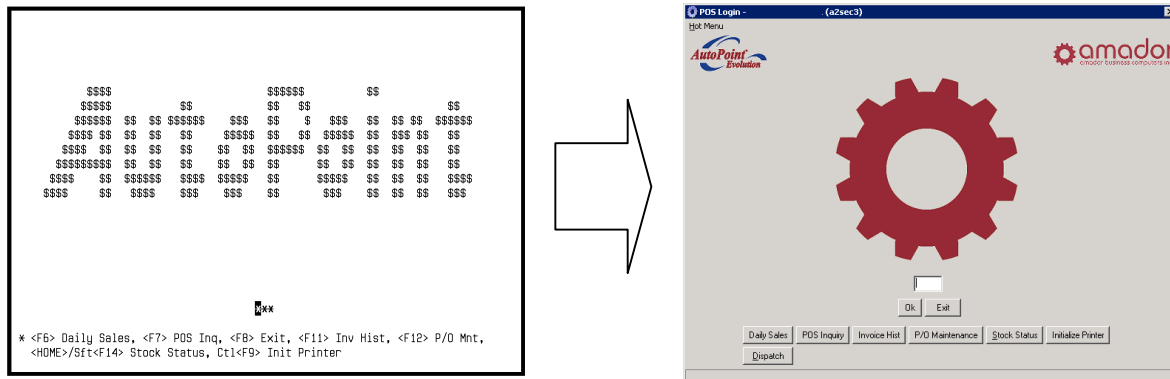
This *Quick Start Guide to AutoPoint® Evolution* was created to introduce the GUI interface to new and experienced users of **AutoPoint®**, focusing on navigation. For detailed information on how to use **AutoPoint®**, please refer to the **AutoPoint® Evolution User Manual**.



*The <TAB>, <ENTER> and <ARROW KEYS> are your best friends in Evolution! Although the interface is point-and-click, the mouse does not have to be used to move between fields and press buttons. Try using the keyboard shortcuts listed in this Guide to navigate through Evolution efficiently.*

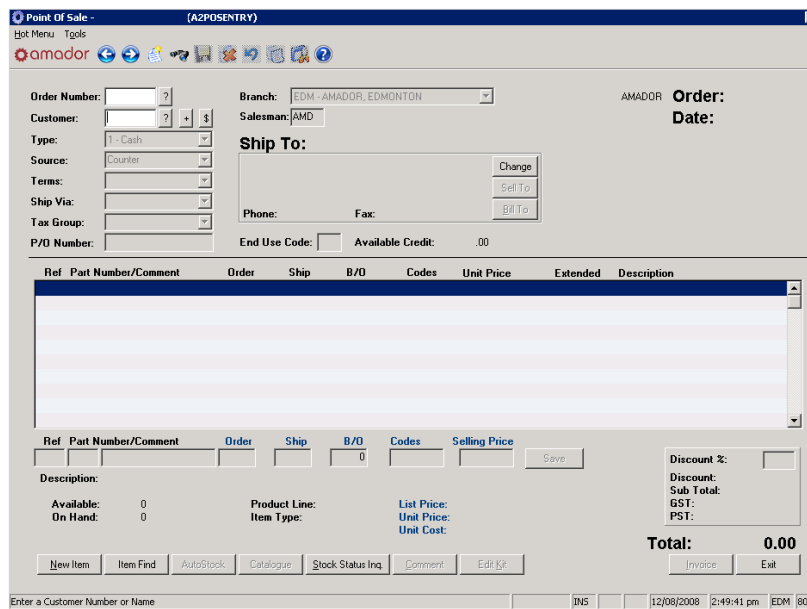
## A Note to Users of the Character-Based Version of AutoPoint®

In many respects, the GUI version of **AutoPoint®** is identical to the character-based version. The character screens and the graphical windows display information the same way, but more information and additional functions appear in the graphical version. Below is a side-by-side comparison of the Point-of-Sale security screens:



The layouts of the screens are very similar, except that the descriptions of function keys at the bottom of the text-based version are replaced by buttons on the GUI version.

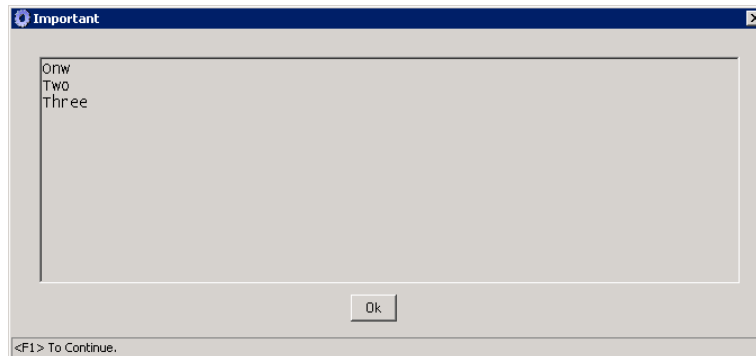
Most of the functions within **AutoPoint®** Evolution can be performed with the keyboard just the same as the character version of **AutoPoint®**. A good example of this is entering an order in Point-of-Sale. After entering your initials at the security screen, the POS entry screen will appear:



The cursor appears in the customer number field, where the number can be entered (if known), followed by pressing the <ENTER> key to go to the next field. The other fields in the header can

be changed or accepted from the keyboard by pressing the <ENTER> key. You can move back up or down through the fields by pressing <TAB> and ALT-<TAB>. Pressing <F4> will toggle the cursor between the header and the item details.

If the customer or part number has a note, a pop-up will appear:



Instead of clicking on the "OK" button to close the window, you can press the <F1> key.



*In many program or pop-up windows, you can see a tip in the bottom left corner of the window that explains what function keys are available.*

### Point-of-Sale and Quotes

Some other function keys that work the same in GUI as in the text version are as follows:

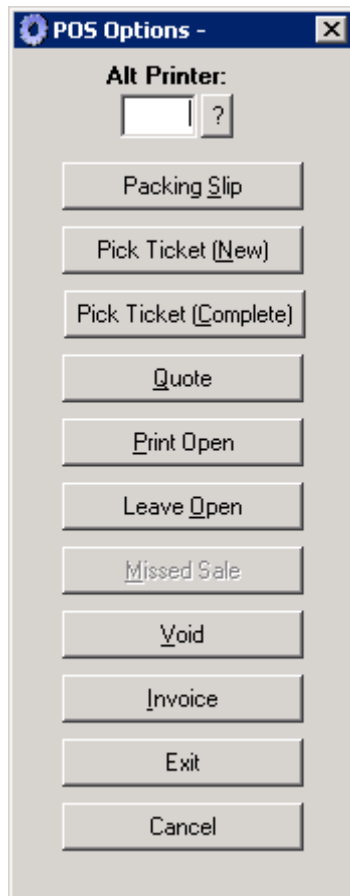
- In POS, <F7> can be used to access open orders, <F6> to bring up the cash customer, and CTRL-<F6> to add a new customer.
- When entering a comment, <F5> will bring up the Vendor Lookup and SHIFT-<F5> will bring up canned comments.
- Re-calculating the total on an invoice is done by pressing ALT-<T>.
- Special Orders are brought up by pressing ALT-<A>.
- Web Links are brought up by pressing ALT-<W>
- A Branch Transfer is entered by pressing CTRL-<F3> and Branch Transfer Inquiries are brought up by pressing SHIFT-<F3>.
- A buy-out or backorder is selected by pressing SHIFT-<F11>.
- The pop-up to display the Codes pop-up for a line item is brought up by pressing CTRL-<F11>.
- The Item Discount is entered by pressing CTRL-<F12>.
- In Stock Status Inquiry, <F9> can be used to view kit details.

When the order is complete and ready for invoicing, you can click on the "Invoice" button or press ALT-<I>.



*The <END> or <F14> key is not available in the GUI version to close an invoice. Some keys used in the text-version of **AutoPoint®** are reserved by the operating system, so the GUI version will use different keys. Please see the following section on GUI keyboard shortcuts for a complete listing.*

When invoicing the order, the following pop-up window will appear:



- If you enter an **Alt-Printer**, then the invoice will print on that printer instead of the default Invoice Printer set up the CRT record. Click on the "?" button to look up the alternate printer number.
- **Packing Slip** will print a packing slip on the packing slip printer, with items that have been added to an order.
- **Pick Ticket (New)** will print a pick ticket with items added to the order.
- **Pick Ticket (Complete)** will print a pick ticket with all items on the order.
- **Quote** is only available on a new order. It's used to convert the open order into a quote.
- **Print Open** will allow you to print the invoice without closing (invoicing) it.
- **Leave Open** allows you exit the invoice without printing or invoicing it.
- **Missed Sale**, if available, will record the order as a missed sale.
- **Void** will void the invoice.
- **Invoice** closes the invoice and sells the items to the customer, prompting for payment if required.
- **Exit** will leave an open order uninvoiced or exit a closed/voided invoice.
- **Cancel** will close this window and return you back to the order in the POS entry screen.

