



EPC
Electronic Parts Catalogue
User Guide

EPC Software Version 1.6

Copyright/Trademark Information

ProQuest Business Solutions, Inc. reserves the right to change the performance specifications of its software to meet industry requirements. Software enhancements may not always be reflected in the documentation.

Software

ProQuest Business Solutions, Inc. is the owner of and has vested in the copyright and all other intellectual property rights of a similar nature relating to its software, which includes, but is not limited to, ProQuest Business Solutions' computer programs, user manuals and all associated documentation, whether in printed or electronic form (the "Software"), which is supplied by ProQuest Business Solutions or its subsidiaries to their respective customers. No copying or reproduction of the Software shall be permitted without the prior written consent of ProQuest Business Solutions, save to the extent permitted by law.

Trademarks

Microsoft, Windows, and Windows NT are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Use

The Licensee shall follow all instructions given to it by ProQuest Business Solutions, Inc. from time to time in relation to the use of copyright, the ProQuest Business Solutions Trademarks, and all similar property rights in the Software. All rights in respect of ProQuest Business Solutions' Trademarks and all rights in respect of the copyright of the Software are reserved.

Copyright © 1999 - 2002 ProQuest Business Solutions, Inc. All rights reserved.

Contents

1. Opening the EPC	7
Using the Desktop Icon.....	7
Using the Start Menu	8
2. The Main Application Window	9
Overview.....	9
Using the Blocks List	10
Using the Image Window	11
Using the Parts List.....	12
Viewing the List.....	12
Viewing the Parts List Icons	13
Finding Additional Parts Information.....	14
Using the Quote List	15
Viewing the List.....	15
Changing the Special Order Quantity.....	15
Using the Quote Popup Menu	15
3. Opening a Parts Catalogue	16
Using the Open Catalogue Dialogue Box.....	16
The Open Catalogue Dialogue Box: Initial View	16
The Open Catalogue Dialogue Box: Navigate View	17
The Open Catalogue Dialogue Box: Find By View	18
Setting the Catalogue Load Option	19
Opening a Catalogue in Navigate View.....	20
Opening a Catalogue in Find By View.....	21
Setting Filters Before Opening a Catalogue.....	22
Entering Frame/Engine Numbers.....	22
Entering Color Codes.....	22
Entering a VIN	22

4. Working with Quotes	23
Creating a Quote	23
Displaying Additional Information for a Part	26
Deleting Parts from a Quote	27
Adding a Miscellaneous Part to a Quote	28
Saving a Quote	29
Opening a Quote	30
Printing a Quote	30
Using Price Escalation	31
Downloading a Quote	32
Using Order Types	33
Working with Superseded Parts	34
5. Working with Illustrations	35
Switching Between Thumbnails and Illustrations	35
Zooming In and Out	35
Zooming In	35
Rubber Banding	36
Zooming Out	36
Moving and Scaling an Illustration	37
Moving an Illustration	37
Scaling an Illustration	37
Selecting Callouts / Hotspots	37
Using the Looking Glass	38
6. Searching for Parts	39
Searching for a Part in an Open Catalogue	39
Searching by Part Number	40
Searching by Part Description	41
Applying Filters to Narrow Your Search	42
Applying Color Code Filters	46

Using the Where Used Feature.....	48
Selecting a Manufacturer	48
Where Used: Applying Masks	49
Where Used: Searching by Part Number	49
Where Used: Searching by Part Description	50
7. Using Additional Features	52
Using the Find Feature	52
Viewing Bulletins.....	55
Viewing Catalogue Bulletins.....	55
Viewing Block Bulletins	55
Viewing Part Bulletins	55
Viewing Bulletins for All Manufacturers	55
Using the Bulletin Buttons	56
Printing	57
Printing Parts Lists and/or Illustrations	57
Changing the Print Setup	58
Printing a Quote	59
Adding and Removing Dealer Notes	60
Adding a Note to a Block or Parts List.....	60
Removing a Note from a Block or Parts List.....	61
Loading a Price Book.....	61
8. Setting User Options	62
Setting General Tab Options	62
Setting AutoSave Options	63
Enabling Euro Extensions	63
Setting Quote List Options	64
Setting Display Tab Options	65
Setting Images Tab Options	66
Typing Information at the Company Details Tab	67

9. Reference	68
Using the Toolbar	68
Hiding/Displaying and Docking/Undocking Toolbar Sections.....	68
Using the Toolbar Buttons.....	69
Using the Pull-Down Menus.....	71
The File Menu	71
The Quote Menu	72
The View Menu	73
The Illustration Menu.....	75
The Search Menu	76
The Notes Menu	76
The Bulletins Menu	76
The Tools Menu	77
The Help Menu	77
Using a Mouse.....	78
Working with Windows.....	79
Maximizing Windows.....	79
Minimizing Windows.....	79
Restoring Windows	79
Resizing Windows.....	80
Resetting the Display	80
Working with Information Columns	81
Resizing Information Columns	81
Displaying and Hiding Information Columns.....	81
10. Glossary	82

1. Opening the EPC

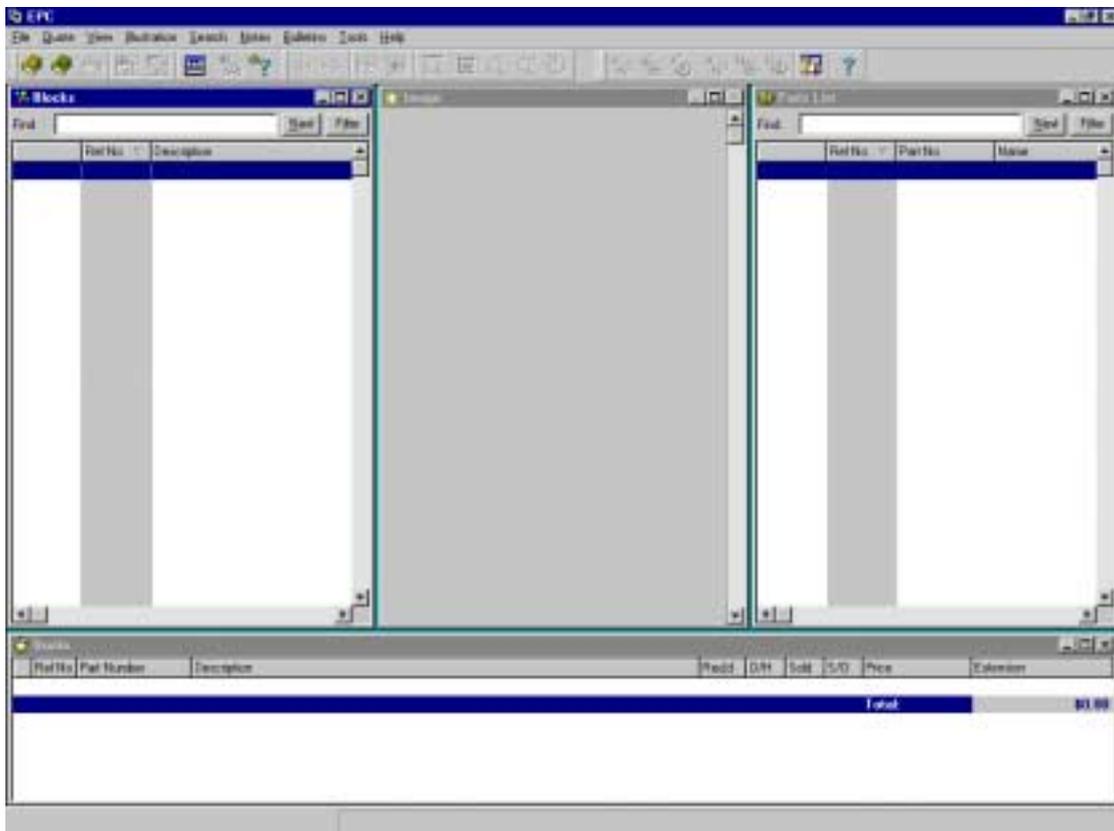
Use either of the methods shown in this chapter to open the Electronic Parts Catalogue (EPC).

Using the Desktop Icon

1. Double-click on the **EPC** icon from the Windows Desktop.

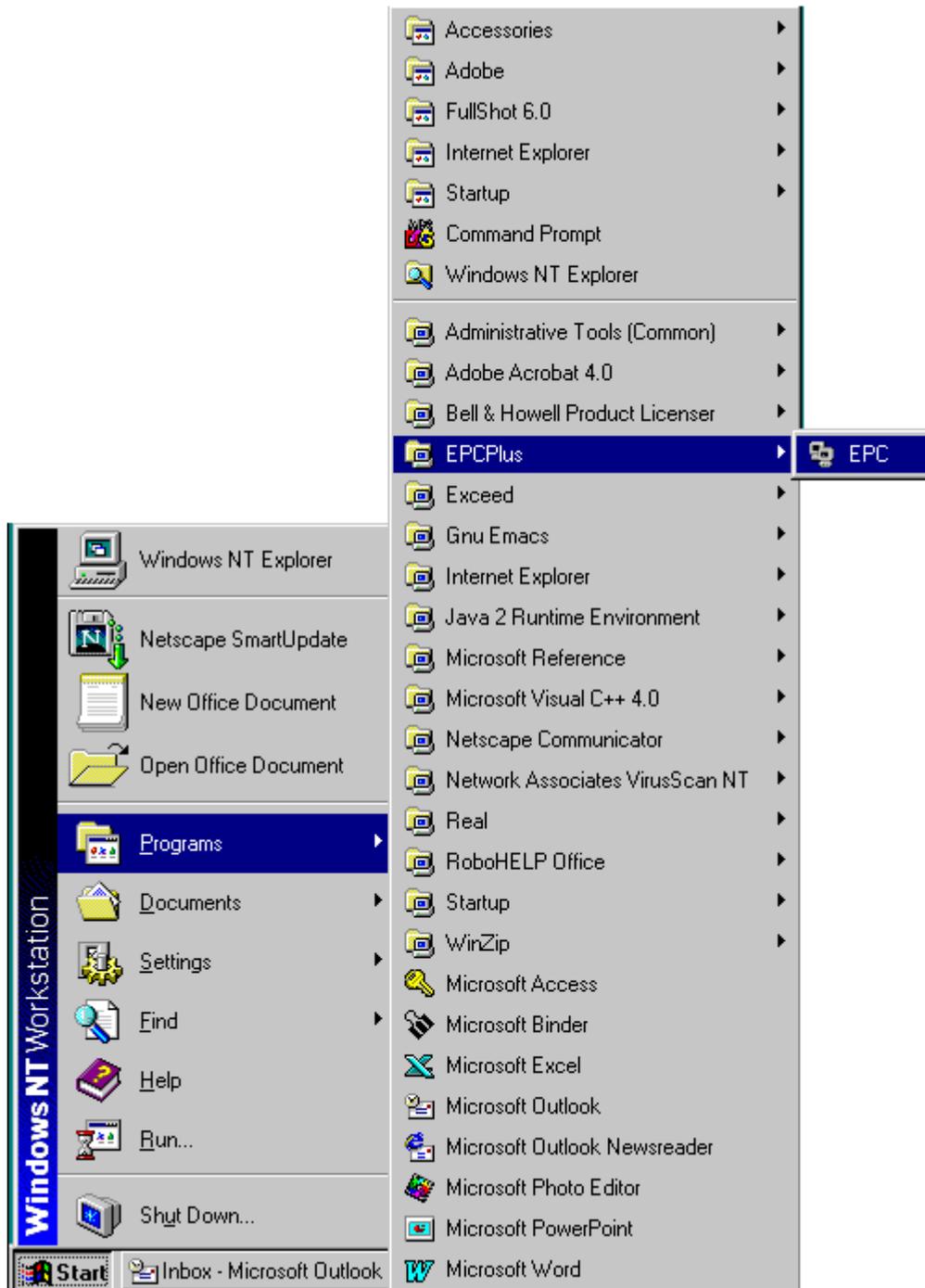


2. A “splash” screen appears briefly, followed by the Main Application Window.



Using the Start Menu

1. Click on **Start** to open the Start menu.
2. Select **Programs** to open the Programs menu.
3. Select **EPCPlus** from the Programs menu to open a submenu.

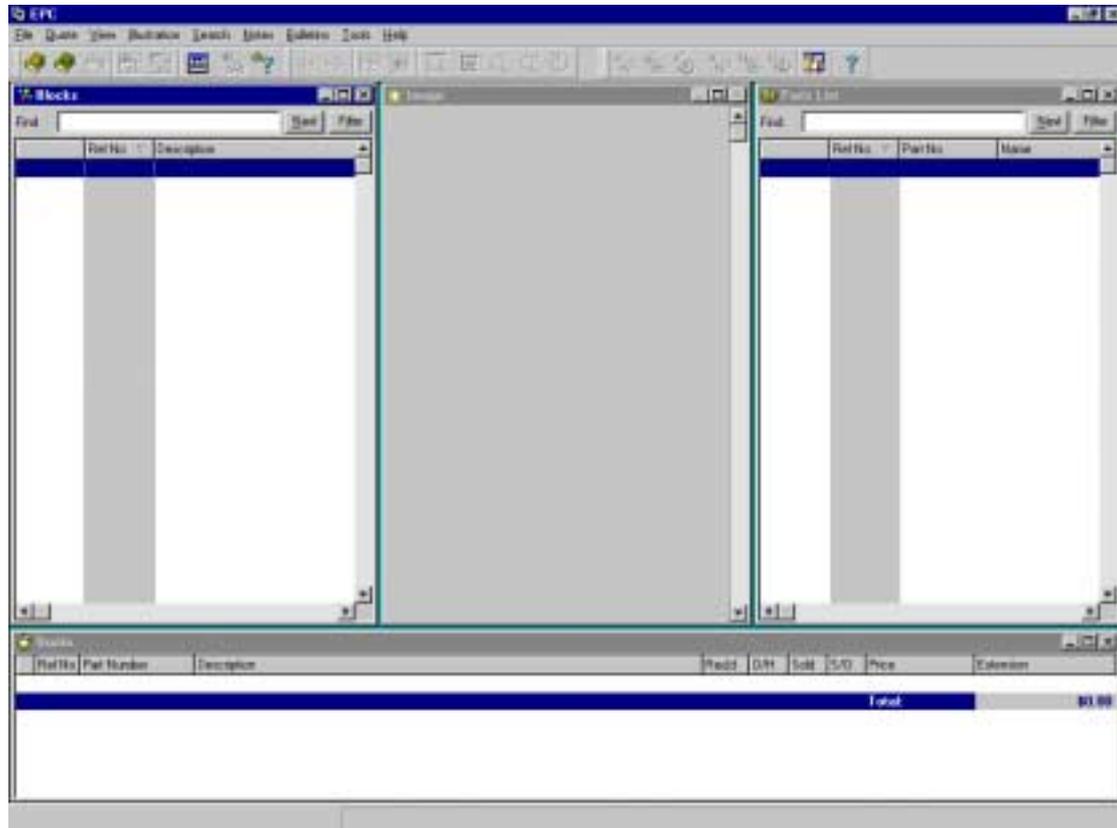


4. Select **EPC** from the submenu.
5. A “splash” screen appears briefly, followed by the Main Application Window.

2. The Main Application Window

Overview

The Main Application Window displays parts and illustrations for the open catalogue.

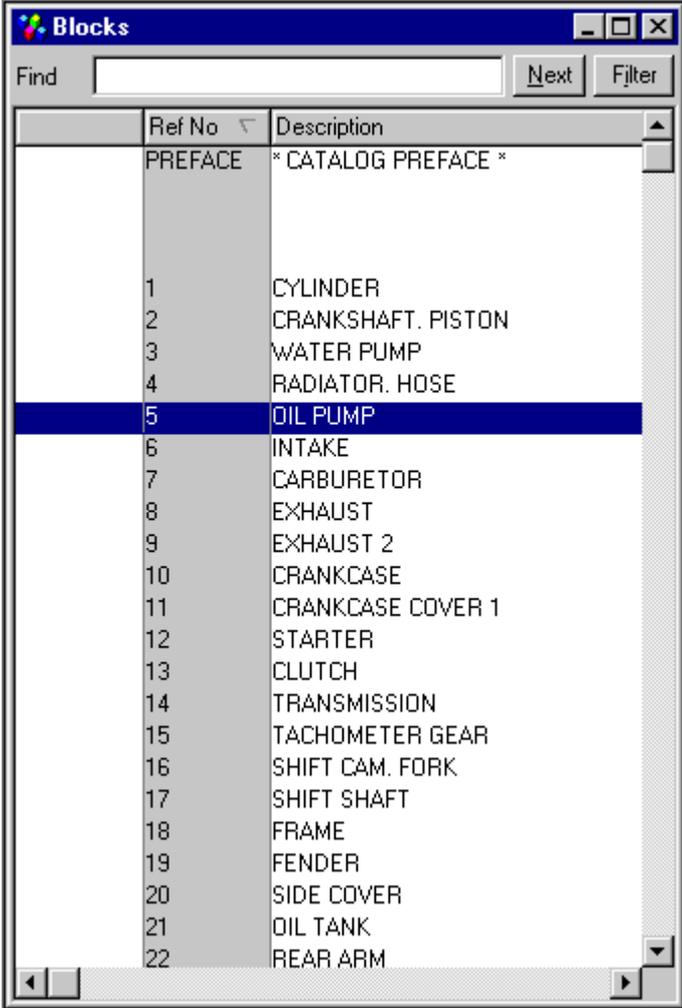


- Menu Bar** Displays pull-down menus whose commands perform EPC functions
- Toolbar** Displays buttons that perform EPC functions
- Blocks List** Lists the illustrations (blocks) for a catalogue
- Image Window** Displays thumbnails and full-sized illustrations
- Parts List** Displays the parts for an illustration
- Quote List** Displays parts for sale, order, etc.
- Status Bar** Displays the manufacturer and product line as you make selections. Also displays a button for each window that is minimized.

Note: When you work in the Blocks List, Image window, Parts List, or Quote List, make sure the window is selected by clicking on the window (the window's title bar should be highlighted). You may need to use the window's scroll bars to view all entries.

Using the Blocks List

The Blocks List displays the blocks (illustrations) for the open catalogue.



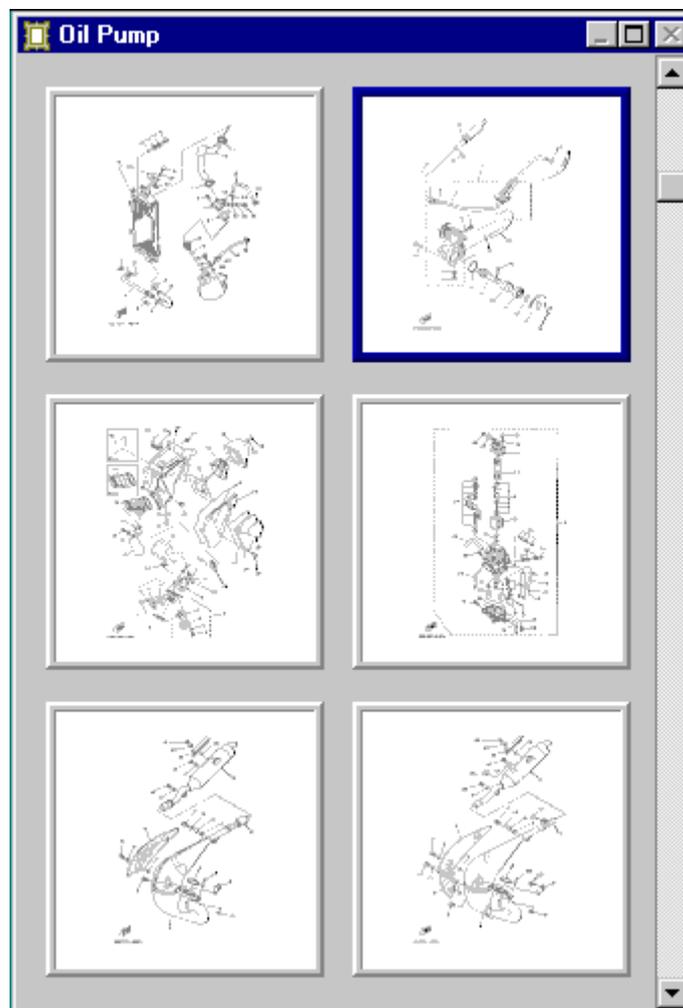
The screenshot shows a window titled 'Blocks' with a search bar and 'Next' and 'Filter' buttons. Below is a table with two columns: 'Ref No' and 'Description'. The entry for 'OIL PUMP' (Ref No 5) is highlighted in blue.

Ref No	Description
PREFACE	* CATALOG PREFACE *
1	CYLINDER
2	CRANKSHAFT. PISTON
3	WATER PUMP
4	RADIATOR. HOSE
5	OIL PUMP
6	INTAKE
7	CARBURETOR
8	EXHAUST
9	EXHAUST 2
10	CRANKCASE
11	CRANKCASE COVER 1
12	STARTER
13	CLUTCH
14	TRANSMISSION
15	TACHOMETER GEAR
16	SHIFT CAM. FORK
17	SHIFT SHAFT
18	FRAME
19	FENDER
20	SIDE COVER
21	OIL TANK
22	REAR ARM

To select a block from the Blocks List, highlight an entry by clicking on it or using the arrow keys. The Parts List displays the parts from the illustration corresponding to the selected block.

