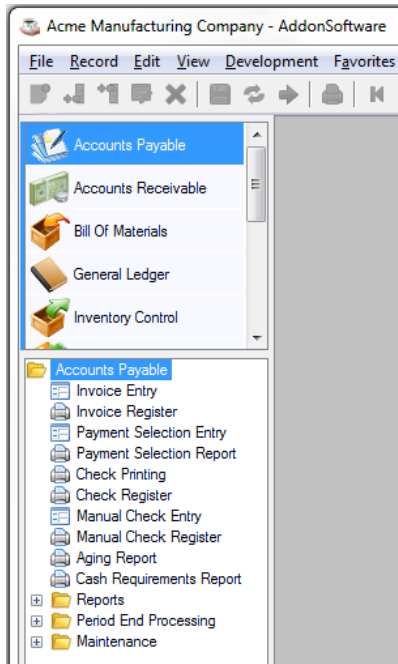# A First Look at AddonSoftware by Barista

ACCOUNTS PAYABLE When *AddonSoftware® by Barista®* launches, a multi-document interface (MDI) frame appears with menu options on the left portion of the screen. The various ERP modules appear in the upper panel. Select the **Accounts Payable** module (see figure to the left) and notice the tasks associated with this module appear in the lower panel. Commonly used tasks appear expanded for easy launching, while other less-often used tasks are organized neatly into collapsed folders. Select a different module in the top panel and notice that the associated tasks change but maintain a consistent structure.

ACCOUNTS RECEIVABLE Now select the **Accounts Receivable** module in the top frame and then expand the **Maintenance** folder in the bottom panel to display the maintenance tasks. Select **Customers** to launch the master record shown below.

In the *Customer ID* field, type 100 and press the [Tab] or [Enter] key, or select the blue ▶ **Display next record** navigation button to display the first customer record, Everest Industries.
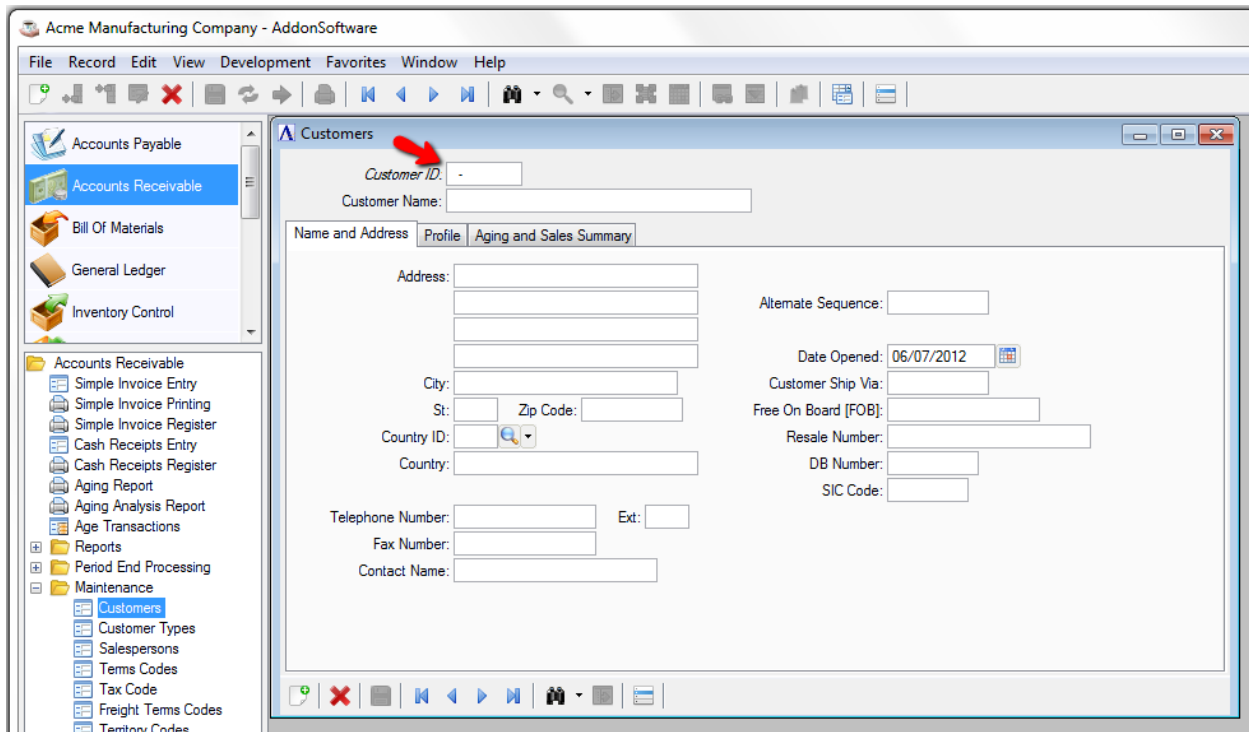
Notice the comfortable and modern screen with tabs across the top of the record that display additional information.