Quote Option...

Print Quote

Leave Open

POS Invoice

Exit

Cancel

- ## Purchase Order Maintenance

To search the PO details for a part number, enter a part number in the Search Entry fields in the bottom-left corner of the window, and press <ENTER>. This will start the search and highlight the first line with the part on it. Only exact matches are permitted.

PO Maintenance - (a2point)

Hot Menu

Branch: ESB - EASTERN BRANCH

PO Number: 282

PO Type: Generated

Supplier Id: AWI AUTO WAREHOUSE INC.

Ship Via: T - COMPANY TRUCK

Terms Code: 2 - 2% - 10TH PRIOK

Requested Ship: 12/28/99

Status: Pending

Operator:

Total Weight: 1

Times Received:

PO Number: 282

Date Created: 12/28/96

Date Released: 12/28/96

Date Received:

Totals

Datal Count	Ordered	27	Already Received	Receiving Selection
Exchange Value		22916.67		
Core Value		5320.00		
Total Value		28236.67		

1

AER

1306036

12

5.840

Date Expected:

Save Item

Select	Part Number	Quantity Ordered	Units	Weight	Unit Cost	Core Cost	Extended Cost	Description
16	BOS WR9LPL	164	EA	.00	2.899	.000	475.44	PLATINUM PLUG
17	BOS WR10LC	32	EA	.00	1.666	.000	53.31	SUPER PLUG
18	BOS WR10LCV	168	EA	.00	1.666	.000	279.89	SUPER PLUG
19	BOS SR23DX	36	EA	.00	133.841	50.000	6618.28	STARTER
20	BOS SR231X	30	EA	.00	136.315	50.000	5399.45	STARTER
21	BOS 40719A	72	EA	.00	4.803	.000	345.82	MICRO EDGE 19"
22	BOS 40722A	64	EA	.00	7.608	.000	486.91	MICRO EDGE 22"
23	BOS 43120A	50	EA	.00	5.440	.000	272.00	REFILL 2PK
24	BOS 43322	46	EA	.00	7.778	.000	357.79	REFILL 2PK
25	BOS 47716	66	EA	.00	5.653	.000	373.10	WINTER BLADE 16"

Description: 37618 MALE FLARELESS

Product Line: AERO

Comparison Price:

Total: 28,236.67

Qty Already Received: 0 EA

Quantity In Transit: 0 EA

Purchase Package: 1 EA

Status: Pending

Extended Weight: 0

In Purchase Qty: 12 EA

Date Received: 12/29/96

Date Recommended: 12/28/96

Return Type:

Search: BOS WR9LPL

New Item

Confirm

Release

Unrelease

Void

Discourt

Print PO

Receive PO

Special Orders

Warranty

Save Header

Enter the Part to Find

INS

NLM 12/29/2008

11:04:52 AM

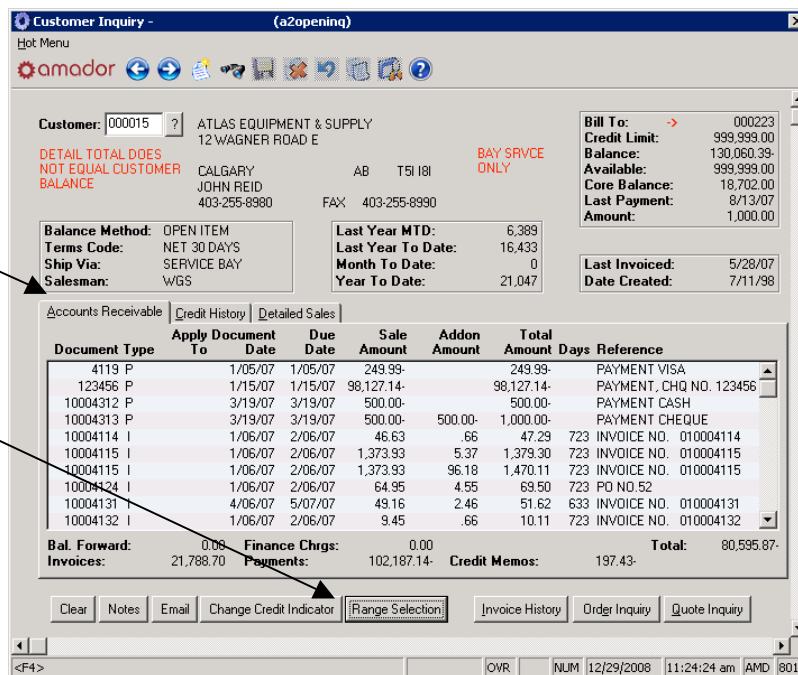
AMT



The shortcuts for entering a comment are similar to POS: enter a comma "," in the Part Number field, or click on the "Comment" button (ALT-<C>).

### Customer Inquiry

The Customer Inquiry "Range Selection" button can bring up one of two different windows. The range window that appears depends on which tab is selected:



**Customer Inquiry - (a2opening)**

Hot Menu

amador

Customer: 000015 ? ATLAS EQUIPMENT & SUPPLY  
12 WAGNER ROAD E  
CALGARY AB T5J 1B1  
403-255-8980 FAX: 403-255-8990

DETAIL TOTAL DOES NOT EQUAL CUSTOMER BALANCE

Balance Method: OPEN ITEM  
Terms Code: NET 30 DAYS  
Ship Via: SERVICE BAY  
Salesman: WGS

Last Year MTD: 6,389  
Last Year To Date: 16,433  
Month To Date: 0  
Year To Date: 21,047

Bill To: 000223  
Credit Limit: 999,999.00  
Balance: 130,060.39  
Available: 999,999.00  
Core Balance: 18,702.00  
Last Payment: 8/13/07  
Amount: 1,000.00

Last Invoiced: 5/28/07  
Date Created: 7/11/98

Accounts Receivable | Credit History | Detailed Sales

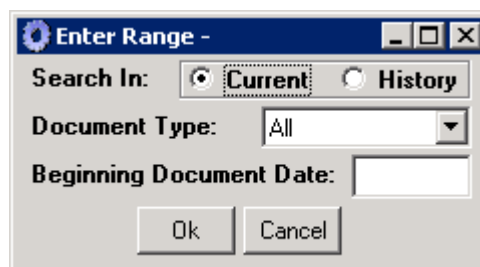
Document Type	Apply To	Document Date	Due Date	Sale Amount	Addon Amount	Total Amount	Days	Reference
4119 P		1/05/07	1/05/07	249.99		249.99		PAYMENT VISA
123456 P		1/15/07	1/15/07	98,127.14		98,127.14		PAYMENT, CHQ NO. 123456
10004312 P		3/19/07	3/19/07	500.00		500.00		PAYMENT CASH
10004313 P		3/19/07	3/19/07	500.00	500.00	1,000.00		PAYMENT CHEQUE
10004114 I		1/06/07	2/06/07	46.63	.66	47.29	723	INVOICE NO. 010004114
10004115 I		1/06/07	2/06/07	1,373.93	5.37	1,379.30	723	INVOICE NO. 010004115
10004115 I		1/06/07	2/06/07	1,373.93	96.18	1,470.11	723	INVOICE NO. 010004115
10004124 I		1/06/07	2/06/07	64.95	4.55	69.50	723	PD NO.52
10004131 I		4/06/07	5/07/07	49.16	2.46	51.62	633	INVOICE NO. 010004131
10004132 I		1/06/07	2/06/07	9.45	.66	10.11	723	INVOICE NO. 010004132

Bal. Forward: 0.00 Finance Chgs: 0.00  
Invoices: 21,788.70 Payments: 102,187.14 Credit Memos: 197.43 Total: 80,595.87

Clear Notes Email Change Credit Indicator **Range Selection** Invoice History Order Inquiry Quote Inquiry

<F4> OVR NUM 12/29/2008 11:24:24 am AMD 801

If you are on the "Accounts Receivable" tab, you will see the range with "Current" and "History" on it:



