



Compass

User Handbook



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1

Introduction

Product Description

Compass enables you to quickly and simply search for spare parts. The system software is found on your Compass CD's and is available for use under license from FG Wilson. All aftermarket parts information is available at a glance with illustration and part numbers laid out side by side.

System Requirements

Minimum Requirements

- Windows 2000 / XP
- Processor - 1.8 GHz or equivalent
- Main memory at least 512 MB
- DVD-ROM drive
- More than 6 GB of free memory on hard drive
- Screen resolution 1024 x 768 or greater (800 x 600 possible, but not recommended)

Recommended Requirements

- Windows 2000 / XP
- Processor - 3.0 GHz or faster
- Main memory at least 1 GB
- DVD ROM drive
- More than 8 GB of free memory on hard drive
- Screen resolution 1024 x 768 or greater (800 x 600 possible, but not recommended)

2

Getting Started

Starting the Disc

Insert the disc into your computer. The software will automatically start the installation process and a screen will appear:



From this screen you can select the language for the installation process and application software, there are currently six language options (English, French, German, Italian, Spanish and Portuguese). Once you have selected a language you have three options:

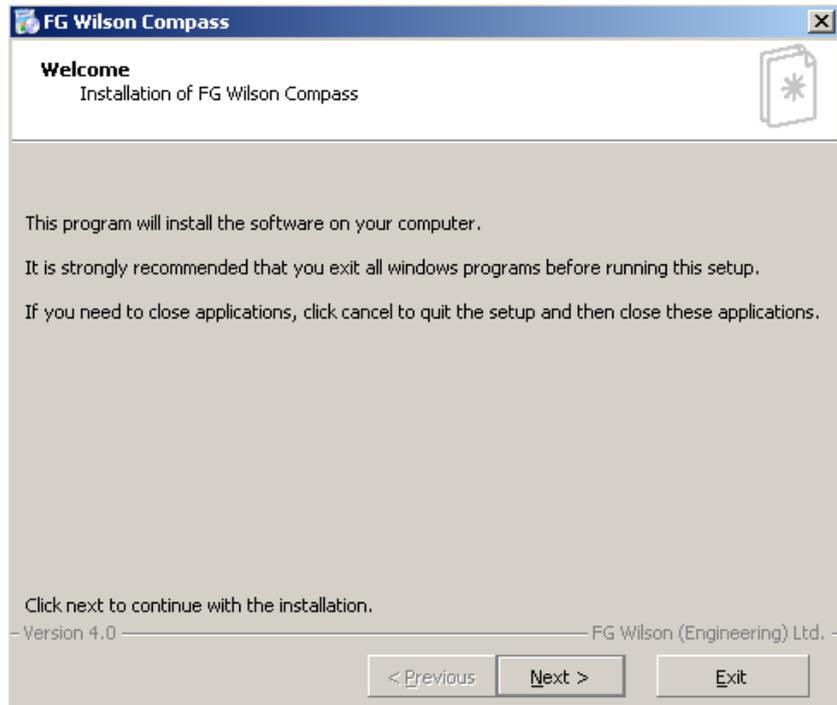
Exit When you select this option you will come out of the software without proceeding any further.

Start Installation If you select this option you will start the process for a full installation of the software onto you PC. (Recommended)

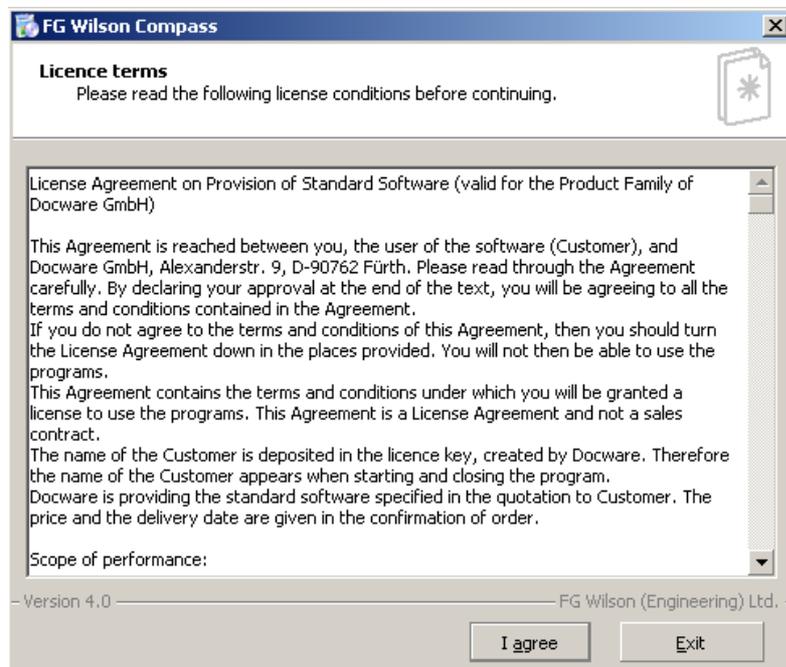
Start Install of Acrobat This option will automatically run the installation of the Adobe Acrobat software from the disc without installing any of the other software.

Start Installation

Upon selection of the “Start Installation” option a new window will appear



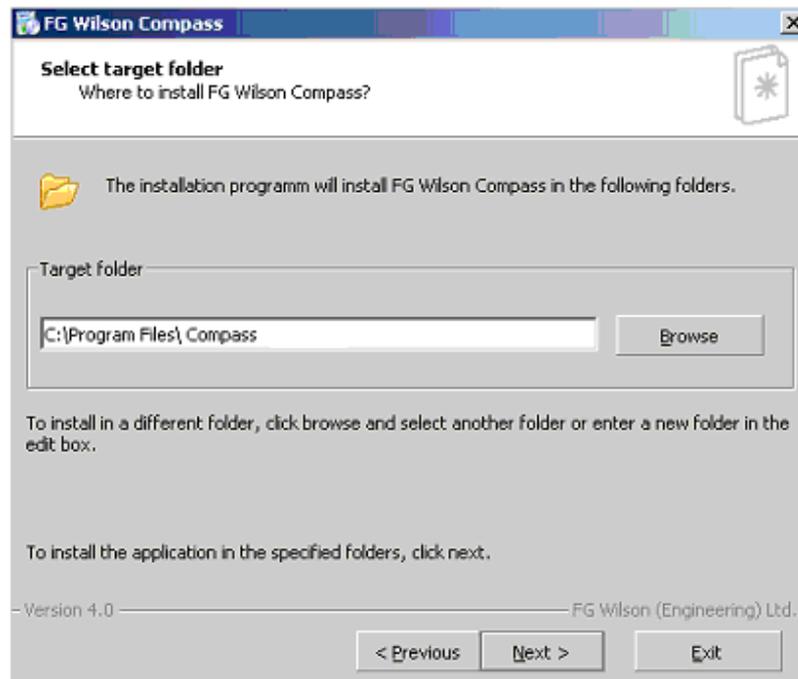
It is recommended that you exit from all windows programs before continuing with the installation. Once ready 'click' on “Next >” to continue.



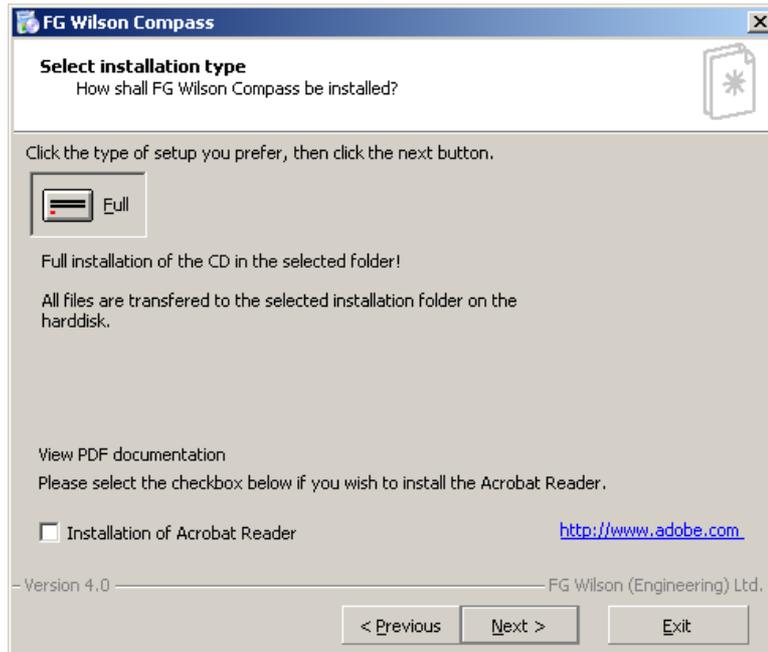
The new screen details the licence agreement with FG Wilson for the software. Select “I agree” to continue the installation.



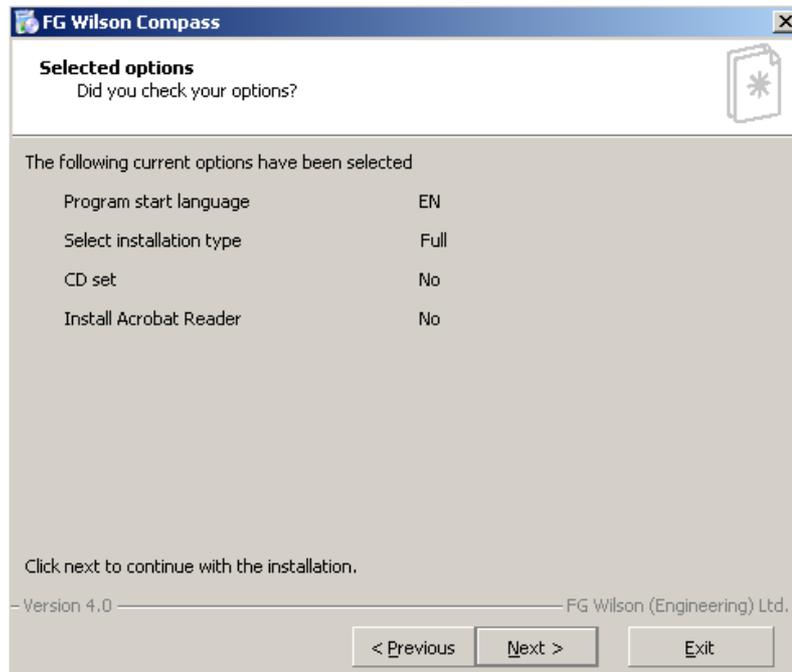
This screen allows you to select the default language that the software will use to open. Select "Next >" to continue.



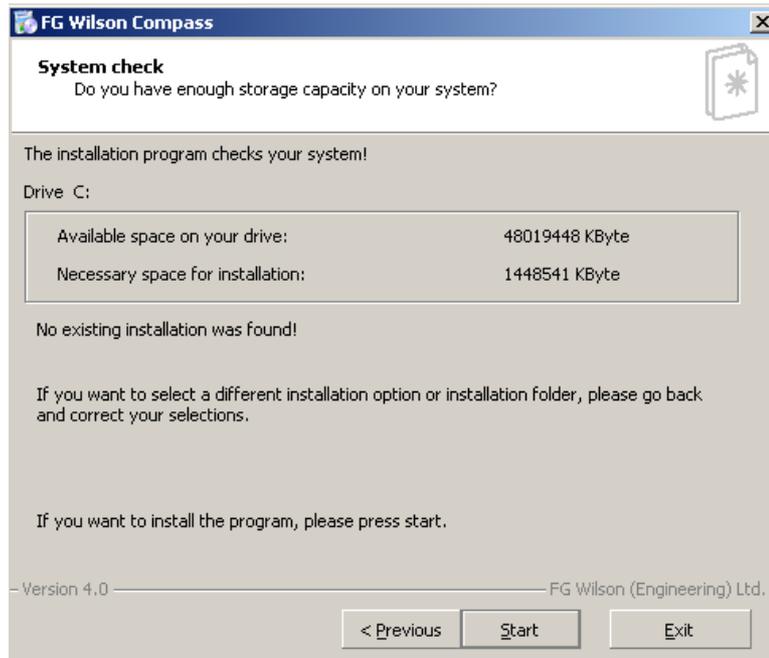
This screen details where the software files will be installed to. It is possible to select "Browse" and define a new location for the software, but we recommend that you leave the default setting as standard. Select "Next >" to continue.



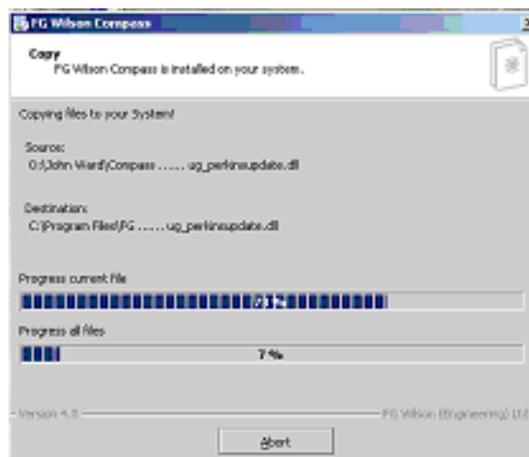
This screen details the type of installation you will be running. The default is a full installation of all the information. This will require at least 5GB of free space on your PC's hard drive. If you do not have Adobe Acrobat installed onto your PC there is also the option to install version 6.0, at this point, by clicking on the selection box at the bottom of the screen. The software will work with all versions of Adobe Acrobat, but it is recommended that you upgrade if you are using an older version than 6.0 of the software. Select "Next >" to continue.



This screen lists the options you have selected in the previous five screens. If you wish to change any of your selections you can click on "< Previous". If the selections are OK then click on "Next >" to continue.

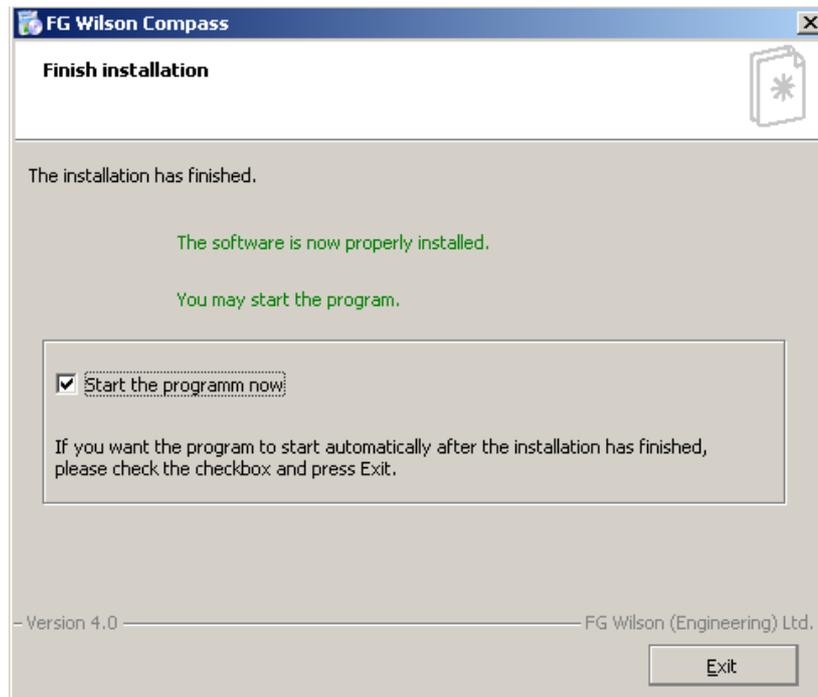


The software now makes a quick check of your system to confirm if there is enough space on your hard drive or if there are any previous versions of the software on the PC. Select "Start" to start the installation.



As the installation starts, this screen appears detailing what is being installed and how far through the process the software has completed. The software can take up to an hour to install depending on the specification of your PC.

If you wish to stop the installation for any reason then you can click on "Abort" at any time. If you do abort you will have to start the installation from the beginning. You may want to remove the files that have already been loaded before restarting, although the system will automatically put the new install over the top of them.



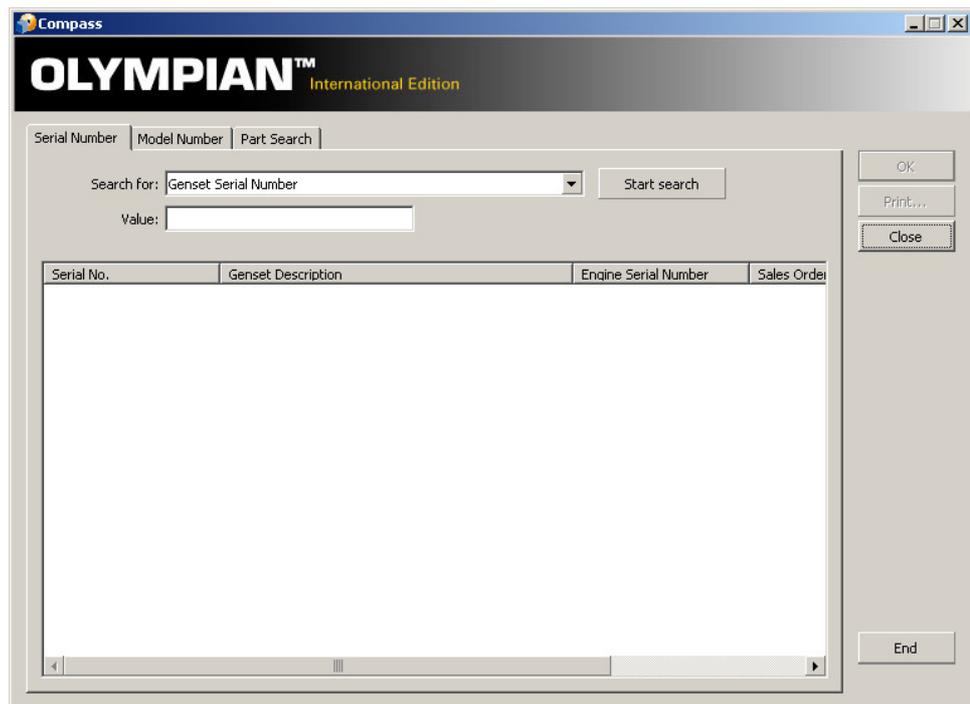
The software has now completed installation. You can start the software immediately by selecting the tick box, leave it unchecked if you wish to start later, and then select "Exit" to finish.