Using the Image Window

The Image window displays thumbnail views of illustrations (as shown in this example) or full-sized illustrations for the open catalogue.



To select a thumbnail from the Image window, click on the thumbnail to highlight it. A thumbnail is highlighted when a thick border surrounds it. In the example above, the top right thumbnail is highlighted.

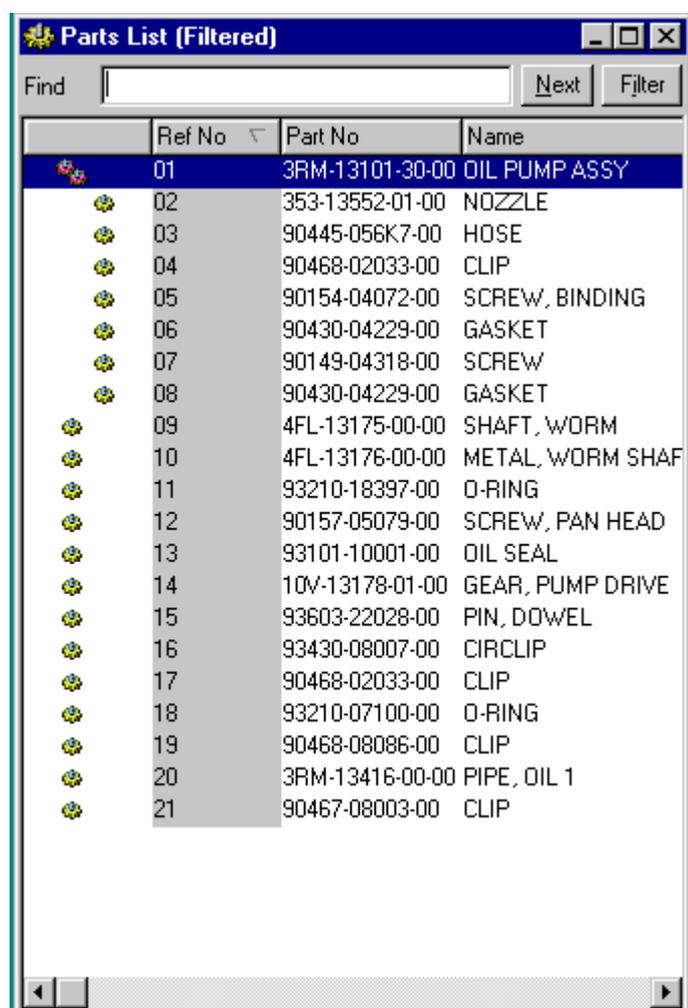
When you select a thumbnail, the Parts List displays the parts from that illustration and the corresponding entry in the Blocks List is highlighted.

Select **Display Illustration** from the Illustration menu, click on , or press **F2** to display the full-sized illustration.

Using the Parts List

Viewing the List

The Parts List displays the parts for the currently selected block (illustration).



	Ref No	Part No	Name
	01	3RM-13101-30-00	OIL PUMP ASSY
	02	353-13552-01-00	NOZZLE
	03	90445-056K7-00	HOSE
	04	90468-02033-00	CLIP
	05	90154-04072-00	SCREW, BINDING
	06	90430-04229-00	GASKET
	07	90149-04318-00	SCREW
	08	90430-04229-00	GASKET
	09	4FL-13175-00-00	SHAFT, WORM
	10	4FL-13176-00-00	METAL, WORM SHAF
	11	93210-18397-00	O-RING
	12	90157-05079-00	SCREW, PAN HEAD
	13	93101-10001-00	OIL SEAL
	14	10V-13178-01-00	GEAR, PUMP DRIVE
	15	93603-22028-00	PIN, DOWEL
	16	93430-08007-00	CIRCLIP
	17	90468-02033-00	CLIP
	18	93210-07100-00	O-RING
	19	90468-08086-00	CLIP
	20	3RM-13416-00-00	PIPE, OIL 1
	21	90467-08003-00	CLIP

The "Ref No" column displays reference numbers that refer to the parts on the corresponding illustration in the Image window.

Note: You can drag the border to the left to expand the width of the list. The expanded list shows each part number with its name and description.

Viewing the Parts List Icons

The following list provides an overview of the Parts List icons and their meanings.

Icon	Meaning
	Package, assembly, or kit
	Part in a package, assembly, or kit
	Part
	Dealer note with part
	Dealer note with package, assembly, or kit
	Dealer note with part in package, assembly, or kit
	Dealer note with block
	Bulletin note with part
	Bulletin note with package, assembly, or kit
	Bulletin note with part in package, assembly, or kit
	Bulletin and dealer note with part
	Bulletin and dealer note with package, assembly, or kit
	Bulletin and dealer note with part in package, assembly, or kit
	Bulletin and dealer note with block
	Part linked with another block that contains the same part number
	Package, assembly, or kit linked with another block that contains the same part number
	Bulletin and dealer note with part in package, assembly, or kit linked to another block with the same information
	Bulletin and dealer note with block linked to another block with the same information

Finding Additional Parts Information

Double-click on a part in the Parts List. A window showing additional information about that part appears. If you have an inventory system connected, the window shows the quantity in stock.

Catalogue		DT125R(103RM-300EA)	
Block		OIL PUMP	
Ref No.	13	Part No.	93101-10001-00
Name	OIL SEAL		
Description	OIL SEAL		
Price	\$0.00	Cost	
Discount\Price Code			
Qty Req'd.	1	Qty In Stock	

Qty Model	
3RMJ	4DJA
1	1

Dealer Notes		
Date	User	Note

Add Delete

Manufacturer Notes

OK Cancel Help

If you want to attach your own notes to a part, click on **Add** to open the Notes dialogue box. You can add more than one dealer note. Your notes appear in the list, with the most recently added note first. See “Adding Dealer Notes” for additional information.

To delete a note, select the note and click on **Delete**.

Using the Quote List

The Quote List appears in the bottom portion of the Main Application Window. It is independent from the open catalogue, allowing you to add parts from different catalogues to one quote.

Viewing the List

The Quote List displays parts you select for sale, order, etc. The Quote List appears as follows. *Note:* The information shown here is an example only.



Part No	Part Number	Description	Req'd	O/H	Sold	S/O	Price	Extension
14	81011101-00	OIL PUMP ASSY	1	0	0	0	\$20.00	\$20.00
11	82011101-00	OIL PUMP	1	0	0	0	\$3.00	\$3.00
17	84011101-00	CLIP	1	0	0	0	\$7.50	\$7.50
13	81011101-00	OIL SEAL	1	0	0	1	\$21.75	\$21.75
							Total	\$57.25

The Quote List includes the following information: the Parts List icon, the illustration reference number, part number, part description, required quantity, parts on hand (O/H), parts sold, special order parts (S/O), unit price, and total cost of listed parts.

Changing the Special Order Quantity

Use the mouse to highlight the item you want to adjust, then do one of the following:

- Press the **Right Arrow** key to increase the special order (S/O) by the required quantity.
- Press the **Left Arrow** key to decrease the special order (S/O) by the required quantity.
- Press **Shift** with the arrow keys to increase or decrease quantities by single units.

Using the Quote Popup Menu

Right-click on the Quote List to open a shortcut menu that includes all the commands available from the Quote pull-down menu.

3. Opening a Parts Catalogue

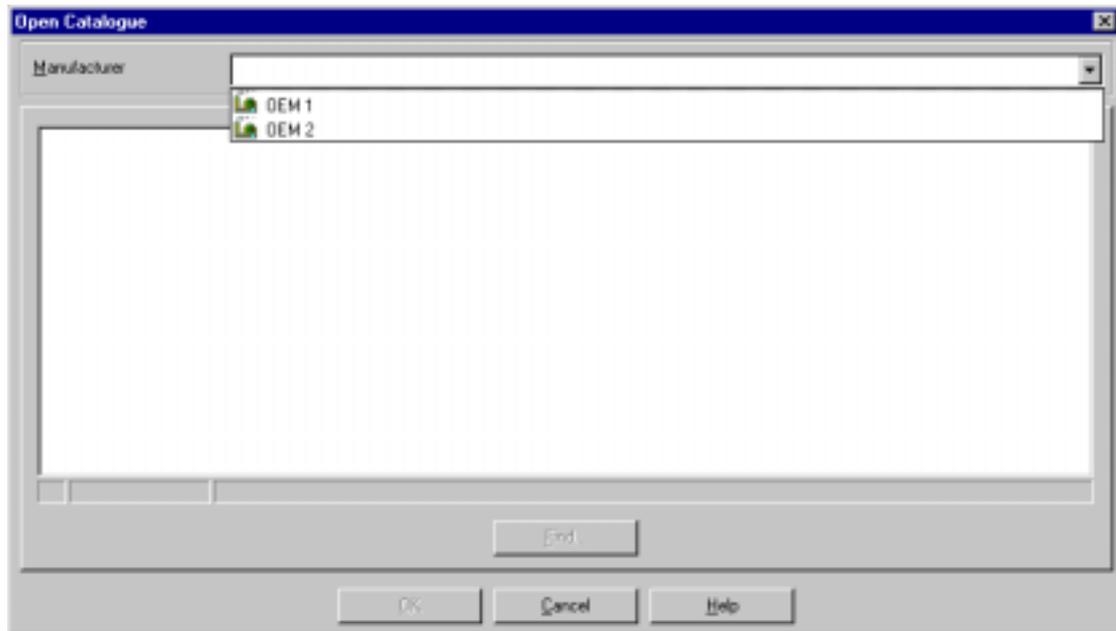
You can open a catalogue at any time while you are using the EPC. How you select catalogues depends on each manufacturer's data.

Using the Open Catalogue Dialogue Box

When you select **Open Parts Catalogue** from the File menu or click on  , the Open Catalogue dialogue box is displayed. The Open Catalogue dialogue box opens in Navigate view or Find By view, depending on the manufacturer.

The Open Catalogue Dialogue Box: Initial View

When you initially select **Open Parts Catalogue**, the Open Catalogue dialogue box appears in Navigate view. At this point the dialogue box is empty except for providing choices in the "Manufacturer" drop-down list. For example:

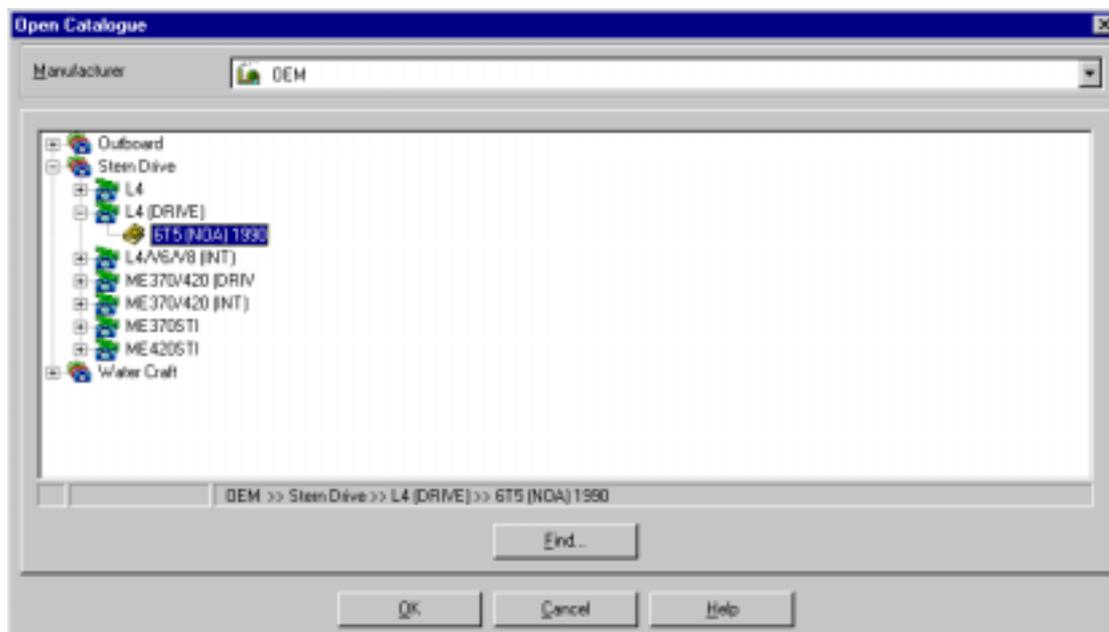


When you click on a manufacturer, the dialogue box will either list the available catalogues in Navigate view's tree structure or switch to Find By view and list available categories in a drop-down list.

Note: If only one manufacturer is available on your system, the dialogue box will open in the view that applies to that manufacturer's data.

The Open Catalogue Dialogue Box: Navigate View

In Navigate view, the Open Catalogue dialogue box arranges information in a tree structure. For example:



Click on the plus sign (+) preceding a catalogue or double-click on the catalogue name to list the available models. The plus sign changes to a minus sign (-). In the example above, the status line displays the navigational path to the model specified in the opened catalogue.

OEM>>Stern Drive>>L4 (Drive)>>6T5 (NOA) 1990

To close a catalogue listing, click on the minus sign or double-click on the catalogue name.

Note: To switch to Find By view, click on the **Find** button.

The Open Catalogue Dialogue Box: Find By View

When a manufacturer has detailed model information, the dialogue box automatically switches from Navigate view to Find By view. Or, if you are in Navigate view and want to change to Find By view manually, click on the **Find** button. Either way, the dialogue box appears as shown in this example.

Models (3001)							
Model	Year	Colour Code	M. Code	P. Code	Frame #	Engine #	Catalogue #
FT9.9DEHL	2001		66R0			EHL-300194	

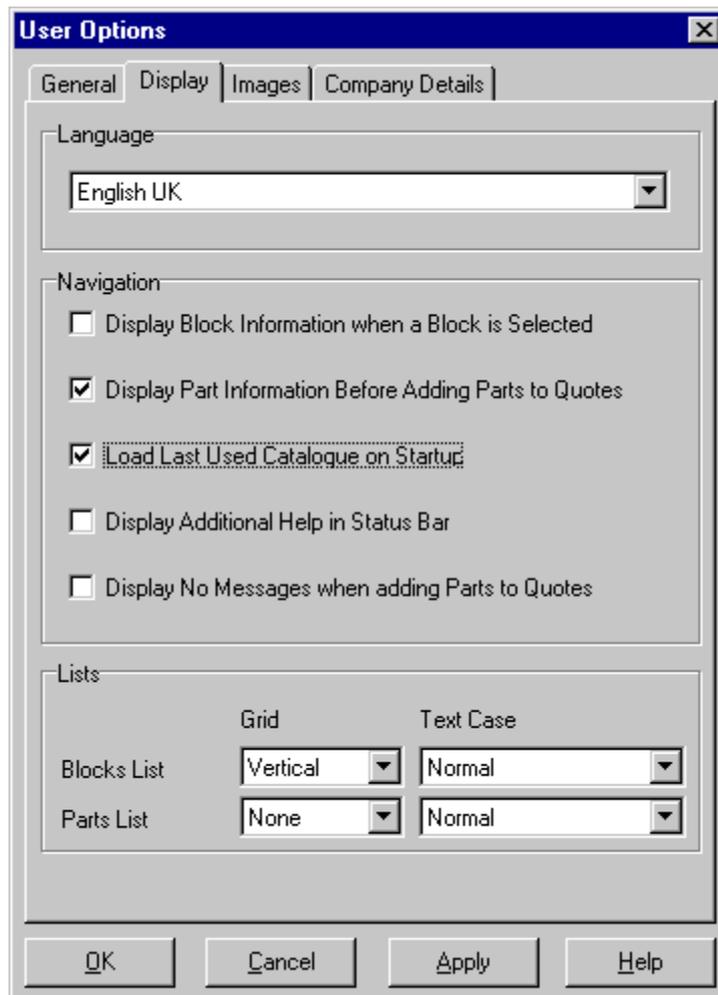
In Find By view, the Find button changes to a Navigate button so you can switch to Navigate view.

In Find By view, the EPC searches the manufacturer data and lists the available categories in the “Category” drop-down list. Click on the list box arrow to view the available categories. Catalogues or models that apply to the selected category are then listed in the “Models” drop-down list. If you select **All** categories (as shown in the example above), all available catalogues or models are listed.

Setting the Catalogue Load Option

The first time you use the EPC, you must manually select a catalogue. If you want the previously viewed catalogue to open automatically each time you start the EPC, use the following procedure.

1. Select **Options** from the Tools menu to open the User Options dialogue box.
2. Click on **Display** to open the Display tab.



3. Click on the check box preceding **Load Last Used Catalogue on Startup** to insert a checkmark (✓), as shown in the example above.
4. Click on **OK**.

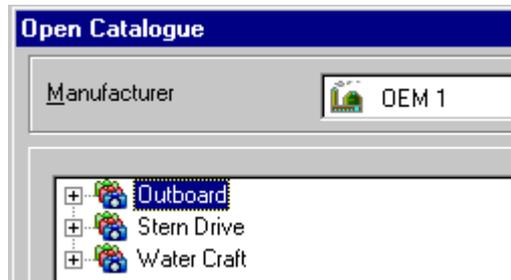
Opening a Catalogue in Navigate View

For some manufacturers, the Open Catalogue dialogue box opens in Navigate view. In this view, you select catalogues and models from entries arranged in a tree structure. Use the following procedure to open a catalogue in this view.

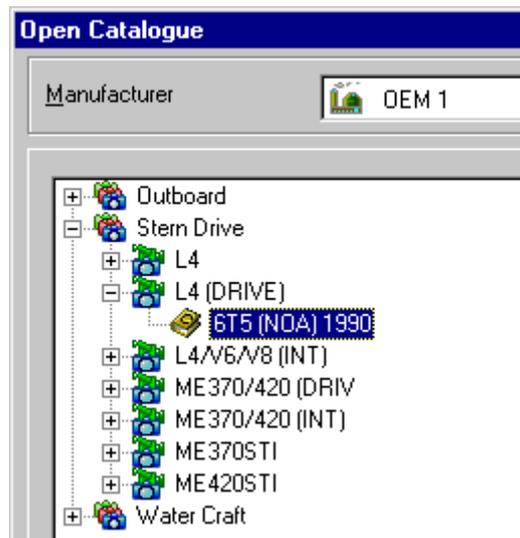
1. Select **Open Parts Catalogue** from the File menu or click on  to display the Open Catalogue dialogue box.
2. Select a manufacturer from the “Manufacturer” drop-down box. For example:



3. When you select a manufacturer, all available catalogues for that manufacturer are listed. For example:



4. Open a catalogue by one of the following methods.
 - Click on the plus sign (+) preceding the catalogue name.
 - Double-click on the catalogue name.
 - Highlight the catalogue name and click on **OK**.



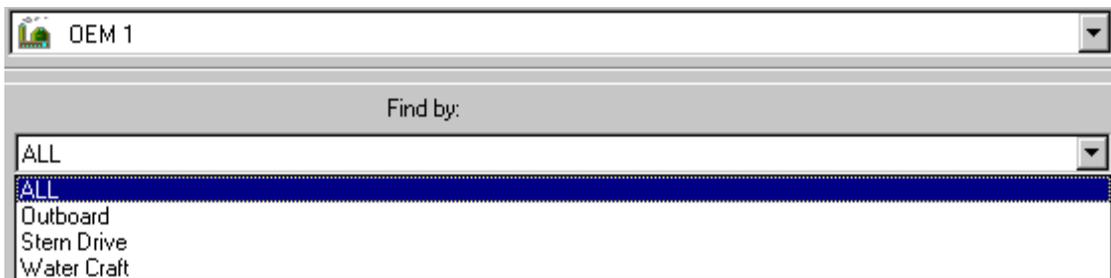
Opening a Catalogue in Find By View

When a manufacturer has detailed model information, the Open Catalogue dialogue box automatically changes from Navigate view to Find By view.

1. Select **Open Parts Catalogue** from the File menu or click on  to display the Open Catalogue dialogue box.
2. Select a manufacturer from the “Manufacturer” drop-down box. For example:



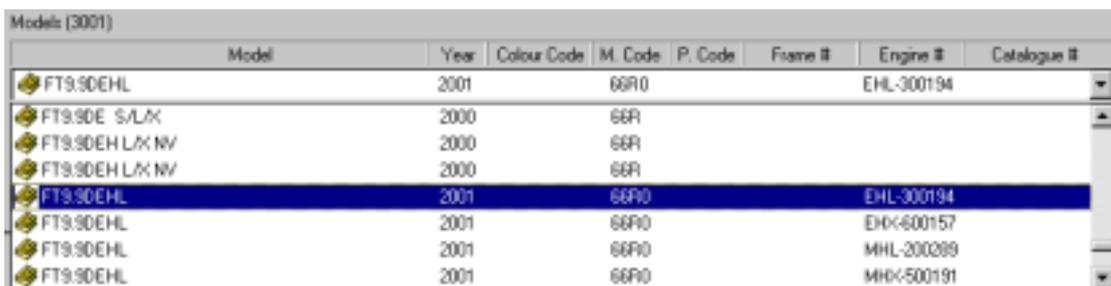
3. Select a category from the “Category” drop-down list. For example:



4. Click on **Retrieve** to list the catalogues (or models) in the selected category.

To narrow your search for catalogues/models in a category, type a search term in one of the available text boxes before you click on **Retrieve**. For example, you can narrow your search by frame number, engine number, model, or VIN. The availability search fields varies by manufacturer.

