



Using Intact

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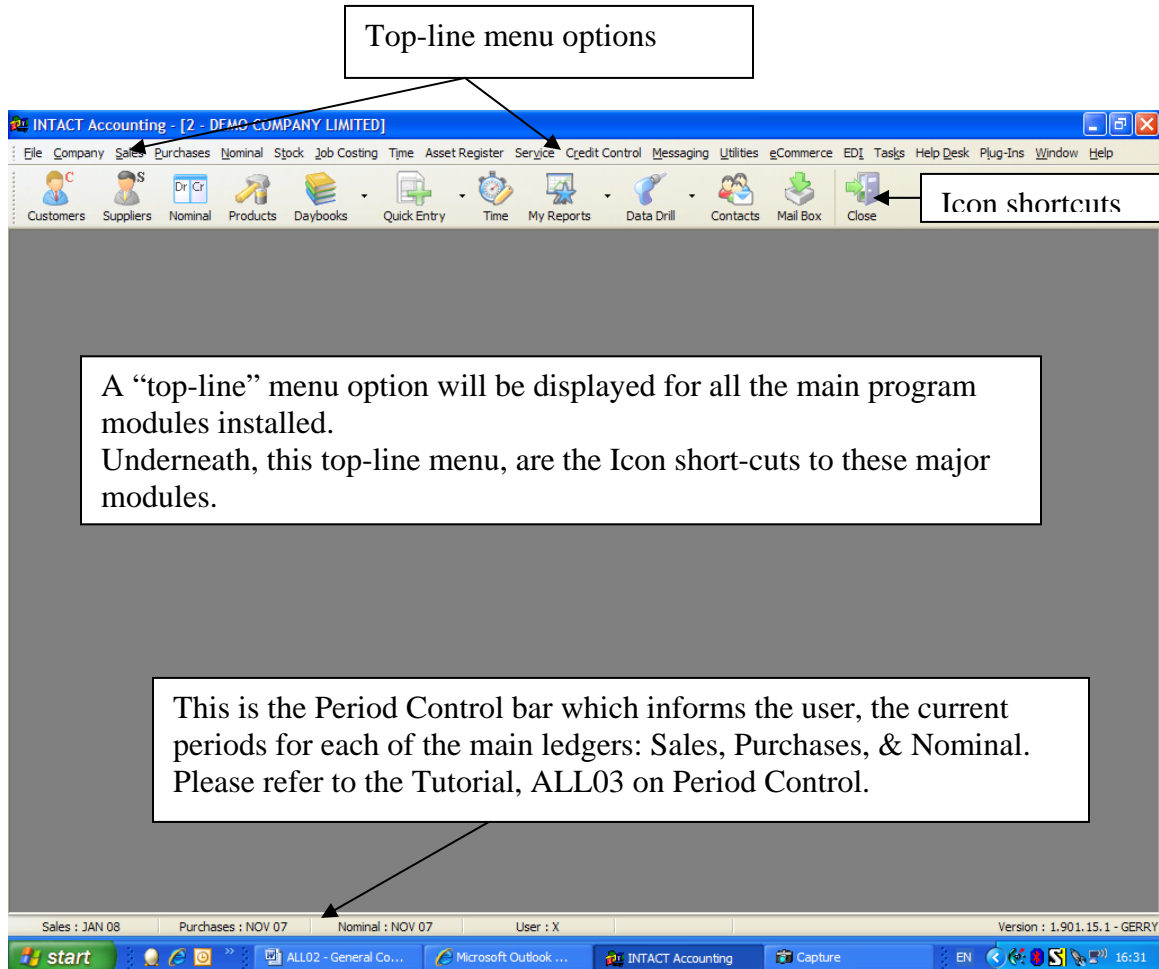


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The Main Intact Screen.

As a rule, when a user logs into the system, the Main Intact Screen is displayed:-



How to use and “navigate” around the system is outlined on the following pages.