3

Navigation

Into the Catalogue

When opening the application you will see the opening search screen:



There are three different ways of entering the main catalogue from this search screen:

Serial Number

Allows you to search using a full or partial serial number to find the correct parts list.

Model Number

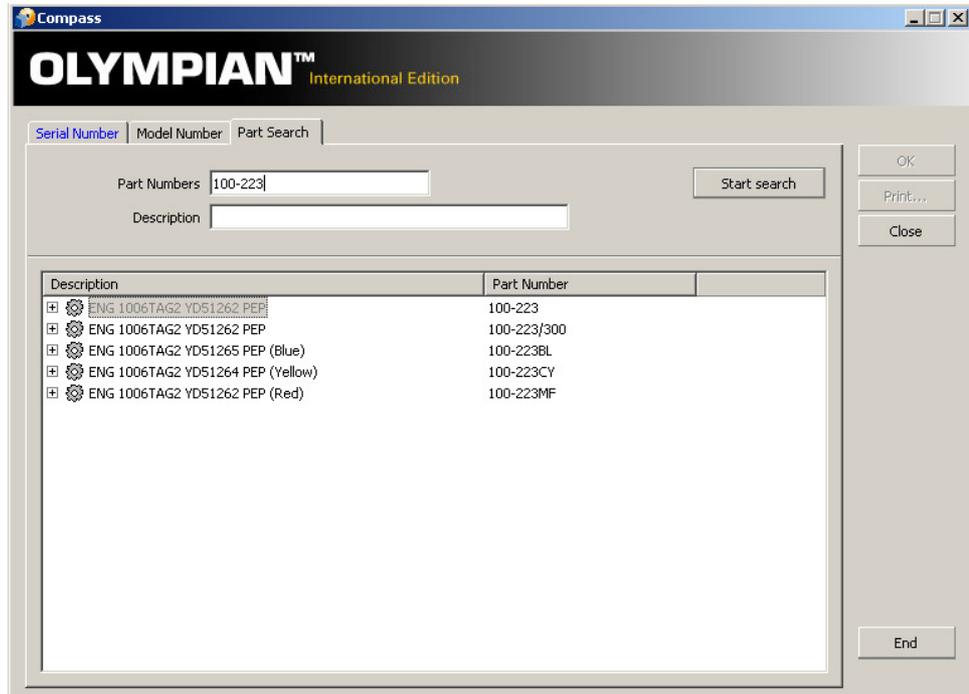
Allows you to search using a structured table of contents to drill down through all the data levels available.

Part Search

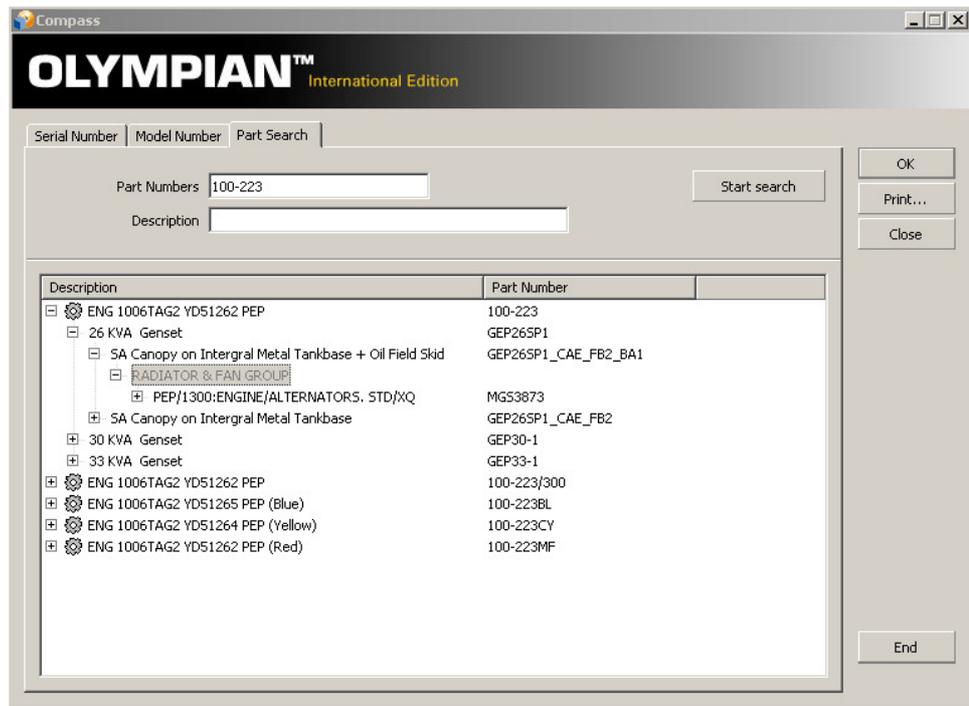
Allows you to search using a part number or a part description.

Parts Search

There are three main options within the parts search: search using a part number, using a description or using a combination of both of these. Enter the known part number or description and select start search; the results will be displayed below. If you do not have a complete number you can search by using wildcards (the ? symbol represents a single character and the * symbol represents multiple characters).

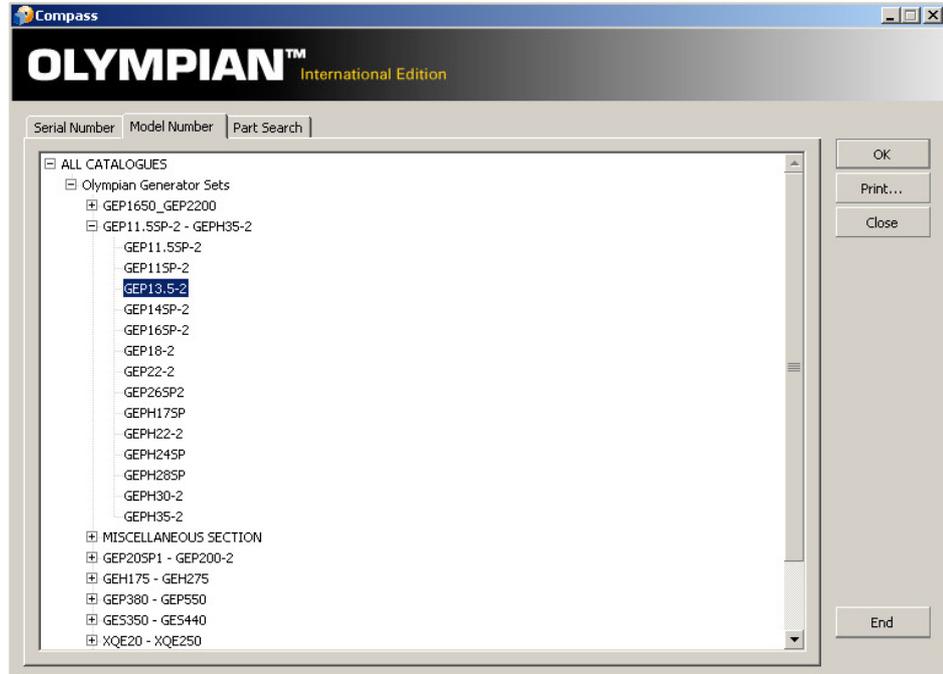


Compass will list the search results in the window. The list will show every appearance of the specified part. To expand the selection click the small "+" symbol next to the part number you have searched for. The system will expand the selection and reveal all the build lists where the part number is used. You then have the ability to drill further down through the build list to display the exact location of the part you are looking for. You may select any of the levels, and then click on "OK" to open the catalogue at that exact point.

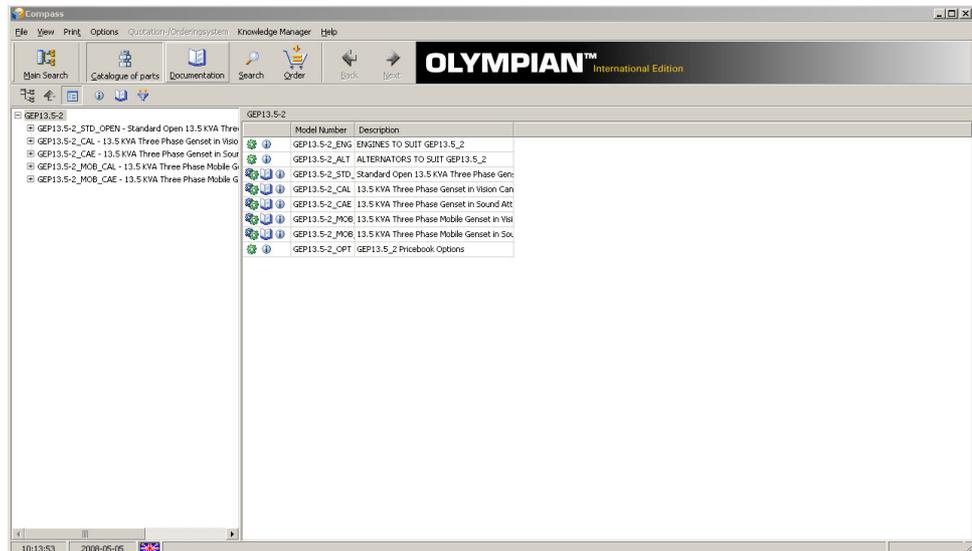


Model Number

This search is a simple table of contents that can be drilled through to the desired build list. Once you have selected the required part number either double click on it or click on “OK”.

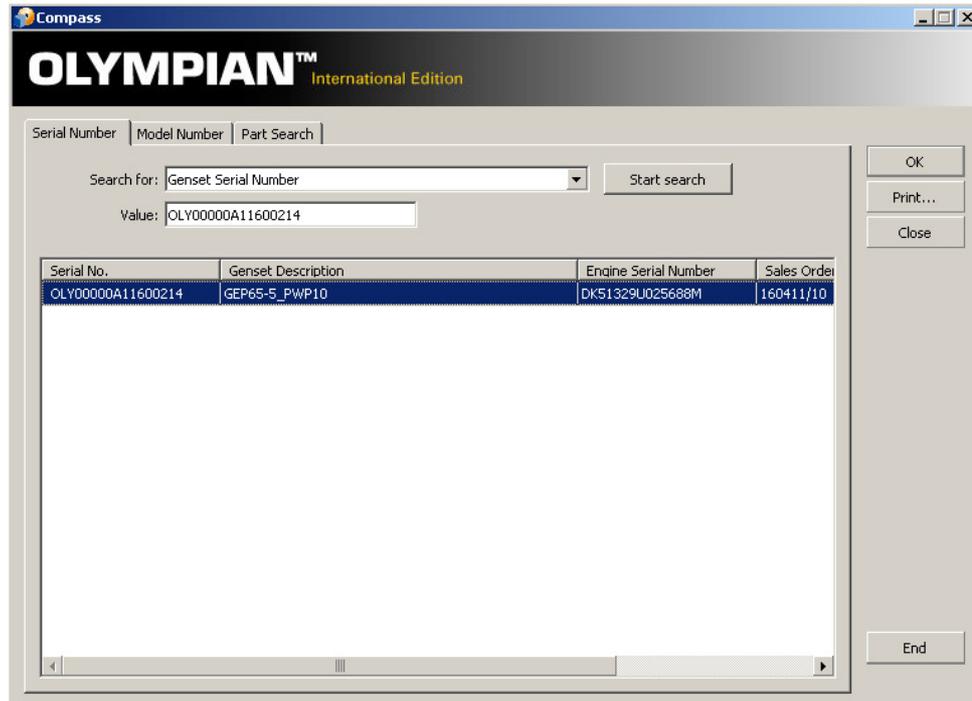


Once the desired part number is selected then simply hit the “OK” button and a screen like the following one will appear. This screen is the “catalogue of parts” screen and we will cover this in parts catalogue section.



Serial Number

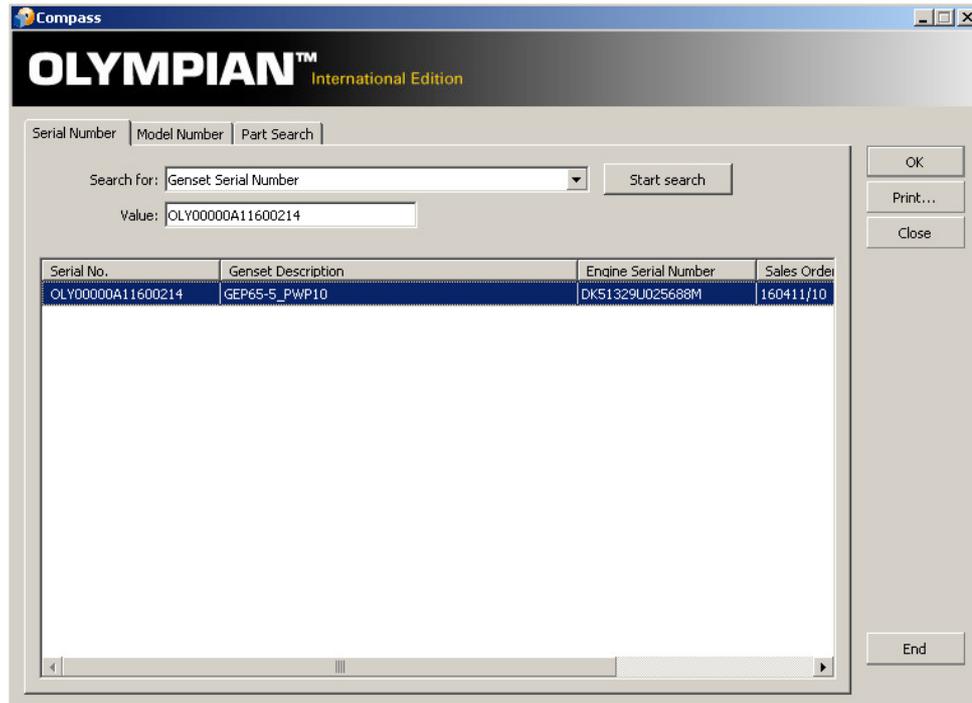
The serial number search has the ability to search via a number of different attributes. These include genset serial number, sales order number, engine serial number and alternator serial number. For examples of these part numbers check the reference section at the rear of the book. The system will allow you to search for an entire number or part of that number by including wildcards (? for a single character and * for multiple characters). Wildcards can be used when we only know part of the number for example if we knew the first 5 digits of the engine serial number was 04UG2 but were unsure of the last four digits we could enter 04UG2*, this would bring up the possible engine serial numbers. Once your serial number has been found, click "OK" to launch the parts catalogue for this generator set.



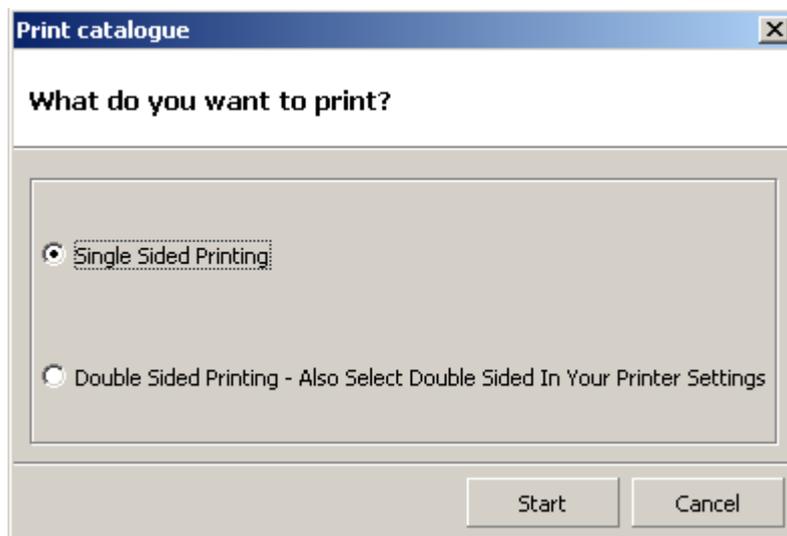
Catalogue Printing

The print function gives the ability to print a copy of the parts catalogue selected. The catalogue will print with a cover page, contents list and index. It is possible to print a catalogue for a complete generator set serial number, model number, engine only or individual assemblies.

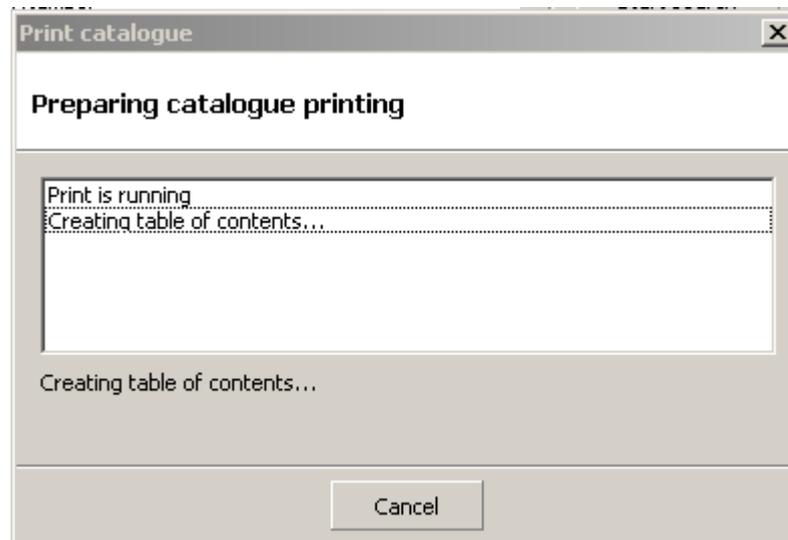
To print a complete generator set parts catalogue by serial number, simply search for the serial number in the usual manner as described previously. Once you have found your serial number click "Print...".