5. Select a catalogue/model from the drop-down list. For example:



A screenshot of the 'Models (3001)' list in the Open Catalogue dialogue box. The list is displayed as a table with the following columns: Model, Year, Colour Code, M. Code, P. Code, Frame #, Engine #, and Catalogue #. The table contains several rows of model information, with the fourth row highlighted in blue.

Model	Year	Colour Code	M. Code	P. Code	Frame #	Engine #	Catalogue #
FT9.9DEHL	2001		66R0			EHL-300194	
FT9.9DE S/LX	2000		66R				
FT9.9DEH L/X NV	2000		66R				
FT9.9DEH L/X NV	2000		66R				
FT9.9DEHL	2001		66R0			EHL-300194	
FT9.9DEHL	2001		66R0			EHL-600157	
FT9.9DEHL	2001		66R0			MHL-300289	
FT9.9DEHL	2001		66R0			MHL-500191	

6. Click on **OK** in the Open Catalogue dialogue box to open the catalogue.

Setting Filters Before Opening a Catalogue

Before you open a catalogue, you can filter the results by frame number, engine number, VIN, color code, year, model, model code, production code, and country. In most cases, entering one or more criteria can narrow a search from hundreds of catalogues or models to a few or even a single model. Use filters individually or in combination. You could, for example, enter a frame/engine number plus a model year or a VIN plus a country. However, if you enter a frame/engine number plus a VIN, the EPC will filter on the frame/engine number and ignore the VIN you entered.

Entering Frame/Engine Numbers

Depending on the manufacturer, the frame number field appears separately or in combination with the engine number field. For example:



The image shows two adjacent text input fields. The first field is labeled "Frame #" and the second is labeled "Engine Number". Both fields are currently empty.

To filter by frame number when the fields appear as shown here, simply type a frame number or an engine number in the appropriate field.

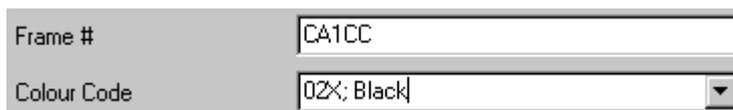
When the frame engine number fields appear in combination, type the number in a two-section text box. Type the prefix code (a maximum of five characters), press the **Tab** key, and type the serial number (a maximum of seven digits). For example:



The image shows a single input field with the label "Frame # / Engine #". The field is divided into two sections by a vertical line. The left section contains the text "DE031" and the right section contains "0003387".

Entering Color Codes

When you type a complete or partial frame number, the color codes associated with that number are available in the "Color Code" drop-down list. For example:



The image shows two input fields. The top field is labeled "Frame #" and contains the text "CA1CC". The bottom field is labeled "Colour Code" and is a drop-down menu showing the selected option "02X; Black".

Color code information appears with the code and description separated by a semicolon (;). In this example, the code is "02X" and the description is "Black". When you know a color, but not the code, type what you know to produce a list of matches in the drop-down list. From the list, you can select the specific color code you need.

Entering a VIN

Type a VIN in a three-section text box. Type the three-character factory code, press the **Tab** key, type the five-character prefix code, press **Tab**, and type the serial number (a maximum of nine digits). You may omit leading zeros.



The image shows a single input field with the label "VIN". The field is divided into three sections by vertical lines. All three sections are currently empty.

4. Working with Quotes

You can create a quote to give a customer an accurate quotation for parts. This chapter explains how to create a quote and do the following: display additional information for a part; delete a part; add a miscellaneous part; save, open, clear, and print quotes; use price escalation; download a quote; use order types; and work with superseded parts.

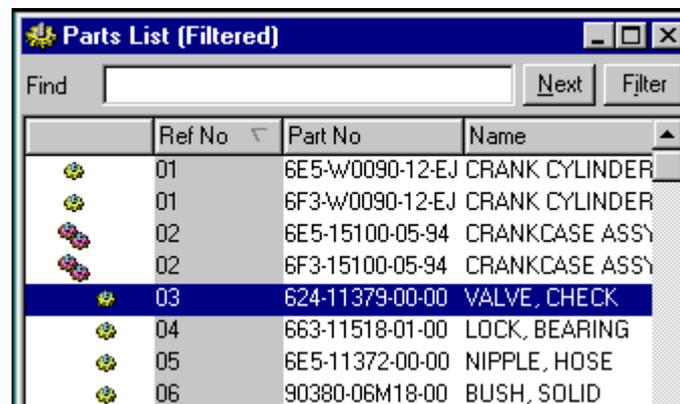
Creating a Quote

Use any of the following methods to add a part to a Quote List.

- Double-clicking on a part entry in the Parts List.
- Pressing **Enter** on a highlighted part entry.
- Double-clicking on an callout/hotspot in an illustration.
- Typing a reference number from the selected illustration in the Image window.

The following example demonstrates how to select a part for a Quote List by double-clicking on a part entry in the Parts List.

1. Open a catalogue and select a block to display the Parts List.



	Ref No	Part No	Name
	01	6E5-W0090-12-EJ	CRANK CYLINDER
	01	6F3-W0090-12-EJ	CRANK CYLINDER
	02	6E5-15100-05-94	CRANKCASE ASSY
	02	6F3-15100-05-94	CRANKCASE ASSY
	03	624-11379-00-00	VALVE, CHECK
	04	663-11518-01-00	LOCK, BEARING
	05	6E5-11372-00-00	NIPPLE, HOSE
	06	90380-06M18-00	BUSH, SOLID

2. Double-click on a part number (**624-11379-00-00**, for example).

If “Display Part Information Before Adding Parts to Quotes” is selected on the User Options Display tab, a Parts Information dialogue box is displayed.

Catalogue		115A/140A(276E5-300E1)	
Block		CRANKCASE CYLINDER	
Ref No.	03	Part No.	624-11379-00-00
Name	VALVE, CHECK		
Description	. VALVE, CHECK		
Price	\$0.00	Cost	
Discount\Price Code			
Qty Req'd.	1	Qty In Stock	

Qty Model	
6E5	6F3
1	1

Date	User	Note

Buttons: Add, Delete, OK, Cancel, Help

3. Click on **OK**.
4. If the part is included in a kit, you are prompted to specify the kit or the part.

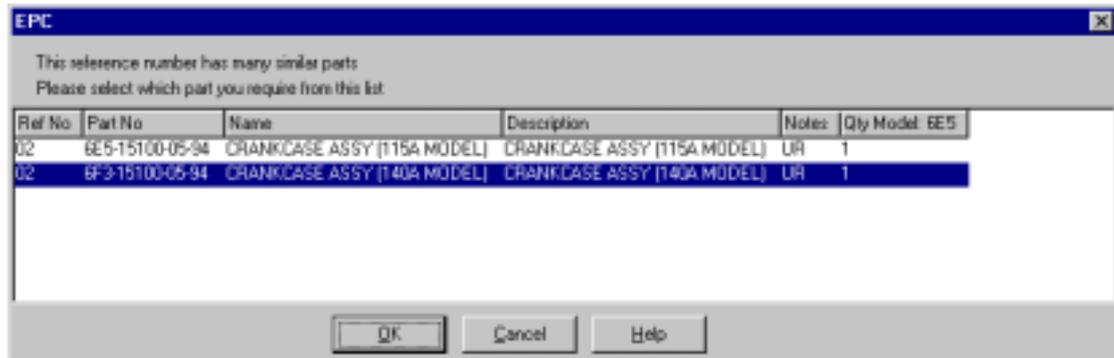
EPC

Part Number 624-11379-00-00 is part of the kit 6F3-15100-05-94 CRANKCASE ASSY (140A MODEL)
Do you wish to order the whole kit?

Buttons: Yes, No, Cancel

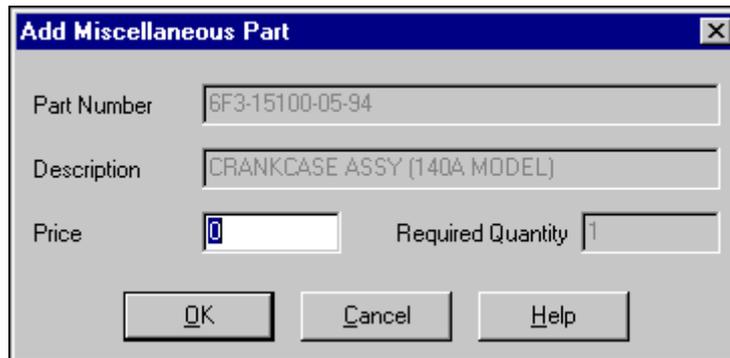
Note: This prompt appears if “Display No Messages when adding Parts to Quotes” is not selected in on the User Options Display tab.

5. Make a selection based on the following guidelines.
 - Click on **Yes** to add the entire kit to the Quote List.
 - Click on **No** to add the selected part to the Quote List.
 - Click on **Cancel** to add neither the kit nor the part.
6. If an illustration reference has more than one part associated with it, a dialogue box lists the associated parts.



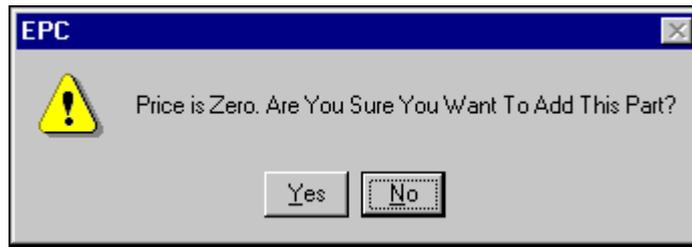
Note: This prompt appears if “Display No Messages when adding Parts to Quotes” is not selected in on the User Options Display tab.

7. Click on a part entry to highlight it and click on **OK**. The price of the part is checked in the price book.
8. If no price book is loaded or if there is no entry for the part in the price book, an Add Miscellaneous Part dialogue box gives you the option to add a price. The part number, description, and quantity fields are read-only.



9. Type a price and click on **OK** to add the part to the Quote List with that price.

If you click on **OK** without typing a price, the following prompt appears.

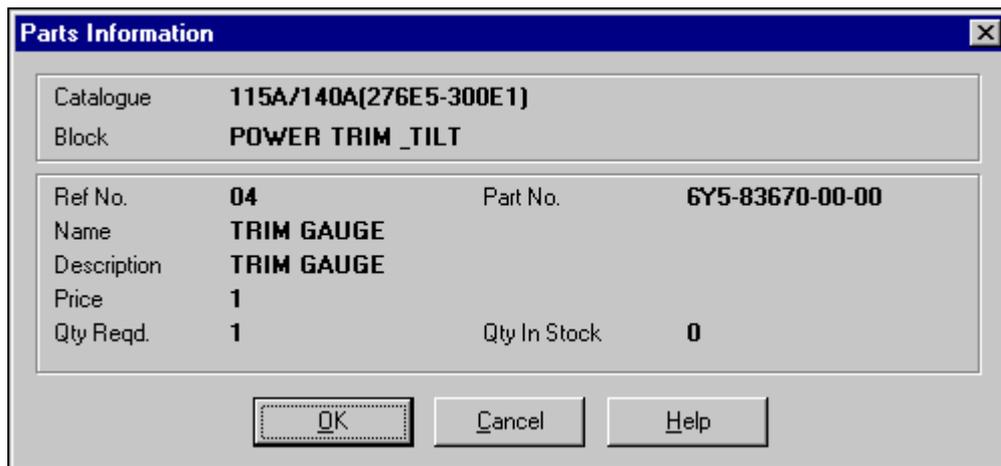


Clicking on **Yes** adds the part to the Quote List with a price of \$0.00. If you click on **No**, the part is not added to the list.

10. If you add a part with a price, any settings you made at the Price Escalator dialogue box (price escalation, rounding, and/or minimum retail values) are applied.

Displaying Additional Information for a Part

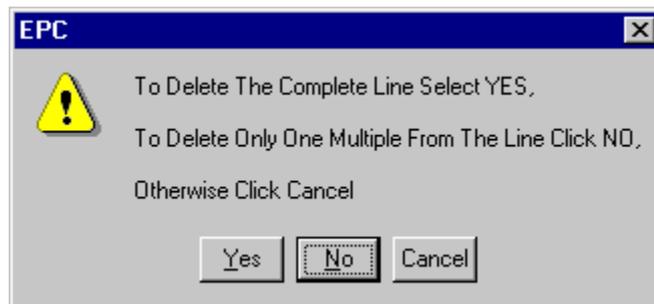
1. Double-click on a part entry in the Quote List or highlight the entry and select **Part Information** from the Quote menu to open the Parts Information dialogue box.



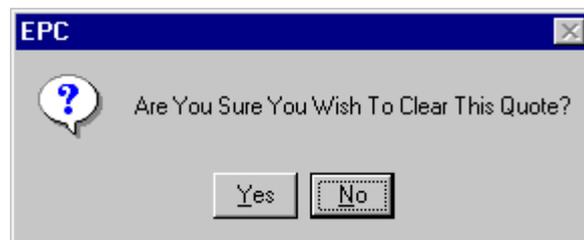
2. When you finish viewing information, click on **OK** to close the dialogue box.

Deleting Parts from a Quote

1. Click on the part you want to delete to highlight it.
2. Select **Delete Part** from the Quote menu to remove the part from the Quote List.
3. If you selected a part more than once, the following dialogue box will be displayed.



4. Respond to this dialogue box in one of these ways.
 - Click on **Yes** to delete all occurrences of the part.
 - Click on **No** to delete one occurrence of the part.
 - Click on **Cancel** to retain the duplicate selections.
5. To delete all parts from a Quote List, select **Clear Quote** from the Quote menu. The following confirmation prompt will appear.

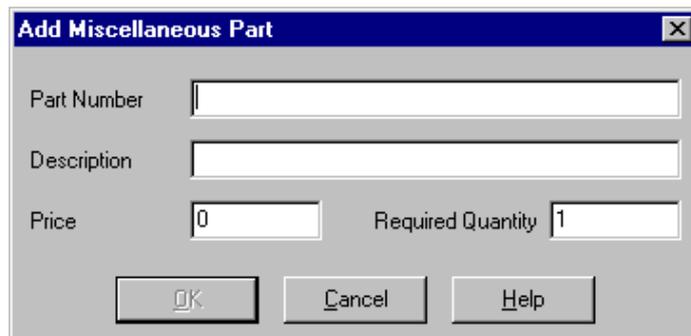


6. Click on **Yes** to delete all parts from the Quote List.

Adding a Miscellaneous Part to a Quote

This option allows you to add parts to your quote that are not in any catalogue or in a price book. Do the following to add a miscellaneous part to a quote.

1. Select **Add Miscellaneous Part** from the Quote menu or press **Ctrl + M** to open the Add Miscellaneous Part dialogue box.



The image shows a dialog box titled "Add Miscellaneous Part". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog contains four input fields arranged in two rows. The first row has "Part Number" and "Required Quantity". The second row has "Description" and "Price". The "Part Number" field is empty. The "Description" field is empty. The "Price" field contains the number "0". The "Required Quantity" field contains the number "1". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

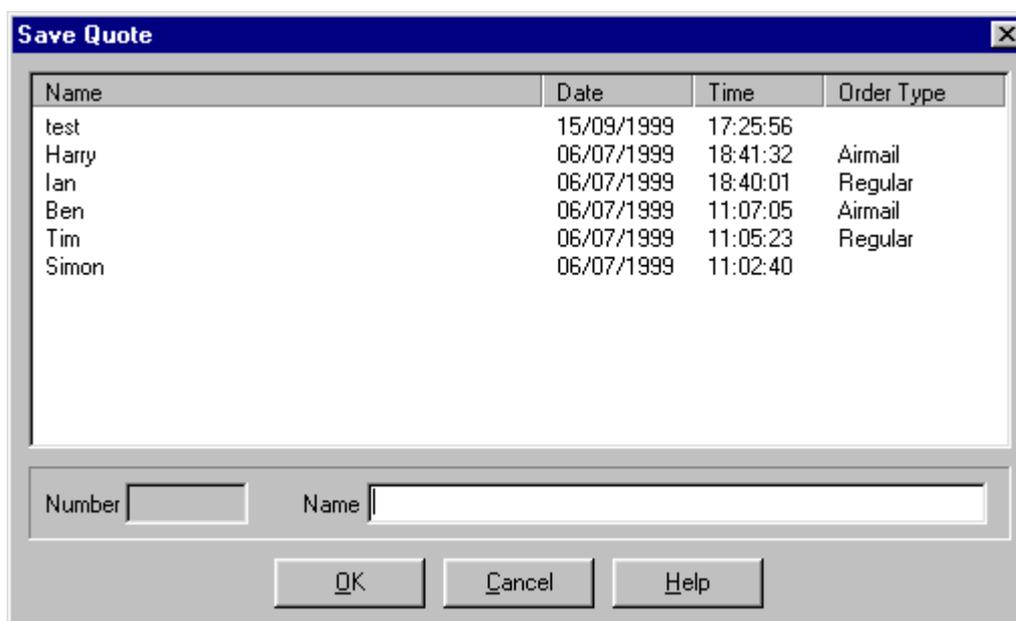
2. Type a part number in the "Part Number" field.

The number you type is checked against a DMS or current price book. If the number exists, all other fields are filled in automatically and made read-only.

3. If the part number is not found, do one of the following:
 - Type a part description in the "Description" field.
 - Type the part's retail price in the "Price" field.
 - Type the quantity required for the part in the "Required Quantity" field.
4. Click on **OK**.

Saving a Quote

1. Select **Save Quote** from the Quote menu to open the Save Quote dialogue box.



The Save Quote dialogue box shows all previously saved Quotes.

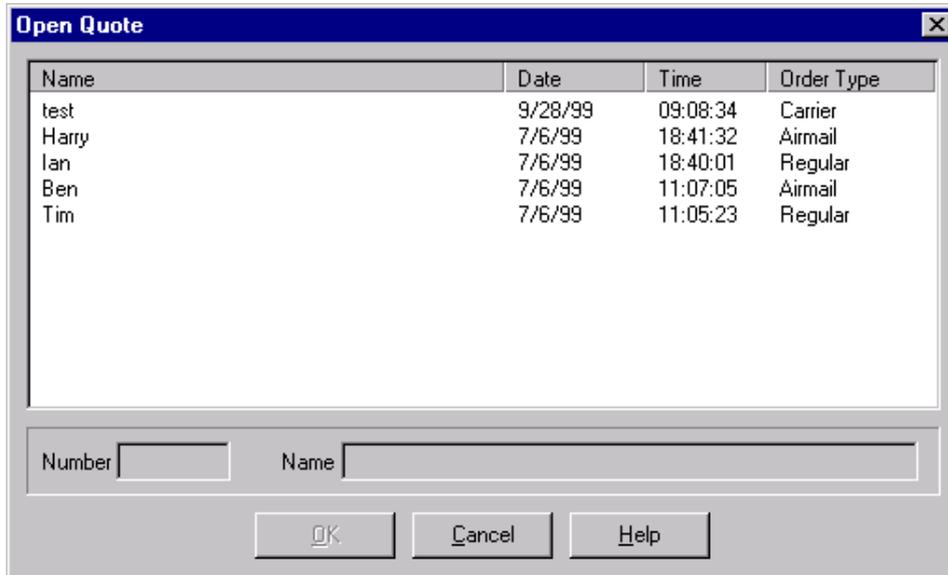
2. Type a name in the "Name" text box to save the quote under.
3. Click on **OK**. A message will indicate that the quote has been saved.

If you type a name that already exists, you will be asked if you wish to overwrite that quote.

- Click on **Yes** if you want to overwrite the quote.
- Click on **No** to return to the Save Quote dialogue box.

Opening a Quote

1. Select **Open Quote** from the Quote menu to display the Open Quote dialogue box.



The Open Quote dialogue box shows all previously saved Quotes.

2. Highlight a saved quote and click on **OK** to load a previously stored quote.

If you attempt to open a quote without saving the current quote that you are working on, a warning appears: "Current Quote Has Note Been Saved. Are You Sure You wish To Load A Quote?"

- Click on **Yes** to open a new quote without saving the current quote.
- Click on **No** to return to the current Quote List without opening a new quote.

Printing a Quote

Note: You must save a quote before you can print it. If you want dealer information to appear on the printout, enter information on the User Options dialogue box's Company Details tab.

1. Select **Print Quote** from the Quote menu, right-click in the Quote window and select **Print Quote** from the popup menu, or press the **F10** key.
2. The Print dialogue box will be displayed.
3. Click on **OK**.

