User’s Guide
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Important Notice
This user's guide and the online Help describe all available application features. When using your version of the application, you will only see those features to which your OEM subscribes. Screenshots in this user's guide and the online Help are "generic". Depending on the OEM data, some features in your version of the application may look different.
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1. How to Use this Guide and the Online Help

When you need assistance, you can view the online Help, view, save, and print this user’s guide, or display Tooltips.

Available Features

This user’s guide and the online Help describe all available application features. When using your version of the application, you will only see those features to which your OEM subscribes. Screenshots in this user’s guide and the online Help are “generic”. Depending on the OEM data, some features in your version of the application may look different.

View Online Help

Click the Help button to view online help at any page.

View the User’s Guide

Click Preferences and click User Guide or click the Technical Support button and click User Guide. The online user's guide opens in Adobe Reader.

Save and Print the User’s Guide

1. Click the Adobe Reader Save button. The Save a Copy dialog box opens.
2. Select a location in which to store the file.
3. Click Save.
4. Double-click the file name to open the guide.
5. Print sections of the user’s guide as you need them or print the entire guide.

Identify Buttons and Icons

To identify a button or icon, position the mouse pointer over the button or icon to display its label (referred to as a Tooltip).
2. The Main Page

The main page is your starting point in the application. This screen shot shows all features available from the main page. When using your version of the application, you will only see those features to which your OEM subscribes.

1. Click 🖋 to return to the main page from any other page.
2. Click 📜 to view and search for bulletins.
3. Click 🔍 to make an advanced search for parts and service information.
4. Click 📊 to view, modify, and delete user notes.
5. Click 📊 to view and open picklists, quotes, and orders.
6. Make a quick search by model, part number, or description. Or search the price file.
7. Click Links to display a page linked by the OEM.
8. Click Preferences to set your user interface preferences and view the user’s guide.
9. Click Logoff to sign off the Web site.
10. Click 祐 to view technical support information and the user’s guide.
11. Click 📚 to view Help.
12. Click Part Info to quickly display information for a part number.
13. Click links to display parts pages, service manuals, and operator manuals.
14. View parts pages and other information.

Note: Some features are not supported in all OEM implementations of Net-Compass.
3. Set User Preferences

**Note:** Available user preference settings vary by OEM.

**User Preferences Overview**

From the main page, click **Preferences**.

1. Select the user interface language.
2. Select the default parts lookup page and click **Update**.
3. Select the parts page layout and click **Update**.
4. Select the default price book.
5. Select your time zone and click **Update**.
6. Select a date display format and click **Update**.
7. Click **Change**. Select alternating background color bands for parts lists. Click **Update**.
8. Click **Change**. Type your current password. Type your new password twice. Click **Change**.
9. Click **User Guide** to view or download the User’s Guide.
Change the User Interface Language

The Language list box allows you to change the language in which the parts and service application displays user interface features such as column headers, button labels, prompts, messages, and Help. Switch between languages at any time.

1. Click the Language list box arrow to open the list of languages.
2. Select your language.
3. Application user interface text will be displayed in the language you select.

Change the Default Parts Lookup Page

By default, the Navigation page is displayed when you open the application. You can set the application to open to a different page. Select an option from the Navigation Type list box and click Update. For example, selecting Bulletins indicates that the Bulletins page will open each time you open the application.

Change the Parts Page Layout

Select an option from the Parts Page Layout list box and click Update.

Change the Default Price Book

Select an option from the Primary Price Book list box and click Update. Picklists will display prices from the selected price book. When necessary, you can select a different price book in a Supplier Information window to view prices in that particular window.

Note: Not all OEMs allow users to view multiple price books.

Change the Time Zone

Select your time zone from the Time Zone list box and click Update.

Change the Date Format

Use this option to change the format in which dates are displayed in the application. Select a format from the Date Format list box and click Update.
Change the Parts List Background Color

When you initially install the application, the parts list appears with the default alternating background color bands. To change the colors, click Change Parts Listing Color Change. The Color window opens.