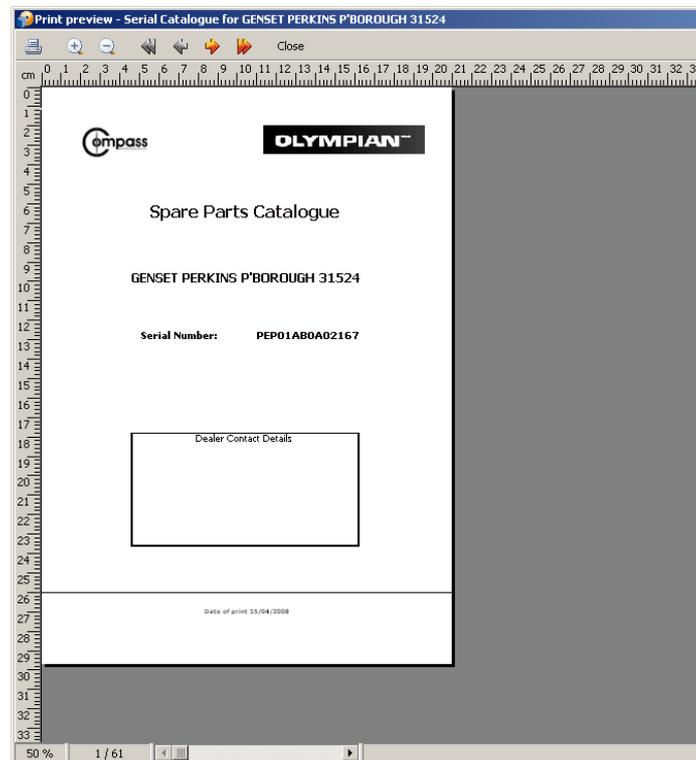
The system will then ask how you would like to print. The system will tailor the parts catalogue to either single-sided or double-sided printing. When double-sided printing is selected the system will prepare a parts catalogue that will print in a usable format for viewing. However, the user must select double-sided printing in their printer settings also.



Compass will then begin compiling the parts catalogue contents lists and indexes for printing. A window will appear showing the progress.



The parts catalogue will then be displayed for previewing. The parts catalogue can be printed by clicking the printer button (). Alternatively, if the computer has a .pdf file creation software installed the catalogue could be printed to a pdf file for storing, emailing or saving to CD. PDF creation software is available from the internet, the software will then appear as a print option after clicking the printer button ().



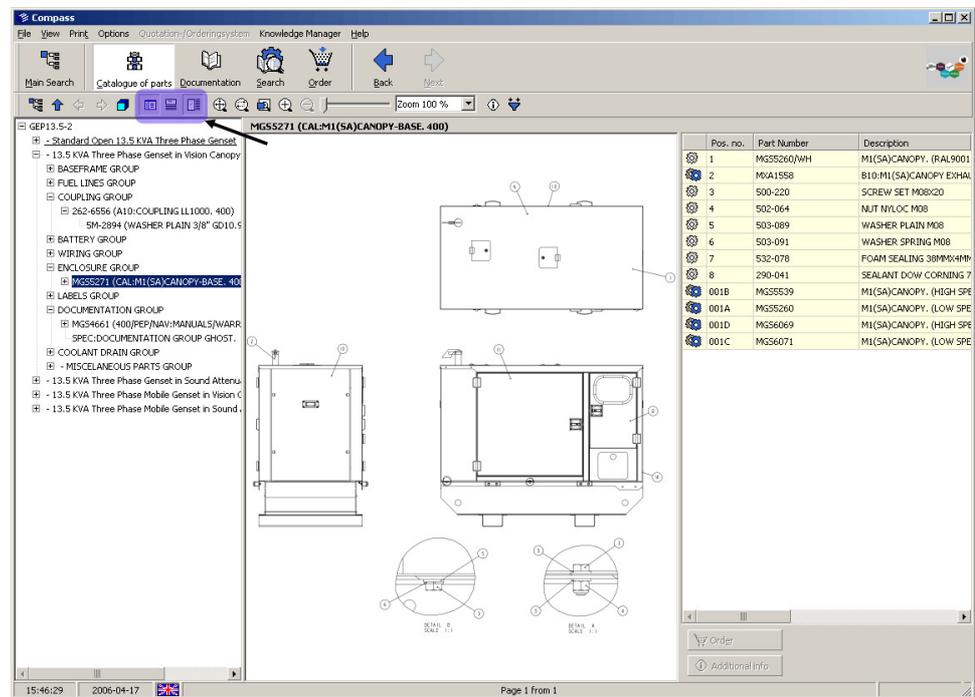
4

Parts Catalogue

Navigation



This section of the software is called the “Catalogue of Parts”. The software is designed to display the list of levels for your chosen build list on the left of the screen. An image, if one is available, is displayed, and a breakdown of the parts for respective level of the list will also be shown. Clicking on the area highlighted in blue shown below can customise the layout of your screen.



There are many different **buttons** and **icons** displayed within the screen. These are:



Overview takes you straight to the top of the build list structure.



Active **Arrow up** jumps up to the respective higher level of the structure.



Open or remove the **build list structure** from the screen.



Arrangement of the **list of parts** on the right, next to the drawing, or below the drawing.



Fit the drawing to the window width.



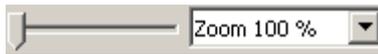
Select a **section** of the drawing to view in the window.



Display a **pan window** to move around the drawing.



Use the **Magnifying glass** symbol to zoom in and out of the drawing.



Additional methods to zoom in and out of the drawing.



The **modules symbol** in the list of parts shows that there is a hierarchical structure one level down (i.e. a Kit or Assembly). Double-click on that part number to drill-down to the next level. Selecting the part will highlight the item number on the drawing.



Entries with this **Parts symbol** represent parts without further hierarchical levels. Selecting the part will highlight the item number on the drawing.



Active **item numbers**, with a hierarchical structure one level down, in the drawing with an equivalent item number in the parts list are highlighted in **green**.



Active **item numbers**, without further hierarchical levels, in the drawing with an equivalent item number in the parts list are highlighted in **yellow**.



Clicking on the part causes the **item number** in the drawing to be highlighted in **blue**.



The **History** icon indicates that the part has a **supersession chain** that is available for viewing. To see the supersession information, **double-click** on the icon.



The **Notes** icon appears when a part has a note saved against it. Notes can be created in the **list of parts**, in the **drawings** and in the **documentation**. (See section on creating notes in **Information**)



If a **document** is available and linked to the **parts list** then this button, at the bottom of the screen, becomes active. It will take you to the **documentation** section of the Information screen.



If a **part** is available to **order** then this button becomes active. It will take you to the **Shopping Basket** section of the application.



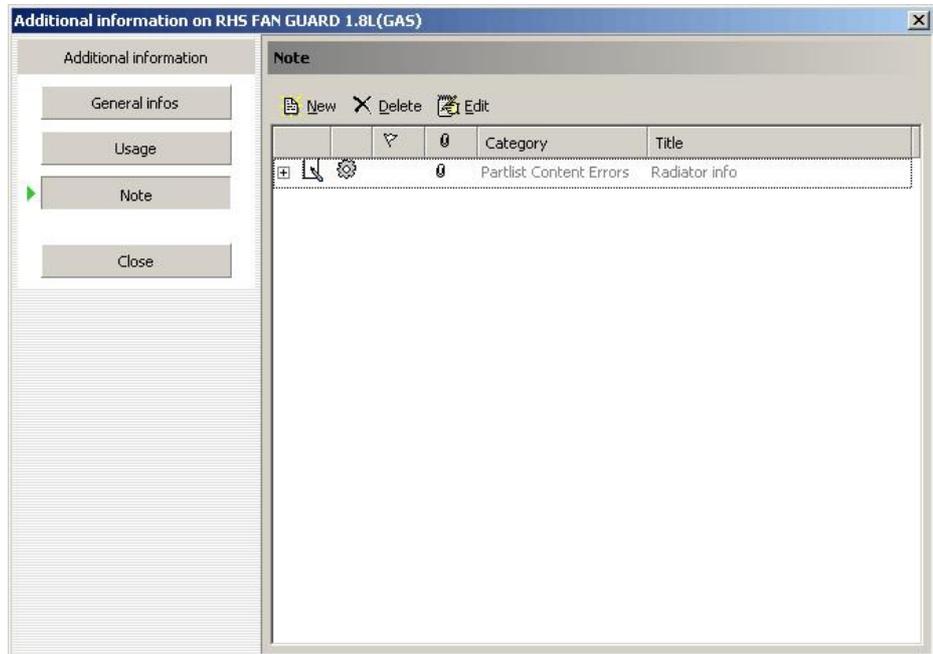
When any **additional information** is available this button will be active. It will take you to the Information screen.



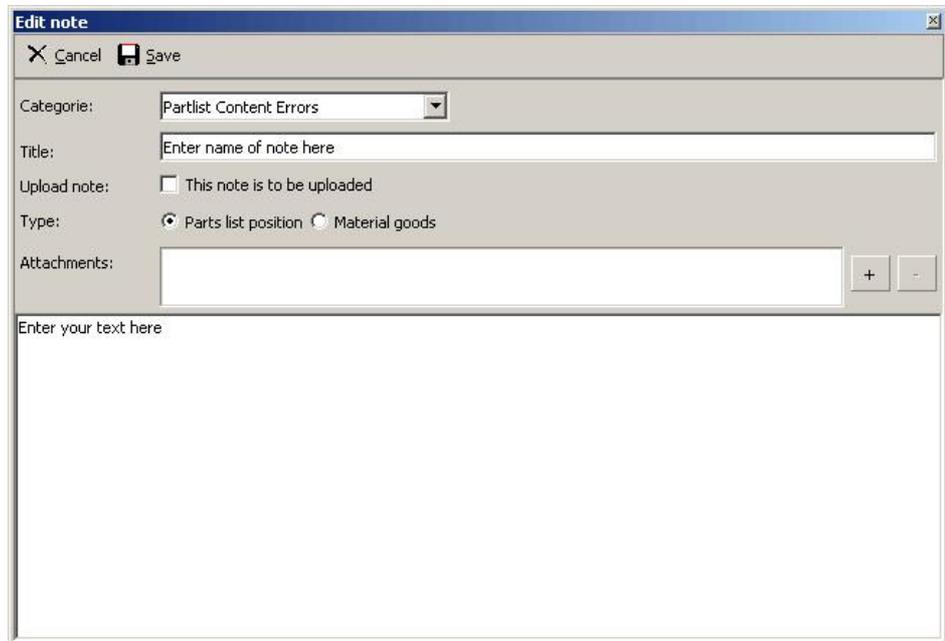
Opens an **information** window in the middle of the screen for either parts or data.

Note

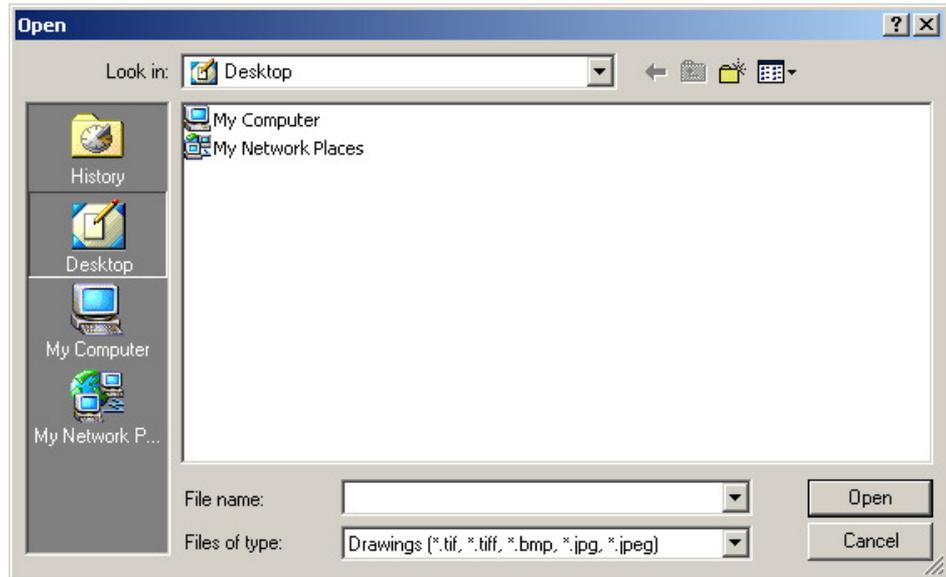
The **Notes** section displays all the user notes that have been created.



From here you can create your own notes and edit or delete those that have already been created. To create a new note click on "New".



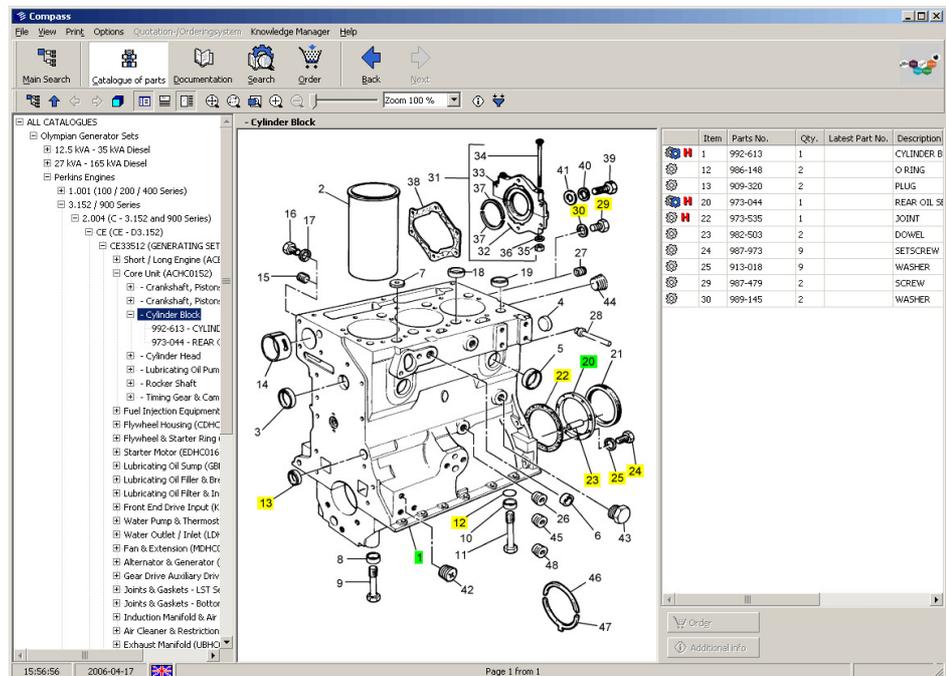
A new window will open on screen. You must give the note a **Title** and select whether you want it to be attached to the **Parts list position** (attaches the note to this occurrence of the part only) or to the **Material goods** (attaches the note to the part every time it appears in the parts book). You can type in your comments into the box at the bottom of the window. You also have the option to send the note to be **uploaded** (this enables the technical authoring team to view it) or to **attach a file** (e.g. a photo or service report). To attach a file click on the "+" and then search for the file you want to select.



Once you have selected the file, click on “Open” to add it to your note. To remove the attachment click on the “-”. Once you have finished creating your note click on “Save”.

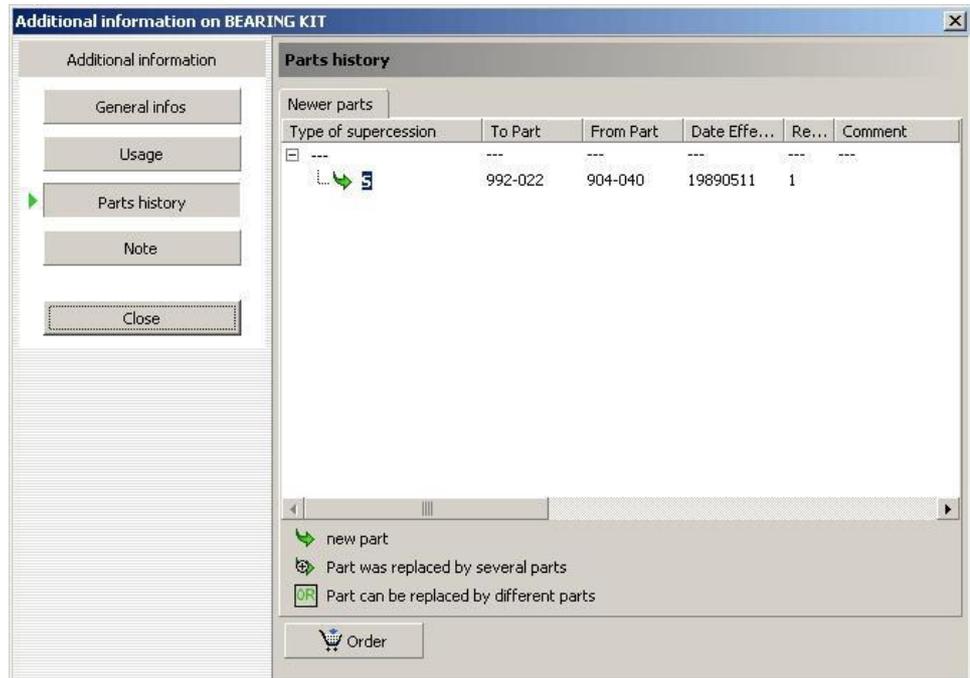
History

If a part has supersession information then the history icon will appear in additional information. Also the **H** symbol will appear beside the part as shown below. The information available can then be viewed by clicking on either of these icons.