Using Price Escalation

1. Select **Price Escalator** from the Quote menu.
2. The Price Escalator dialogue box is displayed. For example:

The screenshot shows the 'Price Escalator' dialog box. At the top, the 'Manufacturer' dropdown is set to 'OEM'. Below it, there are eight rows of price ranges, each with a 'Through' value and a 'times' multiplier. The first row is '.00 Through 20.00 times 1.175'. The other rows have empty 'Through' fields and a multiplier of 1.000. To the right, the 'Range Based On' section has radio buttons for 'Cost' and 'Retail', with 'Retail' selected. The 'Escalator Rounding Options' section has radio buttons for 'Round Up / Down', with 'Round Up' selected for the first range (00 Through 49 to 50). There is also an 'Enable rounding' checkbox which is unchecked. At the bottom, the 'Minimum Retail Price' field is set to 0.00. Buttons for 'OK', 'Cancel', and 'Help' are at the very bottom.

3. For each range you specify, you can enter a multiplier to adjust the retail figures of the parts you put in a Quote List.

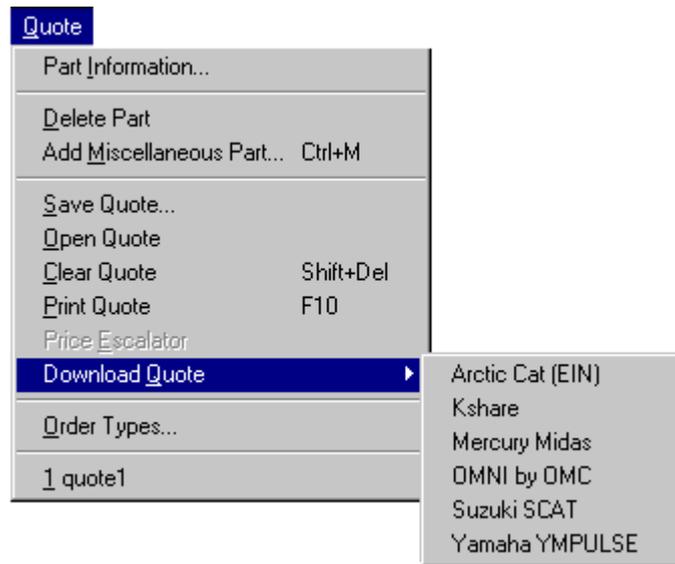
The Price Escalator dialogue box features operate as follows:

Manufacturer	Lists the manufacturers you can select.
Range	Enter the range and multiplying factor. For example: \$0 - \$20 times 1.175: All parts in the price book that cost between \$0 and \$20 are automatically multiplied by 1.175 before being added to a Quote List.
Range based on	Select whether to base the price escalation on cost or retail figures. The multiplication is always based on the retail price.
Escalator Rounding options	Set up rounding of escalated values. For example: 00-.49 round up to 50.
Enable Rounding	Enable rounding.
Minimum Retail Price	Enter the minimum price for any line on a Quote for Parts provided by this manufacturer. For example, if a part costs \$2.50 and the minimum retail price is set to \$5.00, the Quote window displays the price as \$5.00.

Downloading a Quote

Use the following procedure when you want to download a Quote List to request parts via modem.

1. Select Download Part from the Quote menu to open a submenu. For example:

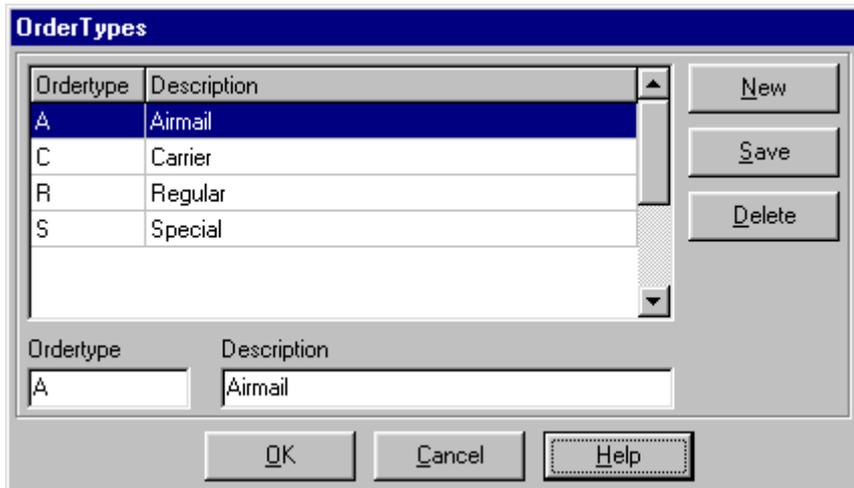


2. Click on a selection. Your Quote List will be transferred via your modem connection.

Using Order Types

The Order Types feature allows you to specify the dispatch method to use for the current quote. You can create, edit, and delete order types. You can also select an order type for the current quote.

1. Select **Order Types** from the Quote menu to open the Order Types dialogue box.



Four order types are already set up on your system by default: Airmail, Carrier, Regular, Special. To add a new order type, click on **New** and enter a code letter and a description in the appropriate text boxes.

2. Click on **New**.
3. Type a one-character order type and a description.
4. Click on **Save** to save the order type.

The order type information is saved with, and printed on, the quote.

If the order type already exists, the following message appears: "This Order Type already exists. Please change." If you see this message, click on **OK** to close the message box, enter a different order type, and click on **Save** again.

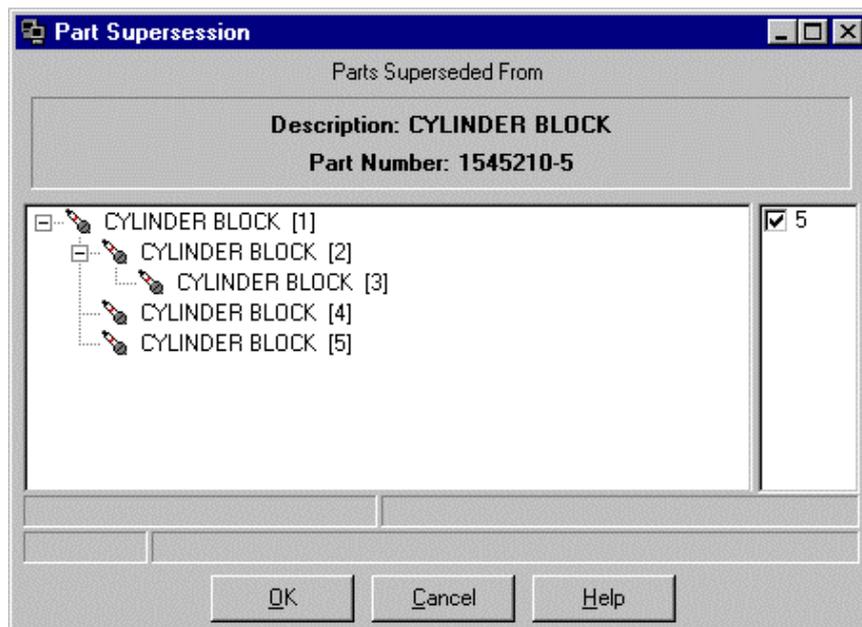
If you click on **Cancel** before saving the new order type, the following prompt appears: "Save Order Type Changes?". Click on **Yes** to save the new order type, click on **No** if you do not want to save it, or click on **Cancel**. If the order type already exists, you will be prompted to change it.

5. To apply an order type to the current quote, select an order type from the list and click on **OK**.
6. To delete an order type from the list, highlight the entry and click on **Delete**.

Working with Superseded Parts

When a part has been superseded, the Part Supersession dialogue box is displayed. From this dialogue box you can select the current part or one of the superseding parts for your Quote List.

1. Click on a part entry to highlight it. The number in the right column shows the part you selected. For example:



2. Click on **OK** to add the selected part to your Quote List.

5. Working with Illustrations

The EPC provides various options for exploring illustrations. This chapter explains how to use thumbnails, zoom in and out, move and scale, select callouts, and use the looking glass.

Illustration	
Display Thumbnails	F2
Display Looking Glass	Shift+F2
Fit Illustration in Window	Shift+F11
Zoom Out (Make Illustration Smaller)	F11
Zoom In (Make Illustration Larger)	F12
Restore to Normal Size	Shift+F12
Rotate Image	
View First Block (Illustration)	
View Previous Block (Illustration)	
View Next Block (Illustration)	
View Last Block (Illustration)	

Switching Between Thumbnails and Illustrations

Thumbnail view displays miniature images of the illustrations in a catalogue.

Select **Display Thumbnails** from the Illustration menu, click on , or double-click on a full-sized illustration to switch to thumbnail view.

Select **Display Illustration** from the Illustration menu, click on , or double-click on a thumbnail to display the full-sized illustration.

Press **F2** to toggle between thumbnails and full-sized illustrations.

Zooming In and Out

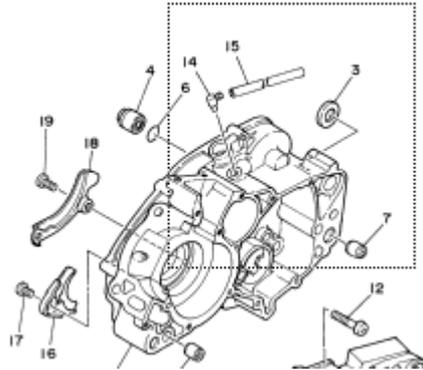
Zooming In

When you first display an illustration, it may be difficult to read because the EPC fits the entire illustration on the screen at once. You can see more detail by zooming in on the illustration. There are several ways to zoom in.

- Click on .
- Press **F12**.
- Select **Zoom In** from the Illustration menu.
- Use rubber-banding.

Rubber Banding

1. Position the mouse cursor a little above and to the left of the area you want to magnify.
2. Hold down the left mouse button and drag the mouse.
3. Position the dashed outline around the area you want to magnify.



4. Release the mouse button. This magnifies the selected portion of the illustration to fill the window. Rubber banding is also possible in the looking glass window.

Zooming Out

After zooming in, you can see more of the illustration by zooming out.

- Click on  on the toolbar.
- Press **F11**.
- Select **Zoom Out** from the Illustration menu.
- Use the mouse wheel (if available).

Moving and Scaling an Illustration

Moving an Illustration

When you zoom in, you cannot see all of the illustration. You can move the illustration around as follows.

1. With the mouse pointer anywhere in the illustration, hold down the right mouse button.
2. Move the mouse.
3. The mouse pointer changes to  and the illustration moves with the mouse.

Note: You can also use the mouse to move the Image window's scrollbars.

Scaling an Illustration

Click on  to scale an illustration exactly to the size of the Image window.

Selecting Callouts / Hotspots

For some catalogues, illustrations have callouts/hotspots. These appear in the Image window as a reference number with a line connecting the number to the part. When you move the cursor within a certain distance of the hotspot, the hotspot is highlighted and a ToolTip, showing the part's description, is displayed next to the cursor. If more than one part is associated with the callout, the first part in the Parts List is displayed.

Clicking

Click on a hotspot to select the first associated part from the Parts List.

Double-Clicking

Double-click on a hotspot to select the associated part from the Parts List and place the part in the Quote List.

Note: If no hotspot is highlighted, double-clicking on an illustration displays the thumbnail of the illustration.

Choosing from Multiple Associated Parts

If a callout has more than one part associated with it, a dialogue box lists all the parts associated with the reference and prompts you to select the one you need. This prompt appears if you have disabled the "Display No Messages when adding Parts to Quotes" option on the User Options dialogue box's Display tab. To allow the prompt to be displayed, do the following:

1. Select **Options** from the Tools menu to open the User Options dialogue box.
2. Click on **Display** to open the Display tab.
3. If a checkmark (✓) precedes "Display No Messages when adding Parts to Quotes", click on the check box to remove the checkmark.
4. Click on **OK**. With this option de-selected, the prompt will appear when more than one part is associated with a hotspot.

Right-Clicking

Right-click on a hotspot to select the associated part from the Parts List and display the Part Information dialogue box.

Using the Looking Glass

The Looking Glass displays the currently selected block's thumbnail in a separate window. It shows the area being displayed in the Image window. You can move the highlighted area in the Looking Glass window by right-clicking and dragging the highlighted area.



Click on  to open the Looking Glass window. Click on the button again to close the window.

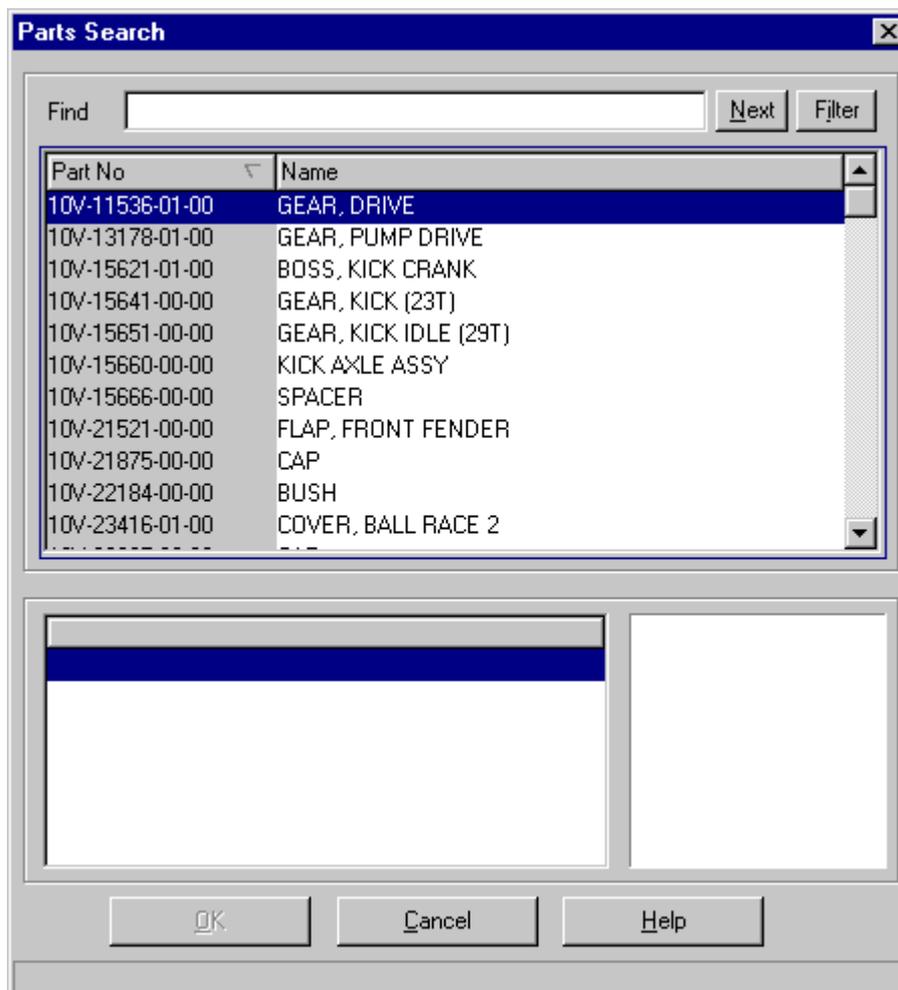
Note: You can move the Looking Glass window to a different part of the screen by clicking and dragging on the Looking Glass title bar.

6. Searching for Parts

In an open catalogue you can search by part number, partial part number, description, or keywords. Also available is the Where Used feature, which allows you to search for a part or description across all catalogues of a manufacturer.

Searching for a Part in an Open Catalogue

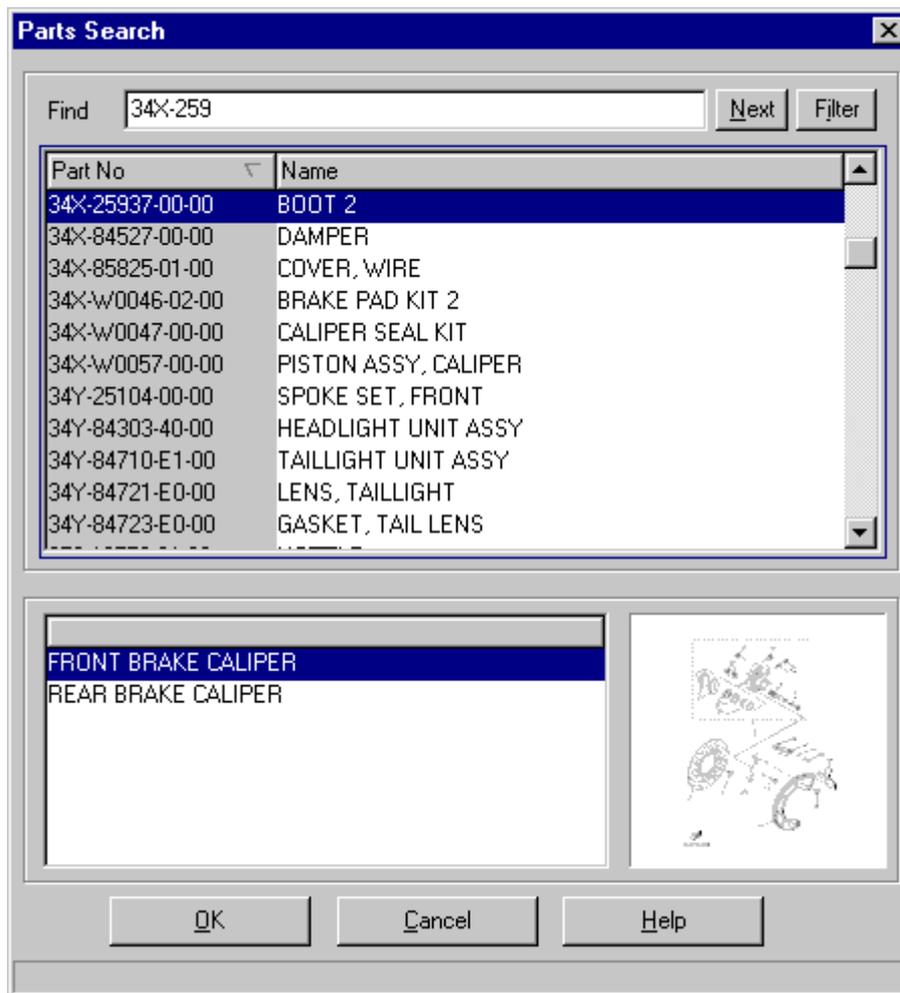
Select **Search for Part** from the Search menu, click on , or press **F7** to open the Parts Search dialogue box.



This dialogue box lists all parts in the catalogue in alphanumeric order by part number.

Searching by Part Number

1. In the Parts Search dialogue box, click on the **Part No** header to highlight the column below.
2. Type the full or partial part number in the Find text box. The part that is the closest match to your entry is highlighted in the list below.
3. Click on **Next** to highlight the next matching part. Continue clicking on **Next** until you locate the part you want.
4. Click on the highlighted part to display one or more blocks and a mini-illustration in the bottom portion of the dialogue box.

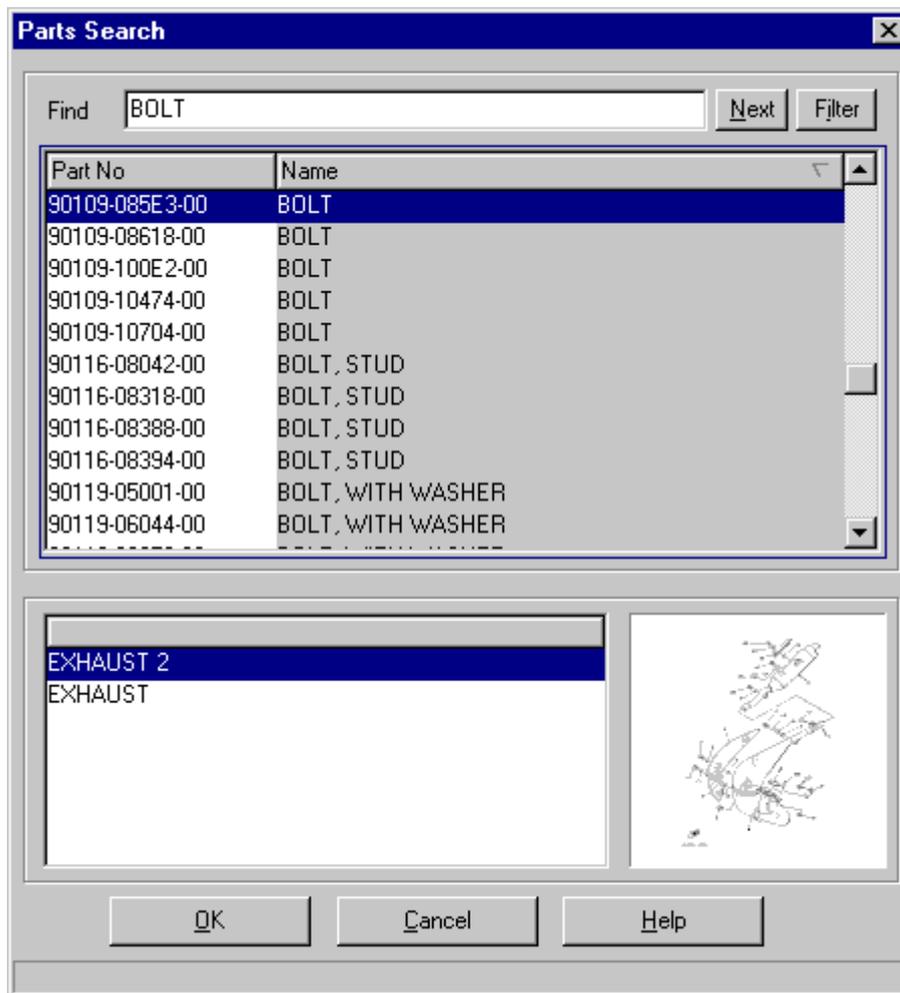


Note: If the part you want is not highlighted but is on the list, click on it with the mouse.