The top portion of the window displays the primary and alternating colors and color codes selected for parts list rows. The middle portion of the window displays selectable color bands.

To change the primary color:
Select Primary Color and scroll through the color bands until you see the color you want. The color and color code in the top portion of the window change correspondingly. Then click Update.

To change the alternating color:
Select Alternating Color and scroll through the color bands until you see the color you want. The color and color code in the top portion of the window change correspondingly. Then click Update.

To restore the default colors:
Click Default in the upper right corner of the Color window.
Change Your Password
Use this procedure to change the password you use to log on to the Web site.

1. Click Change my password Change Now. The Change Password window opens.

2. Type your current password.

3. Type your new password twice.

4. Click Change.
4. **Make a Quick Search**

**Note:** Quick Search selections vary by OEM. For example, your version of the application may be limited to quick model searches and the search results may display different column headings.

1. Select **Model, Part Number, Part Description,** or **Price File.**

2. Type a model, partial model; part number, partial part number; part description, or partial part description.

3. Click **Search**. Price information or links to applicable models are displayed.

4. Click a link in the search results. A list of parts pages containing the model is displayed.

5. When a search retrieves multiple pages of information, click **Next>>** and **<<Previous.**

6. Click a page link to view the page. Or click the part number link to view additional information for the part.
5. Make an Advanced Search

You can enter additional search criteria to make an advanced search.

**Note:** Advanced Search selections vary by OEM. For example, your version of the application may not include regions and the search results may display different column headings.

![Main Icon Bar](image)

Click the **Advanced Search** icon. The Advanced Search page opens.

1. Type a model, part number, part description, or remarks text.
2. Select the manual type or Price File.
3. Specify a search for a model, part number, part description, or remarks text.
4. Select the criteria match.
5. Select a region (if applicable).
6. Select a model to narrow your search.
7. Select the number of results to be displayed at a time.
8. Click the **Go** button.
9. A list of parts pages is displayed. When a search retrieves multiple pages of information, click **Next>>** and **<<Previous**.
10. Click a page link to view the parts page. Or click the part number link to view additional information for the part.
11. Hide the Search fields.
6. Find Additional Information for a Part Number

**Note:** This feature varies by OEM. For example, not all OEMs allow users to view multiple price books.

1. Click **Part Info**. The Part Info window opens.

2. Type the part number.

3. If the PC is connected to a business system, type a quantity. If applicable, select a region.

4. Click **.**

   - If the PC is connected to a business system, information is displayed from the supplier.
   - If the PC is not connected to a business system, information is displayed from the database.

5. Click **.** to list all models that include the part number. When available, click **.** to view supersession information, click **.** to view user notes linked to the part number, or click **.** to view kit information.

6. To add the part to a picklist, type a quantity and click **.**

7. Click **.** to link a user note to the part number.

8. To view prices from a different price book, select a price book and click **.**

9. To make a part inquiry, select a warehouse, type a quantity, select CCN/CPN or Part Number, and click **.**

10. When you finish viewing information, click **Close**.
7. Navigate to Information

To navigate to parts pages, service manuals, and operator manuals, use the navigation links in the left pane of the main page. The navigation levels shown below are examples only.

To navigate to a parts page:

Click a link to open additional links until you reach the page links. Click a page link to open the parts page.

Navigation:
- 459
- 608
- 800
- 803
- 2007
- 2008
  - PARTS MANUAL
  - ENGINE
  - BRAKE
  - DRIVE
  - STEERING AND CONTROLS
    - STEERING CONTROL
    - WHEEL ASSEMBLY
    - WHEEL HUB
    - STEER PIPING
    - WHEEL STEERING
  - SERVICE MANUAL
- 630
- 633

To navigate to a service manual or operator manual:

Click a link to open additional links until you reach the manual links. Click a manual link to open the manual.