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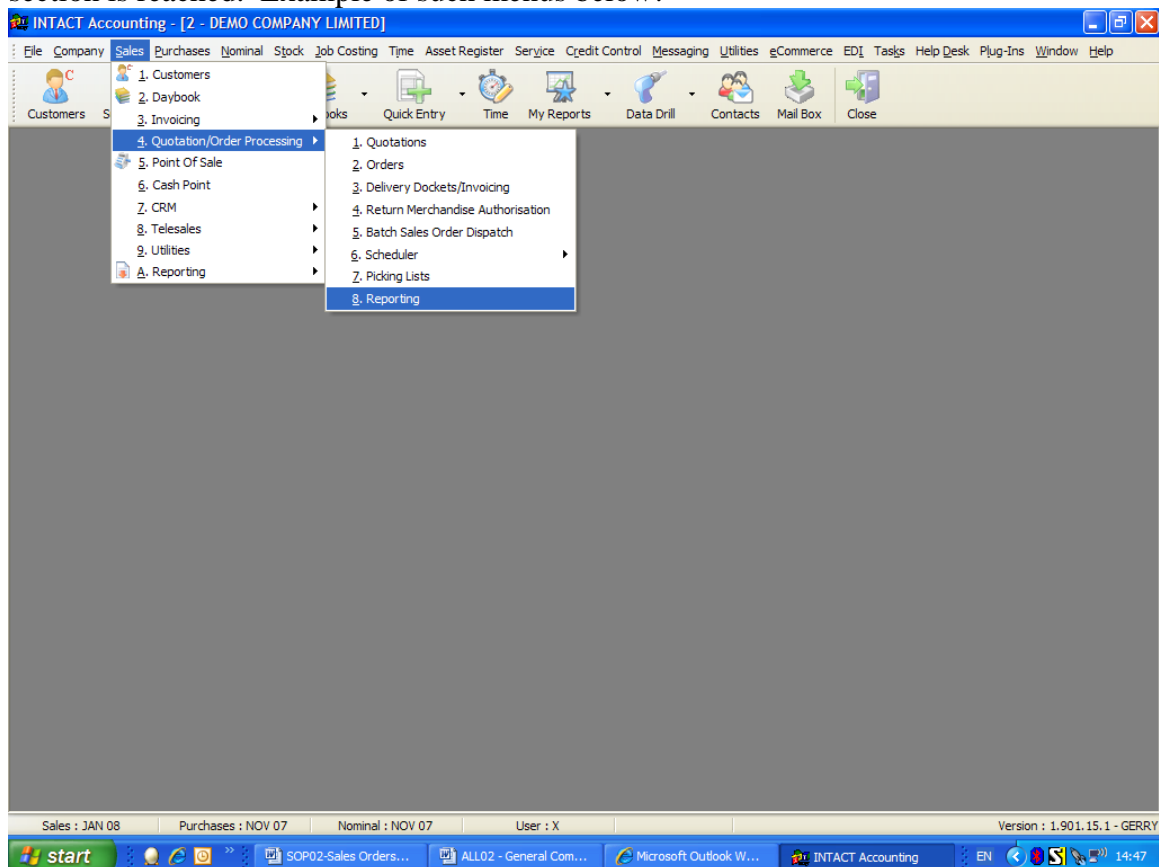
Like most Windows based systems, commands (instructions to perform some task) can be executed with either the mouse, OR, using keyboard shortcuts!

People accustomed to a keyboard find that using keyboard shortcuts is faster than using the mouse.

This section explains how the menu structures and commands work in Intact.

Drop Down Menus.