5. Select the required block from the bottom part of the dialogue box.
6. Click on **OK** to return to the Main Application Window, which shows the selected block and highlighted part.

Searching by Part Description

1. In the Parts Search dialogue box, click on the **Name** header to highlight the column below.
2. Type the part description in the Find text box. The part that is the closest match to your entry is highlighted in the list below.
3. Click on **Next** to highlight the next matching part. Continue clicking on **Next** until you locate the part you want.
4. Click on the highlighted part to display one or more blocks and a mini-illustration in the bottom portion of the dialogue box.



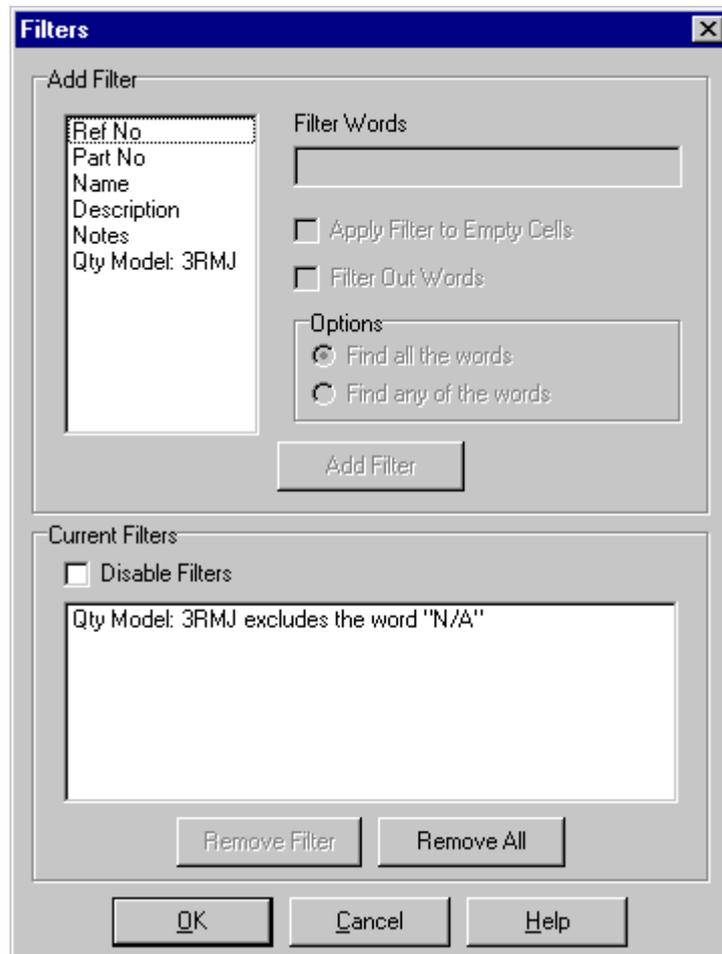
Note: If the part you want is not highlighted but is on the list, click on it with the mouse.

5. Select the required block from the bottom portion of the dialogue box.
6. Click on **OK** to return to the Main Application Window, which shows the selected block and highlighted part.

Applying Filters to Narrow Your Search

Use the following procedure to create and apply filters to narrow a search.

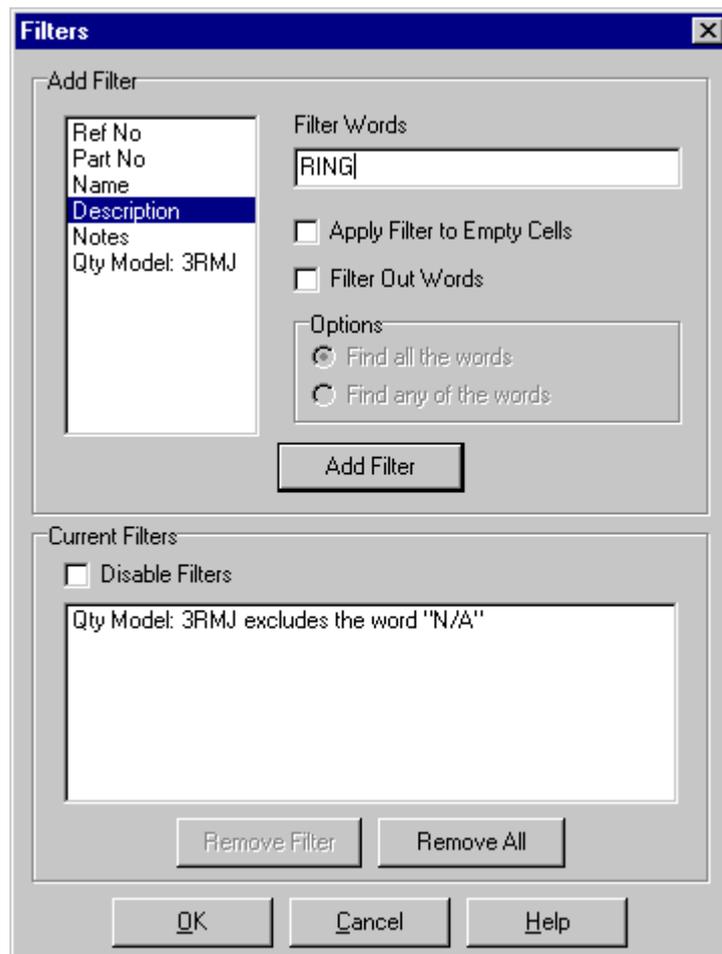
1. From the Parts List in the Main Application Window, click on **Filter** to open the Filters dialogue box. For example:



Any filters and settings currently associated with the selected grid are displayed in the corresponding sections of the dialogue box. The list of columns that can be filtered on is taken from the headers. They are listed in the order they appear from left to right in the grid column headings.

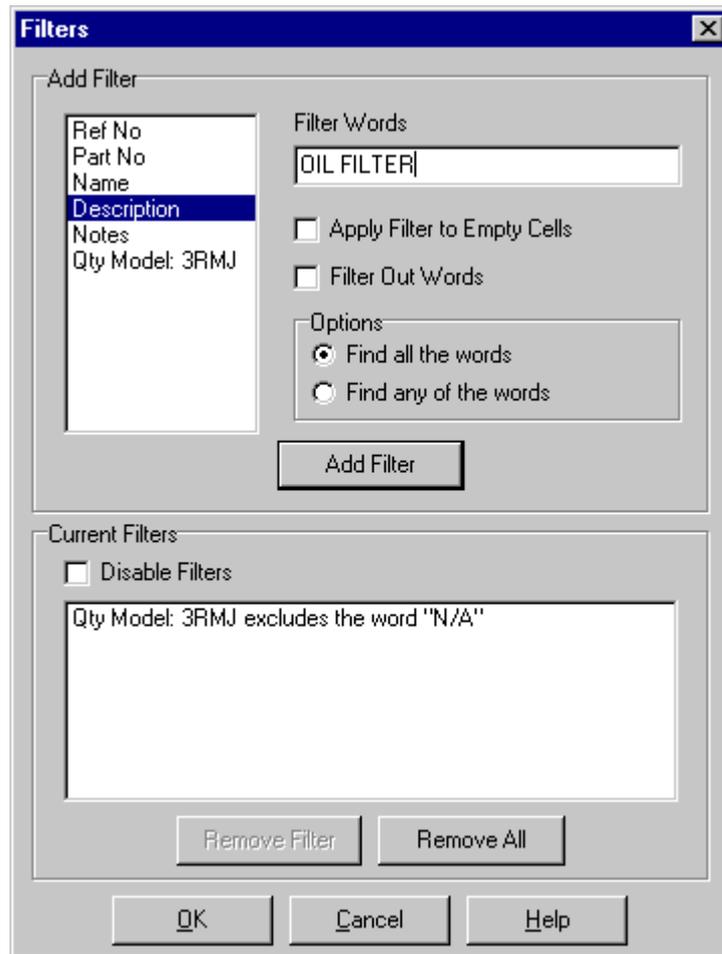
2. Click on a header in the Add Filter list. The Filter Words text box becomes active.

3. Type the text to filter on.



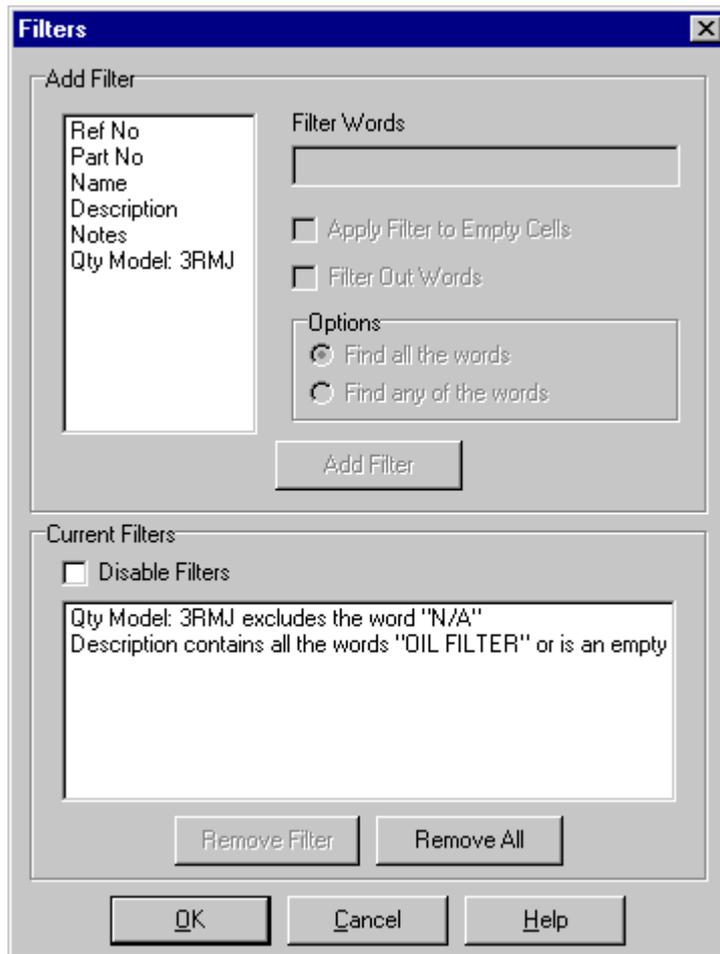
In this example, **Description** has been selected from the Add Filter list and **RING** has been typed in the Filter Words text box.

If you type more than one word, the Options radio buttons become active. For example:



Selecting one of these radio buttons refines the filter to match all words or to match any of the words. For example, clicking on "Find all the words" would filter on both "oil" and "filter". Clicking on "Find any of the words" would filter on either "oil" or "filter".

4. Click on the **Add Filter** button to insert the filter in the Current Filters list.



Apply Filter to Empty Cells

Click on this check box to insert a checkmark (✓) to hide empty cells in the selected column. If you do not select this option, empty cells will be displayed with the filter results.

Filter Out Words

Click on this check box to insert a checkmark (✓) to filter out the text you typed in the Filter Words text box.

Disable Filters

Click on this check box to insert a checkmark (✓) to disable current filters temporarily without deleting them. To re-enable the filters, click on the check box to remove the checkmark.

Remove Filter

Highlight the filter(s) you want to remove and click on this button to delete one or more filters,

Remove All

Click on this button to delete all filters.

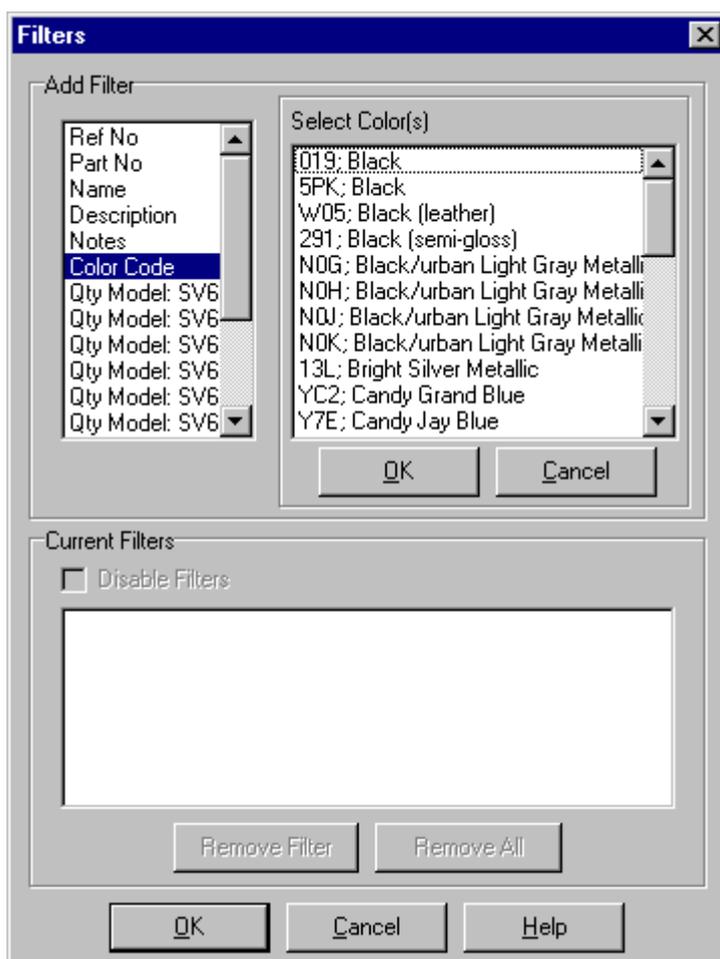
Note: You can add more than one filter, including additional filters on the same column heading.

Note: If the text in the Add Filter list or the Current Filters list extends beyond the width of the field, position the mouse pointer over the text to display the entire description.

Applying Color Code Filters

When you open a catalogue for a manufacturer that has color code data available, you can create and apply a color code filter to narrow your search.

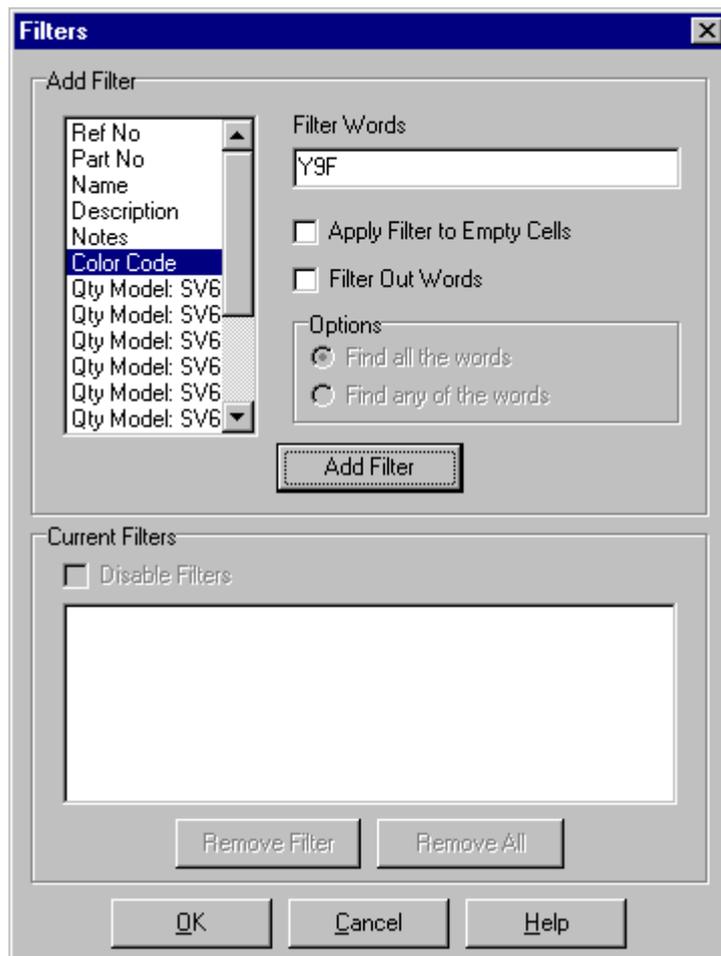
1. From the Parts List in the Main Application Window, click on **Filter** to open the Filters dialogue box.
2. Click on the **Color Code** header in the Add Filter list. Color Codes are displayed in the Select Color(s) list.



3. Click on a color code in the Select Color(s) list to highlight the code.

Note: To select more than one color code at a time, hold down the **Ctrl** key and click on each code you want to filter on or hold down the **Shift** key and click on the first and last codes in a range of codes you want to filter on.

4. Click on **OK** to insert the selected color code in the Filter Words text box.



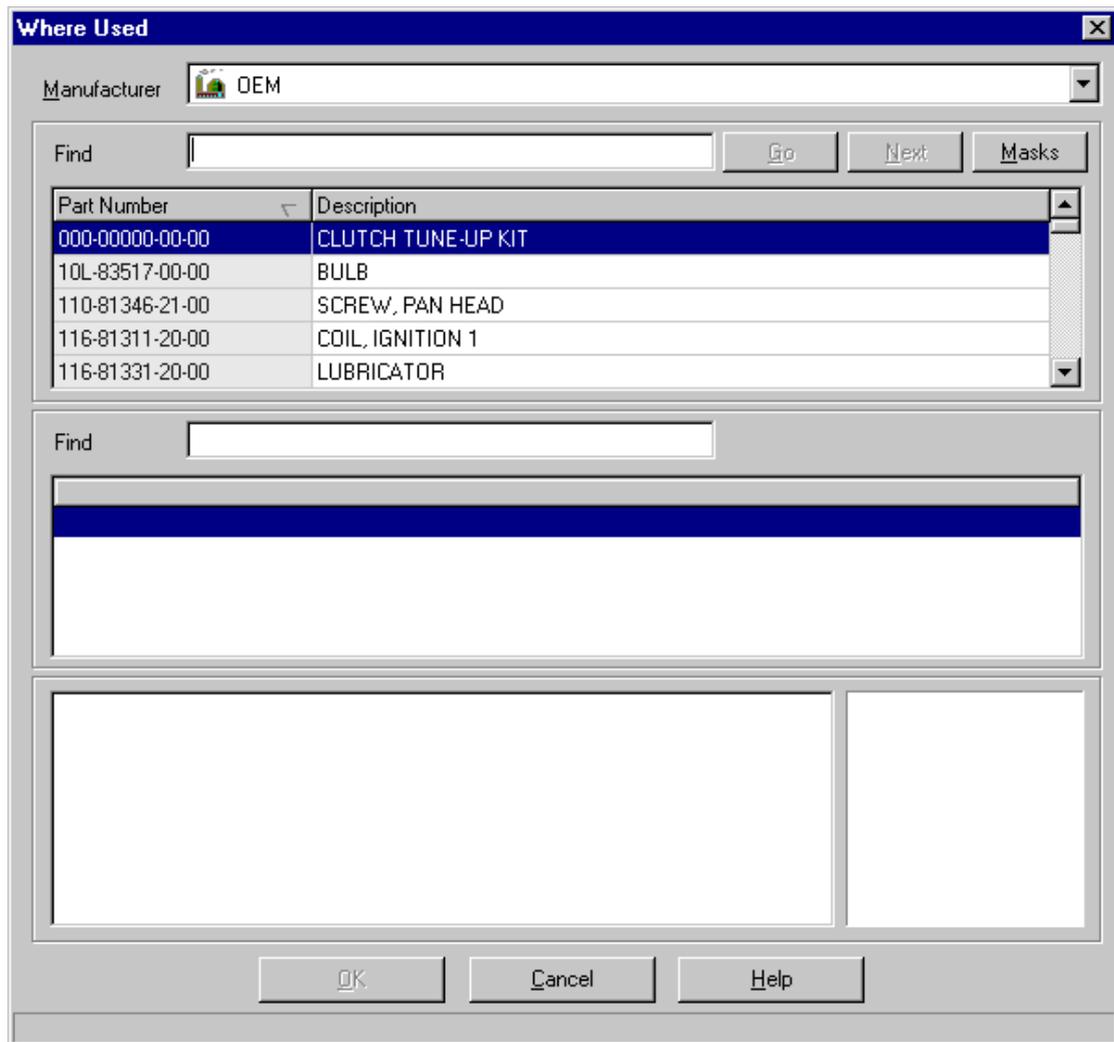
5. Click on the **Add Filter** button to insert the color code filter in the Current Filters list.

Using the Where Used Feature

The Where Used feature allows you to search for a part number or description across all catalogues of a manufacturer. If you want to find out what models use a particular part, Where Used can provide this information. You can use the Where Used options for a catalogue other than the one already open.