Navigation:
- 459
- 608
- 800
- 803
- 2007
- 2008
- PARTS MANUAL
- SERVICE MANUAL
- 5-01 CHASSIS AND MAST
  - GENERAL INFORMATION
  - SAFETY
  - SYSTEMS OVERVIEW
  - PLANNED MAINTENANCE
  - TROUBLESHOOTING
  - MESSAGES, CODES, AND TESTS
  - COMPONENT PROCEDURES
  - THEORY OF OPERATION
  - APPENDIX
  - INDEX
8. View Parts Pages

This screen shot shows all features available from a parts page. When using your version of the application, you will only see those features to which your OEM subscribes.

1. Click Previous to display the previous diagram within a part group.
2. Click Next to display the next diagram within a part group.
3. Click to attach your own note to the display. See "Creating User Notes".
4. Click (when displayed) to view page notes.
5. Create a new picklist or open an existing picklist. Click to view the selected picklist.
6. Click the image icons to zoom, print the diagram and parts list, or resize the diagram.
7. Click a reference number in the diagram to highlight the part text in the parts list. Or click the reference number in the parts list to highlight the reference number in the diagram.
8. Click a part number link to display additional information for the part.
9. When available, click to view user notes, click to view supersession information, click to view bulletins, or click to view kit information.
10. Click to add an individual part to a picklist.
11. Click to select a part.
12. Click to add all selected parts to a picklist.
Zoom, Print, and Resize Parts Diagrams

*Note:* The Image icons vary by OEM data.

Click \+ to zoom in on a diagram.

Click - to zoom out from a diagram.

Click \(\text{\textcopyright}\) to optimally resize the diagram to the display area.

Click \(\text{\textcopyright}\) to view the previous page of a multiple page diagram.*

Click \(\text{\textcopyright}\) to view the next page of a multiple page diagram.*

Click \(\text{\textcopyright}\) to print the diagram and parts list.

Click \(\text{\textcopyright}\) to print the diagram.

Click \(\text{\textcopyright}\) to print the parts list.

* This icon appears only when a multiple page diagram is displayed.

Print Parts Text

1. Right-click in the parts list to open a context menu.

2. Select **Print** from the menu to open the Print dialog box.

3. Click **Print** from the Print dialog box.
View Supersession Information

When $\mathbb{S}$ precedes a part entry or appears in a Part Info window, click $\mathbb{S}$ to view supersession information for the part number.

Part Number 5W-11102-10-00 contains supersession information. What would you like to do?

- Order Current
- Order Newest
- No Detail...

<table>
<thead>
<tr>
<th>No.</th>
<th>Part Number</th>
<th>Description</th>
<th>Code</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SW-11102-10-00</td>
<td>CYLINDER HEAD AS</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SW-11102-00-00</td>
<td>SW-11102-10-00</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Click **Order Current** to add the supersession part to a picklist.

Click **Order Newest** to add the newest part to a picklist.

Click **No Detail** to limit the Supersession window to the upper portion. The No Detail button changes to Detail so you can redisplay the entire window.

Part numbers are listed from newest (top) to oldest (bottom). Clicking a part number link displays information for that part. You can select these numbers for a picklist.

To add a part to a picklist, select the check box that precedes the part number and click **Add**.

Click **Close** to close the supersession window.
9. Create a Picklist

From a parts page, create a picklist to accumulate part numbers for a job. You can also use a picklist to create a quote or order. For information on using a picklist to create a quote or order, see “Create a Quote” on page 28 or “Create an Order” on page 37.