The buttons across the bottom of the window are intuitive icons. From left to right, the icons clear 🗎, delete ✖, save 🖫; the blue navigation buttons move forward ▶ and backward ◀ one-at-a-time or jump to the first ⏮ and last ⏭ record files; binoculars 🔎 query records, and the dropdown list icon ☰ displays additional options.

Select the ☰ **Display Additional Options** button at the bottom of the frame to reveal a dropdown list that launches new windows quickly with additional information for this particular customer record.

Return to the Customer window and select the **Profile** tab to display information (see next page) commonly associated with the Order Entry process.

Customer Comments

Customer Job Number

Customer Master, Fax and Email

Customer Ship-To Addresses

Invoice Detail Inquiry

Order/Invoice History Inquiry
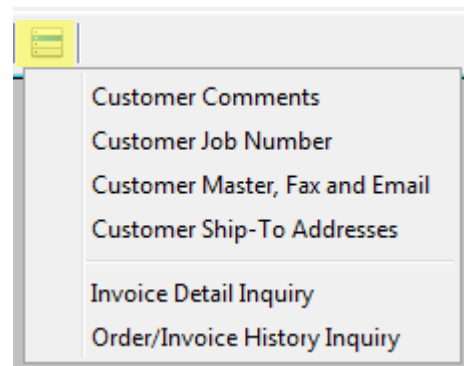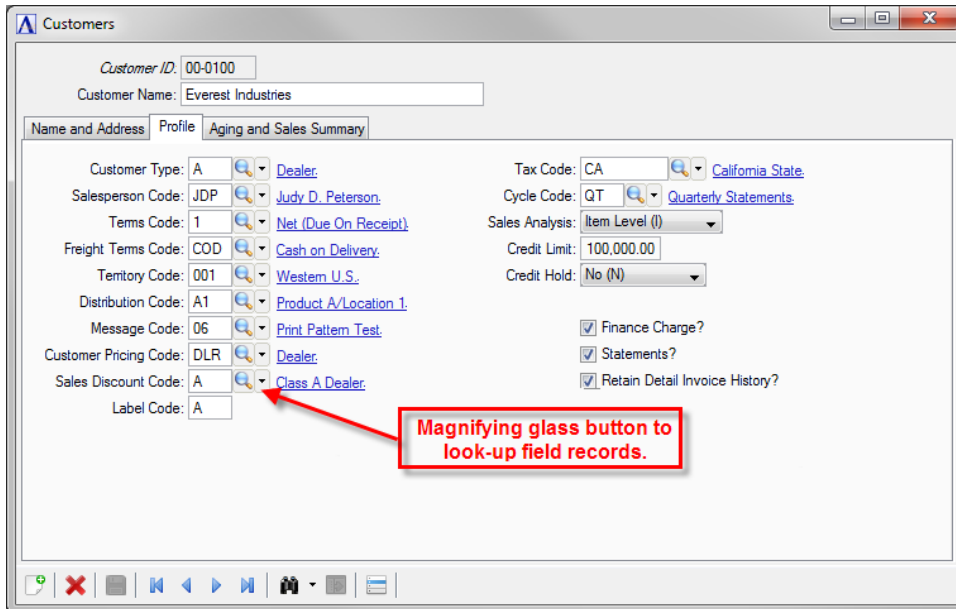
Notice a magnifying glass look-up button next to each Profile field. Clicking this will quickly access records for that particular field. To the right of the look-up button is the description of the code entered in the field that is linked to the code record file. For example, Sales Discount Code "A" is a Class A Dealer.