**Enter Range -**

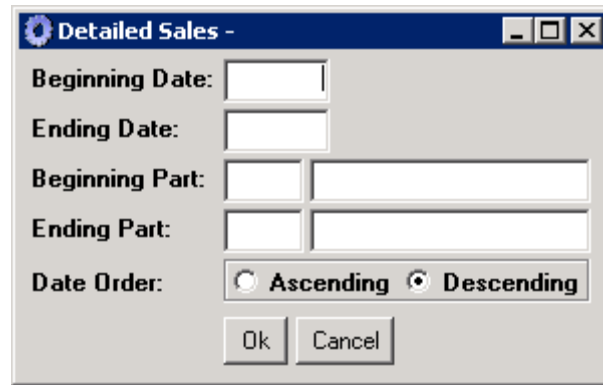
Search In: ☒ Current ☐ History

Document Type: All

Beginning Document Date:

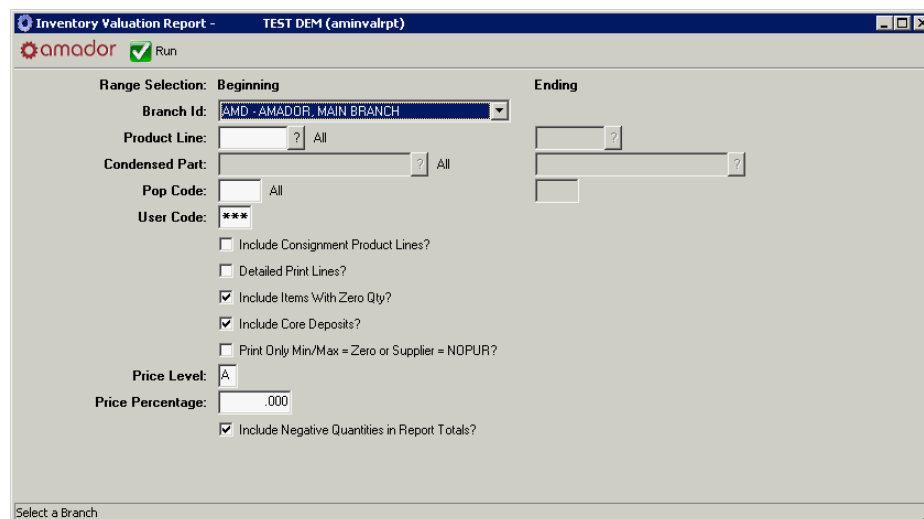
Ok Cancel

The "Detailed Sales" tab only displays details from history, so it permits you view the details in ascending or descending order:



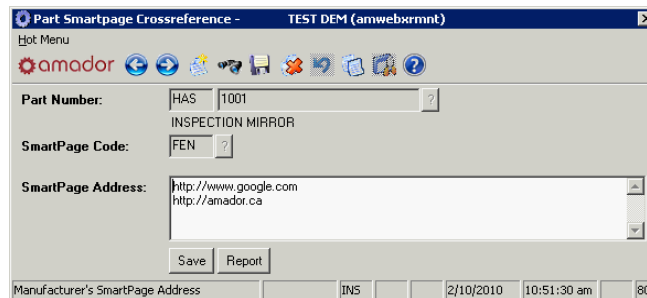
### One-Click Execution of Reports

When running a report, it can be run wide open with a single click by accepting the default ranges and options and clicking on the green "Run" button in the toolbar (or pressing the <F12> key.) The report ranges and options can be changed by clicking on them individually, without having to visit each field. The image below shows the default options and ranges for the Inventory Valuation report:



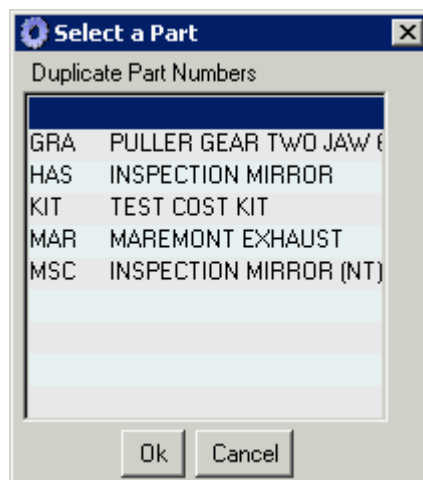
### ***Enhanced Web Links***

Multiple links can be set up for a part number, and when the web link is selected, a web browser will automatically launch with the first address set up for that part number.



### ***Item Abbreviation Not Required for Part Number Entry***

For any program with a part number double-field (abbreviation and condensed part number,) the cursor defaults to the condensed part number field. The abbreviation field can be accessed by pressing SHIFT-<TAB> or clicking on it, but it is not necessary to enter the abbreviation in this field. Either the condensed part number can be entered alone or the 3-character abbreviation can be entered together with the condensed part number, and the system will automatically move the 3-character abbreviation over to the abbreviation field after pressing <ENTER>. If the condensed part number has multiple abbreviations, and only the part number is entered, a pop-up will appear asking the user to select an abbreviation/product line:



### **HotMenu**



In the text version of **AutoPoint®**, you could jump out to other programs without backing out of the current programs by pressing the <TAB> key and bringing up the HotMenu. Evolution has the HotMenu as well, but instead of pressing the <TAB> key, the user clicks on the orange Hotmenu icon or presses ALT-<H>. This will bring up a drop-down menu similar to the one that appears in the text version, and other programs can be started without exiting the current window. As with the text version, only the top window is active, and to return to other windows, you will have to close out of the top window.

### **Other Programs**

Other **AutoPoint®** programs have been translated as close as possible from the text version, but in many cases the GUI version has modifications that take advantage of the graphical interface (for example, more information can be displayed on the screen.) The Main Menu, described further in this manual, has several enhancements that make it easier to get to the menus and programs you need to run. The "Select:" prompt works the same way as in the character version, so you can use the same menu shortcuts (listed at the end of this guide.)

## GUI Keyboard Shortcuts

- There are a number of Windows-standard short cut keys that function the same in **AutoPoint®** Evolution as they do in other Windows applications:

CTRL-<X> - Cut selected text.  
CTRL-<C> - Copy selected text.  
CTRL-<V> - Paste selected text.

SHIFT-<HOME>/<END>/<ARROW> keys – Allows you to select range of text.  
CTRL-<RIGHT ARROW> - Move the cursor to the beginning of the next word.  
CTRL-<LEFT ARROW>- Move the cursor to the beginning of the previous word.  
<TAB> – Move forward through input fields and buttons.  
SHIFT-<TAB> – Move back words through input fields and buttons.  
<HOME> - Puts the cursor at the beginning of the line of text.  
<END> - Puts the cursor at the end of the line of text.  
CTRL-<HOME> - Puts the cursor at the beginning of the first line of the paragraph.  
CTRL-<END> - Puts the cursor at the end of the last line of the paragraph.

- Global keystrokes that will work from any window and are Windows standard short cuts:

ALT-<F4> – Close current window.  
ALT-<TAB> – Cycle forwards through open windows.  
ALT-SHIFT-<TAB> – Cycle backwards through open windows.  
ALT-<Underline Letter in Menu Name> - Display the corresponding menu.  
<ESC> - Cancel the current task.  
<ENTER> - Accept the default value and move the cursor to the next field.

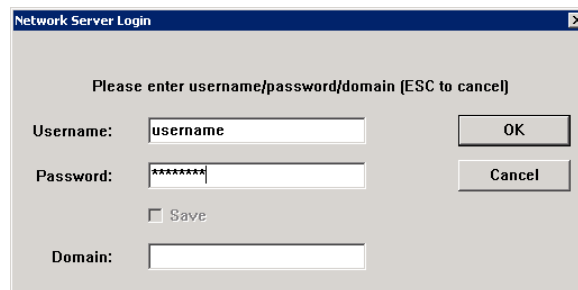
- Function keys along the top of the keyboard can be used to perform actions similar to how they worked in the character version:

<F1> - Bring up the first record in a program or close a note pop-up window.  
<F2> - Bring up the next record.  
<F3> - Bring up the previous record.  
<F5> - When pressed in a field with a "?" button, will bring up the look-up.  
<F8> - Cancel or back out of a program.  
<F12> - Run a program selected in a menu, works the same as clicking on "Run". In file maintenance windows, <F12> will save the current record.