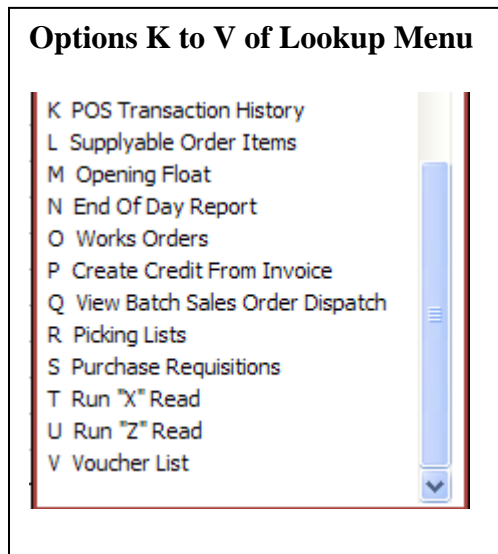
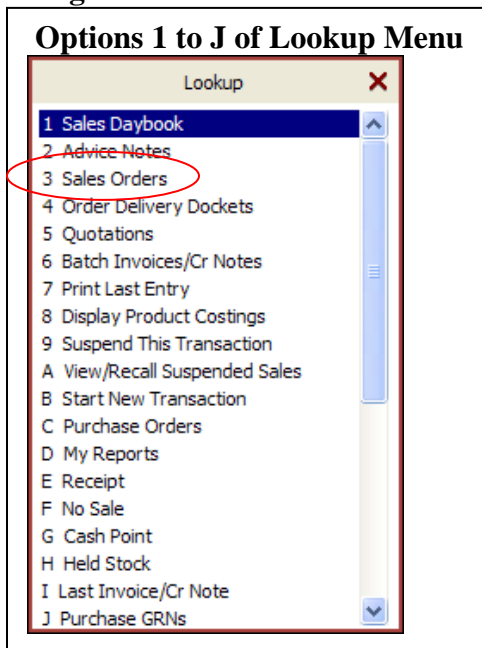
This is where you highlight a menu option, and a menu “drops down”, moving to an option within this menu may result in another drop down menu until the relevant program section is reached. Example of such menus below!



Above menus were displayed using the mouse. Notice every menu option on the top bar has an underlined capital letter while every sub-menu has an underlined number!

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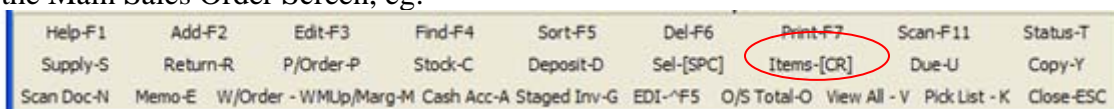
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To choose 3 Sales Orders, you can either:-

- Just press **3**, or
- Using the down arrow, move the highlight bar (also called a cursor) to 3 Sales Orders and press the ENTER (also called the RETURN) key.

Note on the "ENTER or RETURN key. On some screen menu options, such as that of the Main Sales Order Screen, eg:-



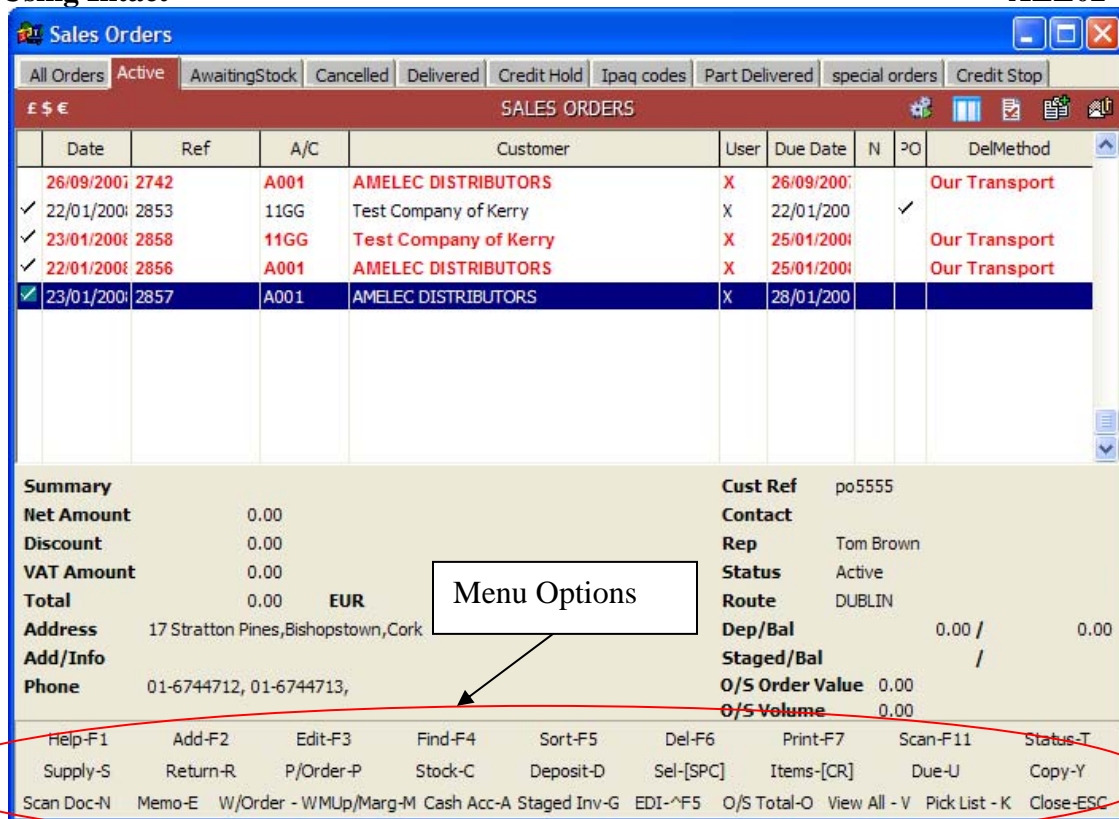
the instruction to press the Enter/Return key will be shown as **[CR]** as in Items-[CR] above. The CR is a "throw-back" to the typewriter days when the **Carriage Return** key had to be pressed in order to move to the next line!