Select the **Aging and Sales Summary** tab to view a snapshot of the financial activity for this customer. Many fields throughout the software include a drilldown button that reveals details for that particular field. Select the ▼ **Drilldown** button next to the Balance field to open a new window displaying invoices whose totals equal `18,024.58`.
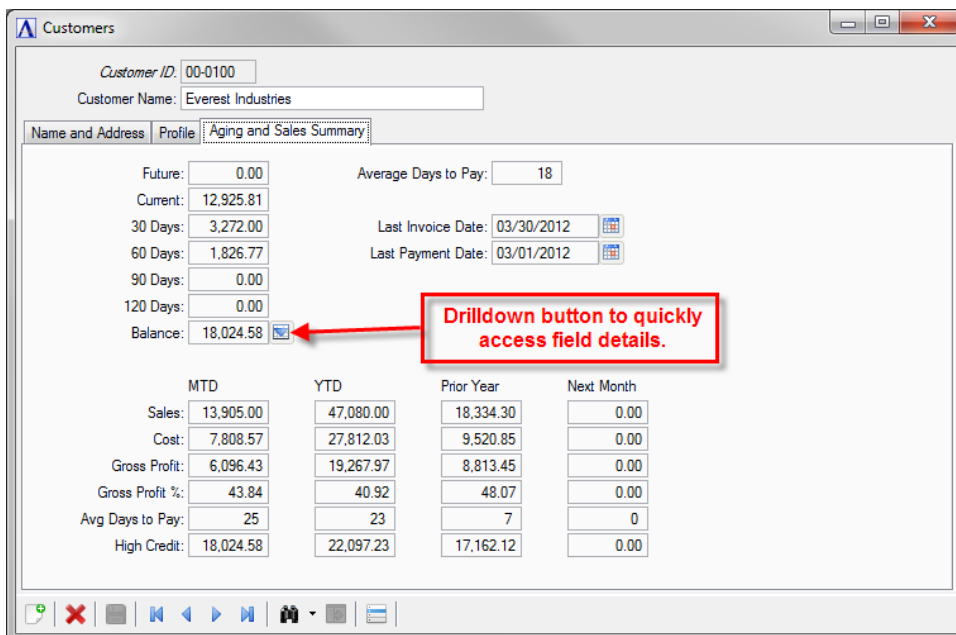
To quickly export the data from this or any table in AddonSoftware, simply select the data (left mouse click or [Ctrl]+ click to select multiple rows), right click on the table, select Copy; or select **Edit** from the top of the window and choose **Copy** from the dropdown list.

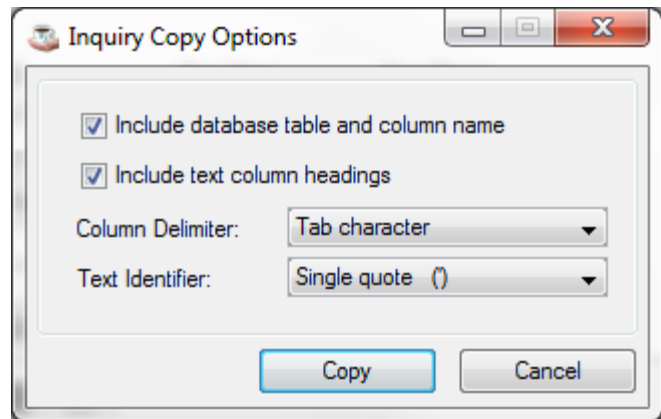The Inquiry Copy Options window appears with choices to include table and column name, text column headings, column delimiter, and text delimiter. After making your selections, select the **Copy** button.