## The Main Menu

### Logging into AutoPoint®

When you first log into **AutoPoint®** by double-clicking on the icon for **AutoPoint®** Evolution to launch the program, you will see the following prompt:



Network Server Login

Please enter username/password/domain (ESC to cancel)

Username:  OK

Password:  Cancel

☐ Save

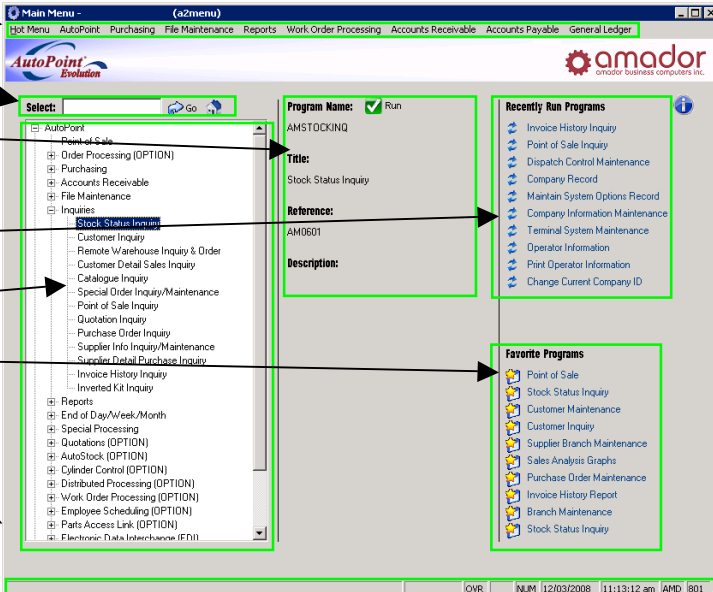
Domain:

Enter your username and password and press <ENTER> or click on the "OK" button. The main menu screen will then appear.

### Parts of the Main Menu

The main menu window is pictured below, along with descriptions of the different parts:


- Menu Bar
- "Select:" Prompt
- Current Program Name, Title & Menu Reference
- Recently Used Programs
- Menu Tree
- Favourite Programs
- Status Bar



The image shows the Main Menu window with various components highlighted by green boxes and labeled with arrows from the list on the left. The components include:

- Menu Bar:** Located at the top of the window, containing options like Hot Menu, AutoPoint, Purchasing, File Maintenance, Reports, Work Order Processing, Accounts Receivable, Accounts Payable, and General Ledger.
- "Select:" Prompt:** A prompt box with a "Go" button, used for selecting a program.
- Current Program Name, Title & Menu Reference:** A section displaying the selected program's details, including Program Name (AMSTOCKING), Title (Stock Status Inquiry), Reference (AM0601), and Description.
- Recently Used Programs:** A list of programs that have been used recently, such as Invoice History Inquiry, Point of Sale Inquiry, and Dispatch Control Maintenance.
- Menu Tree:** A hierarchical list of programs and options, including Point of Sale, Order Processing (OPTION), Purchasing, Accounts Receivable, File Maintenance, Inquiries, Customer Inquiry, Remote Warehouse Inquiry & Order, Customer Detail Sales Inquiry, Catalogue Inquiry, Special Order Inquiry/Maintenance, Point of Sale Inquiry, Quotation Inquiry, Purchase Order Inquiry, Supplier Info Inquiry/Maintenance, Supplier Detail Purchase Inquiry, Invoice History Inquiry, Inverted Kit Inquiry, Reports, End of Day/Week/Month, Special Processing, Quotations (OPTION), AutoStock (OPTION), Cylinder Control (OPTION), Distributed Processing (OPTION), Work Order Processing (OPTION), Employee Scheduling (OPTION), Parts Access Link (OPTION), and Electronic Data Interchange (EDI).
- Favourite Programs:** A list of programs that have been marked as favorites, including Point of Sale, Stock Status Inquiry, Customer Maintenance, Customer Inquiry, Supplier Branch Maintenance, Sales Analysis Graphs, Purchase Order Maintenance, Invoice History Report, Branch Maintenance, and Stock Status Inquiry.
- Status Bar:** Located at the bottom of the window, displaying system information such as OVR, NUM, 12/03/2008, 11:13:12 am, AMD, 801.

On the Main Menu screen there are numerous sections and short cuts to navigating within ***AutoPoint®***.

- 
- The screenshot displays the 'a2menu' application interface. At the top, a dark blue header bar contains the text 'Main Menu - (a2menu)'. Below this, a horizontal menu bar lists several categories: 'Hot Menu', 'AutoPoint', 'Purchasing', 'File Maintenance', 'Reports', 'Work Order Processing', and 'Accounting'. On the left side, there is a vertical sidebar with the 'AutoP' logo and a 'Select:' label. The main area of the application shows a hierarchical menu structure. The 'Inquiries' option under the 'AutoPoint' category is selected, which has opened a submenu. This submenu lists various inquiry options, with 'Stock Status Inquiry' being the first item. Below the main menu area, there is a 'Description:' label, which is partially visible at the bottom of the frame.
- | Main Menu - (a2menu)   |  |
|--|--|
| Hot Menu   |  |
| AutoPoint  |  |
| Purchasing   |  |
| File Maintenance   |  |
| Reports  |  |
| Work Order Processing  |  |
| Accounting   |  |
| <div>  <div> <div>Point of Sale</div> <div>Order Processing</div> <div><b>Inquiries</b></div> <div>End of Day/Week/Month</div> <div>Special Processing</div> <div>Quotations</div> <div>AutoStock</div> <div>Distributed Processing</div> <div>Employee Scheduling</div> <div>Parts Access Link</div> <div>Electronic Data Interchange (EDI)</div> <div>Road Show</div> </div> </div> |  |
| <div> <div> <div>Stock Status Inquiry</div> <div>Customer Inquiry</div> <div>Remote Warehouse Inquiry &amp; Order</div> <div>Customer Detail Sales Inquiry</div> </div> <div> <div>Supplier Info Inquiry/Maintenance</div> <div>Supplier Detail Purchase Inquiry</div> <div>Invoice History Inquiry</div> <div>Inverted Kit Inquiry</div> </div> </div>  |  |
| <div> <div>Select:</div> <div> <div>- Au</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>-</div> </div> </div>  |  |
| <div> <div> <div>Stock Status Inquiry</div> <div>Customer Inquiry</div> <div>Remote Warehouse Inquiry &amp; Order</div> <div>Customer Detail Sales Inquiry</div> </div> <div> <div>Supplier Info Inquiry/Maintenance</div> <div>Supplier Detail Purchase Inquiry</div> <div>Invoice History Inquiry</div> <div>Inverted Kit Inquiry</div> </div> </div>  |  |
| <div> <div>Description:</div> </div>   |  |

- |  |  |     |     |     |            |            |     |     |
|--|--|-----|-----|-----|------------|------------|-----|-----|
|  |  | OVR | CAP | NUM | 12/03/2008 | 4:43:09 pm | VAN | 800 |
|--|--|-----|-----|-----|------------|------------|-----|-----|

- AutoPoint®** Evolution – Main Menu & Navigation Quick Start Guide

- **Recently Run Programs:** Lists the last 10 used programs in reverse chronological order. Click on the program name in blue to launch it.

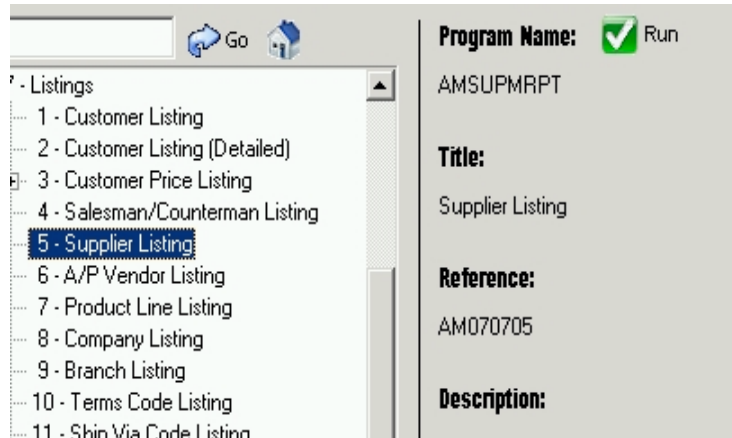


- **Favorite Programs:** List of frequently used programs that you can customize. To change the program in a slot, drag the program name from the Menu Tree into the slot (the cursor will change to a "↑".)





- **Current Program Information:** Section which lists the program name, title, a quick reference to it's location in the menu, and description.



The example above lists the program name (AMSUPMRPT) the program title (Supplier Listing) and it's menu location (AM070705).