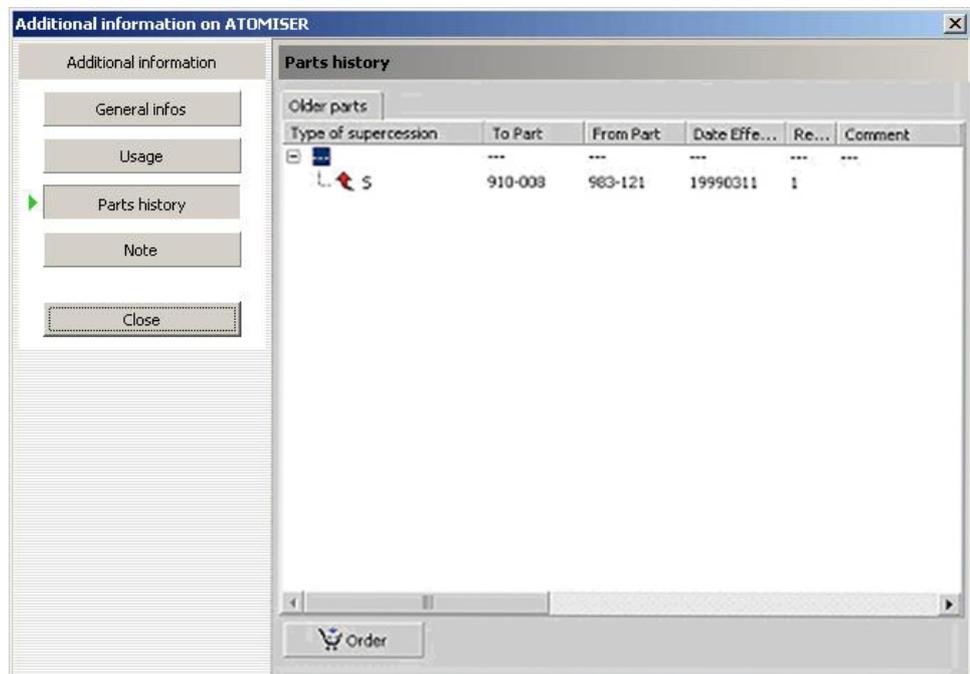


The **History** section, or **Supersessions**, displays a list of all parts that have been replaced in a chain from the newest to the oldest. This will allow users to check the status of a part that a customer may require against what is current and what is in stock.

Supersessions



In this case the part searched for was 904-040. The above image shows us that this part was superseded by 922-022.



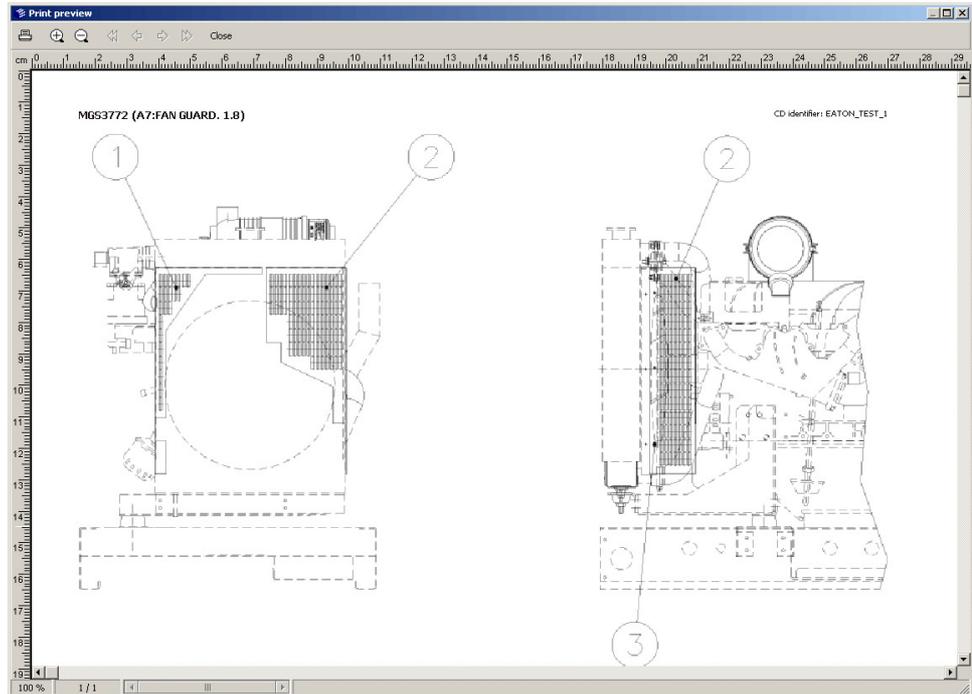
In this case the part searched for was 910-008. The above image shows us that this part supersedes part 983-121.

Printing

You have the option of printing out the currently displayed **drawing** and/or **list of parts**. Open the drawing and list of parts you require.

In the Menu bar select **Print** → **Current drawing and list of parts** or **complete module**. Print the complete module means, that not only is the displayed drawing printed, but also all the images for that module and the list of parts.

The Print preview is displayed:



Click on the **Printer symbol**. The **Print** dialogue window opens and you can print out the drawing and list of parts. The drawing and list of parts are printed out on the one page.



Use the **Magnifying glass symbol** to zoom in and out.



You can page backwards and forwards between the drawing and list of parts and go the start/end of the Print preview using the **arrow symbols**.



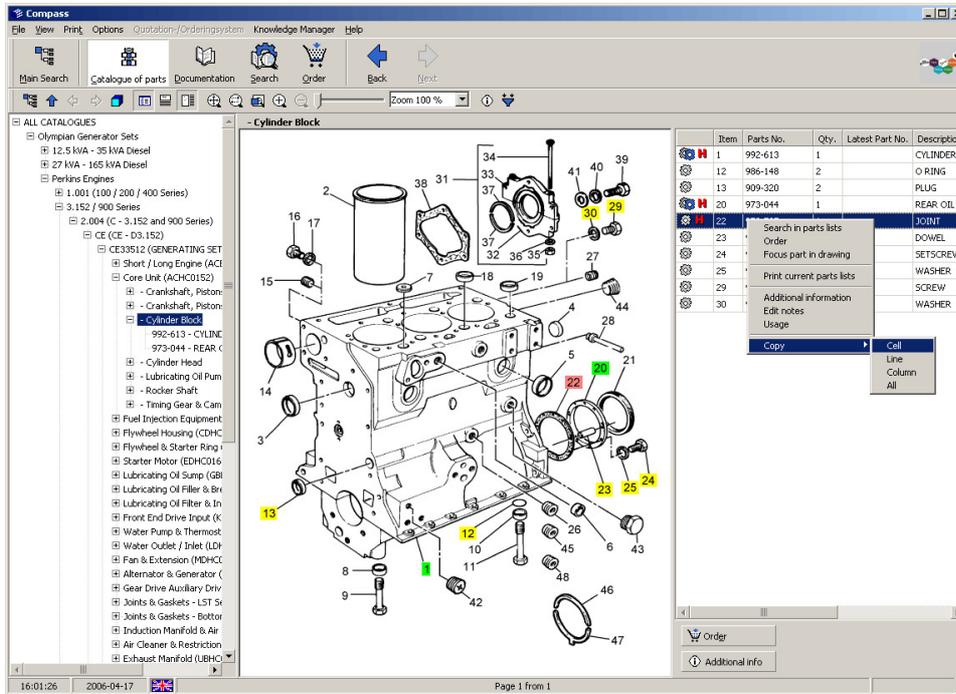
Close takes you back to the Catalogue.

Alternatively, you can print out the parts list by going into the popup Menu and selecting **Print current parts list**. The same applies for the drawing, by clicking on **Print current drawing** (Popup Menu) in the window part of the displayed drawing.

Copying

In the window for the drawing use the right mouse button anywhere on the image then select **copy**. The drawing can now be inserted into an application.

For the parts data use the right mouse button anywhere on the data then select **copy**. You can then select what part of the parts list you wish to copy, cell, line column or all. The list of parts can now be inserted into an application (e.g. Excel/Word/etc.).

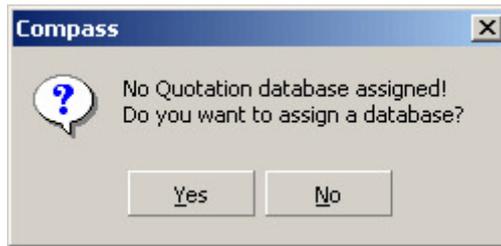


5

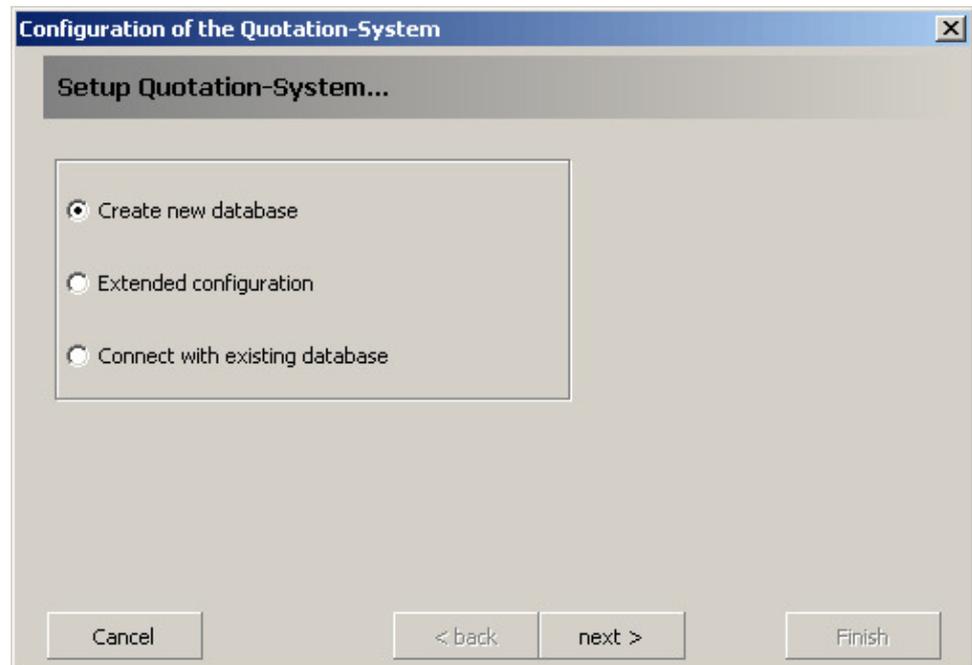
Shopping Basket

Assigning a Database

When the Shopping Basket is first opened a window will open asking if you want to assign a database.



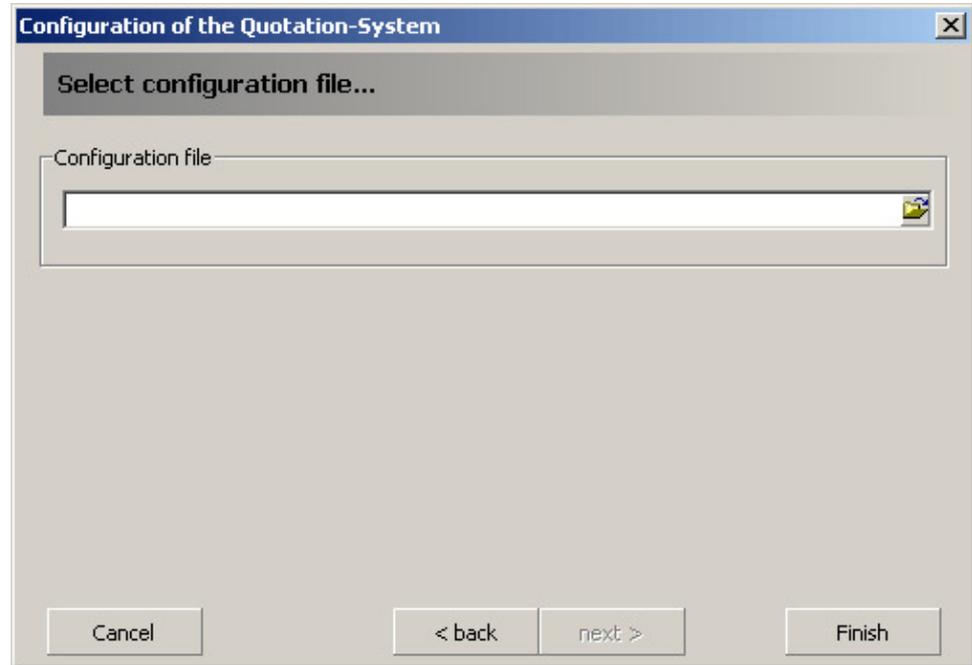
You must select 'yes' to use the shopping basket. A new window will open giving the option to create a new database or connect to an existing database. A database can be created on each machine or a database can be created on a server. The system has the facility for multiple users to connect and share the same database for quotes and orders. If you intend to share a single database please note that the system is only designed for around 5-10 users to access the database at anyone time. A warning message will be displayed if too many users are using the database. Extended configuration will not be required by most users.



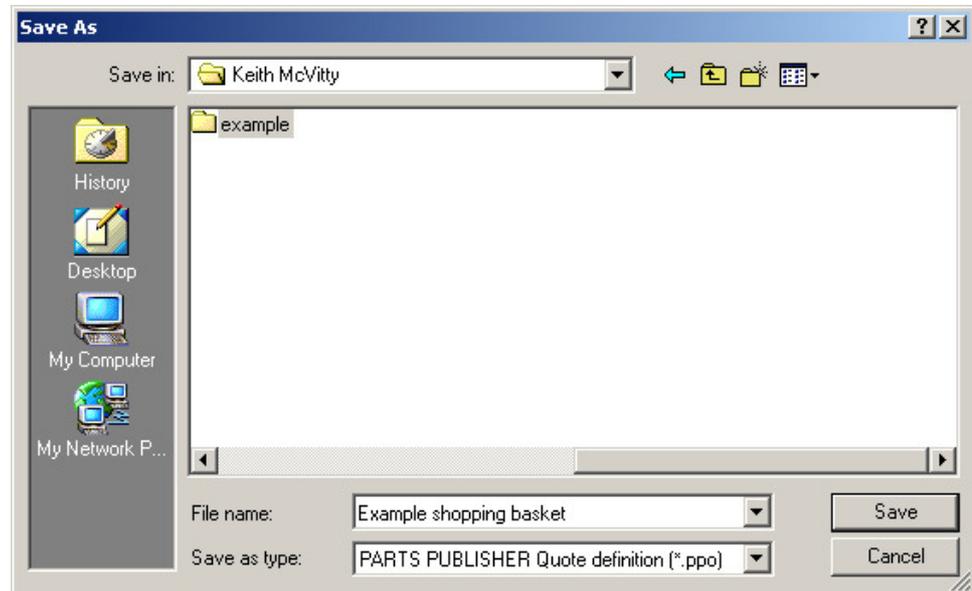
Select one of the options and click on 'Next>' to continue.

Creating a New Database

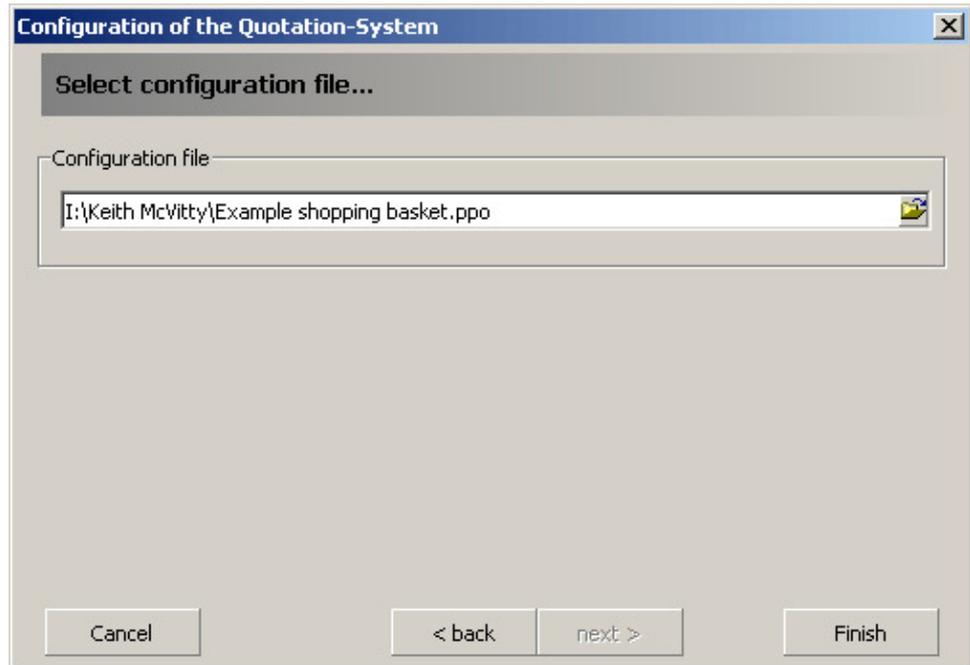
To create a new database you must select a location and name for the file. Click on the folder symbol to select the file location.



Once you have clicked on the file symbol a new window will open where you can make your choice for name and location. Select a location and then give the file a name.

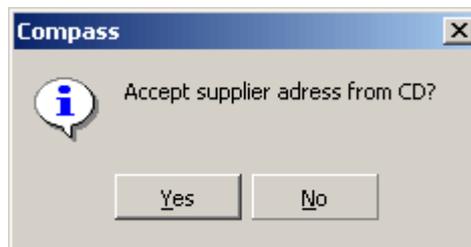


Once you have made you selections click on 'Save' to return to the software.



You will have returned to the Configuration screen for the software. Click on Finish to return to the shopping basket.

Compass will create a new database in your chosen location. If you want to create another new database or attach to an existing database you must first delete or move the current database. As soon as Compass cannot detect a database it will ask you to create a new database.



The system will now ask you to accept the supplier address from the CD, select 'Yes'.

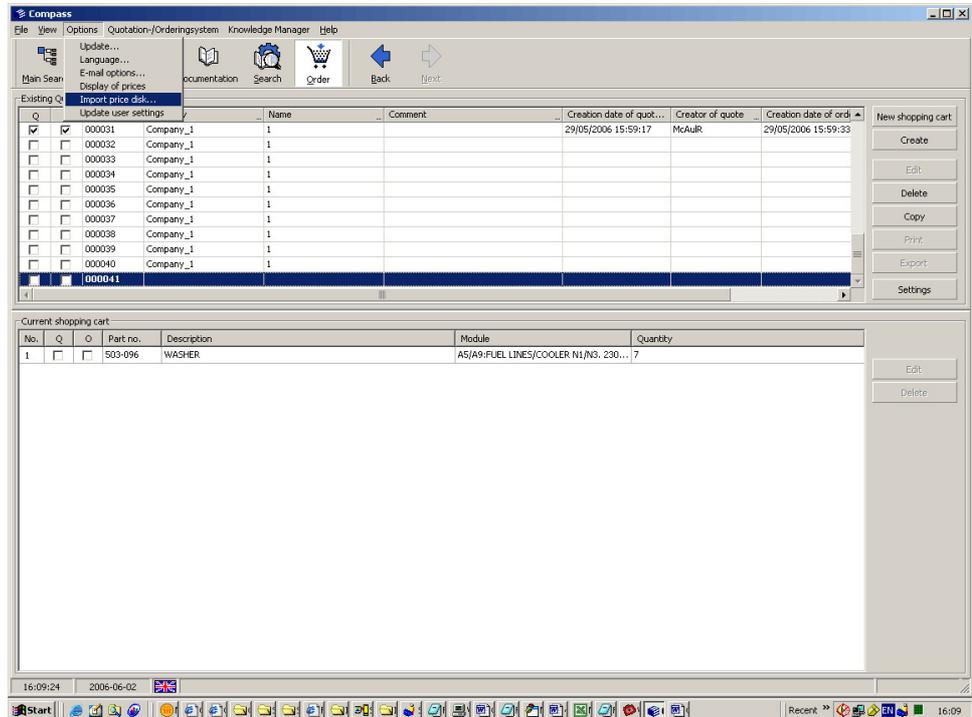
Using an Existing Database

You can use the same process when you want to connect to an existing database. Instead of typing a new file name, search for an existing database with the file extension '.ppo'. Click on 'Open' to start using it. This can be a shared database on a server.