Next, simply open the spreadsheet program of your choice such as Microsoft Excel, and paste in the data. This is a quick and easy way to use the data in whatever form you choose.

Close out of all open windows except for the main AddonSoftware desktop.
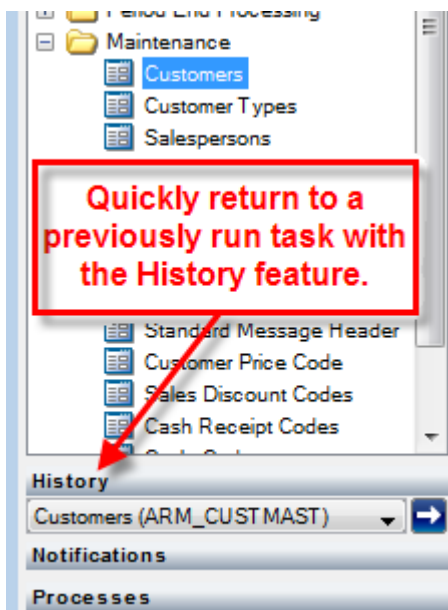
On the left side of the MDI below the module and task panels is the recent **History** area of the menu structure that lists the previously run tasks in this session. This provides a quick way to re-launch a task by selecting it from the dropdown list and clicking the ➡ **Process** button.

INVENTORY CONTROL Select **Inventory Control** from the module listing in the upper panel and then select/expand the **Maintenance** folder from the lower panel. From the expanded list, select **Inventory Items**. Select the ▶ **Display Next Record** button on the bottom of the window to display the first inventory item record - 100 Chromoly Bicycle Frame.
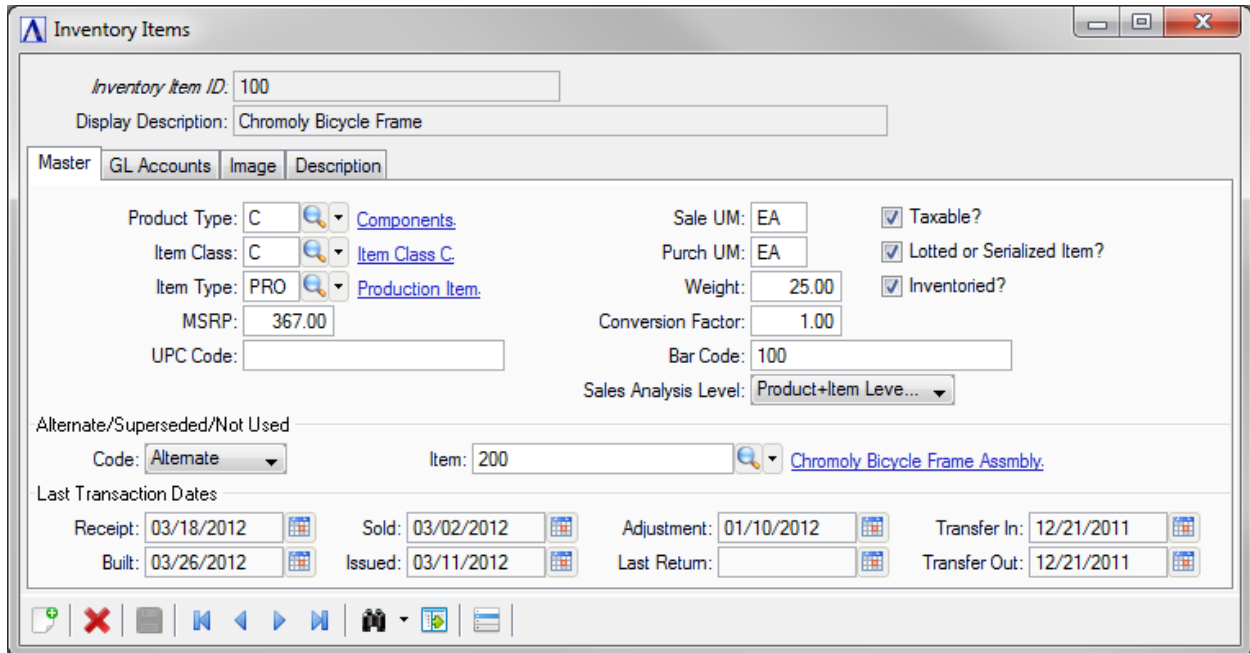
Select the **Image** tab to images for each inventory