Selecting a Manufacturer

1. Select **Where Used** from the Search menu, click on , or press **Shift + F7** to open the Where Used dialogue box.



2. Click on the manufacturer drop-down box and select a manufacturer.



3. Part numbers and descriptions are listed for the selected manufacturer.

Where Used: Applying Masks

The Masks dialogue box allows you to superimpose a manufacturer's part number mask into the Where Used dialogue box. This mask provides a template for the format of the part number and reduces the number of digits you need to enter. All you need to do is fill in the blanks.

Note: The Masks dialogue box is active when the part number column is selected. Settings are saved when you exit if the Auto-Save option is enabled.

1. In the Where Used dialogue box, click on **Masks**. The Masks dialogue box will be displayed.



2. Select a mask from the drop-down list. The following are examples of available formats.

XXX-XXXXX-XX-XX

9XXXX-XXXXX-XX

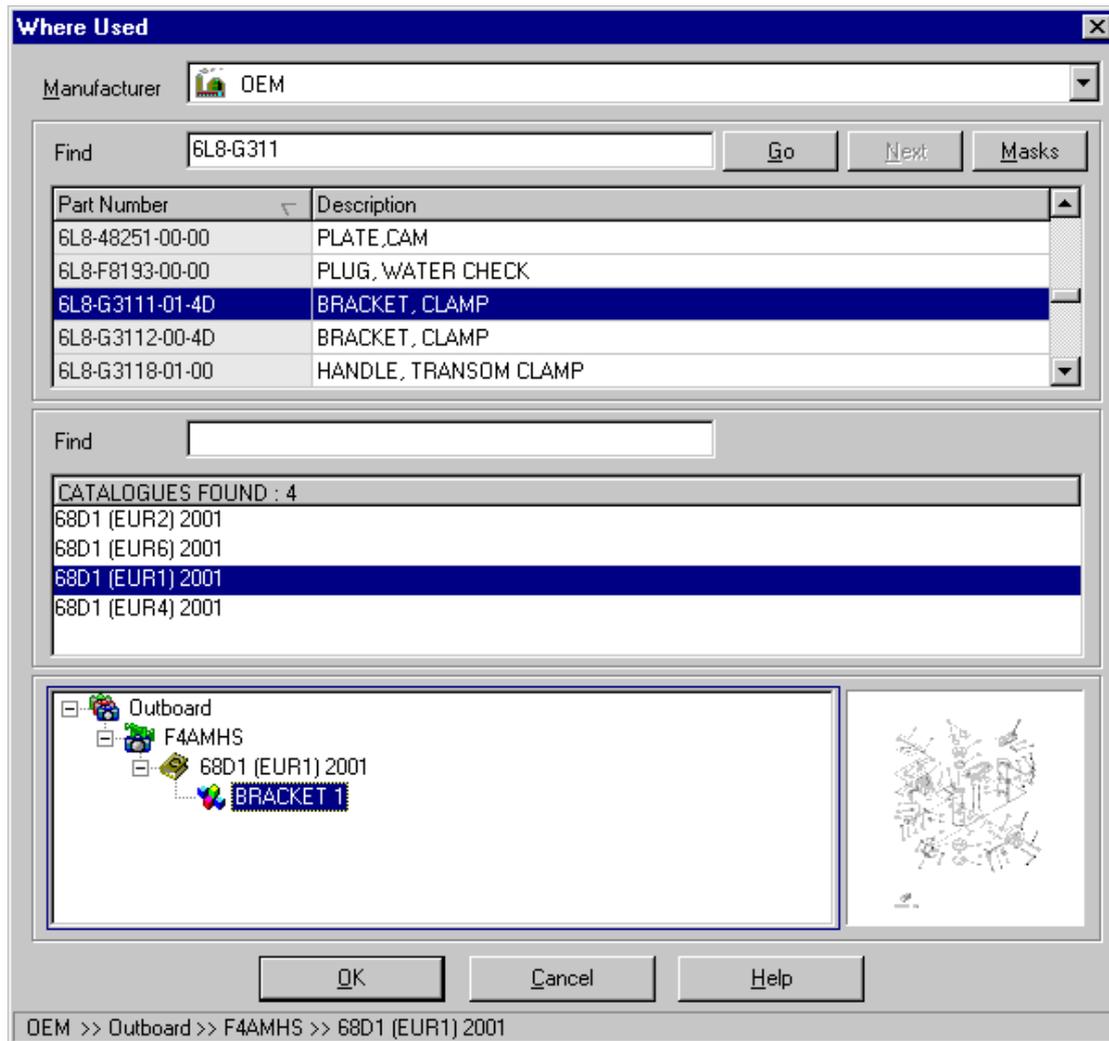
No masks

3. Click on **OK**.
4. To deselect a mask, select **No masks** from the drop-down list.

Where Used: Searching by Part Number

1. Click on the **Part Number** heading to highlight that column.
2. *Optional:* Use the Masks feature if appropriate.
3. Type the full or partial part number in the Find text box and click on **Go**. The part that is the closest match to your entry is highlighted in the list below.
4. Click on the highlighted part to display the catalogues the part occurs in and select a catalogue. The number of available catalogues is displayed. Find is also available for assisting your search of a catalogue.

- Click on the required block in the bottom left field. A thumbnail view of the selected block appears in the lower right corner of the dialogue box.



- Click on **OK** to return to the Main Application Window. The selected catalogue opens, and the selected block and part are displayed.

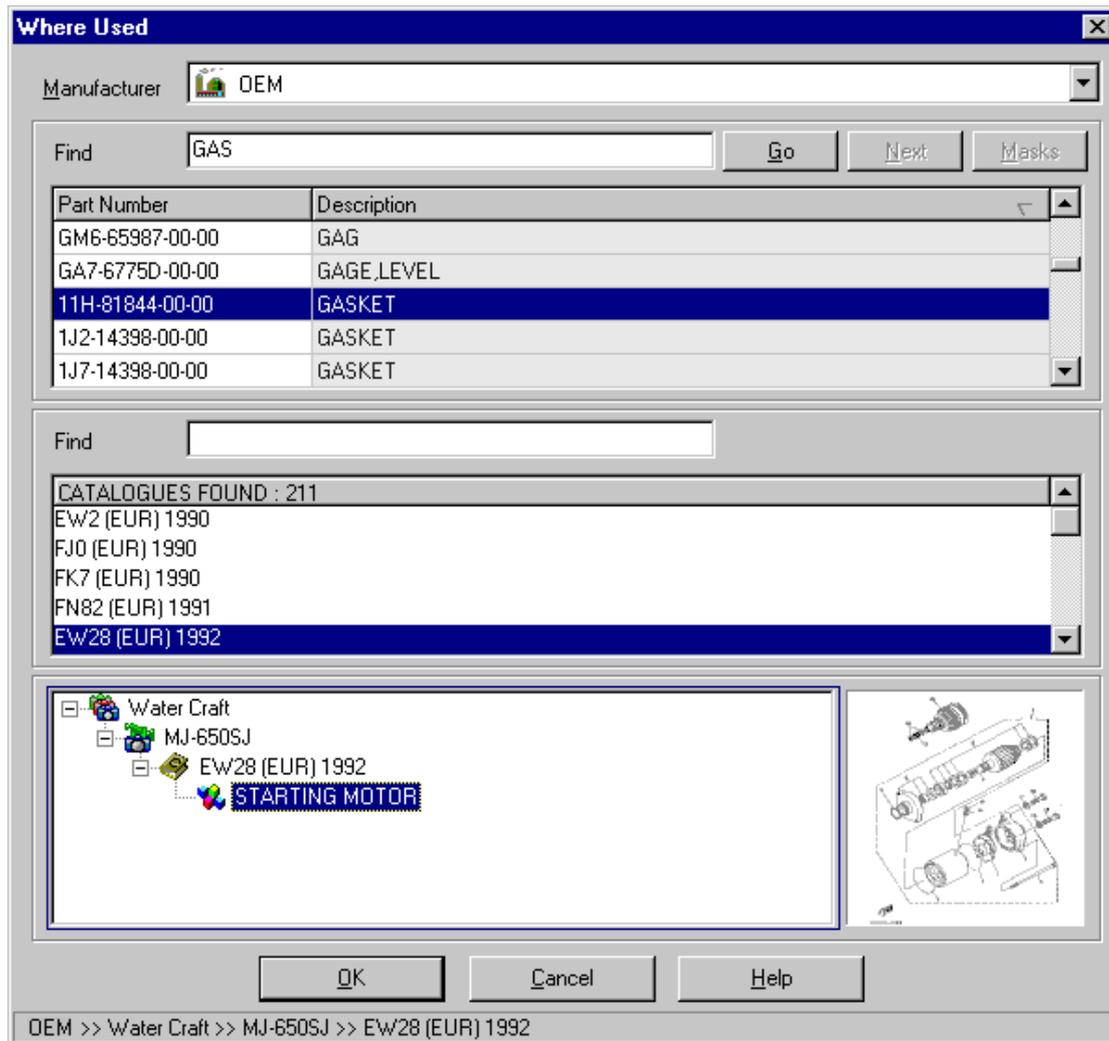
Where Used: Searching by Part Description

- Click on the **Description** heading.

Note: The Masks feature is not available for text searches.

- Type the full or partial description in the Find text box and click on **Go**. The part that is the closest match to your entry is highlighted in the list below.
- Click on the highlighted part to display the catalogues the part occurs in and select a catalogue. The number of available catalogues is displayed. Find is also available for assisting your search of a catalogue.

- Click on the required block in the bottom right field. A thumbnail view of the selected block is displayed.



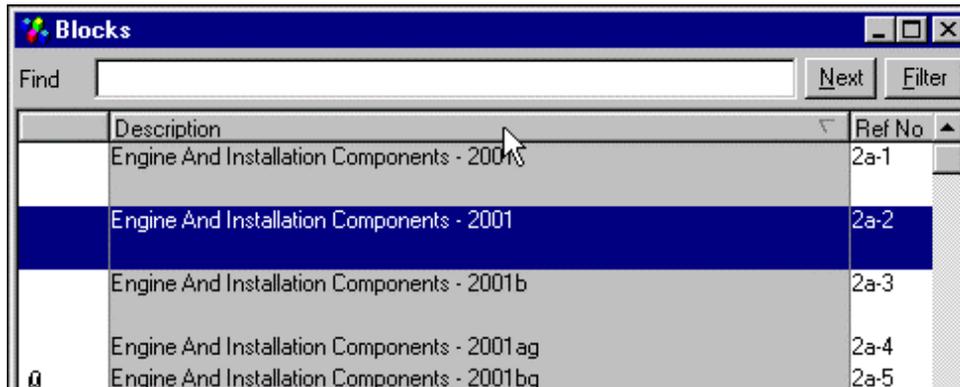
- Click on **OK** to return to the Main Application Window. The selected OEM opens, and the selected block and part are displayed.

7. Using Additional Features

Using the Find Feature

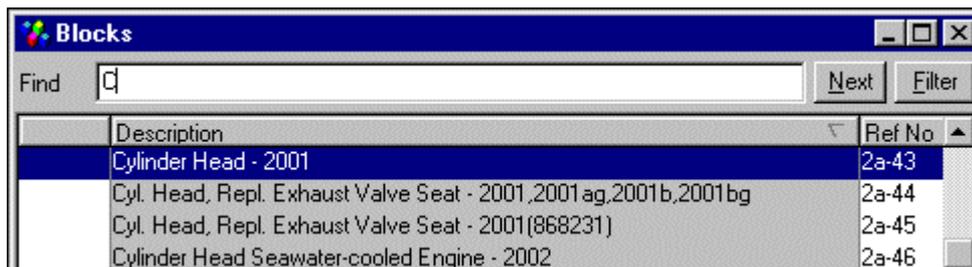
The Find feature is dynamically interactive, meaning that it begins searching as soon as you type the first letter or number in the Find text box. You can use the Find option as follows.

Click on a column header to select the column. The column background turns gray.



Typing in the Find text box finds the first row in the list that matches your input. This is independent of which row is currently selected and starts from the top. This Find routine is dynamic, which means that once typing begins, if a match is found, the highlight moves to that row. As shown in the example above, ref.no. 2a-2 is highlighted.

Typing **C** in the Find text box highlights ref.no. 2a-43. This entry is the first row that meets the Find criteria in the description column.



Typing **L** to add to the Find criteria moves the highlight to ref.no. 9-50. This entry is the first row that meets the full criteria "CL".

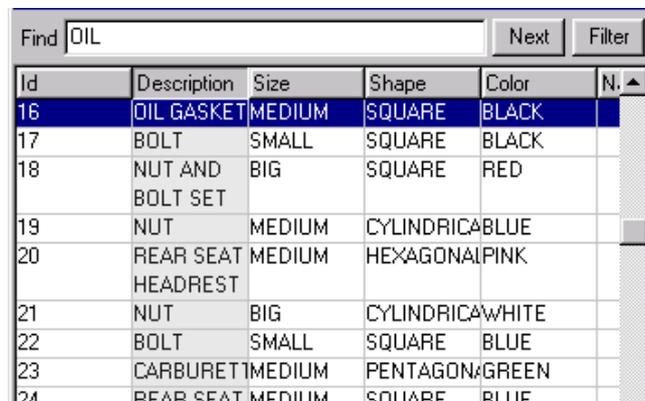


If the Find criteria do not match any items in the list, the highlight remains on the last highlighted row. In this example, typing **X** caused the highlight to remain on the same row.



If a space is the last character of the criteria, Find highlights items containing the text string before the last space in the criteria.

Typing **OIL** as the Find criteria highlights row 16.



Adding a space to make the find criteria "OIL " highlights row 5. This entry includes the word "OIL" somewhere in the description.



If another letter is added to the Find criteria, Find looks for the first item matching the entire string. Adding the letter **F**, for example, makes the search criteria "OIL F".



The screenshot shows a 'Find' dialog box with a search criteria field containing 'OIL F'. Below the field are 'Next' and 'Filter' buttons. A table displays the search results. The first row is highlighted in blue.

Id	Description	Size	Shape	Color	N. ▲
39	OIL FILTER	MEDIUM	CYLINDRICAL	ORANGE	
40	NUT	MEDIUM	CYLINDRICAL	GREEN	
41	REAR SEAT BELT	MEDIUM	HEXAGONAL	CYAN	
42	GASKET, OIL	BIG	HEXAGONAL	YELLOW	
43	REAR SEAT RIG		HEXAGONAL	PINK	

Note: Using "OI" and "OI " produces the same result as using "OIL" and "OIL ". However, using "OI F" produces no results.

Click on **Next** to move the highlight to the next row that meets the Find criteria.

If you reach the bottom of the list, the following prompt appears.

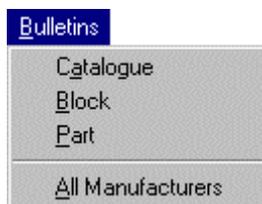
Find has reached the end of the list.
Do you want to start again from the top?

Respond to this prompt in one of these ways.

- Click on **Yes** to move to the top of the list and highlight the first row that matches the criteria.
- Click on **No** to stop the search and remain at the last highlighted row.

Viewing Bulletins

Use the Bulletins menu to access bulletins (where available) for blocks, parts, catalogues, and manufacturers.



Viewing Catalogue Bulletins

Select **Catalogue** from the Bulletins menu or click on  to open the Catalogue Bulletins dialogue box, from which you can view catalogue bulletins. This command is available when a catalogue is open or when the catalogue has bulletins attached.

Viewing Block Bulletins

Select **Block** from the Bulletins menu or click on  to open the Block Bulletins dialogue box, where you can view block bulletins. This command is available when a catalogue is open or when the selected block has bulletins attached.

Viewing Part Bulletins

Select **Part** from the Bulletins menu or click on  to open the Part Bulletins dialogue box, where you can view part bulletins. This command is available when a part is selected or when the selected part has bulletins attached.

Viewing Bulletins for All Manufacturers

Select **All Manufacturers** from the Bulletins menu to open the Bulletins dialogue box, where you can view all bulletins. This command is available when a catalogue is open. Click on a header to sort the list by the selected column. Select a bulletin and click on **View** to open a window displaying the bulletin.

Using the Bulletin Buttons



Print opens the Print dialogue box, from which you can print the selected bulletin.



Fit Illustration in Window resizes a bulletin to fit the Image window.



Zoom Out zooms out one level on a bulletin.



Zoom In zooms in one level on a bulletin.



Rotate Bulletin rotates a bulletin 90 degrees clockwise.



Previous Page displays the previous page of a bulletin.



Next Page displays the next page of a bulletin.



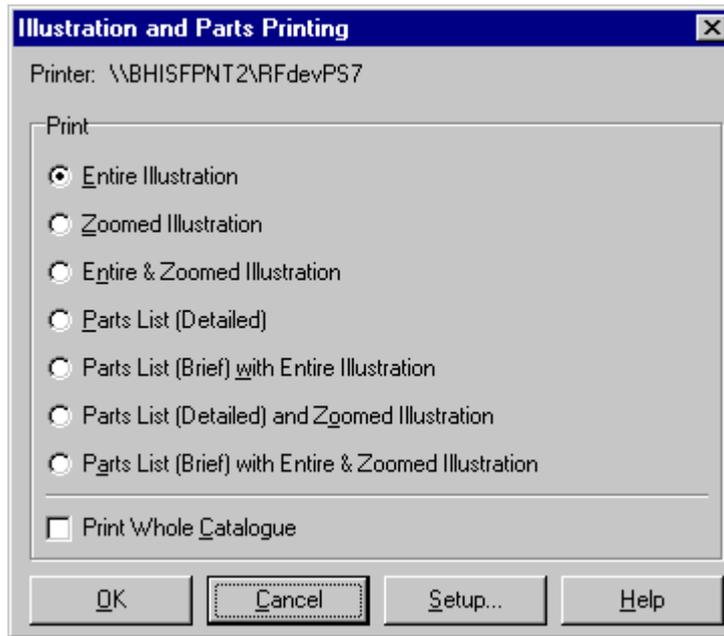
Help opens the Help topic for the current screen.

Printing

You can print a Parts List, an illustration, or a quote. The print job will be sent to the printer you selected as your Windows default.

Printing Parts Lists and/or Illustrations

1. Select **Print** from the File menu, click on , or press **Ctrl+P** to open the Illustration and Parts Printing dialogue box.



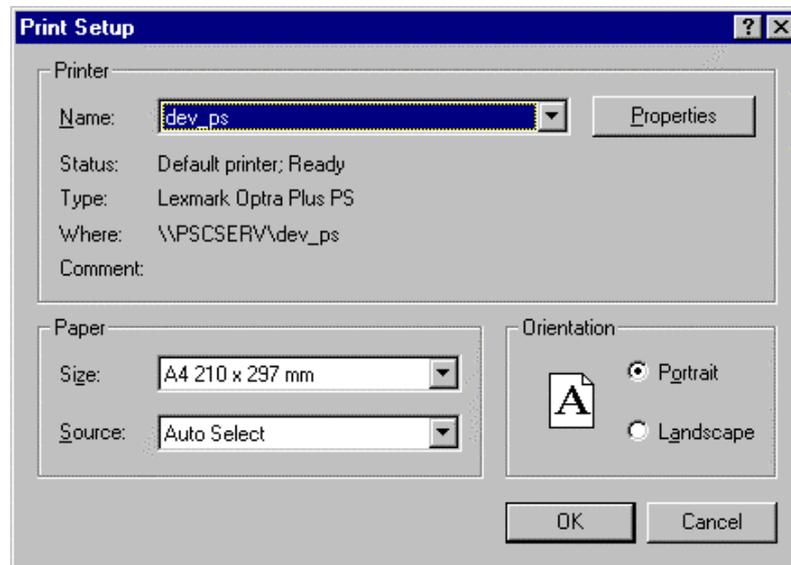
2. Click on the radio button corresponding to what you want to print.

Note: Some options are not available in thumbnail view or illustration view. Some options print in landscape only.

3. Click on **OK**.
4. In addition to the parts text and/or illustration, the printout will show the following:
 - The catalogue title
 - The product line
 - The page number

Changing the Print Setup

1. Click on **Setup** to open the Print Setup dialogue box.

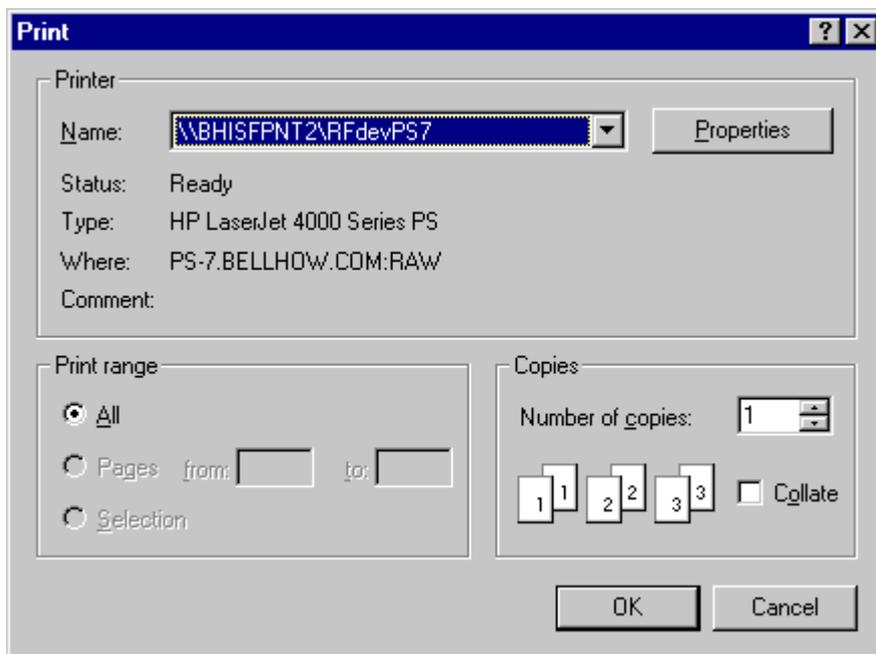


2. Select a printer, page size, orientation, etc., depending on the type of printer installed.
3. Click on **OK**.

Printing a Quote

Note: You must save a Quote List before printing it.