1. Select New or an existing list from the Current Picklist box.

   ![Current Picklist](image)

2. In the parts list, select the check box preceding each part number you want to add.

<table>
<thead>
<tr>
<th>REF ND</th>
<th>Part Number</th>
<th>Part Name</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>529-11102-1030-00</td>
<td>CYLINDER HEAD ASSY</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>90119-10004-00</td>
<td>BOLT, WITH WASHER</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>90223-00312-00</td>
<td>BOLT, FLANGE</td>
<td>1</td>
</tr>
<tr>
<td>12</td>
<td>90430-08119-00</td>
<td>GASKET</td>
<td>1</td>
</tr>
</tbody>
</table>
   | 13     | 358-11100-00-00 | COVER, CYLINDER HEAD 1 | 1  

3. Click ➔. The selected parts are added to your picklist.

   **Note:** You can also select a single part by clicking ■.

4. Click ➔ to open the picklist.

   ![Picklist](image)

   **Note:** The application assigns a name to the picklist based on the user, date, and time.

5. Click Rename and type a new name for the picklist.

6. When necessary, type a different quantity for a part or click ✗ to delete a part.

7. Click ☑ to save the picklist.

8. When necessary, click ‡ to print the picklist, click ✗ to delete the picklist, click ☰ to view the transaction list, or click † to close the picklist.
10. View Kit Information

Note: This feature is not supported in all OEM implementations of Net-Compass.

1. From a parts page, click 📞. The Kit Information window opens.
   - If the part is only found in one kit, the window lists the parts in the kit.
   - If the part is found in multiple kits, the window lists each kit that includes the part.

2. Click a part number link to list the parts in the kit below the list of kits.

3. Click ⬤ to select a kit for a picklist.
   
   Note: To add multiple kits to a picklist, select ☑ for each kit and click ✅.
11. Create, View, and Maintain User Notes

Note: This feature is not supported in all OEM implementations of Net-Compass.

Create User Notes

1. From a parts page, click Add Note. The Add Note page opens.

2. Type a name for the note.

3. Type the note.

4. Select the release status of the note.

5. Click Save. The note is linked to the parts page and 🔄 appears.

View User Notes

1. Click 🔄 to view one or more page or part notes.

2. Click a link to view the note.

3. To delete a note, click ✗.

4. To create a note, click New.

5. Click Close to close the Note window.
Maintain User Notes

Main Icon Bar

Click the **Notes** icon. The Notes page lists all saved user notes.

Click **Next>>** or **<<Previous** to view the next or previous page of search results.

Click ★ to create a new note.

**Search for a Note**

Use the Search section to find a specific note in the list.

1. Type search criteria in the Name box or Note Text box.
2. From the Search by and Created sections, select criteria to narrow your search.

   **Note:** To select a date, click ★ to open a calendar and select the applicable date.
3. Click **Go**.
**View Details for a Note**

Click a link in the Name column to view details for the note.

Modify the note name, content, or attachment status as necessary and click **Update** to save your changes.

To delete the note, click **Delete**.
12. View Bulletins

Note: This feature is not supported in all OEM implementations of Net-Compass.

Main Icon Bar

Click the Bulletins icon. The Bulletins page lists new bulletins that have been posted since you last logged onto the application.

To View Bulletins:

1. Click Next >> or <<Previous to view the next or previous page of search results.
2. Select a specific page of search results.
3. Click a bulletin number link in the Number column to view the bulletin.
4. Select ☐ for each bulletin you view.
5. ☐ indicates a mandatory bulletin.
6. Click ☐ to indicate that you have read the bulletins.

To Search for Bulletins:

7. Type a bulletin number, partial bulletin number, or a word from a bulletin name.
8. To narrow the search, select a bulletin name or bulletin number, bulletin type, criticality level, and/or model.
9. To narrow the search by a range of dates, click between, click ⛄, and select start and end dates. Or click Previous, type a number, and select day(s) or month(s).
10. Select the number of search results you want to display at a time.
11. Click Go. Bulletins that meet your search criteria are listed.
12. Click ☐ to hide the Search sections. To redisplay these sections, click the box to remove the checkmark.

Note: To list all bulletins, click Go with the Search For box empty and All selected for search criteria.
13. View BOM Information

The BOM feature allows you to retrieve bill of materials information from a serial number. **Note:** This feature is not supported in all OEM implementations of Net-Compass.

Main Icon Bar

Click the **BOM** icon. The BOM page Search BOM and Current Picklist sections are displayed.