Select the ▤ **Display Options** button at the bottom of the frame to open a drop down menu. Notice more there are options appear from the Inventory Master than we saw from the Customer Master window. Select **Warehouse Master**.

The **Warehouse Master** window (see next page) opens for item **100**. A Warehouse ID needs to be entered before the detailed information on this window is displayed. Either enter **01** in the Warehouse ID field; or select the ▶ **Display Next Record** navigation button at the bottom of the window to select the Oregon warehouse.
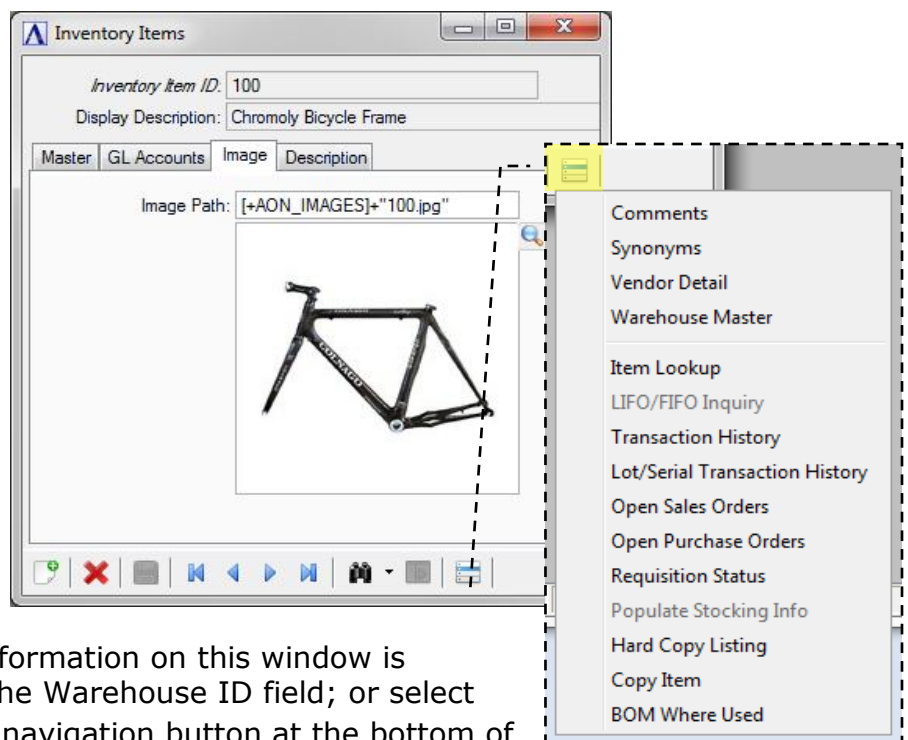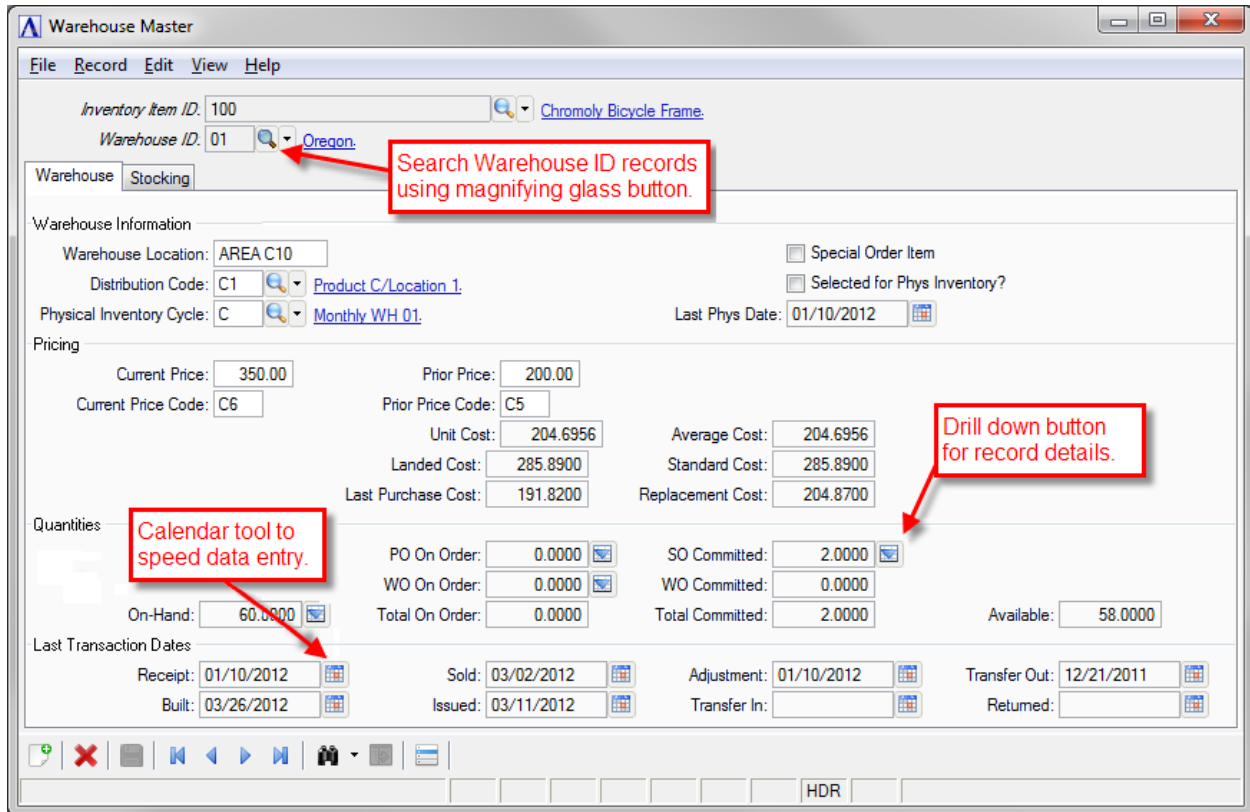
Entering a number in the Warehouse ID field displays all pricing, quantity, and transaction information for this item in this specific warehouse. Notice the multiple drilldown buttons in the Quantities sections in this window that will quickly access details for various On Hand, On Order, and Committed quantities. Selecting a drilldown button opens a window displaying a detailed table for the total displayed on the Warehouse Master field. In the **Last Transaction Dates** section toward the bottom of the window, selecting the Calendar tool opens a calendar window for easy data entry.

To demonstrate the next feature, close all the open dialogs except for the main AddonSoftware MDI window. Notice a **Favorites** function at the top menu bar. You can easily add any task to the **Favorites** dropdown list for quick launching by just right clicking on a task in any module. The **Favorites** lists are specific to each user so they can customize this quick launch list for their most commonly used tasks.