- **"Select:" Prompt:** From the "Select" prompt, type in the program name or the shortcut (see list of shortcuts at the end of this guide) and press the <ENTER> key or click on "Go". *NOTE: security field 50 must be 1 or higher to run programs by name.*



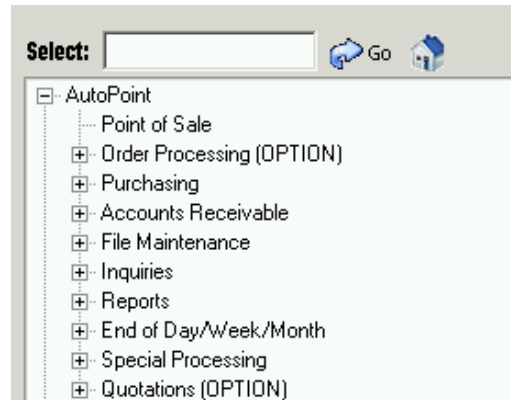
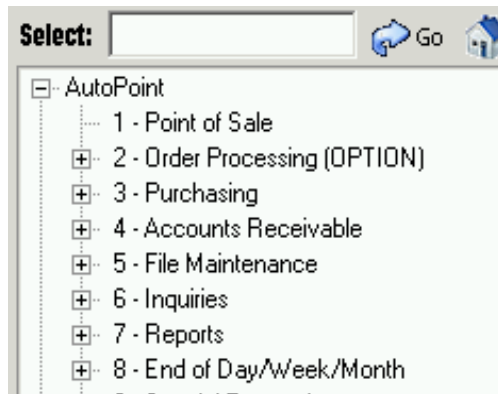
If the Menu Tree is displaying only a sub-menu, then click on the "Home" icon to change the menu tree back to displaying the main menu.

- **Menu Tree:** This section displays the menu tree, which can be expanded or collapsed by clicking on the "+" sign. Double-clicking on the menu item will expand a sub-menu or launch a program. The keyboard can be used to navigate the menu tree by using the up and down arrow keys to select a menu item, and the left/right keys to expand/collapse a submenu. Pressing <ENTER> will launch the program selected.

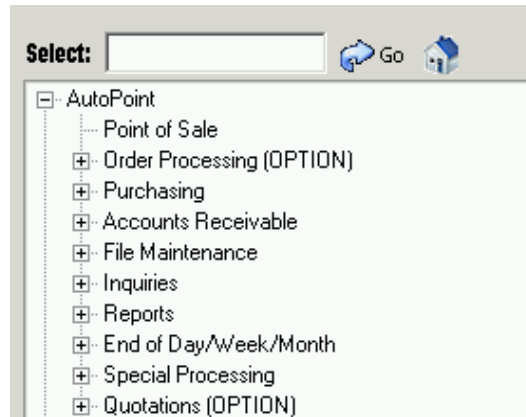
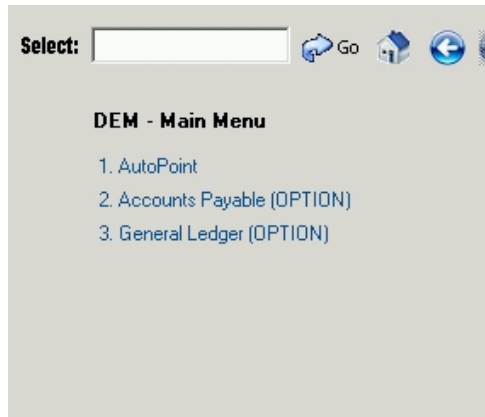
### Menu Types

There are currently two GUI Menu Types for **AutoPoint®** Evolution which are defined by the user login record. Toggling between the two chosen types can be performed with the <F6> key at the Main Menu.

- **Numbered/Tree** – Numbered menu options and standard tree type menu structure:



- **Classic/Alpha** – Classic text version of **AutoPoint®** menu and Alpha Tree menu structure:



The Classic version is the recommended version to be used as it is more familiar to text version of **AutoPoint®**.

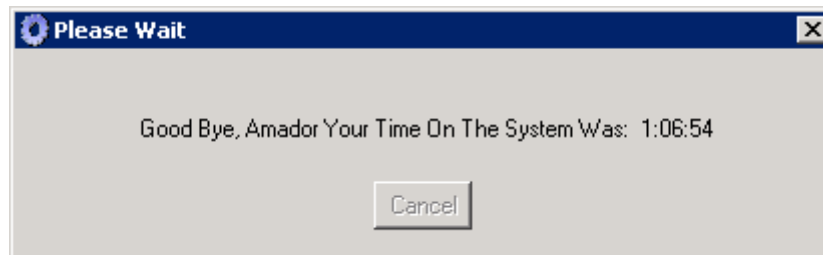
Menu items with a "+" beside them can be expanded to show the tree structure clicking the plus sign with the mouse, double clicking on the menu item or having the item selected and pressing the "+" on the numeric keypad.

#### Logging out of AutoPoint®

You can log out of **AutoPoint®** by typing in "EXIT" or "BYE" at the "SELECT:" prompt and pressing <ENTER>.

You can also log out of **AutoPoint®** by clicking on the "X" in the top right corner of the window.

When you log out, you will see the following:



#### Tool Bar Icons







At the top of most program windows is a menu bar with icons for different functions (pictured below.)









*If you hover your pointer over the button, a tool tip box will appear with the description and keyboard shortcut.*

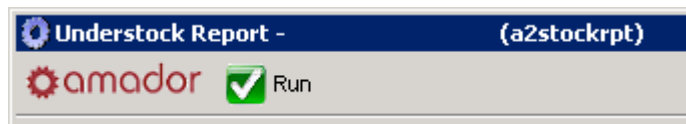



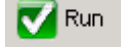
Clicking on these icons performs a different function:

-  Brings up the Hot Menu to jump to another program or menu (click on it to bring up the drop-down menu or press ALT-<H>).
-  Links to Amador's web site (Internet connection required.)
-  Brings up the previous record (functions like <F3>.)
-  Brings up the next record (functions like <F2>.)
-  Create new record.
-  Search or Start. Find the first record (functions like <F1>.)

-  Saves record (function key <F12>).
-  Deletes the record (shortcut key ALT-<D>).
-  Undo - Not used at this time.
-  Copy/Rename the record (shortcut key ALT-<R>).
-  Not used at this time.
-  Bring up Help document for this function.

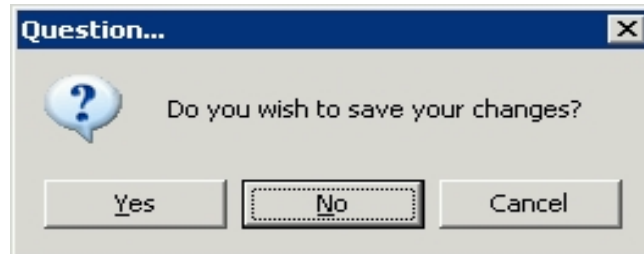
At the top of report windows, the toolbar appears as below:



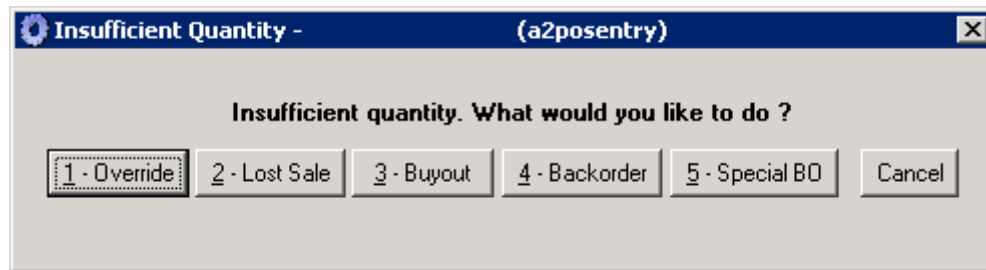
-  Links to Amador's web site (Internet connection required.)
-  Runs the report (function key <F12>.)

### **Pop-Up Dialog Boxes**

In pop up dialog boxes, the default action button (Ok, Cancel, etc.) is highlighted with a dotted box around the button selection:



The default action can be taken by pressing either the space bar or the <ENTER> key. Alternatively, pressing the <TAB> key or the left/right arrow keys will allow you to change to a new selection button within that window, which can also be "pressed" with space bar or <ENTER> key.