<table>
<thead>
<tr>
<th>Serial Number</th>
<th>Model</th>
<th>Description</th>
<th>CCN/CPN</th>
<th>Lot No.</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>0X1111</td>
<td>EP100</td>
<td>AGILENT SIM 300 WAVE</td>
<td>30017028</td>
<td>AS</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ASSY, 176 MM AIR END</td>
<td>42435975</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ASSY, GEARCASE 176 MM</td>
<td>42436894</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BASE, S500S-100 COUGAR</td>
<td>596931763</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BASIC, MODEL EP100</td>
<td>42432104</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BLOCK TERMINAL</td>
<td>35267202</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BOX STARTER</td>
<td>39894421</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CAP, 30 TUBE</td>
<td>39232666</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CLAMP PLATE</td>
<td>39255927</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COMMON, 7X100 HP COUGAR</td>
<td>42438127</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, J6CH OF</td>
<td>39124436</td>
<td>IN</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, J6CH OF</td>
<td>42041704</td>
<td>IN</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, 30 COUDUT</td>
<td>39479451</td>
<td>EA</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, 30 COUDUT</td>
<td>39479484</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, CONDUIT</td>
<td>39479506</td>
<td>EA</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CONNECTOR, WIRE CRIMP</td>
<td>39107735</td>
<td>EA</td>
<td>3</td>
</tr>
</tbody>
</table>

1. Type a serial number or the first three or four characters of a serial number.  
2. Click **Go**. Applicable CCNs/CPNs are listed.  
3. Click the serial number link. CCNs/CPNs for the serial number are listed. Parts are filtered by unit build/ship date.  
4. Select a picklist for adding parts.  
5. Click **+** to add a CCN/CPN to the picklist.  
6. Click **X** to select a CCN/CPN for the picklist.  
7. Click **+** to add selected CCNs/CPNs to the picklist.  
8. Click **Picklist** to view the picklist.  
9. Click **Picklist** to make a “Where Used” search.  
10. View notes linked to a serial number.  
11. Click **Picklist** to hide the Search and Current Picklist sections. To redisplay these sections, click the box to remove the checkmark.  
12. Click **Back** to return to the previous screen or click **Close**.

**Note:** You can view drawings (CCN/CPN numbers with “DWG” in their descriptions) only when you view information within your intranet.
When you type a Centac serial number, the BOM display includes a Part Number column and Parts History pane.

The Part Number column is for reference only. It lists part numbers that correspond to CCN/CPN numbers.

The Parts History pane lists additional parts added to a unit that were not on the original bill of materials. These parts are filtered by the unit’s ship date.
14. Cross-Reference OEM Parts

The Performance Parts feature allows you to enter information for OEM parts to find the equivalent CCN/CPN parts. **Note:** This feature is not supported in all OEM implementations of Net-Compass.

Main Icon Bar

Click the **Performance Parts** icon. The Performance Parts page Search, Search By, and Current Picklist sections are displayed.

<table>
<thead>
<tr>
<th>O.E.M. Part No. (Part Description)</th>
<th>O.E.M. Part No. (Part Description)</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Serial No.</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>91560656</td>
<td>25207 OIL FILTER</td>
<td>(all)</td>
<td>2</td>
<td></td>
<td>Na Built</td>
</tr>
<tr>
<td>91560652</td>
<td>FILTER, OIL</td>
<td>(all)</td>
<td>3</td>
<td></td>
<td>Na Built</td>
</tr>
<tr>
<td>91566661</td>
<td>FILTER, AIR</td>
<td>(all)</td>
<td>4</td>
<td></td>
<td>Na Built</td>
</tr>
</tbody>
</table>

1. Type a complete or partial OEM part number.
2. Select search criteria.*
3. To narrow the search, select a manufacturer, model, and/or region.
4. Click **Go** Equivalent CCNs/CPNs are listed.
5. Select a picklist for adding parts.
6. Click a CCN/CPN link to view information.
7. Click **to add a CCN/CPN to the picklist.
8. Click ** to select a CCN/CPN for the picklist.
9. Click ** to add selected CCNs/CPNs to the picklist.
10. Click ** to view the picklist.
11. Click ** to hide the Search sections. To redisplay these sections, click the box to remove the checkmark.