On any highlighted transaction in the Daybooks, or within a Ledger, the Enter/Return key will "drill-down" from transaction summary level, to the detail lines of the transaction.

From within the above Lookup Menu List, pressing **3** would display the Main Sales Order screen - see next page!

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Date	Ref	A/C	Customer	User	Due Date	N	PO	DelMethod
26/09/2001	2742	A001	AMELEC DISTRIBUTORS	X	26/09/2001			Our Transport
22/01/2001	2853	11GG	Test Company of Kerry	X	22/01/2001		✓	
23/01/2001	2858	11GG	Test Company of Kerry	X	25/01/2001			Our Transport
22/01/2001	2856	A001	AMELEC DISTRIBUTORS	X	25/01/2001			Our Transport
23/01/2001	2857	A001	AMELEC DISTRIBUTORS	X	28/01/2001			

Summary

Net Amount 0.00
Discount 0.00
VAT Amount 0.00
Total 0.00 EUR

Address 17 Stratton Pines, Bishopstown, Cork
Add/Info
Phone 01-6744712, 01-6744713,

Menu Options

Help-F1 Add-F2 Edit-F3 Find-F4 Sort-F5 Del-F6 Print-F7 Scan-F11 Status-T
Supply-S Return-R P/Order-P Stock-C Deposit-D Sel-[SPC] Items-[CR] Due-U Copy-Y
Scan Doc-N Memo-E W/Order - WMUp/Marg-M Cash Acc-A Staged Inv-G EDI-^F5 O/S Total-O View All - V Pick List - K Close-ESC

All the commands available within this screen are itemized in the bottom section, including what key to press to execute these commands. The mouse or the keyboard short key can be used, eg.,

To edit (amend) an existing order, you highlight the required order, and then, you can either mouse-click the word “Edit-F3” or, just press F3.

One important point, commands are consistent through out the entire system, eg,

- **Add-F2** always starts a new transaction
- **Edit-F3** is the key to edit/amend an existing transaction
- **Find-F4** always pops up a Search Option menu
- **Sort-F5** always pops up a Sort Option menu
- **Print-F7** allows you to Print / Post transaction.




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On some screens, the following icons will be displayed:-

Icons 1 to 5




Icon1:  Command Links: facility to run External programs to say, link to 3rd. Party software.

Icon2:  Configure List: allows extra Columns to be displayed on main screen. See also Notes below for a very useful facility.

Icon3:  Task Bar – Add /view tasks (reminders and “To Do”s).