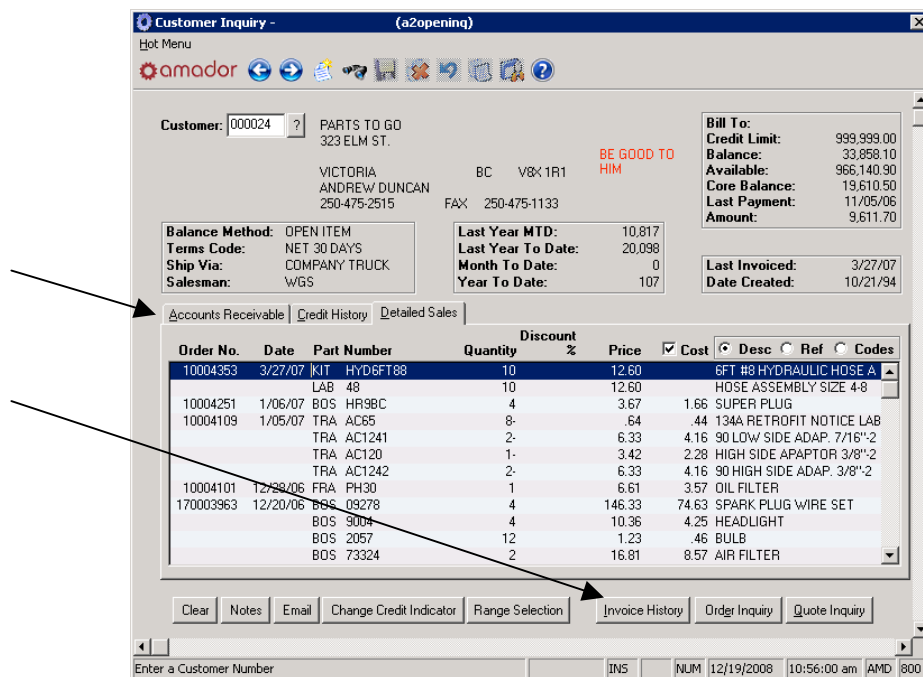
In most pop-ups, a button can be selected by typing the underlined letter/number on the button's title. In the above example, you can select "Override" by typing a "1".

## New Features in GUI not Available in the Text Version

The graphical interface allows for new ways to display and link information in **AutoPoint®**, and the following describes some new features that take advantage of the GUI.

### Enhanced Customer Inquiry Screen

The customer inquiry screen (AM0406) organizes the Accounts Receivable, Credit History and Detailed Sales as separate tabs:



**Customer Inquiry - (a2opening)**

Hot Menu

Customer: 000024 ? PARTS TO GO 323 ELM ST. BC V8X 1R1 BE GOOD TO HIM  
VICTORIA ANDREW DUNCAN 250-475-2515 FAX 250-475-1133

Balance Method: OPEN ITEM 10.817  
Terms Code: NET 30 DAYS Last Year MTD: 20.098  
Ship Via: COMPANY TRUCK Last Year To Date: 0  
Salesman: WGS Month To Date: 107  
Year To Date: 107

Bill To: 999,999.00  
Credit Limit: 33,858.10  
Balance: 966,140.90  
Available: 19,610.50  
Core Balance: 11/05/06  
Last Payment: 9,611.70  
Amount: 3/27/07  
Date Created: 10/21/94

Accounts Receivable | Credit History | Detailed Sales

Order No.	Date	Part Number	Quantity	Discount %	Price	Cost	Desc	Ref	Codes
10004353	3/27/07	KIT HYD6FT88	10		12.60		6FT #8 HYDRAULIC HOSE A		
		LAB 48	10		12.60		HOSE ASSEMBLY SIZE 4-8		
10004251	1/06/07	BOS HR98C	4		3.67	1.66	SUPER PLUG		
10004109	1/05/07	TRA AC65	8-	.64	.44		134A RETROFIT NOTICE LAB		
		TRA AC1241	2-	6.33	4.16		90 LOW SIDE ADAP. 7/16"-2		
		TRA AC120	1-	3.42	2.28		HIGH SIDE APARTOR 3/8"-2		
		TRA AC1242	2-	6.33	4.16		90 HIGH SIDE ADAP. 3/8"-2		
10004101	12/98/06	FRA PH30	1	6.61	3.57		OIL FILTER		
170003963	12/20/06	BOS 09278	4	146.33	74.63		SPARK PLUG WIRE SET		
		BOS 9004	4	10.36	4.25		HEADLIGHT		
		BOS 2057	12	1.23	.46		BULB		
		BOS 73324	2	16.81	8.57		AIR FILTER		

Clear Notes Email Change Credit Indicator Range Selection Invoice History Order Inquiry Quote Inquiry

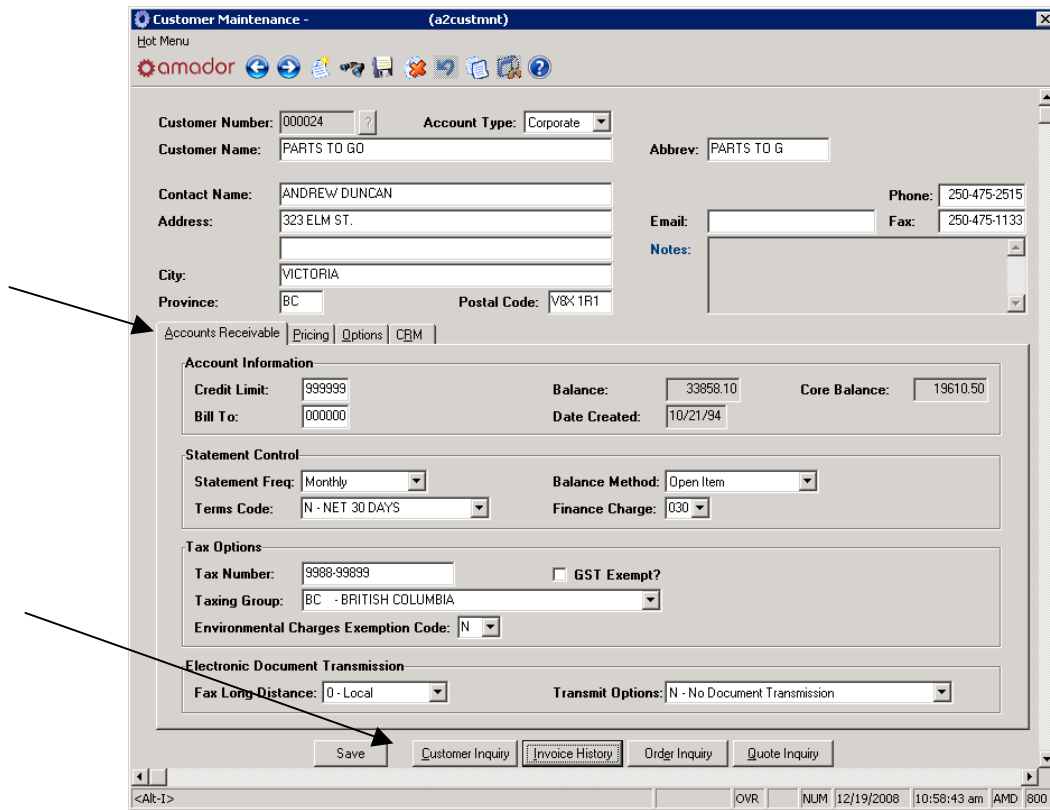
Enter a Customer Number INS NUM 12/19/2008 10:56:00 am AMD 800

As well, one-click access to Invoice History, Order Inquiry and Quote Inquiry for this customer are available as buttons at the bottom-right of the window.

To view the invoice details directly from Customer Inquiry, simply double-click on the document number in the "Order No." column (this works the same way from the Detail Sales Inquiry screen, as well.)

#### Enhanced Customer Maintenance Screen

The Customer Maintenance (AM0408) screen has organized the Accounts Receivable, Pricing, Options and CRM fields on separate tabs:



One-click access to Customer Inquiry, Invoice History, Order Inquiry and Quote Inquiry are available as buttons on the bottom of the window.

#### Drill-down Access to other Inquiry Screens from Stock Status Inquiry

When viewing the list in the History tab, it is possible to view more information from a line from the list by selecting it and then selecting the appropriate inquiry screen from the Hot Menu drop-down menu.

For example, to view the details on an invoice number that appears in History, click on the line in the list to select it, and then click on the Hot Menu drop down menu and select "Invoice History" from the Inquiries menu. The Invoice History Inquiry screen will appear with the invoice number from the line selected. Double-clicking on the invoice number will have the same effect.

Similarly, if receiving history is displayed from the History tab in Stock Status inquiry, you can view the details of the purchase order by double-clicking on the PO number or selecting the detail line and then selecting Purchase Order Inquiry from the Hot Menu.