ADMINISTRATION In the upper menu panel, select **AddonSoftware Administration**, then select **Executive Summary** in the lower panel. This area of AddonSoftware tracks key performance indicators that are configurable to meet your client's requirements. The date selection tools appear in the upper left corner; the performance criteria appear in the panel to the left organized by module and by type of measurement. In the demo data, the criteria indicators are Amount, Units, and Average. Selecting a measurement type populates the display calendar for the month selected. The display calendar tracks performance by day, week, day of the week, and by month.
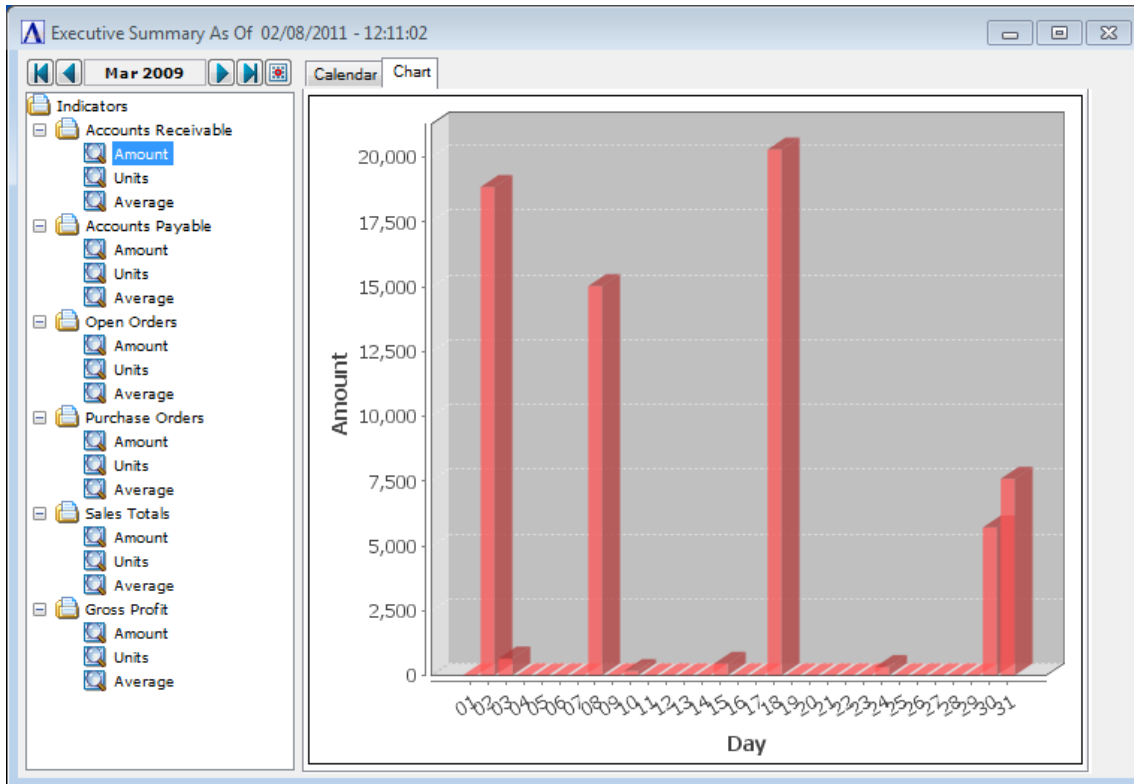
Selecting the **Chart** tab at the top of the frame instantly creates a graphical display of the data selected on the **Calendar** tab.

Thanks for taking a test drive through the product. This is represents a tiny sampling of the many convenient features built into *AddonSoftware by Barista* right out of the box that require no third party utilities.

AddonSoftware® by Barista® is a customizable ERP business solution with the powerful and unique ability to preserve customizations through the update cycle. Our go-to-market strategy provides our partners with a core set of accounting, distribution, and manufacturing building blocks, our developer partners then tailor the solution to meet the exacting business requirements of their customers. Additionally, our partners enjoy both full access to the application source code as an enabler to their customization efforts and the rewards of a 'commercial open source' framework. Though revolutionary in its approach, AddonSoftware is built on a rich history of scalability and reliability going back more than 25 years.