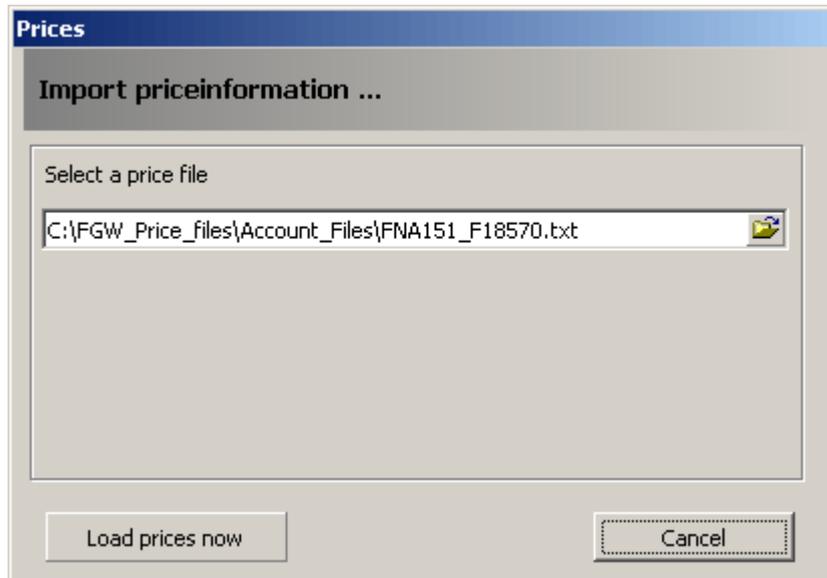
If you intend to share a single database please note that the system is only designed for around 5-10 users to access the database at anyone time. A warning message will be displayed if too many users are using the database at the same time.

Inputting Pricing

To input a new pricing catalogue first press the 'options' tab and scroll to import price disk.



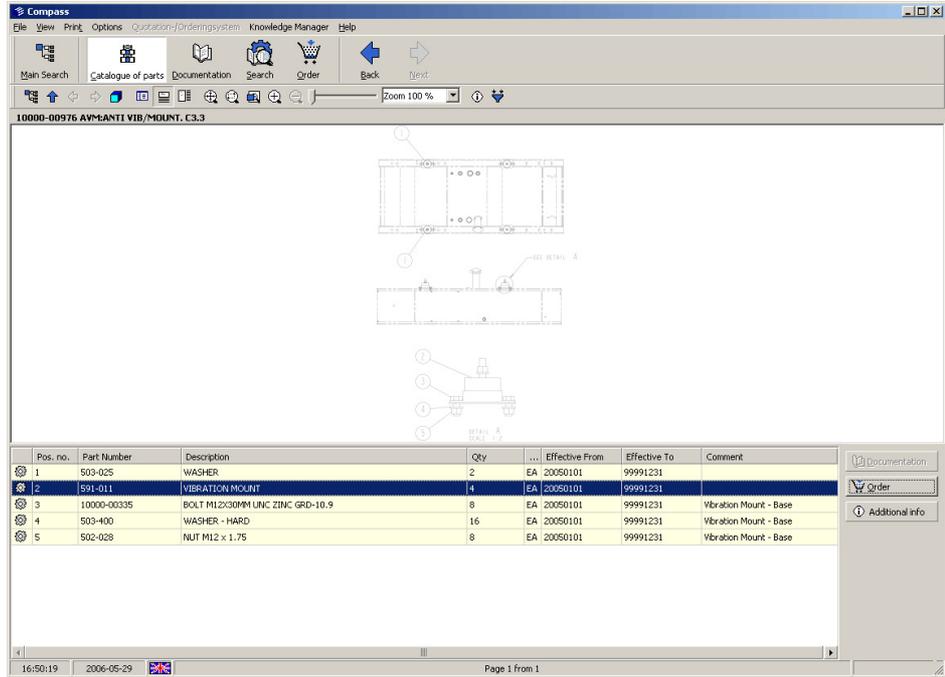
Now scroll to where the price file is stored and select 'load prices now'.



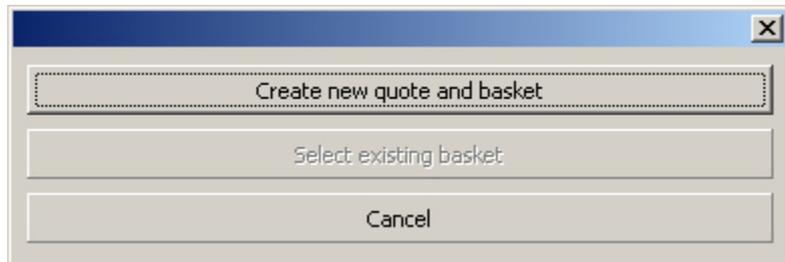
This will import all the prices into your Compass system.

Create a new Quote and Basket

Once a database has been assigned you can start to create lists of parts in the shopping basket. In the parts catalogue select some parts to add to the shopping basket.

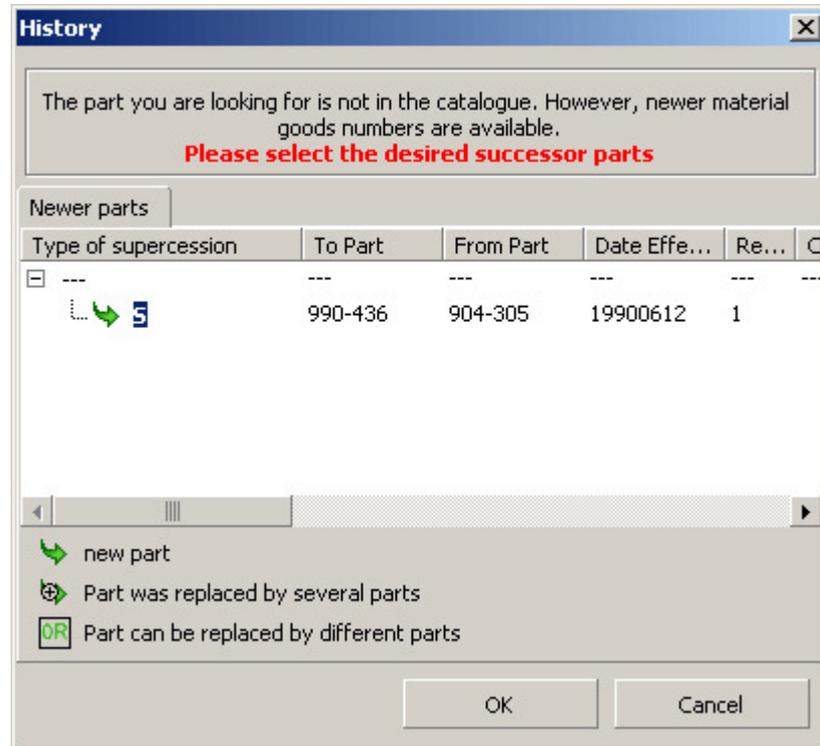


Once you have selected the parts you want click on the 'Order' button at the bottom of the screen. This will automatically send all the highlighted parts to your shopping basket.

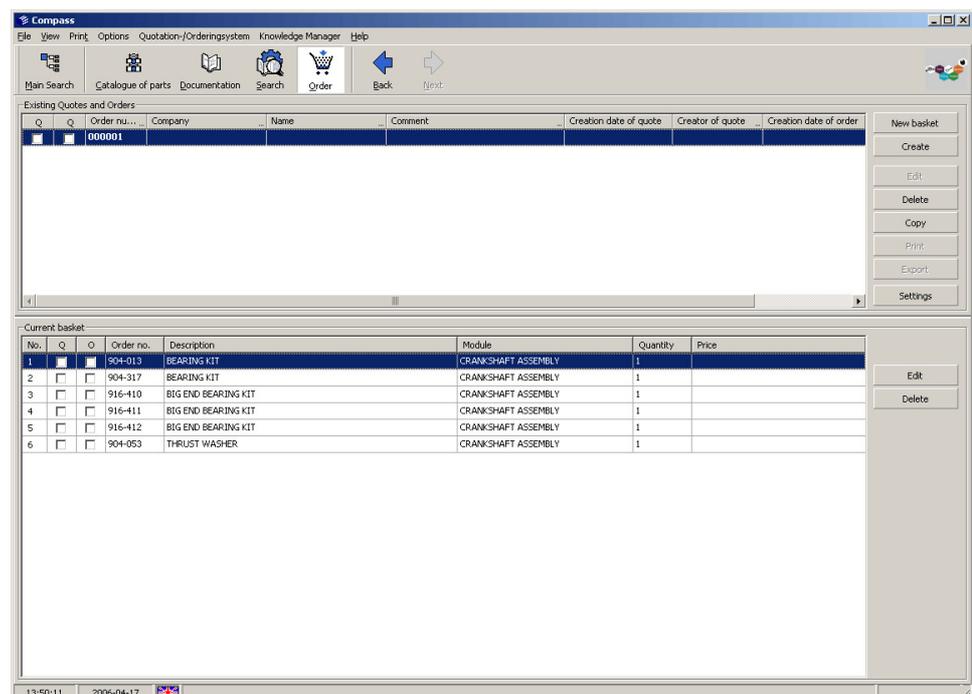


Each time you send parts to the shopping basket a message will ask if you want to 'Create a new quote and basket', or 'Select an existing basket'. Click one of these to add your parts.

A new parts list has now been created in your shopping basket. You can return to the parts catalogue to search for and to add more parts to your basket. If the part has been superseded a dialogue box will appear, it will display all the alternatives. Select the correct alternative and then click on 'OK'.



Once a shopping basket has been created the parts listed in it can be changed at any time. Select a part in the basket. This will highlight two buttons on the right of the list, 'Edit' and 'Delete'.



These buttons allow you to remove any of the parts listed, or change the quantities to be ordered for the selected part.



The 'Order quantity' dialog box displays the following information:

- Order no.: 904-013
- Description: BEARING KIT
- Module: CRANKSHAFT ASSEMBLY
- Price:

Enter required order quantity or accept default value

Old order quantity: 1

New order quantity: 1

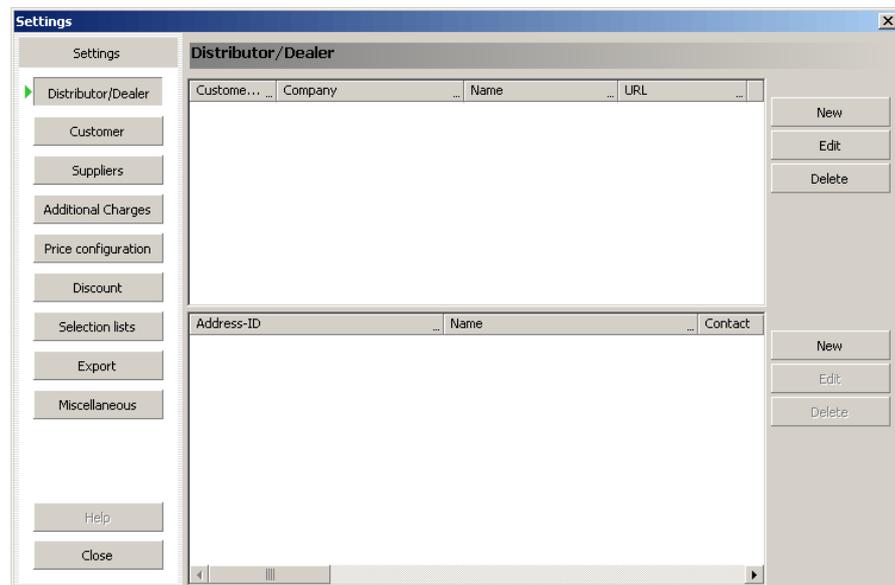
Buttons: Confirm, Cancel entry

Create Settings

The Compass shopping basket has the option to configure various settings that will be used in the quote and order functionality. To view this section select the **'Settings'** button on the left of the screen.



This will open a new window.

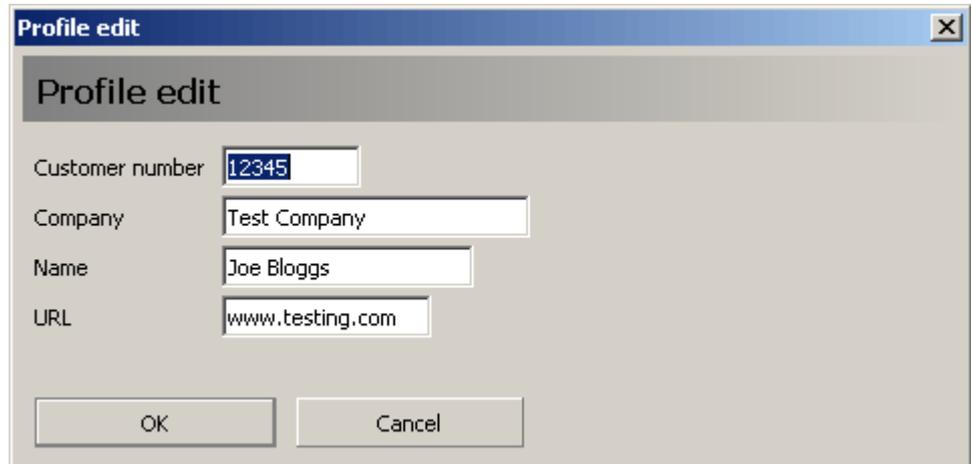


The 'Settings' window is titled 'Settings' and contains the following sections:

- Distributor/Dealer**: A table with columns: Customer..., Company, Name, URL. Buttons: New, Edit, Delete.
- Address-...**: A table with columns: Address-ID, Name, Contact. Buttons: New, Edit, Delete.
- Settings**: A list of settings including: Distributor/Dealer, Customer, Suppliers, Additional Charges, Price configuration, Discount, Selection lists, Export, Miscellaneous, Help, Close.

Distributor/Dealer

To add your company details select the 'Distributor/Dealer' tab and select the 'new' tab in the top right of the window. The box below will appear. Input your details as required.

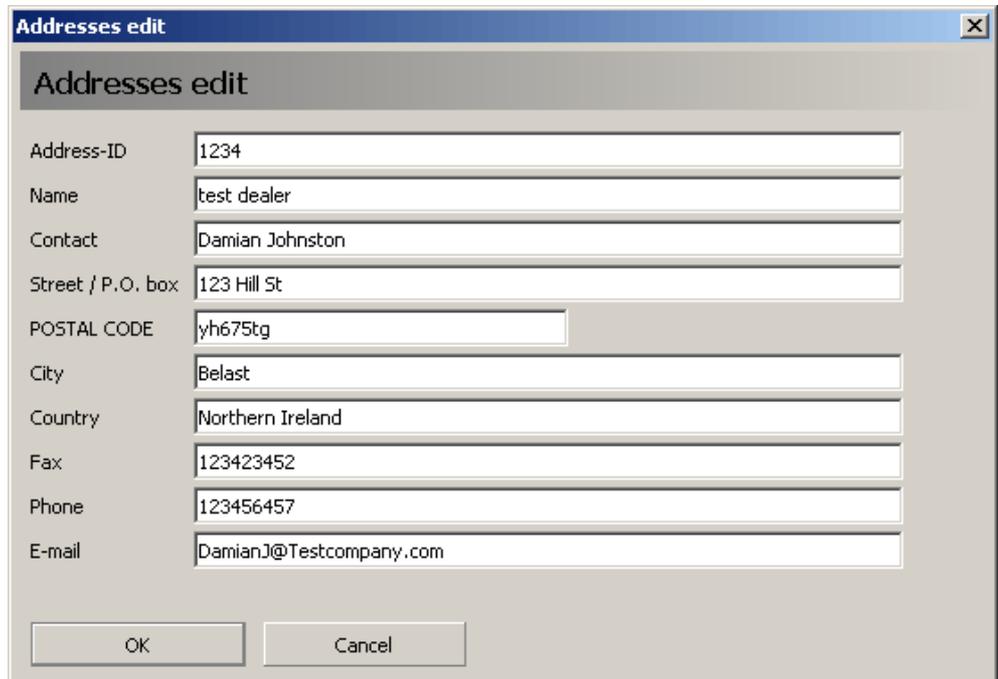


The 'Profile edit' dialog box contains the following fields and values:

Field	Value
Customer number	12345
Company	Test Company
Name	Joe Bloggs
URL	www.testing.com

Buttons: OK, Cancel

Click 'OK' to confirm your selections and press the 'new' tab in the bottom right of the window. The following address box will appear.