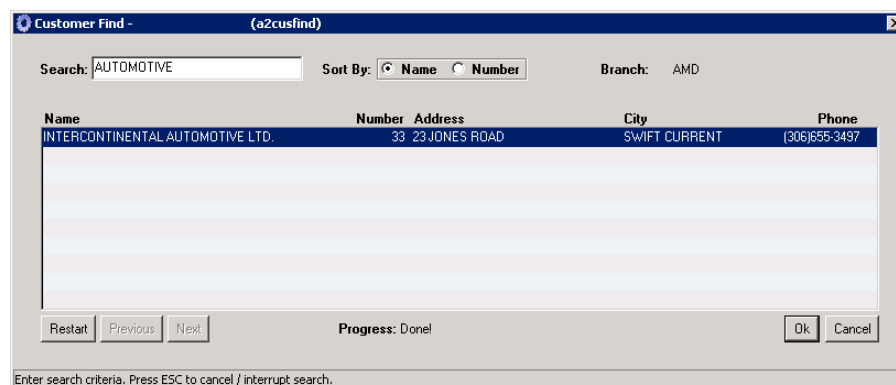
### **Consistent Part and Customer Lookups Throughout all Programs**

The part number and customer lookups (clicking on the "?" button next to the part number of customer number fields) brings up the same search window from all programs. That is, the search window is the same whether it is called from programs like POS Entry, Quotes Entry, Stock Status Inquiry, Purchase Order Maintenance and Reports.

The default behaviour of the searches is to do a Google-like search on all of the record. That is, if you are performing a search for a partial phone number in the Customer Find window, any number that matches in any record will be found and listed. For example, if you searched for "12345", the results would include the customer number 12345, addresses that were on 12345 - 99 St., and the phone number (555)551-2345.

### **Customer Number Find**

You can use the "Sort by Name/Number" radio buttons to change the search type. If you choose to "Sort by Name", then the search looks for matching values. If you choose "Sort by Number" then it is actually only a listing of customers starting with the number you entered (if you entered text, then it starts at the beginning.)



The screenshot shows the 'Customer Find' window with the following details:

- Search:** AUTOMOTIVE
- Sort By:** Name (selected), Number
- Branch:** AMD

Name	Number	Address	City	Phone
INTERCONTINENTAL AUTOMOTIVE LTD.	33	23 JONES ROAD	SWIFT CURRENT	(306)655-3497

At the bottom, there are buttons for 'Restart', 'Previous', 'Next', 'Progress: Done!', 'OK', and 'Cancel'. A footer note says: 'Enter search criteria. Press ESC to cancel / interrupt search.'

### **Item (Part Number) Find**

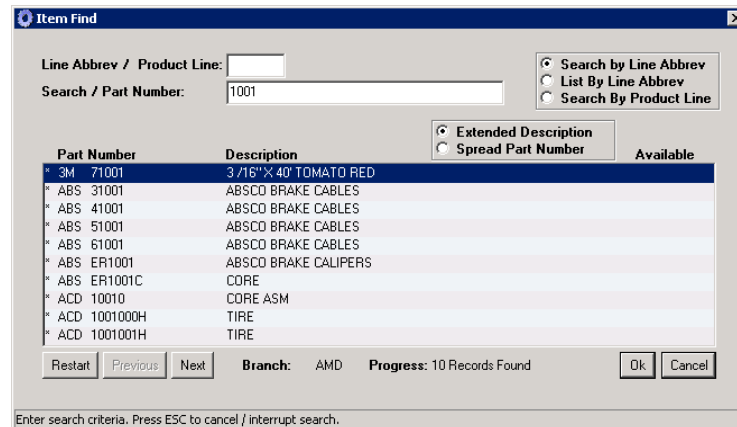
When doing an item search, you can improve the speed of the search by limiting it to the "Line Abbrev" that you are interested in. To do this, enter a product line abbreviation in the calling program and then performing the lookup, or enter a "Line Abbrev" in the search window, and select the "Search By Line Abbrev" radio button.

If you select the "List by Line Abbrev" radio button, it will start a list of part numbers starting with the value you entered and list any part numbers that follow in alphabetical order.

If you select "Search By Product Line", it will limit the search to the product line you entered (similar to "Search By Line Abbrev"), but the results are in Pick Sequence order.



The "Extended Description/Spread Part Number" radio buttons will change the data in that column to the selected value.



The screenshot shows the 'Item Find' window with the following details:

- Line Abbrev / Product Line:** (Empty field)
- Search / Part Number:** 1001
- Search Options:**
  - ☒ Search by Line Abbrev
  - ☐ List By Line Abbrev
  - ☐ Search By Product Line
- Display Options:**
  - ☒ Extended Description
  - ☐ Spread Part Number
- Table:**

Part Number	Description	Available
* 3M 71001	3/16" X 40' TOMATO RED	
* ABS 31001	ABSCO BRAKE CABLES	
* ABS 41001	ABSCO BRAKE CABLES	
* ABS 51001	ABSCO BRAKE CABLES	
* ABS 61001	ABSCO BRAKE CABLES	
* ABS ER1001	ABSCO BRAKE CALIPERS	
* ABS ER1001C	CORE	
* ACD 10010	CORE ASM	
* ACD 1001000H	TIRE	
* ACD 1001001H	TIRE	
- Buttons:** Restart, Previous, Next, Ok, Cancel
- Branch:** AMD
- Progress:** 10 Records Found
- Footer:** Enter search criteria. Press ESC to cancel / interrupt search.



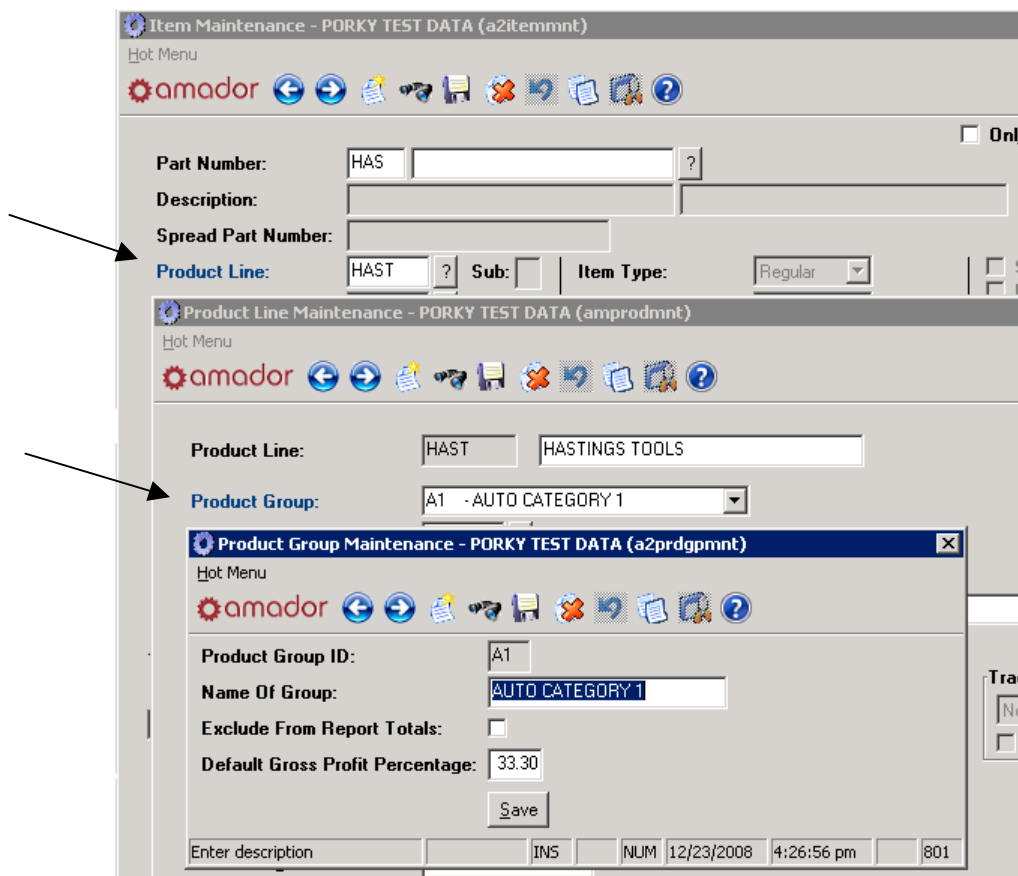
*In POS and Quote entry, the Item Find window is called up by pressing <F11>, in addition to the usual <F5> lookup key.*

### General Tips for Searching

- Do not use dashes "-" or parenthesis "(" )" in phone numbers.
- To do a leading character search (i.e. you know how it starts but not how it ends), end the search string with an asterisk "\*" – e.g. "ANDREWS\*"
- To do a trailing character search (i.e. you know how it ends but not how it starts), start the search string with an asterisk "\*" – e.g. "\*ANDREWS"
- To search for multiple search terms, separate the search terms by a space " ". This will perform an exclusive "AND" search on all of the items entered. The order of the items does not matter – e.g. "123 45 ANDREWS SMITH" can find "45123 Smith Andrews Contracting".