1. Use one of these methods.
 - Select **Print Quote** from the Quote menu.
 - Right-click in the Quote window and select **Print Quote** from the popup menu.
 - Press the **F10** key.
2. The Print dialogue box will be displayed. For example:



3. Click on **OK**.
4. In addition to the quote ("Part Estimate"), the printout will show the following:
 - The name under which the Quote List was saved
 - The order type
 - The date on which the Quote List was saved
 - The dealer code, contact name, V.A.T. registration number, and company registration number as shown on the User Options dialogue box's Company Details tab

Adding and Removing Dealer Notes

You can attach your own notes to blocks and parts. These notes will remain with the catalogue as long as you want for future reference.

These notes will be displayed automatically when you select **Catalogue**, **Block**, or **Part** from the Notes menu. You can also view these notes by clicking on the note icons when they are available.

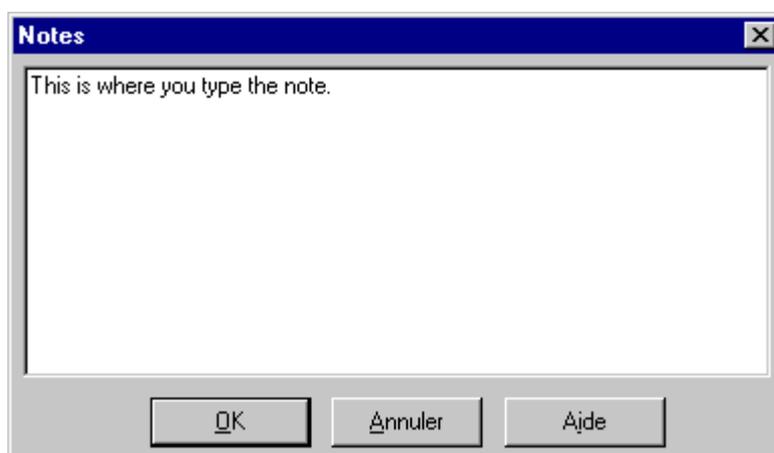
You can attach notes to individual parts or to blocks. If someone has added a note previously, one of the following icons will appear.

-  Dealer note with a block
-  Dealer note with a part
-  Dealer note with a package, assembly, or kit

You can add or read a note by double-clicking on the part or block.

Adding a Note to a Block or Parts List

1. Double-click on a part or block to open the Parts Information or Block Information dialogue box.
2. Click on **Add** to open the Notes text window.



3. Type the note.
4. Click on **OK**. The note appears in the "Dealer Notes" section of the dialogue box.

Removing a Note from a Block or Parts List

You can delete a note by selecting it and clicking on **Delete** in the Block Information or Parts Information dialogue box.

Parts Information

Catalogue **2000 (GBR) 3FAS**
Block **OIL PUMP**

Ref No. **04** Part No. **22F-13329-01-00**
Name **GASKET, PUMP COVER**
Description **GASKET, PUMP COVER**
Price **£0.00** Cost
Discount\Price Code
Qty Req'd **1** Qty In Stock **0**

Qty Model

U49	CAL	JAP	CAN	EUR
1	1	1	1	1

Dealer Notes

Date	User	Note
08/10/1999	terBorgE	Here you can add notes

Manufacturer Notes

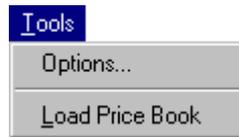
Loading a Price Book

Select **Load Price Book** from the Tools menu to load a Price Book from diskettes. You may be prompted to insert additional price book diskettes.

In Microsoft Windows networks this option is disabled in client systems because the clients access price books from the server.

In a Novell client configuration, this option is enabled because the price book must be installed from a client.

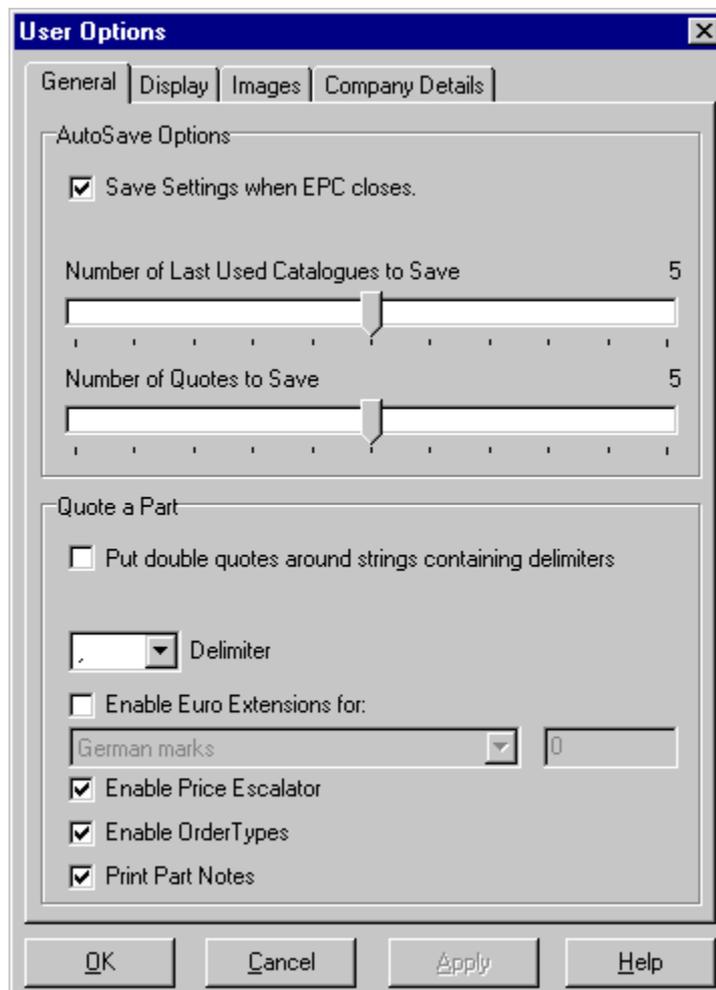
8. Setting User Options



Select **Options** from the Tools menu or click on  to open the User Options dialogue box from which you can use the General, Display, Images, and Company Details tabs to do the following: set auto-save, quote, and Euro extension options; select a language and set navigational options; adjust thumbnail and illustration zoom settings; and type company information.

Setting General Tab Options

Click on the User Options dialogue box **General** tab to view the available options.



Setting AutoSave Options

Save Settings when EPC closes: Enables auto-save for settings such as the grid setup, column width, etc. for the open OEM.

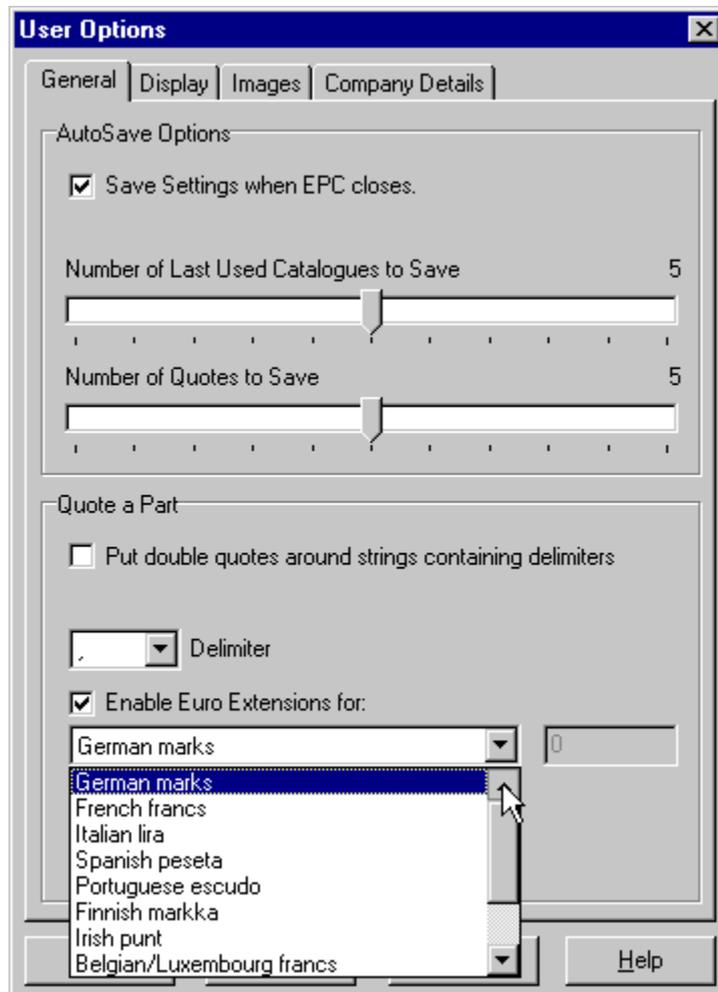
Note: Changes to the user options are saved even if auto-save is not enabled.

Number of Last Used Catalogues to Save: Set the maximum number of previously-opened catalogues to be listed in the recently-used catalogues list.

Number of Quotes to Save: Set the maximum number of quotes to be listed in the recently-saved quotes list.

Enabling Euro Extensions

Enable Euro Extensions for: Enables the calculation and display of Euro extensions for the currency you select from the drop-down list.

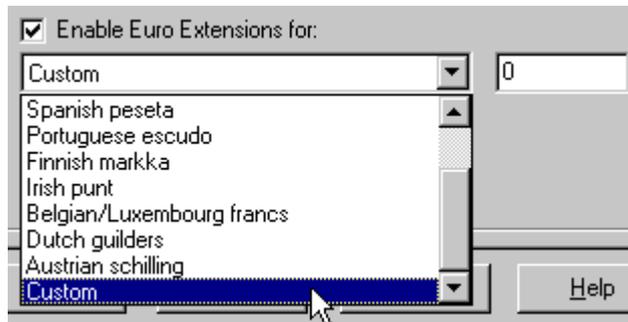


Selecting a Specific Currency

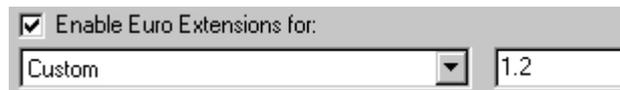
1. Click on the "Enable Euro Extensions for" box to insert a checkmark.
2. Click on the drop-down list box arrow to open a list of currencies.
3. Click on the appropriate currency to highlight it. It will be displayed in the list box.
4. Click on **OK**.

Setting a Custom Exchange Rate

1. Click on the "Enable Euro Extensions for" box to insert a checkmark.
2. Click on the drop-down list box arrow to open a list of currencies.
3. Scroll to the bottom of the list and click on **Custom**. "Custom" will be displayed in the list box and the text box to the right will be activated.



4. Type an exchange rate in the text box. For example:



5. Click on **OK**.

Setting Quote List Options

Put double quotes around strings containing delimiters: Inserts double quotation marks around strings in the Quote List.

Delimiter: Select the delimiter used for data exported to an external application.

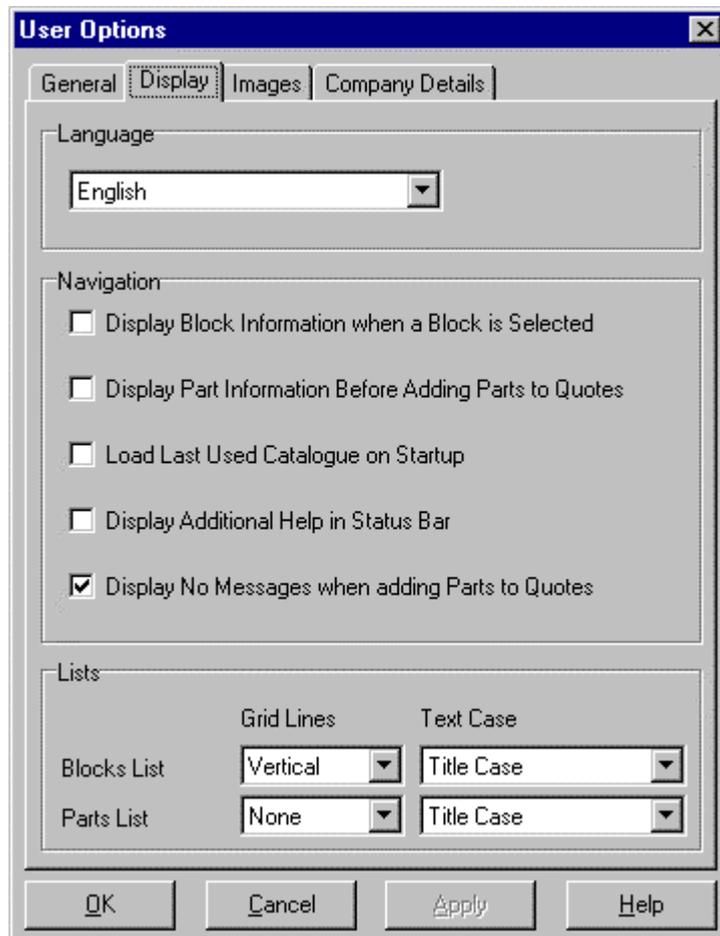
Enable Price Escalator: Enables price escalation for parts in a Quote List.

Enable Order Types: Enables order types for quotes.

Print Part Notes: Enables the printing of part notes and color information when they are available below the part description.

Setting Display Tab Options

Click on the User Options dialogue box **Display** tab to view the available options.



Language: Select a language for the application. When information is not available in the selected language, it is displayed in English.

Display Block Information when a Block is Selected: The Block Information dialogue box appears automatically when you select a block.

Display Part Information Before Adding Parts to Quotes: The Part Information dialogue box appears automatically when you select a part.

Load Last Used Catalogue on Startup: The most recently used catalogue loads automatically when you start the application.

Display Additional Help in Status Bar: An additional status bar is displayed.

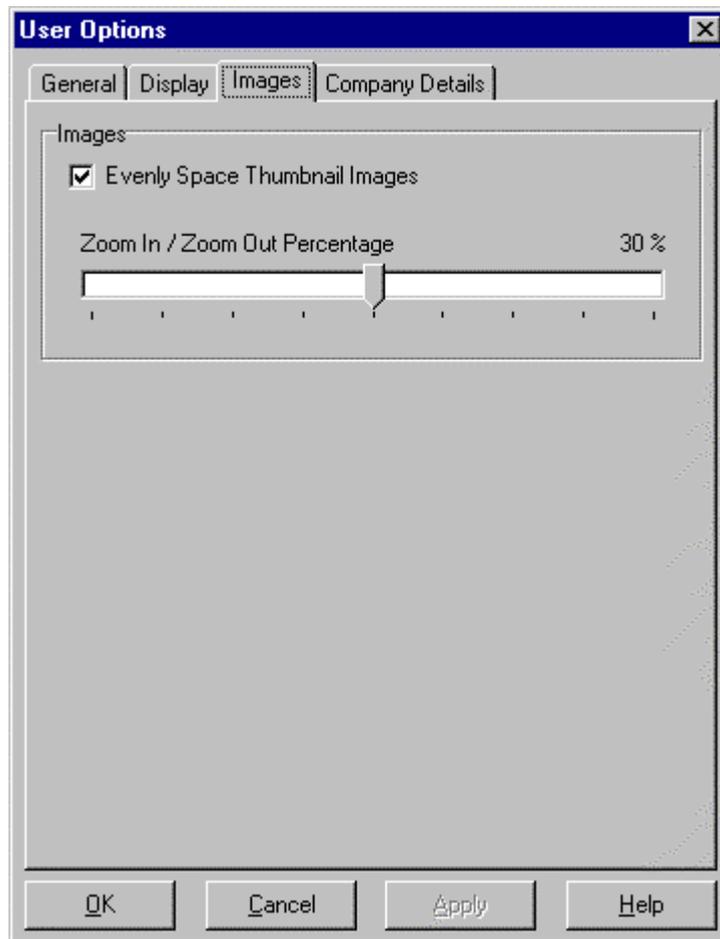
Display No Messages when adding Parts to Quotes: No messages are displayed when duplicate reference numbers and parts in kits are added to the Quote List.

Grid Lines: Select the grid line display for the Parts List and Quotes List.

Text Case: Select the character case for the Parts List and Quotes List.

Setting Images Tab Options

Click on the User Options dialogue box **Images** tab to view the available options.

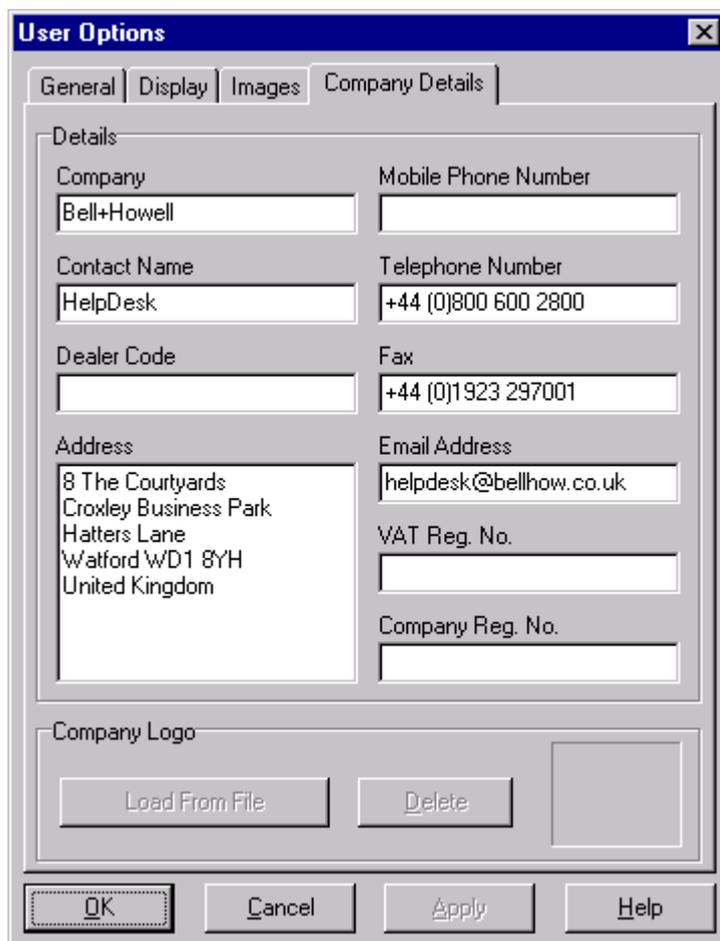


Evenly Space Thumbnail Images: Evenly spaces thumbnails.

Zoom In/Zoom Out Percentage: Set the percentage for Zoom In  and Zoom Out  between 10 and 50 percent.

Typing Information at the Company Details Tab

Click on the User Options dialogue box **Company Details** tab to view the available fields.



The screenshot shows a dialog box titled "User Options" with a close button (X) in the top right corner. The "Company Details" tab is selected, showing a "Details" section with the following fields:

Company	Mobile Phone Number
Bell+Howell	
Contact Name	Telephone Number
HelpDesk	+44 (0)800 600 2800
Dealer Code	Fax
	+44 (0)1923 297001
Address	Email Address
8 The Courtyards Croxley Business Park Hatters Lane Watford WD1 8YH United Kingdom	helpdesk@bellhow.co.uk
	VAT Reg. No.
	Company Reg. No.

Below the "Details" section is a "Company Logo" section with a "Load From File" button, a "Delete" button, and a placeholder box for the logo.

At the bottom of the dialog box are four buttons: "OK", "Cancel", "Apply", and "Help".

Type information about your company such as name, address, and important numbers. This information appears on printed quotes.

9. Reference

Using the Toolbar

The toolbar appears at the top of the Main Application Window just below the menu bar. The buttons provide quick access to EPC commands.



Hiding/Displaying and Docking/Undocking Toolbar Sections

Sections of the toolbar can be undocked and placed as separate toolbars in the Main Application Window.



Select **Toolbar** from the View menu to open a submenu from which you can hide or display the Imaging and Information toolbars. You can also undock sections of the toolbar by dragging them onto the main window area.

Using the Toolbar Buttons

When you point the mouse cursor on a toolbar button, an identifying label appears. Click on a button to activate the corresponding command.