The 'Addresses edit' dialog box contains the following fields and values:

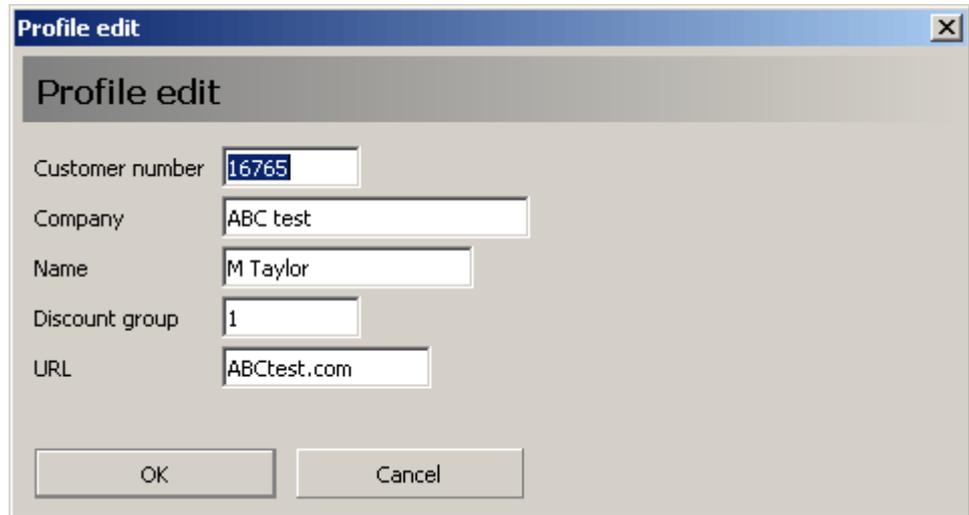
Field	Value
Address-ID	1234
Name	test dealer
Contact	Damian Johnston
Street / P.O. box	123 Hill St
POSTAL CODE	yh675tg
City	Belast
Country	Northern Ireland
Fax	123423452
Phone	123456457
E-mail	DamianJ@Testcompany.com

Buttons: OK, Cancel

Input the address for your company and click 'OK' to confirm your selections.

Customer

To add customer details click on the 'Customer' button and then click on the 'New' button in the top right of the window. This will open the following box in which customer details can be entered.

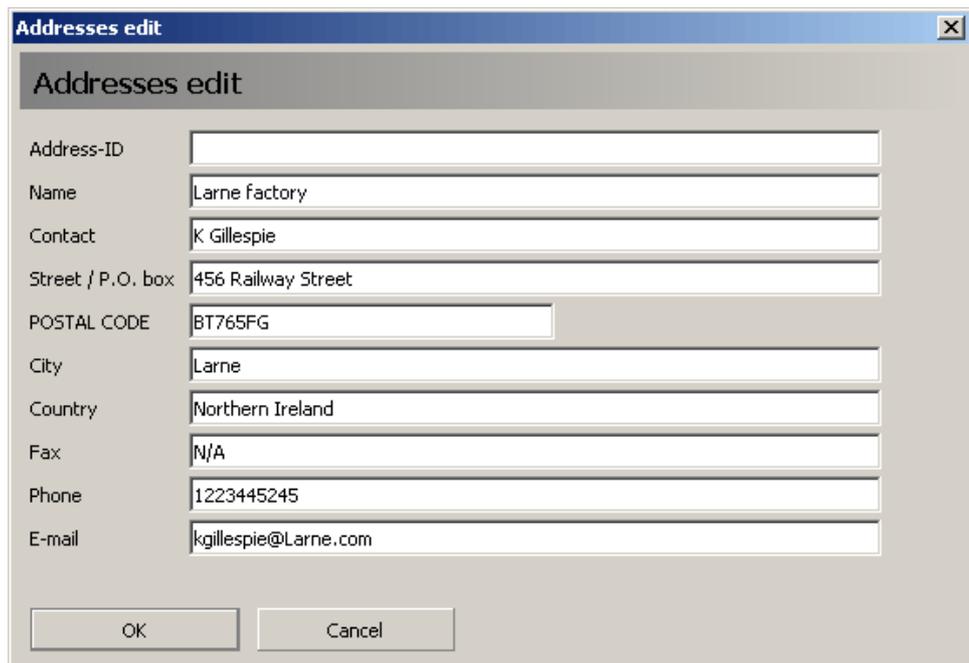


The 'Profile edit' dialog box contains the following fields and values:

Field	Value
Customer number	16765
Company	ABC test
Name	M Taylor
Discount group	1
URL	ABCtest.com

Buttons: OK, Cancel

Click on 'OK' to finish, and return to the settings window. You have now created a customer. Each customer can have multiple address or contacts. Select 'New' in the address section (bottom right of the window).



The 'Addresses edit' dialog box contains the following fields and values:

Field	Value
Address-ID	
Name	Larne factory
Contact	K Gillespie
Street / P.O. box	456 Railway Street
POSTAL CODE	BT765FG
City	Larne
Country	Northern Ireland
Fax	N/A
Phone	1223445245
E-mail	kgillespie@Larne.com

Buttons: OK, Cancel

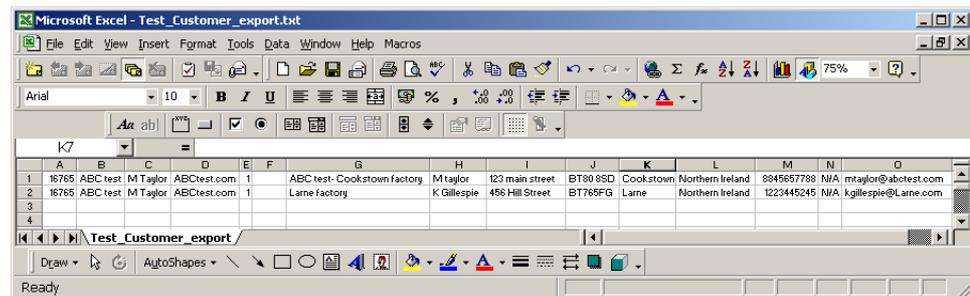
Type in all of the customer details into the relevant fields, and then click 'OK' to continue. If you wish to have more than one address for a customer then simply click on 'new' in the address section and input their alternate address.

Addresses can also be imported and exported from the system. These must be imported in text tab delimited format (.txt) and must be in a defined layout. This can be created in Excel and then saved as text tab delimited format. The format that the columns must be in is as follows:

- Column A – Customer Number
- Column B – Company
- Column C – Name
- Column D – URL
- Column E – Discount Group
- Column F – Address id
- Column G – Name (Facility name)
- Column H – Contact
- Column I – Street / P.O. box
- Column J – Postal Code/ Zip Code
- Column K – City
- Column L – Country
- Column M – Phone
- Column N – Fax
- Column O – E-mail

An example of this can be shown below.

If you wish a customer to have multiple addresses keep columns A-E identical and fill in the alternate address in columns F to O.



When you have your Excel file in the correct format choose the 'File' tab, click on 'Save as' and choose to save as file type 'Text (Tab delimited)' from the menu. (You now should have a file with the file extension .txt). In Compass click on the 'import' tab and select the desired file to load. The customer details will now be added to the system. When importing data, old data will be overwritten so you may want to export your current list and add additional names to this rather than starting from a blank file. You can export your list by selecting the 'export' tab and selecting the folder in which you want to save.

Suppliers

The address details for the supplier (i.e. The parts distribution centre in Desford, England) will appear automatically so there is no need to add any additional information to this screen.

Additional Charges

To add additional charges click on the 'Additional charges' tab and select new. Then simply input any information on charges in with the relevant tax rate.

Description	Amount (€)	Tax (%)
Shipping Charge	30.00	23
Packaging	10.00	12

Buttons: New, Delete

Summary:

- Add. charges (taxable) (€): 40.00
- Tax (€): 8.10
- Add. charges (not taxable) (€): 0.00
- Sum (€): 48.10

Price Configuration

Sub-tabs: General, Base Currency, Currencies for quotation

Price field:

- Quotation price field: DNET PRICE
- Order price field: DNET PRICE

Dealer data:

- Account code: 12434
- Address id: KE (Default)

By selecting the 'Price Configuration' tab you can change the way in which price information is shown in Compass. In the 'General' tab, under 'quotation price field' you can select whether to mark-up from the buying price (by selecting 'DNET Price'), to discount away from the recommended retail price (by selecting 'Retail price') or to use your own prices for the parts by selecting 'distributor own price'. In the tab entitled 'Account code' input your account code (e.g. F12345). This will be used when ordering parts. 'Address id' should be left at 01 to get orders sent to your standard address.

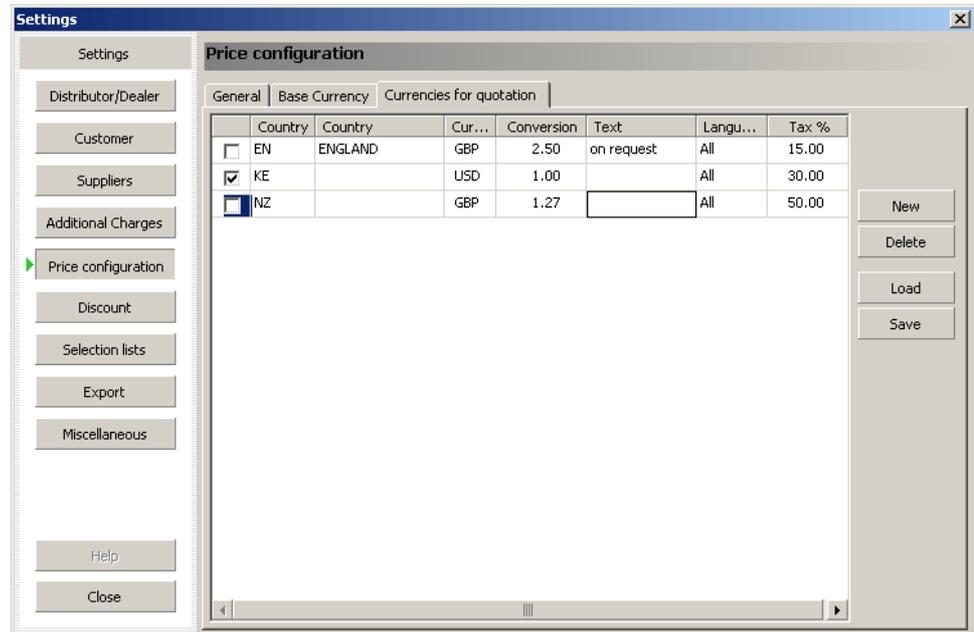
Open your pricefile in Excel (right click on the file and select open with Excel). The country code is a two-digit code shown under country and your currency code is a three-digit code shown under currency (this will be used in the 'base currency' tab).

Account Code	Part Number	Price From	Price To	Category Code	UOI	DNET	RRP	DOP	Comment	Currency	Country	VOR Indicator
20432	AHK-100012	20060605		Z	1	110.66	110.66			GBP	NI	N
20432	AHK-200012	20060605		Z	1	169.28	169.28			GBP	NI	N
20432	BC-PW1112/Y	20060605		Z	1	204.29	204.29			GBP	NI	N
20432	BC-PW1124/Y	20060605		Z	1	262.03	262.03			GBP	NI	N
20432	BC-PW2412/Y	20060605		Z	1	149.64	149.64			GBP	NI	N
20432	BC-PW2424/Y	20060605		Z	1	151.95	151.95			GBP	NI	N
20432	BCK-PBC1012	20060605		Z	1	349.66	349.66			GBP	NI	N
20432	BCK-PBC3012	20060605		Z	1	246.7	246.7			GBP	NI	N
20432	BCK-PW1112	20060605		Z	1	204.29	204.29			GBP	NI	N
20432	BCK-PW1124	20060605		Z	1	262.03	262.03			GBP	NI	N
20432	BCK-PW2412	20060605		Z	1	149.64	149.64			GBP	NI	N
20432	BCK-PW2424	20060605		Z	1	151.95	151.95			GBP	NI	N
20432	BHK-LRG12	20060605		Z	1	126.87	126.87			GBP	NI	N
20432	BHK-WSG12	20060605		A	1	97.76	177.74			GBP	NI	Y
20432	BMDA0124	20060605		R	1	613.5	1022.5			GBP	NI	N
20432	BMDA0614	20060605			5	1689.29	3248.63			GBP	NI	N
20432	BMDA0847	20060605		R	1	1482.62	2471.04			GBP	NI	N
20432	BMDA0930	20060605			5	2430.94	4674.86			GBP	NI	N
20432	BMDA1266	20060605			5	2040.42	3923.89			GBP	NI	N
20432	BMDA1267	20060605			5	2590.59	4981.9			GBP	NI	N
20432	BMDA1268	20060605			5	2907.76	5591.84			GBP	NI	N
20432	BMDA1508	20060605			5	61.81	118.86			GBP	NI	N
20432	BMDA4324	20060605			5	9.59	18.45			GBP	NI	N
20432	BMBF0094	20060605		R	1	996.93	1661.56			GBP	NI	N
20432	BMBF0099	20060605		R	1	945.8	1576.33			GBP	NI	N
20432	BMBF0044	20060605			5	61.81	118.86			GBP	NI	N
20432	BMBF0092	20060605			5	39.93	76.79			GBP	NI	N
20432	BMGC2035	20060605		R	1	46.07	76.79			GBP	NI	N
20432	BMGC2843	20060605			5	25.72	49.46			GBP	NI	N
20432	BMGC4542	20060605			5	8.39	16.13			GBP	NI	N
20432	BMGC4543	20060605			5	46.73	89.86			GBP	NI	N
20432	BMGC4588	20060605		R	1	47.6	79.33			GBP	NI	N
20432	BMGC4780	20060605		R	1	25.15	41.92			GBP	NI	N
20432	BMGC4783	20060605			5	34.92	67.16			GBP	NI	N
20432	BMGC4798	20060605			5	8.28	15.93			GBP	NI	N

By selecting the 'Base currency' your country can be added. Select 'New' to add an extra country to the list. Selecting the desired country and clicking the 'Standard' button can set the default country that is used. **This must be the same country ID and currency ID contained in your pricefile or Compass will not show prices.**

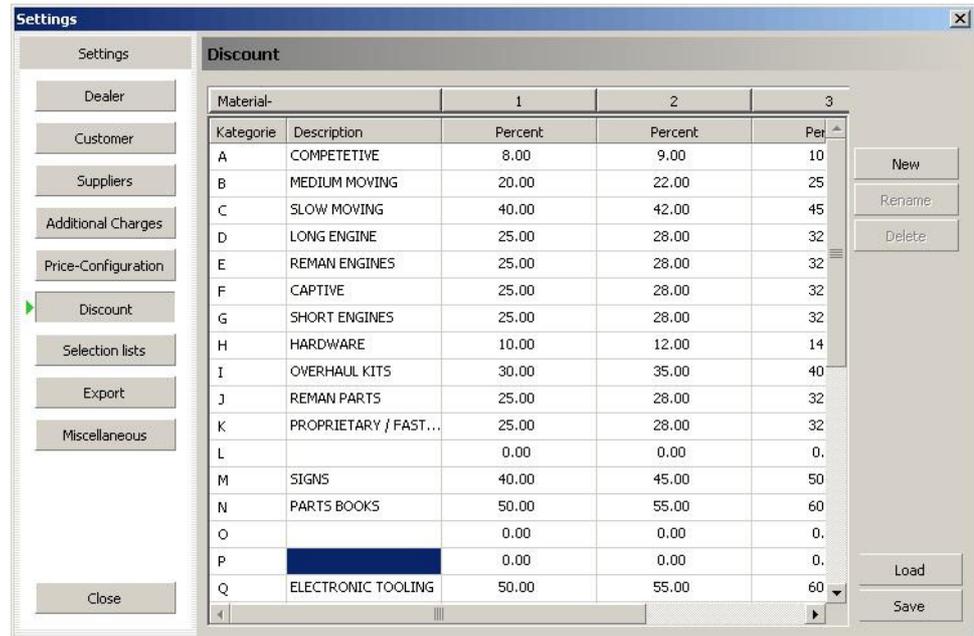
Country	Country	Cur...	Text	Langu...	Tax %
<input type="checkbox"/>	EN ENGLAND	GBP	on request	All	0.00
<input checked="" type="checkbox"/>	KE KENYA	USD		All	17.50
<input type="checkbox"/>	NZ NEW ZEALAND	GBP		All	0.00

Selecting the 'currencies for quotation' tab allows you to change the currencies that you sell to your customers. You can add any relevant countries along with their currency, conversion rate and tax and any text that may be needed. If you wish a country to have multiple currencies add a digit onto the country code e.g. UK would become UK2, UK3 etc.



Discount

By clicking the 'Discount' tab various discounts or mark-ups can be set for the selling price. If you have selected 'DNet price' in the 'Price configuration' tab you can mark products up by the percentage entered into the table. If you have selected 'RRP price' in the 'Price configuration' tab then you can discount away from this price by entering negative numbers (e.g. -5, -10 etc.) You can set various categories of parts to be marked up or down by differing percentage to maximise opportunities within the market.



Material-		1	2	3
Kategorie	Description	Percent	Percent	Per
A	COMPETITIVE	8.00	9.00	10
B	MEDIUM MOVING	20.00	22.00	25
C	SLOW MOVING	40.00	42.00	45
D	LONG ENGINE	25.00	28.00	32
E	REMAN ENGINES	25.00	28.00	32
F	CAPTIVE	25.00	28.00	32
G	SHORT ENGINES	25.00	28.00	32
H	HARDWARE	10.00	12.00	14
I	OVERHAUL KITS	30.00	35.00	40
J	REMAN PARTS	25.00	28.00	32
K	PROPRIETARY / FAST...	25.00	28.00	32
L		0.00	0.00	0.
M	SIGNS	40.00	45.00	50
N	PARTS BOOKS	50.00	55.00	60
O		0.00	0.00	0.
P		0.00	0.00	0.
Q	ELECTRONIC TOOLING	50.00	55.00	60

Across the top of the screen shows the different price bands that you may want to put your customers in. (i.e. you may want to give bigger discounts to some customers than to others). If you would like to create a new band then click on the 'new' button. Type in the name of the new price band and it will appear on the screen alongside the other price bands.



Identification for discount-group

Name

OK Cancel

If you wish to save the list you have created select the 'save' tab and select a folder to save this file to. This file will save as a text file. To view the file right click on this file and open it with Excel. The following is an example of what it should like.