*Search Criteria Guidelines:

| Contains | Any part number that contains the numbers you type will be displayed. |
| Exactly | Only part numbers that match exactly the numbers you type will be displayed. |
| Starts With | Any part number that starts with the numbers you type will be displayed. |
| Ends With | Any part number that ends with the numbers you type will be displayed. |
15. Use the Rapid Parts Feature

The Rapid Parts feature allows you to use OEM part numbers to find matching reference part numbers and to enter manufacturer, model, and part category information to find reference and OEM part numbers.

From the main toolbar in the upper left corner, click or to open the Rapid Parts screen.

Enter OEM Part Numbers to Find Matching Reference Parts
1. Select **Part Number** and type an OEM part number in the "Part Number" field.
2. Click **Go** to display the matching reference part number, part description, and manufacturer.

Enter Manufacturer, Model, and Category to Find Reference and OEM Parts
1. Click **Search Parts Book** and select an OEM from the Manufacturer list box, a model from the Model/Lot Number list box, and a part group from the Category list box.

   **Note:** When you make a selection from a drop-down list, the other lists change automatically to display appropriate options. For example, changing the OEM automatically changes the available models and categories.
2. Click **Go** to display parts information.
16. Create a Quote

**Note:** This feature is not supported in all OEM implementations of Net-Compass.

To create a quote for a customer, do the following:

1. Create a picklist. See page 18.
2. Open the picklist from the Transaction List. See page 29.
3. Convert the picklist to a quote. See page 30.
4. Customize the quote. See page 32.

The following sections explain how to perform each of these steps.
Open the Picklist from the Transaction List

Main Icon Bar

Click the **Transaction List** icon. The Transaction List shows transactions for your user ID.

1. Type a quote number, part number, or part description.
2. Select Order Number, Part Number, or Description.
3. To narrow the search, select a process or user name.
4. To narrow the search by a range of dates: Select **between**, click [ ] and select a start date. Then click [ ] (after “and”) and select an end date. Or click **Previous**, type a number, and select day(s) or month(s).
5. Select the number of search results you want to display at a time.
6. Click **Go**. Picklists and quotes that match your search criteria are listed.
7. To delete one or more transactions, select each transaction you want to delete and click [ ].
8. Click a picklist or quote number. A “Not Submitted” picklist or quote will open. If the picklist or quote shows a status other than “Not Submitted”, a status window will open.
9. Transactions are listed by quote number. To sort by any column, click the column header.
10. Click [ ] to hide the Search sections. To redisplay the sections, click the box to remove the checkmark.
11. Click [ ] to create a new picklist.
Convert the Picklist to a Quote

From the Transaction List, click the link to a picklist (in the Order No. column). The picklist opens.

Select Quote from the Order Process list box. The Quote page opens.
Quote Page

The Quote page displays information from the picklist, allows you to add parts and additional information, and allows you to enter information to appear automatically on all your quotes.

1. Click to return to the Transaction List.
2. Click to preview and print a formatted quote.
3. Click to save changes to a quote.
4. Click to delete the quote.
5. Create an order or picklist from the quote.
6. Change the quote number.
7. Change the date.
8. Type a customer reference number.
9. Type a description for the quote.
10. Select the name of the contact person.
11. Type the unit serial number.
12. Type information to identify the unit.
13. Click Address Book to search for a customer.
14. Type a note for internal use only.
15. Type a note to appear on the formatted quote.
16. Select to hide part numbers on the quote.
Customize the Quote

1. To add a part, type the part number and quantity, select a region, and click Add. Quote totals are updated automatically.