#### Clickable Field Names and Column Titles Link to other Programs

Some of the field labels and table column titles are blue-coloured, indicating that they are clickable links to other programs, usually file maintenance programs. The keyboard shortcut is SHIFT-**<F5>** when the cursor is in the field with a blue label. Pictured below is the Item Maintenance screen. Clicking on the "Product Line" field label will bring up the Product Line Maintenance program. After entering the product line you are interested in, you can click on the blue label, "Product Group". This brings up the Product Group Maintenance screen. To return to the Item Maintenance screen, you can click on the "X" in the top right corner or press **<F8>**.



The screenshot displays three windows from the Amador software:

- Item Maintenance - PORKY TEST DATA (a2itemmnt)**: This is the background window. It has a 'Hot Menu' bar with the Amador logo and navigation icons. Fields include 'Part Number' (HAS), 'Description', 'Spread Part Number', 'Product Line' (HAST), 'Sub' (?), 'Item Type' (Regular), and 'Only' checkbox.
- Product Line Maintenance - PORKY TEST DATA (amprodmnt)**: This window is overlaid on the first. It has a 'Hot Menu' bar. Fields include 'Product Line' (HAST), 'Product Group' (A1 - AUTO CATEGORY 1), and a 'Trac' checkbox.
- Product Group Maintenance - PORKY TEST DATA (a2prdgpmt)**: This is the foreground window. It has a 'Hot Menu' bar. Fields include 'Product Group ID' (A1), 'Name Of Group' (AUTO CATEGORY 1), 'Exclude From Report Totals' checkbox, and 'Default Gross Profit Percentage' (33.30). A 'Save' button is at the bottom.

Arrows in the image point to the blue-colored 'Product Line' field in the first window and the blue-colored 'Product Group' field in the second window, indicating they are clickable links.



The blue-label links are also used in POS and Quote Entry, but the keyboard shortcuts are not always SHIFT-**<F5>**. To see what the keyboard shortcuts are in these programs, look under the "Tools" menu at the top of the window.



***Create a Quote or POS Order from Stock Status Inquiry***

After bringing up a part number in Stock Status Inquiry, the part number can be brought over to a new Quote or POS order by going to the Hot Menu → Point of Sale or Hot Menu → Quotations. After entering your initials and selecting a customer, the first part number will be filled in automatically with the part number entered in Stock Status Inquiry. The part number can also be added to an existing quote or POS order by selecting the open quote/order for that customer.

***Pass a Part Number from Item Maintenance or Stock Status Inquiry to P.O. Maintenance***

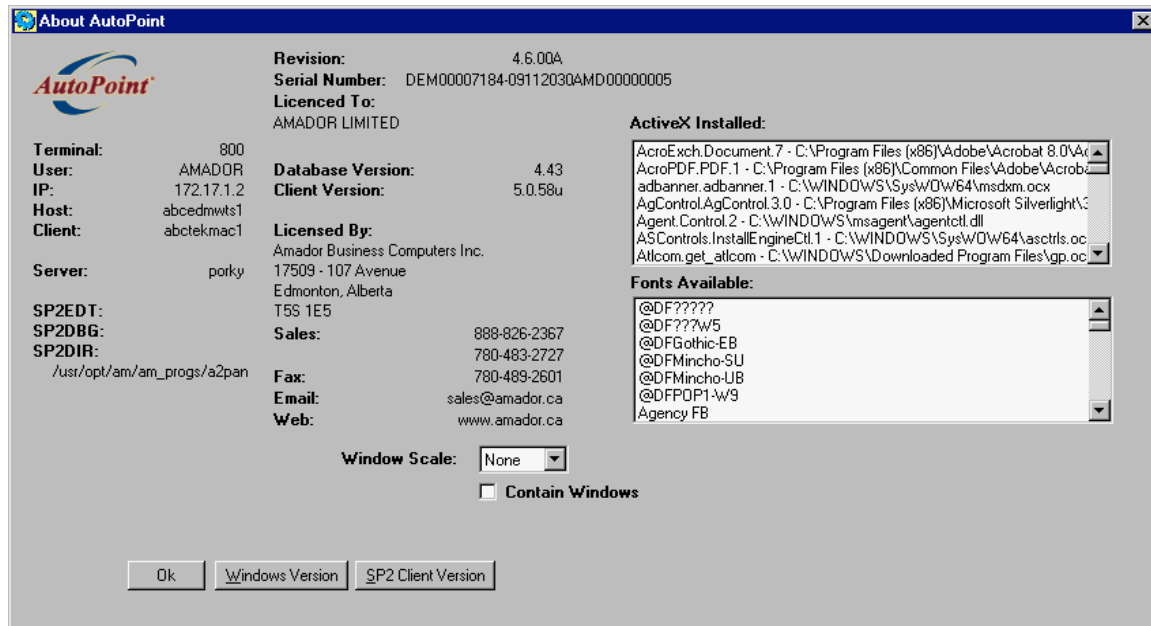
With the cursor in a blank part number field in Purchase Order Maintenance, go to Hot Menu → File Maintenance → Item Maintenance or Hot Menu → Stock Status Inquiry and bring up the desired part number. Exit from the Item Maintenance or Stock Status Inquiry screen with the part number desired, and the it will be passed to the part number field back in Purchase Order Maintenance.

***Look up Customer Part Numbers in Stock Status Inquiry from a Quote or POS Order***

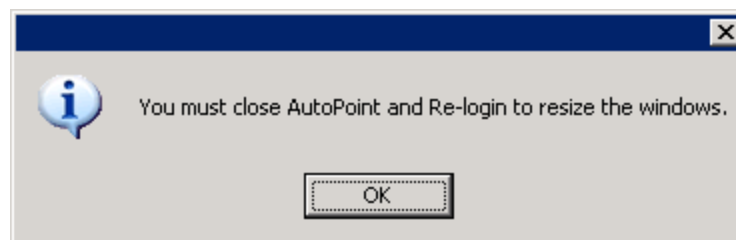
If a customer part number is entered in the part number field in Quotes or POS, clicking on the Stock Status Inquiry button will display the cross-referenced part number.

### Changing Window and Font Size

It is possible to change the window and font size of the Evolution program to better fit your display. To do this, press the <F1> key at the Main Menu or click on the "I" in the upper-right corner. The following window will display:



Click on the down arrow next to "Window Scale" to enable or disable it. To lock the windows and font size to the standard 1024X768 resolution, leave the Window Scale at "None". To allow windows size and font scaling depending on your PC's display resolution, change the Window Scale to "Yes". When you change the window scale, you will be prompted:



Click on "OK", close out of Evolution and log in again. If you don't like the new scaling, repeat the steps above to change the Window Scale field back to "None".



You can maximize the Main Menu screen in Evolution, and check the box next to "Contain Windows" to keep all program windows and pop-ups within the screen.



## Menu and Program Shortcuts

There are numerous short cuts that work in both Evolution and text version of **AutoPoint®**. This is not an exhaustive list but does contain the often used short cuts to menus and programs. Type the shortcut into the field next to "Select:" and press <ENTER>.

Menu Item	Menu Shortcut
<i>Accounting/Financial</i>	
Accounts Receivable Menu	AR
Cash Drawer Report	CASH
End of Day	EOD
End of Month	EOM
General Ledger Menu	GL
Accounts Payable Menu	AP
<i>Inquiries</i>	
Catalogue Inquiry	CAT
Customer Backorder Menu	BO
Inquiry Menu	INQ
Stock Status Inquiry	IQ
<i>Maintenance</i>	
Customer Maintenance	CM
File Maintenance	FM or FILE
Item Branch Maintenance	IB
Item Master Maintenance	IM
Multi-Branch Maintenance	MINMAX
Purchase Order Maintenance	PUR or POM
<i>Reports</i>	
Reports Menu	REP or RPT
Physical Inventory Menu	INV
Listing Menu	LIST
<i>Purchasing/Inventory</i>	
Inventory Adjustments	ADJ
PO Recommendations	POR
Order Processing	POS or OE
Purchasing Menu	PO, BUY or PURCH
Merchandise Receiving	REC
<i>Miscellaneous</i>	
Labels Menu	LAB or LABELS
Change Branch	CB
Change Company	CC
Price Updates	PRICE
Queue Operations	QUE
Special Processing	SP
Quotes	QUOTE
Work Orders	WO