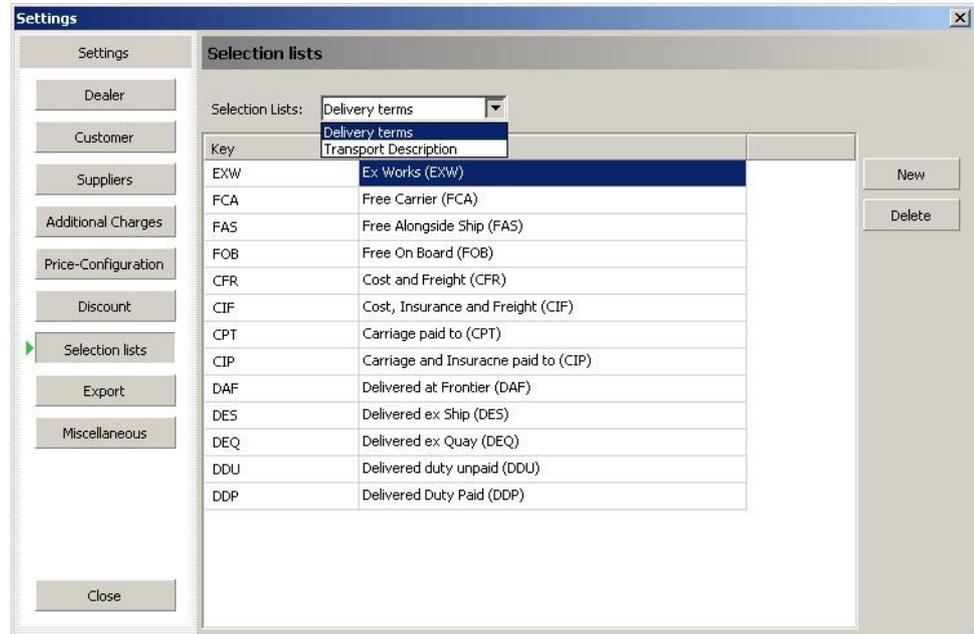
	A	B	C	D
1		CATEGORY 1	CATEGORY 2	CATEGORY 3
2	A	1	-29	3
3	B	2	-28	4
4	C	3	-27	5
5	D	4	-26	6
6	E	5	-25	7
7	F	6	-24	8
8	G	7	-23	9
9	H	8	-22	10
10	I	9	-21	11
11	J	10	-20	12
12	K	11	-19	13
13	L	12	-18	14
14	M	13	-17	15
15	N	14	-16	16
16	O	15	-15	17
17	P	16	-14	18
18	Q	17	-13	19
19	R	18	-12	20
20	S	19	-11	21
21	T	20	-10	22
22	U	21	-9	23
23				

The column headings in row 1 are the varying categories for your customers. Column A shows the discount code and columns B-D show the varying percentage mark-up/discount for each discount code and each customer category. These percentages can be altered and new categories can be added. When you are happy with the result select 'file and select 'save as' and choose to save the file as a text '(tab delimited)' file. This file can now be imported into Compass.

To import a discount file into Compass go to the discount tab and select 'load'. Navigate to where your file is stored and click 'OK'. You will have the option of overwriting the current information or adding to it.

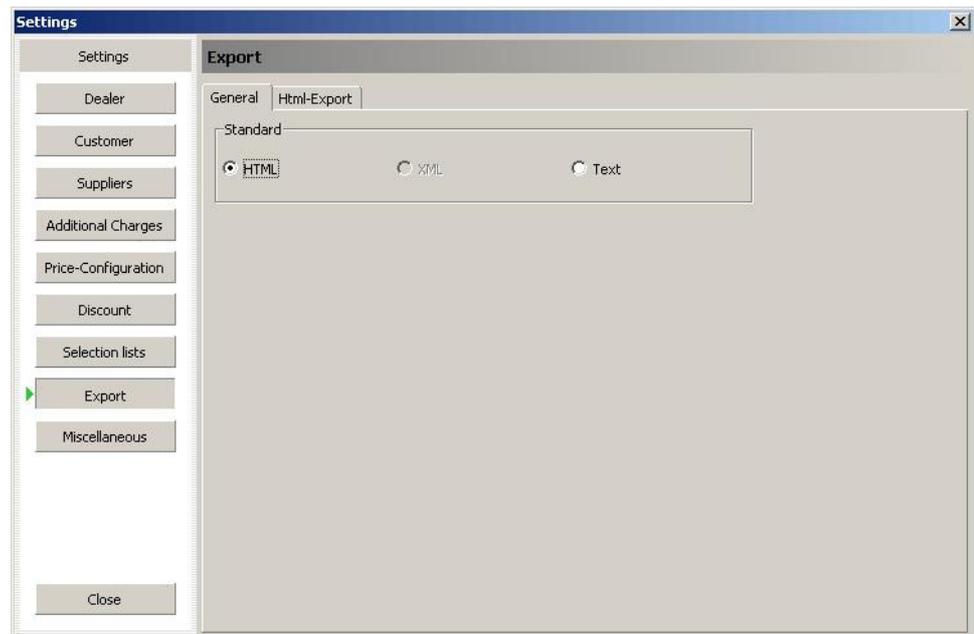
Selection Lists

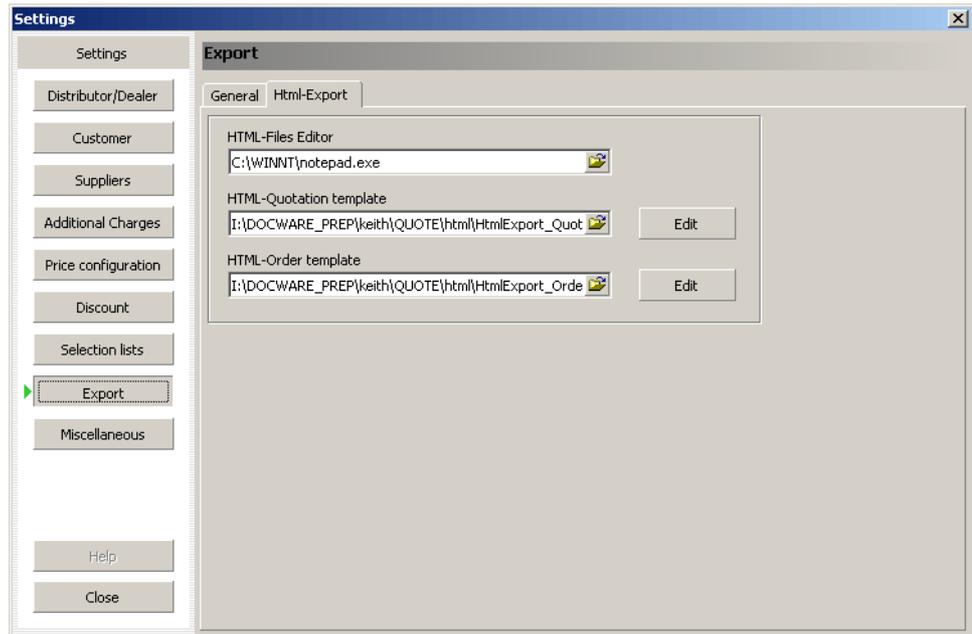
From the 'Selection list' tab 'delivery terms' and 'transportation description' can be set. Select 'new' to add in an extra line of data



Export

From this screen you can decide to have exports generated by either 'text' or 'HTML' by selecting the relevant box.

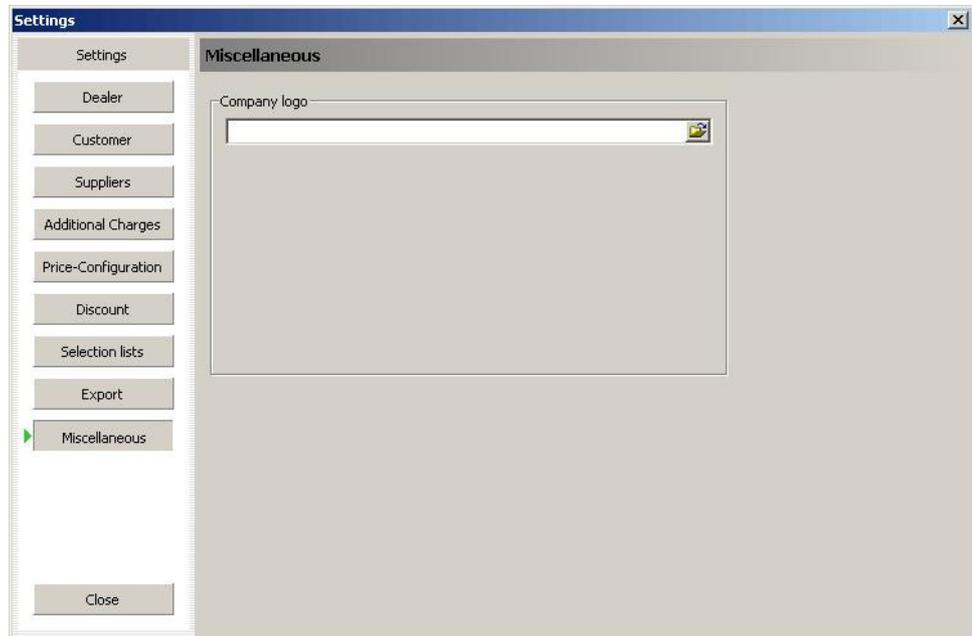




By clicking the 'HTML-Export' you can set which HTML templates Compass will use for quotations and orders. We supply a template that may be imported to this screen by selecting the folder icon beside either the quotation or order fields. The templates are stored in your Compass CD under the folder 'HTML' which is in the folder 'Extras'.

Miscellaneous

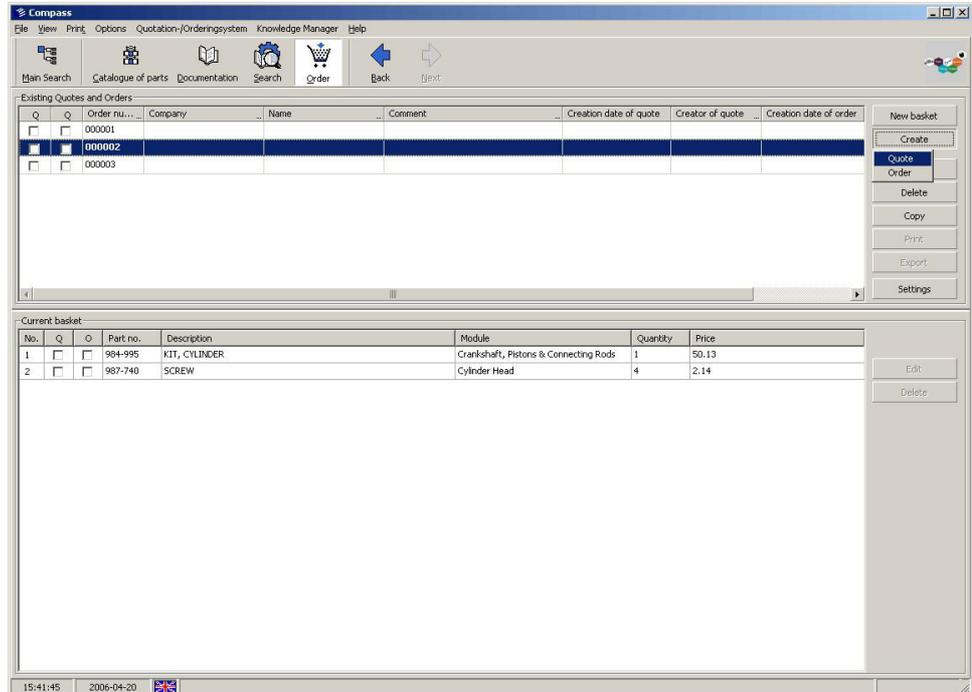
From this screen a company logo can be added to appear in quotes and exports. Click on the file icon and browse to find the location of the company logo.



Once you have added all the customer details you want then click on 'Close' to return to the shopping basket.

Create a Quote

Once you have created a shopping basket you can convert it to a quote for your customer. Click on the 'Create' button. A drop down box will appear which will display the option to 'Quote'. Click on 'Quote' to convert the list you have selected.



A new window will open in the middle of the screen, which will take you through the step for converting a list of parts into a quote. The first page is the **Common Settings**.

The 'Create Quote' dialog box is shown with the following fields:

Common settings

ID: Creation date:

Created by: Comment:

Dealer data

Name: Address:

Discount & Currency

Discount-group: Currency:

Buttons: Save, Cancel, < back, next >, Complete

A quote ID is created automatically. The 'Created by' field and 'Creation date' are created automatically but can be changed. You can also add any comments. Select 'Next' to continue.

The window will change to show the **Billing Address** section. You can use the drop down boxes to select from your list of customers and addresses that you have already created. If you have not already created the customer you can create a new customer now by selecting "new customer".

The screenshot shows the 'Create Quote' window with the 'Billing address' section active. It contains two main sections for data entry. The first section has 'Name' and 'Address' dropdown menus, a 'New' button, and text boxes for 'Customer number', 'Company', and 'Name'. The second section has text boxes for 'Name', 'Contact / Division', 'Street', 'P/C / City / Country' (split into three boxes), 'Telephone / Fax' (split into two boxes), and 'E-mail'. A checked checkbox labeled 'Same delivery address' is located below the second section. At the bottom are buttons for 'Save', 'Cancel', '< back', 'next >', and 'Complete'.

If you want to add a different delivery address uncheck the 'Same delivery address' box. Select save to save the new details. Select next to continue.

The screenshot shows the 'Create Quote' window with the 'Terms & Comments' section active. It includes dropdown menus for 'Delivery terms' and 'Transport Description', a text box for 'Payment Terms', a text box for 'Named Location', and a date selector for 'Quote Validity'. A large text area is provided for 'Additional Comments'. At the bottom are buttons for 'Save', 'Cancel', '< back', 'next >', and 'Complete'.

The next screen is the **Terms & Comments** section. Select the correct delivery terms and transportation method using the drop down box or add your own transportation. Type in the correct payment terms and named location, if necessary. Select the quote validity date. Finally add any additional comments. Select 'Next'.

Create Quote

Quote quantity

No.	Part Number	Description	Qty	Price (quote)
1	984-995	KIT, CYLINDER	1	65.01 GBP
2	987-740	SCREW	4	6.56 GBP

Sum before tax: 72.57 GBP
Tax: 5.50 GBP
Sum: 78.07 GBP

A list of all the parts in the order, the quantities, and their prices will be brought up. If you are content with the information click 'next' to continue.

Create Quote

Additional Charges

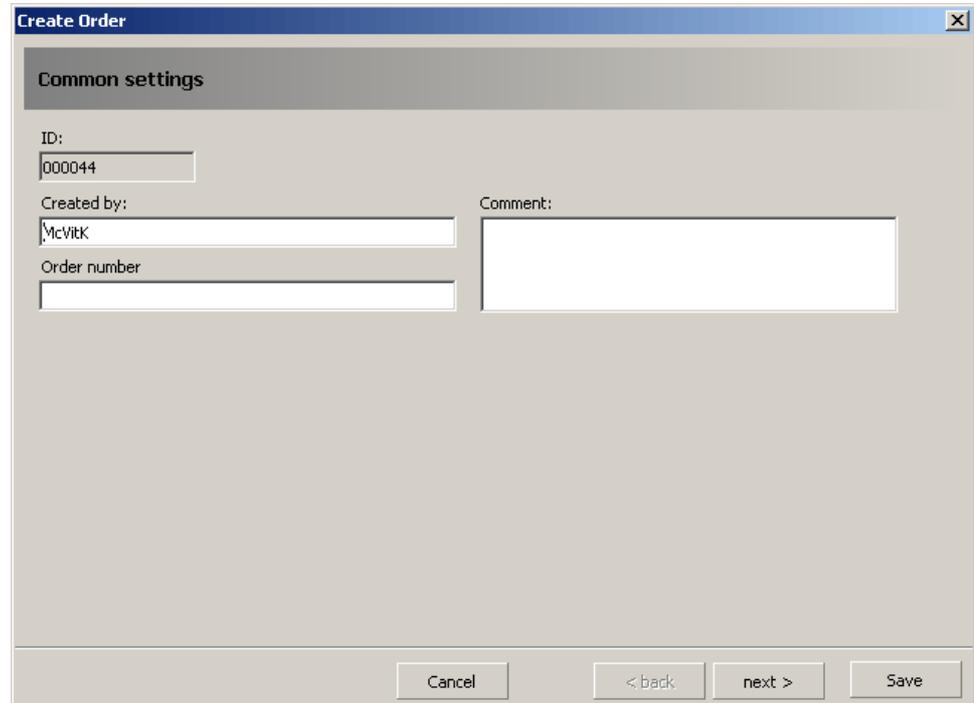
Description	Amount	Steuer (%)
Packaging	4.00 GBP	0

Add. charges (taxable): 0.00 GBP
Tax: 0.00 GBP
Add. charges (not taxable): 4.00 GBP
Sum: 4.00 GBP

Any additional charges that you want to add on may be added on in this section by clicking 'new'. When you are happy with the information click 'complete' to complete the order.

Create a Order

Orders can also be created by using the 'create' tab. Select 'create' and select 'order'. The following screen will appear, if necessary add any required comments.