Icon4:  Linked Transactions: shows related transactions

Icon5:  Document Links: Links to other documents such as Word, Excel, Cad Drawings, etc. Example, detailed Excel costings can be attached to a summary quotation and is readily available for viewing.

Icon4 is particularly useful to view the flow of a particular transaction through the system. Example, clicking this icon on highlighted sales order 2806 displays the following “linked transactions”,:-

SALES ORDERS										
	Date	Ref	A/C	Customer	User	Due Date	N	PO	DelMethod	
✓	09/01/2008	2815	C	MIKE THE PIE	X	09/01/2008				
✓	07/01/2008	2806	A001	AMELEC DISTRIBUTORS	X	10/01/2008			Our Transport	

Linked Transactions					
SALES ORDER - 2806					
Ledger	T	Date	Number	Account	Value
Sales	DD	07/01/2008	1566	AMELEC DISTRIBUTORS	4,355.84
Sales	IN	07/01/2008	46037	AMELEC DISTRIBUTORS	4,355.84
Sales	R	07/01/2008	2806	AMELEC DISTRIBUTORS	2,355.84
Sales	R	07/01/2008	2806	AMELEC DISTRIBUTORS	2,000.00

We can see that the order was supplied per DD (Delivery Docket No. 1566), was invoiced (IN) per Invoice No. 46037, and was paid for in two installments – one for



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2355.84 and one for 2000.00. (The reason the Receipts both have the same reference number is because they were paid using the Deposit System).

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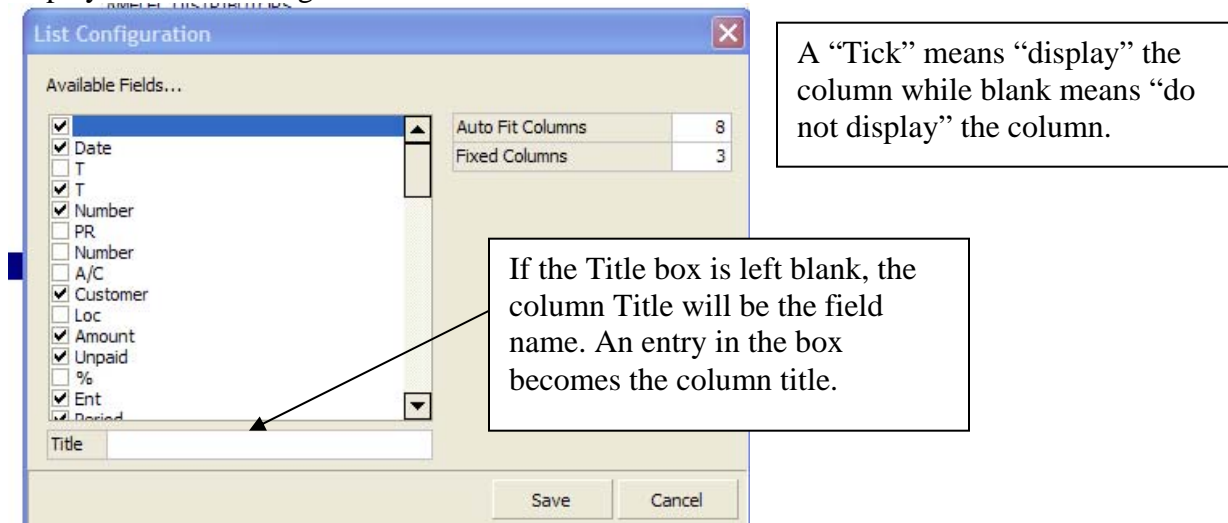
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Notes on **Icon2**:  Configure List:

When this Icon is pressed, a menu with the following options appears:-

1. Configure List:

This presents a list of fields (columns), which can be added to the existing standard display screen. Existing columns can also be removed.



2. Save

After the display columns have been amended, the settings need to be Saved using this option. The settings can be saved “just for the user”, or company wide, for all users.

3. Export

This is a really useful facility. It will export the contents of any window on which this Icon is displayed, to Excel, ie, transactions (a full Daybook, or an individual ledger’s transactions), customer or supplier lists, etc.