Open Parts Catalogue displays the Open Catalogue dialogue box, from which you can select a manufacturer and catalog or model.



Open Quote displays the Open Quote dialogue box.



Print opens the Illustration and Part Printing dialogue box.



Send Parts to Invoice sends the parts in a Quote List to a DMS.



Return to Invoice takes you back to your DMS application.



Reset Windows resets the application window to its default size and each child window to its original size.



Search for Part opens the Parts Search dialogue box, from which you can search for a part in the open catalogue.



Where Used opens the Where Used dialogue box, from which you can search for a part across all catalogues of an OEM and see where it is used.



View Previous Block (Illustration) displays the previous illustration in a catalogue.



View Next Block (Illustration) displays the next illustration in a catalogue.



Display Thumbnails displays thumbnails of illustrations.



Display Illustration displays full-sized illustrations.



Display Looking Glass opens the Looking Glass window, which allows you to magnify portions of an illustration.



Fit Illustration in Window resizes an illustration to the dimensions of the image window.



Zoom Out (Make Illustration Smaller) zooms out one level on an illustration.



Zoom In (Make Illustration Larger) zooms in one level on an illustration.



Rotate Image rotates an illustration 90 degrees clockwise.



Catalogue Notes opens the Catalogue Information dialogue box.



Block Notes opens the Block Information dialogue box.



Part Notes opens the Part Information dialogue box.



Catalogue Bulletins opens a list of bulletins for the open catalogue.



Block Bulletins opens a list of block bulletins for the open catalogue.



Part Bulletins opens a list of part bulletins for the open catalogue.



Options opens the User Options dialogue box from which you can change general, language, display, and zoom settings and type company information.



EPC Help opens the application online Help.

Using the Pull-Down Menus

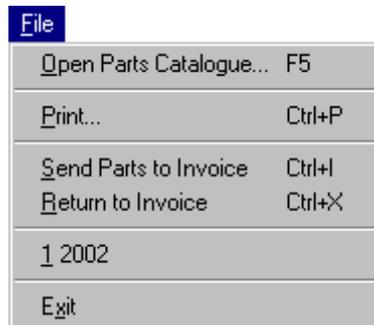
The EPC menu bar is displayed at the top of the Main Application Window.



The menu names are always visible, but the commands available from each menu depend on the location in the Main Application Window and the data available at that particular stage. You can access the menu bar by clicking on the menu items with the mouse or by using the keyboard and shortcut keys.

Certain letters are underlined. These are the shortcut letters. For example, to open the File menu, press **Alt + F**. Then use the arrow keys to move through the menu or click on one of the underlined letters in a command.

The File Menu



Open Parts Catalogue: Opens the Open Catalogue dialogue box. Select a manufacturer and open a parts catalogue in either Navigate or Find By view.

Print: Opens the Illustration and Parts Printing dialogue box. Click on the radio button corresponding to what you want to print. Then click on **OK**.

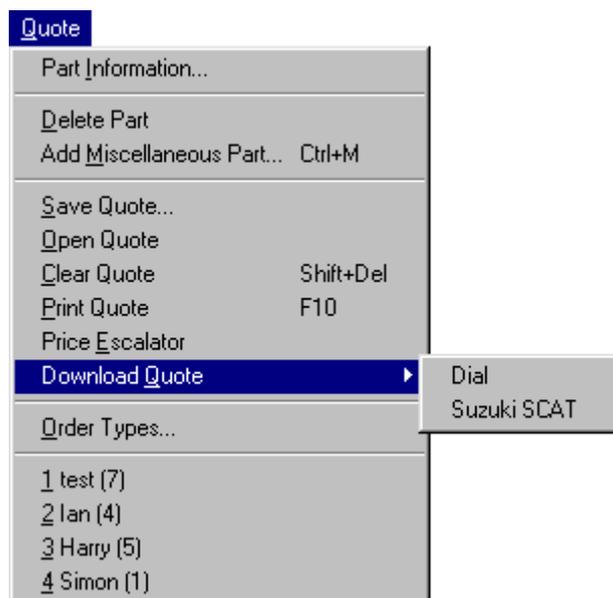
Send Parts to Invoice: If the EPC is connected to a DMS, this command sends all parts from the Quote Window to an invoice application.

Return to Invoice: If the EPC is connected to a DMS, this command returns you to an invoice application.

Recently Used Catalogues: The area of the menu above the Exit command lists recently used catalogues. Click on an entry to open the corresponding catalogue.

Exit: Displays a confirmation prompt: "Closing EPC. Are you Sure?" Click on **Yes** to close the application.

The Quote Menu



Part Information: Opens the Part Information dialogue box. This command is available when a part is selected in the Quote List.

Delete Part: Deletes the highlighted part from the Quote List. If you have selected the part more than once, a dialogue box appears. You can delete one or all occurrences of the part or retain the duplicate selections. This command is available when you highlight a part in the Quote List.

Add Miscellaneous Part: Opens the Add Miscellaneous Part dialogue box. Type a part number. If the number is in a DMS or current price book, the remaining fields are filled automatically with read-only data. If the application cannot find the part number, you can type a part description, price, and quantity.

Save Quote: Opens the Save Quote dialogue box. Type a name to save the quote under.

Open Quote: Opens the Open Quote dialogue box. Highlight a saved quote and click on **OK** to load a previously stored quote.

Clear Quote: Displays a confirmation prompt. Click on **Yes** to clear the current quote.

Print Quote: Opens the Print dialogue box. Click on **OK** to print a saved quote.

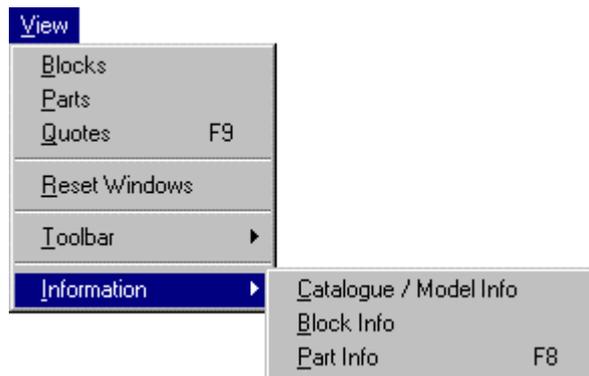
Price Escalator: Opens the Price Escalator dialogue box. For each specified range, enter a multiplier to adjust the retail figures of the parts you put in the Quote window.

Download Quote: Downloads a quote to an external application.

Order Types: Opens the Order Types dialogue box. Enter and save a one-character order type. Select an order type from the list to apply an order to a quote.

Recently Used Quote List: Opens a previously used quote.

Information: Opens a submenu with three commands.



Catalogue/Model Info Catalogue/Model Info opens the Catalogue Information dialogue box from which you can view catalogue or model information and add or delete dealer notes.

Block Info When a block is selected, Block Info opens the Block Information dialogue box which displays catalogue, model, and figure information, dealer notes, and manufacturer notes. You can also add or delete dealer notes.

Part Info When a part is selected, Part Info opens the Part Information dialogue box from which you can view information for the selected part and add or delete dealer notes.

The Illustration Menu

Illustration	
Display Thumbnails	F2
Display Looking Glass	Shift+F2
<hr/>	
Fit Illustration in Window	Shift+F11
Zoom Out (Make Illustration Smaller)	F11
Zoom In (Make Illustration Larger)	F12
Restore to Normal Size	Shift+F12
Rotate Image	
<hr/>	
View First Block (Illustration)	
View Previous Block (Illustration)	
View Next Block (Illustration)	
View Last Block (Illustration)	

Note: The first command on the menu toggles between **Display Thumbnails** and **Display Illustration** as the view in the application changes.

Display Thumbnails: Displays illustrations in thumbnail view.

Display Illustration: Displays illustrations in illustration view.

Display Looking Glass: Opens the Looking Glass window which displays the currently selected illustration in thumbnail view. When you drag the mouse pointer in the Looking Glass window to define an area, the corresponding portion of the illustration is magnified. You can move the defined area around by right-clicking on the Looking Glass window. The mouse pointer changes to a hand, allowing you to drag the defined area. The magnified portion of the illustration changes accordingly.

Fit Illustration to Window: Resizes an illustration to the dimensions of the Image window.

Zoom Out: Zooms out on an illustration.

Zoom In: Zooms in on an illustration.

Restore to Normal Size: Restores an illustration to its normal size.

Rotate Image: Rotates an illustration 90 degrees.

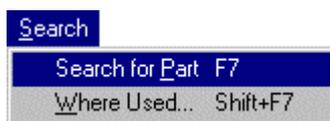
View First Block (Illustration): Displays the first illustration in a catalogue.

View Previous Block (Illustration): Displays the previous illustration in a catalogue.

View Next Block (Illustration): Displays the next illustration in a catalogue.

View Last Block (Illustration): Displays the last illustration in a catalogue.

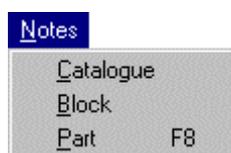
The Search Menu



Search for Part: Opens the Parts Search dialogue box which allows you to search for parts by number or description. The Filters dialogue box allows you to narrow your search. This command is available when a catalogue is open.

Where Used: Opens the Where Used dialogue box which allows you to search for a part or description across all catalogues of a manufacturer.

The Notes Menu

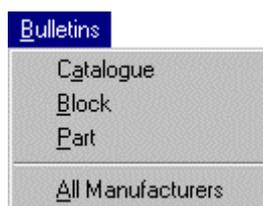


Catalogue: When a catalogue is open, displays the Catalogue Information dialogue box from which you can view catalogue information and add dealer notes.

Block: When a catalogue is open, displays the Notes Information dialogue box from which you can view block information and add dealer notes.

Part: When a Parts List is displayed, opens the Part Information dialogue box from which you can view parts information and add dealer notes.

The Bulletins Menu



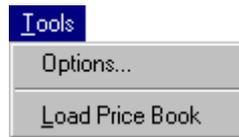
Catalogue: Opens the Catalogue Bulletins dialogue box from which you can view catalogue bulletins. This command is available when a catalogue is open and the catalogue has bulletins attached.

Block: Opens the Block Bulletins dialogue box from which you can view block bulletins. This command is available when a catalogue is open and the block has bulletins attached.

Part: Opens the Part Bulletins dialogue box from which you can view bulletins. This command is available when a part is selected and the part has bulletins attached.

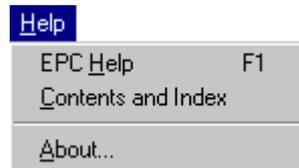
All Manufacturers: Opens the Bulletins dialogue box from which you can view all bulletins. This command is available when a catalogue is open.

The Tools Menu



Options: Opens the User Options dialogue box from which you can use the General, Display, Images, and Company Details tabs to change general settings; language and other display settings; thumbnail and illustration zoom settings; and company information.

The Help Menu



EPC Help: Opens the EPC Help Introduction.

Contents and Index: Opens the EPC Help Contents and Index.

About: Opens the About EPC dialogue box, which displays the EPC version; copyright information; data release details for each OEM loaded on your system; MS Windows information; and a button that allows you to display registry information for the EPC. Click on the **OK** button to close this dialogue box.

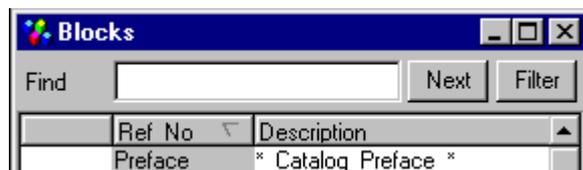


Using a Mouse

The procedures in this user guide refer to clicking or double-clicking. If you are unfamiliar with using a mouse, please read the following information.

Point	Move the mouse pointer to position it over an item.
Click	Position the mouse pointer over an item and rapidly press and release the left mouse button.
Double-Click	Position the mouse pointer over an item and rapidly press and release the left mouse button twice.
Right-Click	Position the mouse pointer over an item and rapidly press and release the right mouse button.
Drag	Position the mouse pointer over an item, press and hold the left mouse button, move the mouse while holding down the button, and then release the button.

Working with Windows



Maximizing Windows

Maximize the Blocks List, Image window, Parts List, and Quote List by using any of these methods.

- Double-click on the window's title bar.
- Click on the window's  maximize button.
- Click on the icon in the top left corner of the window and select **Maximize** from the menu that opens.

Minimizing Windows

Minimize the Blocks List, Parts List, and Quote List by using any of these methods.

- Click on the window's  minimize button.
- Click on the window's  close button.
- Click on the icon in the top left corner of the window and select **Minimize** from the menu that opens.

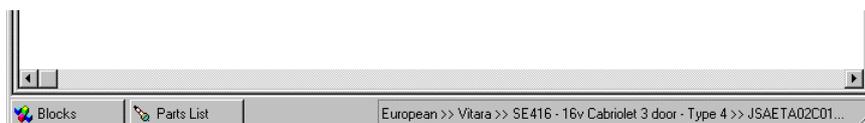
Note: You cannot minimize the Image window.

Restoring Windows

Restore a maximized window to its original size by double-clicking on the window's title bar.

Restore a minimized window to its original size by using one of these methods.

- Select the Blocks, Parts, or Quotes command from the View menu.
- Click on the button on the Status bar. In this example, Blocks and Parts List buttons are displayed, indicating that those two windows are minimized.

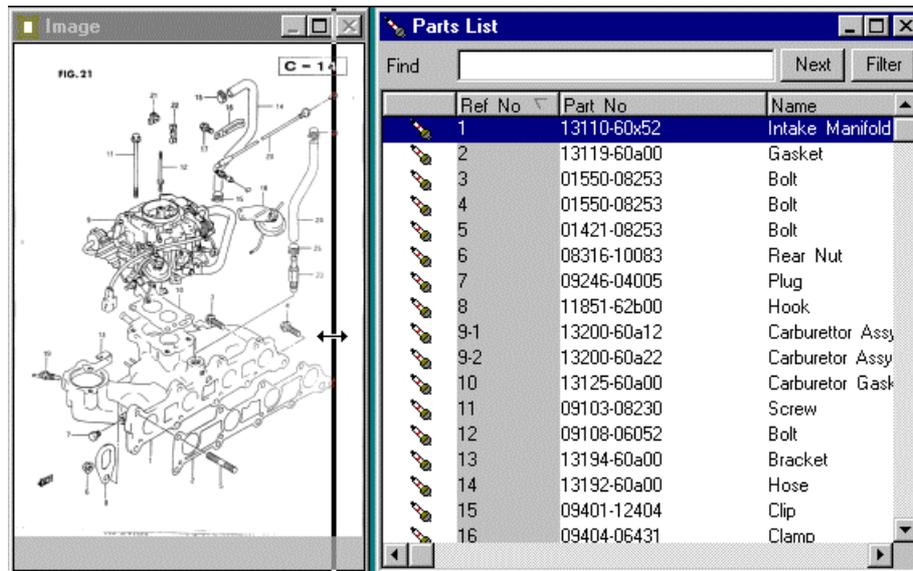


Resizing Windows

You can resize windows by dragging the border between two adjacent windows. When you point the cursor on a border, it changes to a double-headed arrow.



You can then drag the border. For example:



Resetting the Display

You can reset the display to the default settings. Select **Reset Windows** from the View menu to set all windows to their default sizes.

Working with Information Columns

Resizing Information Columns

You can resize information columns by dragging column header boundaries.



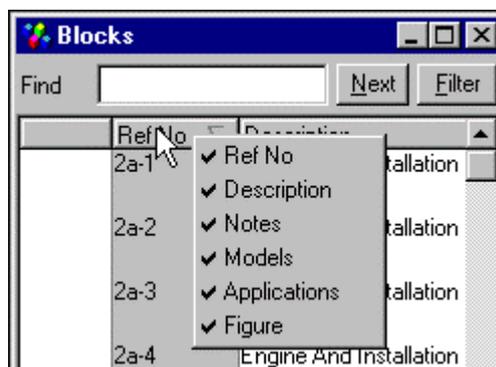
For this example, place the mouse pointer on the boundary between the Ref No and Description column headers. The pointer changes to a double-headed arrow.



Drag the boundary to the left to expand the Description column or drag the boundary to the right to expand the Ref No column.

Displaying and Hiding Information Columns

You can also select which columns are displayed. Right-click on a column header to display a popup list. Then select which columns you want to display.



A checkmark (✓) preceding a column header title indicates that the column is displayed. Clicking on the header title to remove the checkmark hides the column.

When no checkmark precedes a column header title, the column is hidden. Clicking on the header title inserts a checkmark and displays the column.

10. Glossary

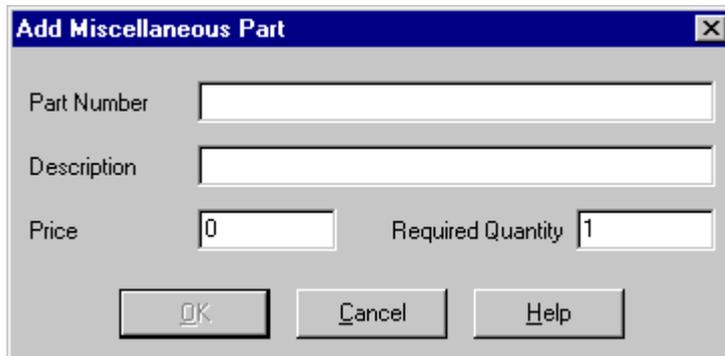
Check Box

A box in which a click is required to select or deselect an option. A checkmark in a box indicates that the option has been selected or enabled.



Dialogue Box

A window that opens when you select an item. A dialogue box lists options or prompts for additional information. For example, the Add Miscellaneous Part dialogue box prompts you to type a part number and description, a price, and a quantity.



Once you type the required information, the OK button becomes active. Clicking on the button adds the part to your Quote List.

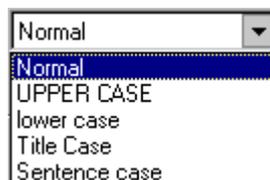
Drop-down Box (Drop-down List)

A box that opens a list from which you can make selections.

1. Click on the arrow located on the right side of the box.



2. A list of choices drops down.



3. Click on a selection.
4. The item you selected appears in the box.

Field

A general term for a box or specified area on the screen for typing characters or selecting options. *Drop-down boxes* and *text boxes* are types of fields.

Function Keys

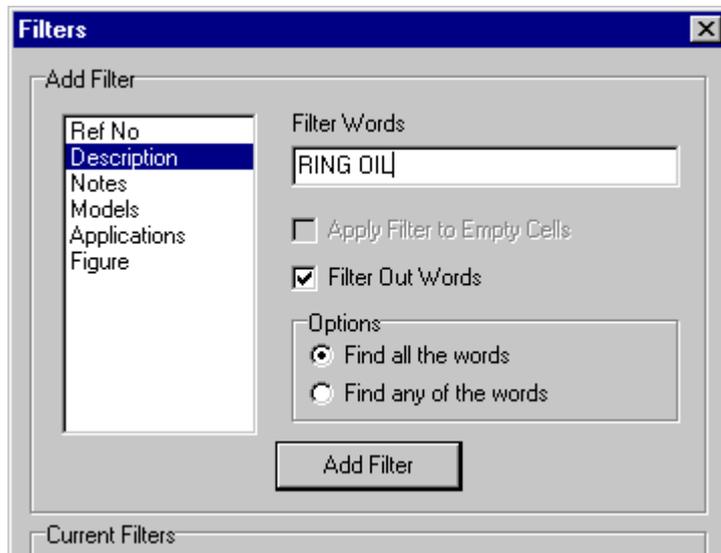
The top row of keys, labeled F1 through F12.

Grid

From the User Options dialogue box you can define the view of a dialogue box by means of lines (grids). You can set up no grid, horizontal lines, or vertical lines.

Group

A self-contained portion of a dialogue box. For example, the Filters dialogue box consists of two groups: the Add Filter group and the Current Filters group.



Highlight

Do the following to highlight a group of characters.

1. Position the mouse pointer in front of the first character you want to select.
2. Press and hold down the left mouse button.
3. While holding down the button, drag the mouse to the last character in the group.
4. Release the button. The characters you selected will be highlighted. For example:

6E5-42649-01-94 Holder, Clamp Band

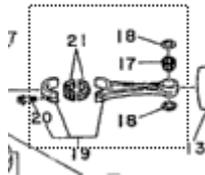
Radio Button

A circle in which a click is required to select or deselect an option. A dot in a circle indicates that the option has been selected or enabled.



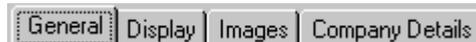
Rubber Band

A rectangular box outlined with a dashed line that appears when you click and drag on an illustration. It is used in the EPC for zooming in on an illustration. For example:



Tab

Some dialogue boxes have more than one page. Each page is referred to as a "tab". In the EPC, you move from tab to tab by clicking on the tab controls at the top of the dialogue box. For example, the User Options dialogue box consists of four tabs.



Text box

A box in which you type text or in which text is displayed. For example, the Filters dialogue box includes a Filter Words text box in which you type text to filter on.



Window

An on-screen rectangle that contains a particular set of information. The Main Application Window, Parts List, and Quote List are examples.



Other windows appear when you select options.