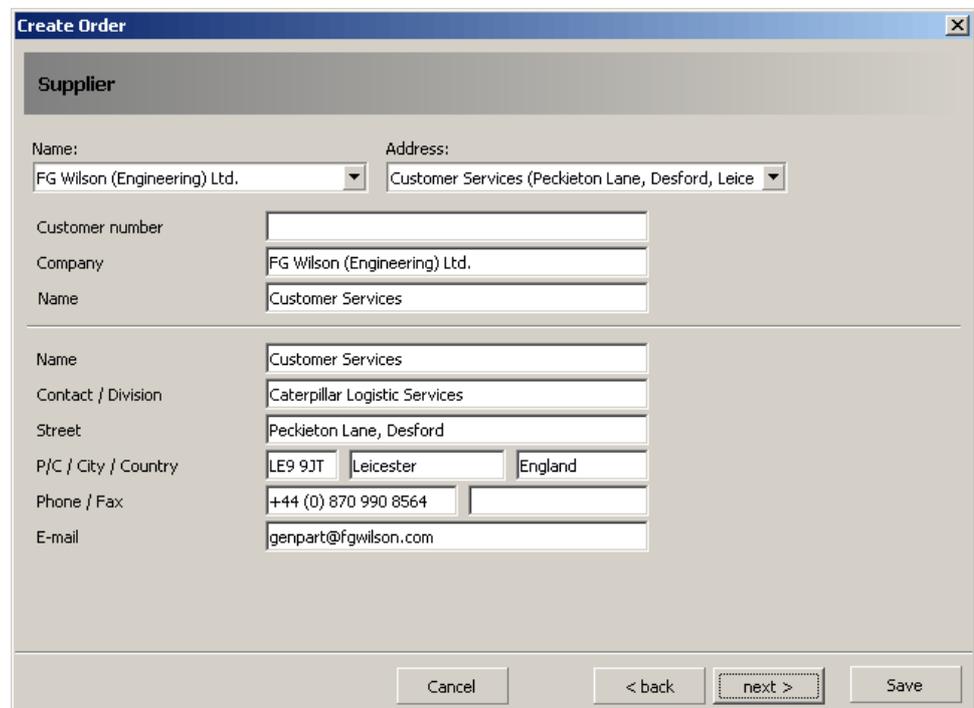


The screenshot shows a dialog box titled "Create Order" with a close button (X) in the top right corner. The main area is titled "Common settings" and contains the following fields:

- ID:
- Created by:
- Order number:
- Comment:

At the bottom of the dialog box, there are four buttons: "Cancel", "< back", "next >", and "Save".

Select 'Next' and a supplier field should appear. This should be filled in automatically.



The screenshot shows the same "Create Order" dialog box, but now the "Supplier" tab is active. The fields are populated with the following information:

- Name: Address:
- Customer number:
- Company:
- Name:
- Name:
- Contact / Division:
- Street:
- P/C / City / Country:
- Phone / Fax:
- E-mail:

At the bottom of the dialog box, the "next >" button is highlighted with a dashed border, indicating it is the next step in the process.

Select 'Next' and an overview of the parts in your order should appear. Select 'Save' when you are happy with the information entered.

No.	In order	Part Number	Description	Requested Quantity	Package size	Or
1	<input checked="" type="checkbox"/>	341-002	HOSE NYLON 1/4"OD NYF8	2	5	5
2	<input checked="" type="checkbox"/>	520-007	ADAPTOR 1/4NPTX1/4BSP	3	10	10
3	<input checked="" type="checkbox"/>	528-034	HOSE ASSY 1/4IDX750CR5	4	1	4
4	<input checked="" type="checkbox"/>	511-016	TIE CABLE 200 X 4.8MM BLACK	6	100	100

Sum (USD): 51.45

Print the Quote/Order

Once you have created the information for the quote/order you can send it to be printed as a finalised quote/order by selecting the 'print' button

Order number 000043

Delivery address:
Cust. No: 16765
 ABC test- Cookstown factory
 M Taylor
 M Taylor
 123 main street
 BT80 8SD Cookstown
 Northern Ireland
 Phone: 8845657788
 Fax: N/A
 E-mail: mtaylor@abctest.com

Billing address:
 ABC test- Cookstown factory
 M Taylor
 M Taylor
 123 main street
 BT80 8SD Cookstown
 Northern Ireland
 Phone: 8845657788
 Fax: N/A
 E-mail: mtaylor@abctest.com

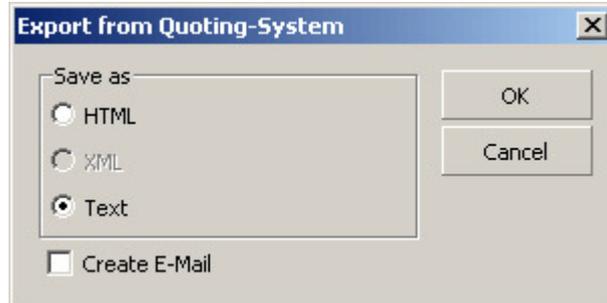
Purchaser:
 test dealer
 Joe Bloggs
 Damian Johnston
 123 Dealer St
 y675tg Belast
 Northern Ireland
 Phone: 123456457
 Fax: 123423452
 E-mail: Damian.J@Testcompany.com

Part Number	Description	Requested Quantity	Unit of Issue	Order Quantity	Package Price	Extended Price
341-002	HOSE NYLON 1/4"OD NYF8	2	5	2	6.66	6.66
520-007	ADAPTOR 1/4NPTX1/4BSP	3	10	3	6.59	6.59
528-034	HOSE ASSY 1/4IDX750CR5	4	1	4	8.62	34.48
511-016	TIE CABLE 200 X 4.8MM BLACK	6	100	6	3.73	2.73
Total:						51.45

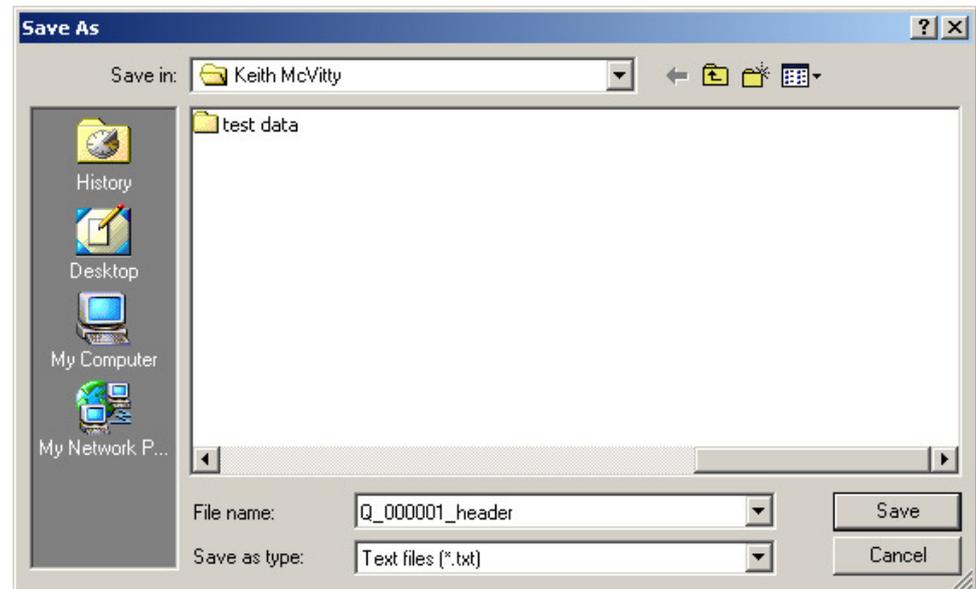
The quote/order appears in a print preview screen. Select the 'Print' icon to continue. Click on 'Close' to return to the shopping basket. You will see that the list of parts that you have converted to a quote/order will now have a tick in the box against the quote or order column.

Export a Quote/Order

To export a quote or order, select the 'Export' button on the right of the screen. Select whether you want to export a quote or an order. A new window will open giving you various options for the format you can export the information.



Select whether you want to export in either 'Text' format or in 'HTML' format, then select 'OK' to continue.



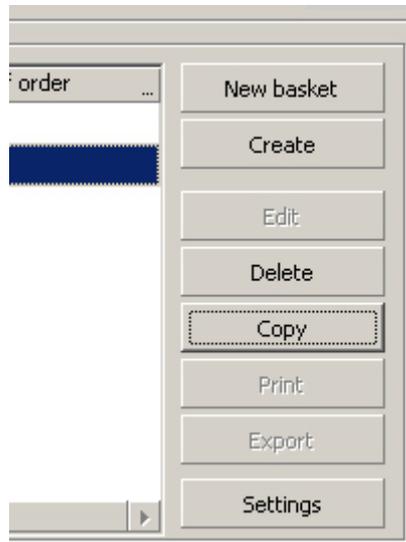
If text is selected the system will create two text files one with the basket information (part numbers) and one with the header information (customer details etc.) You can change the name of the file and its location if you desire. Select 'Save' to continue. If HTML is selected this will save in HTML format using the HTML template which is selected within 'settings'. (Note if you save an order in HTML format this will also export an .egt file, which can be loaded to EGO)



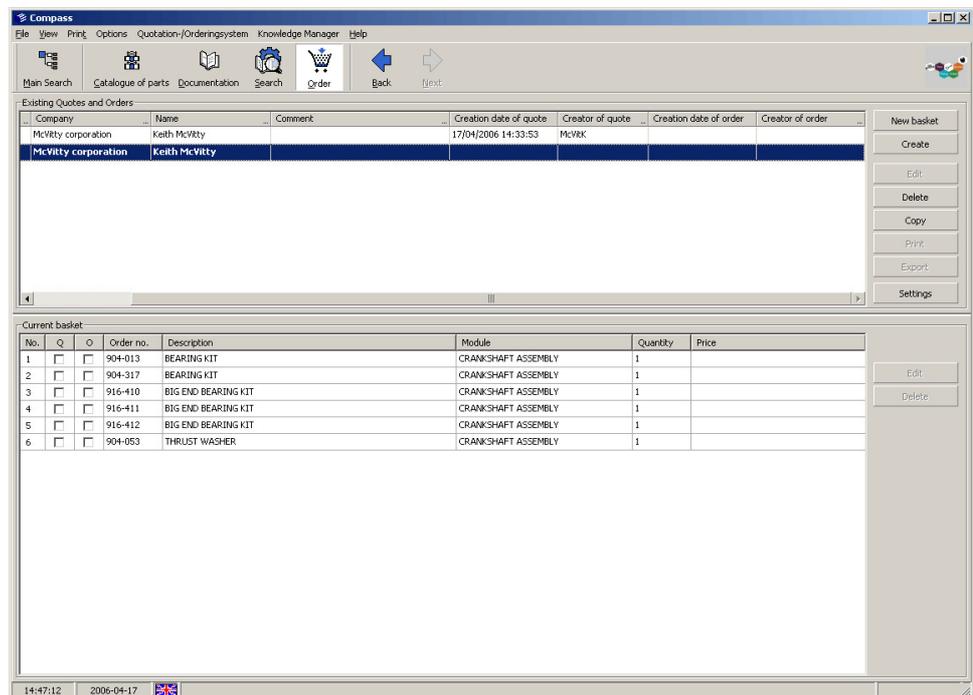
The export has been completed, click on 'OK' to finish.

Create a Copy

To create a copy of an existing basket or quote select the 'Copy' button on the right of the screen.



A copy will be created in the list of baskets.



6

Settings

Operator Interface and Data Language

You can display the operator interface and the database for the Compass system in any of the six languages that are available for selection. Select **Options** → **Language** on the menu bar, or click on the flag icon at the bottom of the screen. The Language selection dialogue window is displayed:



Select the desired language for the user interface and database and click on **OK** to confirm. The language selected is effective immediately and in future the system will start with the language you have selected.

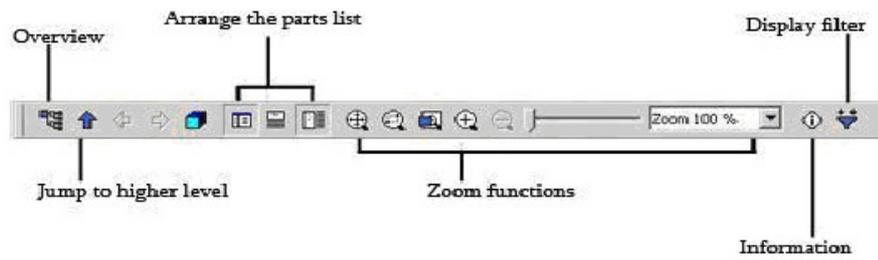
7

Reference

Menu Bar

File →	Main Selection Opens the window for the Compass search screen.
	End Program Closes the Compass software.
View→	Catalogue of parts Opens the window for the catalogue.
	Order Opens the window for ordering.
	Search Opens the window for searching.
Print →	Current drawing Leads to the Print preview of the drawing for the selected level (module). The drawing can be printed out.
	Current list of parts Leads to the Print preview of the list of parts for the selected level (module). The list of parts can be printed out.
	Current drawing and list of parts Leads to the print preview of the drawing and list of parts for the selected level (module). The drawing and list of parts can be printed out on separate pages.
	Complete module Leads to the Print preview of the selected module. The drawings and list of parts of the module can be printed out.
Options →	Update With the catalogue update the catalogue database is updated. You can obtain information on the sequence from the supplier of the CD.
	Language Leads to the dialogue, used to change the language of the user interface, documentation and database.
	E-mail options Leads you to the E-mail setup, which you complete before you send your orders by E-mail. If necessary, consult your system administrator.
	Update user settings On delivery of a new CD catalogue version this command is selected in order to update the addresses and the catalogue.
	Automatic change to Preview If a part on the list of parts is on many of the drawing pages of a module, this function is used to mark all the drawings in the postage stamp view, on which the part is represented. When displayed the item number is highlighted on the respective drawing.
	Display of prices Change the currency displayed to enable the quoting of customers in their currency.

Compass Toolbar



Serial numbers

The following are examples of the various serial numbers that can be searched for using Compass as discussed in the navigation section.

Genset Serial

Below we can see an example of a genset serial number (highlighted towards the top of the image below) and sales order number (highlighted towards the bottom of the image below).

MANUFACTURED IN UNITED KINGDOM BY FG WILSON (ENGINEERING) LTD
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OLYMPIAN™

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GENERATING SET		GRUPO ELECTROGENO
MODEL	GEP110	MODELO
SERIAL NUMBER	OLY00000LRPS05038	NUMERO DE SERIE
YEAR OF MANUFACTURE	2006	ANO DE CONSTRUCCION
RATED POWER - STANDBY	110.0	KVA
	88.0	KW
	0.80	COS Ø
RATED VOLTAGE	400/230	V
PHASE	3	FASE
RATED FREQUENCY	50	Hz
RATED CURRENT	159	A
RATED R.P.M	1500	RPM
MAXIMUM ALTITUDE*	152.4	m
MAXIMUM AMBIENT TEMPERATURE*	27	°C
SALES ORDER REFERENCE	173268/10	SPANISH
ALTERNATOR CONNECTION	S_STAR	CONEXION DEL ALTERNADOR
RATING ISO 8528-3	PR 500H TL0 875	POTENCIA ISO 8528-3
ALTERNATOR ENCLOSURE	IP23	CUERPO DEL ALTERNADOR
INSULATION CLASS	H	CLASE DE AISLAMIENTO
EXCITATION VOLTAGE	40	V
EXCITATION CURRENT	2	A
A.V.R	R230A	REGULADOR AUTOMATICO DE VOLTAGE
MADE IN U.K.		

*GENERATOR SET IS DESIGNED TO OPERATE IN AMBIENT TEMPERATURES UP TO 50°C AND AT HIGHER ALTITUDES. PLEASE CONSULT FACTORY FOR OUTPUTS AVAILABLE

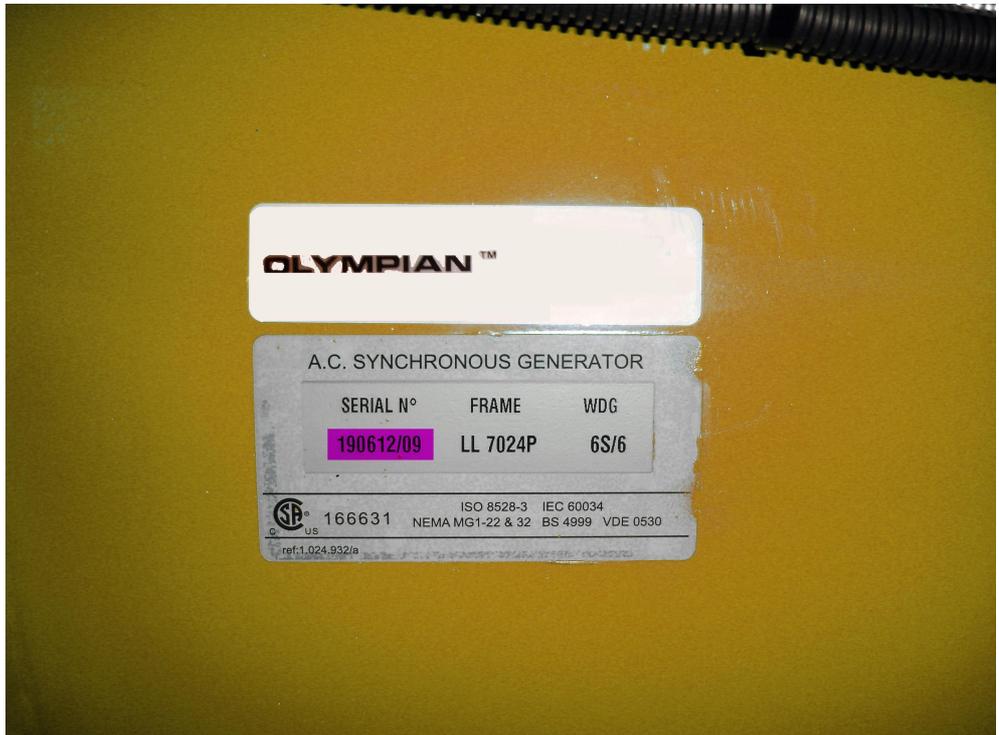
Engine Serial Number

Shown below is an example of an engine serial number:



Alternator Serial Number

Shown below (highlighted) is an example of an alternator serial number:



8

Glossary

In the Catalogue

- Record** A Record is a line in the list of parts, which represents a level (machine, module) or a part.
- Level** A spare parts or service catalogue is usually provided with a hierarchical structure. These hierarchical structures are represented in the form of nodes or catalogue levels. On entering the catalogue there may be different machines/commission numbers, followed by modules, where a module is in turn divided into one or more modules.
- Catalogue** When the term catalogue is used, this always refers to an electronic spare parts or service catalogue.
- Catalogue Update**
The database of the existing catalogue is updated.
- Navigation** This is movement through the levels of a catalogue, with the aim of viewing it or to find elements of the catalogue.
- Note** Information in the form of a Note tag can be assigned to any level (module) and to any part.
- Pan window** Display of a portion of an illustration, which can be increased in size to be viewed in greater detail.
- List of parts** Displays the content of an opened level (module), comprising parts and other possible levels.
- Catalogue of parts**
Is a spare parts or service catalogue displayed on the CD Viewer. It is represented as a tree structure and indicates drawings and parts lists for the level depicted.