2. Click Add Multiple Parts. For each part, type the part number and quantity and select the region. Click Add.

3. Click Add Picklist(s). Merge multiple picklists into the quote.

4. Type new quantities. The application adjusts extended sell price, parts total, discount, and total.

5. When applicable, enter a sell price. The application dims the adjusted list price and updates the extended sell price, parts total, discount, and total. When you delete a sell price, the application adjusts all amounts.
Add, Delete, Hide, and View Information

1  To hide part numbers on the formatted quote, click □ to insert a check mark.
2  Select each part to delete. Click x. Click OK at the prompt.
3  Click □ to view user notes linked to the part number.
4  Click S to view supersession information for the part number.
5  Click □ to view the parts in a kit.
6  Click a part number link to display additional information for the part.
7  Type a note for a line item.
Enter Additional Information

1. Type a discount. The application adjusts the total.
2. Type the tax rate. The application displays the tax and adjusts the total.
3. Type labels and amounts for miscellaneous charges. The application adjusts the total.
4. To display costs in a different currency, type the exchange rate and code. The application applies the rate to the adjusted list price.

**Note:** To add a note to the bottom of the formatted quote, scroll down the Quote page to display the Customer Note Bottom text box. Type the note.
Add Information from the User Toolbox

1. Select a logo or no logo to appear on each quote.

2. **Required**: Type contact information.

3. **Optional**: Click and type a label and description to appear near the bottom of each quote.
Print the Quote

From the Quote page, click 📄 to display the formatted quote. The Print dialog box appears on top of the quote. To print the quote, click the Print button.
17. Create an Order

Note: This feature is not supported in all OEM implementations of Net-Compass.

To create an order, do the following:

1. Create a picklist. See page 18.
2. Open the picklist from the Transaction List. See page 38.
3. Convert the picklist to an order. See page 39.
4. Customize the order. See page 40.

The following sections explain how to perform each of these steps.
Open the Picklist from the Transaction List

Click the Transaction List icon. The Transaction List shows transactions for your user ID.

1. Type an order number, part number, or part description.
2. Select Order Number, Part Number, or Description.
3. To narrow the search, select a process, type, status, or user name.
4. To narrow the search by a range of dates: Select between, click (after "and") and select an end date. Or click Previous, type a number, and select day(s) or month(s).
5. Select the number of search results you want to display at a time.
6. Click Go. Picklists and orders that match your search criteria are listed.
7. To delete one or more transactions, select each transaction you want to delete and click .
8. Select the orders you want to submit. Click to submit the selected orders.
9. Click a picklist or order number. A "Not Submitted" picklist or order will open. If an order shows a status other than "Not Submitted", a status window will open.
10. Transactions are listed by order number. To sort by any column, click the column header.
11. Click to hide the Search sections. To redisplay the sections, click the box to remove the checkmark.
12. Click to create a new picklist.
13. Click to open the Messages window.
Convert the Picklist to an Order

From the Transaction List, click the link to a picklist. The picklist opens.

Select **OEM Order** from the Order Process list box. The Order page opens.
Customize the Order

The Order page allows you to finalize an order.

1. Click to return to the Transaction List.
2. Click to print and submit the order.
3. Click to print the order.
4. Click to save the order.
5. Click to delete the order.
6. Create a quote or picklist from the order.
7. Change the order number.
8. Type a description for the order.
9. Select the name of the contact.
10. The Price Book cannot be changed.
11. For drop-ship orders, click Maintenance to search for a customer.
12. Select the order type.
13. Select a shipping method.
14. Select the purpose code.
15. Select Partial Ship - Yes or Partial Ship - No.
16. Select ☑, click ☑, and select a date.
17. To add a part to the order, type a part number and quantity. Click ☑.
18. Click to add multiple parts. Type the part numbers and quantities. Click Add Multiple Parts.
19. Click to merge picklists with the order. Select the picklists to add. Click Add Picklist(s) to Order.
20. Select ☑ for each order to delete. Click ☒ to delete all selected orders.
21. Click a part number link to view additional information.
22. Type a new quantity. The application updates the extended cost and total.
23. Type a note to appear on the order.