4. Reset

This will allow the user to reset the screen display to the default settings for either the user, or company wide. It basically “undo”s what was set using the Configure List option described above.

5. Print

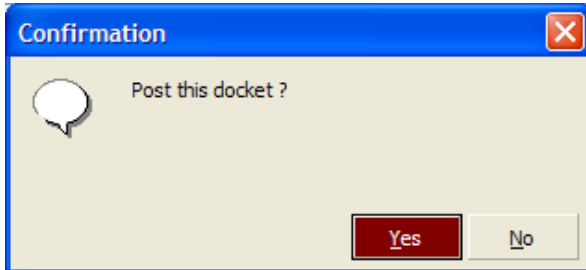
Same idea as Export except that the contents can be printed to Screen, Printer, etc.



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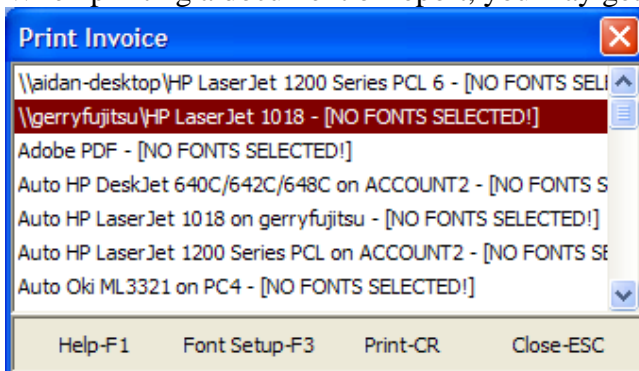
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During the processing of many transactions, Confirmation Prompts will be displayed, eg,



If the Option is already highlighted (the cursor is on the Option), then the Option can be “executed” by either pressing the ENTER key, or entering Y for Yes. Likewise, entering N for NO will cancel the process.

When printing a document or report, you may get a Printer Selection menu, eg,



If the required printer is highlighted, as in the opposite example, just press ENTER to start the printing. Otherwise, use the scroll Up/Down arrows to move to the required printer and then press ENTER. If you do NOT want to print the document immediately, press the ESC key.

A “document” is any Form that is designed using the Utilities / Form Designer program. Such Forms include invoices, customer & supplier statements, sales order acknowledgements, purchase orders, remittance advices, delivery dockets, etc.

All Forms, if not printed at the time of creation, can be printed at a later stage.

Reports on the other hand, cannot be stored for later printing UNLESS they are exported to Excel at the time of running the report.



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Use of the F10 key (Instant Access Menu)

This is a "hidden key, meaning, it is not displayed anywhere on the menu structure.

Pressing F10 displays the Instant Access Menu (IAM for short):-

INSTANT ACCESS MENU	
1. Customers	
2. Suppliers	
3. Nominal Accounts	
4. Products	
5. Currencies	
6. Calculator	
7. Printers	
8. Address Book	
9. Find Serial Number	
A. Sales Daybook	
B. Purchases Daybook	
C. Nominal Daybook	
D. Jobs	
E. Service Calls	
F. CRM Contacts	
G. Tasks	
H. Mailbox	
I. Advice Notes	

This menu can be called from any point in the system! **Example 1:** In the middle of taking a sales order, a supplier rings looking for payment – press F10, press 2 (for suppliers), find the relevant supplier and lookup his ledger or see his Aged Debt profile so that his query can be dealt with.

Example 2: In the middle of paying a supplier, a customer walks into the office to pay a bill – press F10, then A (for Sales Daybook), go to the Receipts Tab and process the receipt.

Example 3: In the middle of taking a sales order, another customer rings to inquire if such a product is in stock – press F10, then 4 (for products), find the relevant stock record which will provide all such information.

Exiting the "called up" program, returns the user to the point from which the F10 IAM was first called,

Whether or not, a user has this facility, is determined by a "flag" in his User Setup record which the System Administrator will set. Likewise, another "flag" determines if the Daybooks (Options A, B, and C of the above menu) are available on this menu for this user. The two User flags are:-

Show Daybooks on IAM ?	Yes
Disable Instant Access Menu ?	No