

SOFTWARE USER MANUAL



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1. OrderGen System Requirements

OrderGen will run on any 32-Bit Windows-based operating system (98 – XP) with at least 128 Meg of memory. It requires about 20 Meg hard drive space for installation. As data is entered, the amount of required space increases. Expect to use 100 Meg or more of hard drive space within the period of one year of regular use.

OrderGen version builds higher than 3.1.6.742 **will work** with Windows Vista® operating system if the installed workstation is authorized to read from and write to the Windows registry. Typically, this will be the case for users with administrative and power user rights. This should also be the case for Windows XP users.

Those using Windows Vista should also read the following article on the Sundial Services web site:

http://www.sundialservices.com/products/chimneysweep/strategies/windows_vista

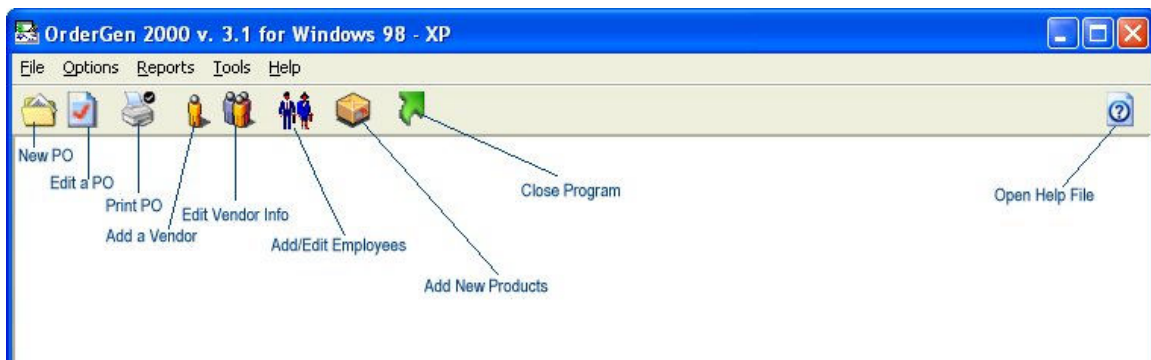
Network usage – see the OrderGen Network installation manual for complete information on installing in a network environment.

2. OrderGen Main Interface

The main interface shows the client area in the full program window when opened.

This manual deals with generalized approaches of using OrderGen rather than a menu-by-menu description of feature usage.

The shortcut buttons and menu items are described below in the context of the OrderGen user interface – primarily to show *where* things are located. The icons shown on the toolbar are shortcuts to frequently used menu items.



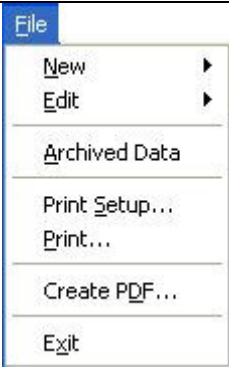
2.1 Shortcut Icons

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- ❑ New PO – Create a new purchase order using existing data. This button is always active, and it will open the PO Builder even if there is no data in the database. If there is no data in the database, the required data can be entered through the builder while the PO is being created.
- ❑ Edit a PO – Edit an existing purchase order. After selecting the PO to edit, the PO Builder will be opened in order to make the changes. This button is inactive until at least one purchase order has been created.
- ❑ Print PO – Print the last opened purchase order. This button is inactive until at least one purchase order has been created.
- ❑ Add a Vendor – Enter one or more vendors into the master vendor database. This button is always active.
- ❑ Edit Vendor Info – Change or delete information currently in the vendor database. Modify vendor contact information or delete one or more vendors from the database. This button is inactive until at least one vendor has been entered into the database.
- ❑ Add/Edit Employees – Each purchase order will have a contact person (or group) that will receive incoming orders. This list can be augmented or edited once company information has been added (see Initial Setup). This button is inactive until company information has been added.
- ❑ Add New Products – Enter product data into master inventory list. Each product is connected to a particular vendor. This button is inactive until there is at least one vendor listed in the Vendor Database.
- ❑ Close Program – Exit OrderGen. This button is always active.
- ❑ Open Help File – Open the Win32 Standard Help file.

2.2 Main Menu Items

Details of certain procedures initiated by these menu items are provided in this manual. For the basic menu item functions, see the OrderGen help file.

	<p>New: Vendors, Products, Requisitions, Purchase Orders</p> <p>Edit: Vendors, Products, Requisitions, Purchase Orders</p> <p>Archived Data: Opens a utility that allows user to access data that has been removed from the OrderGen transaction database.</p> <p>Print Setup</p> <p>Print: Prints most recently opened purchase order</p> <p>Create PDF: Open a PO and convert it to a PDF file that can be emailed to vendor.</p> <p>Exit</p>
---	--

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<p>Options</p> <ul style="list-style-type: none"> Company Data ▶ Font Settings ▶ Phrase Settings ▶ Purchase Order Formats... Reports Sort Orders... BarCodes Type... ✓ Auto Launch Purchase Order Expert ✓ Copy Current P O Number to Clipboard ✓ Show Detailed Transaction Reports During Application Exit ▶ Password Protection... 	<p>Company Data: Software User's company information. Will appear on PO header. Font Settings: Determine what POs look like Phrase Settings: Determine how POs are worded Purchase Order Formats: Advanced Settings Reports Sort Orders: (Company Name, Zip Code...) BarCodes Type: For Label Printing Auto Launch Purchase Order Expert Copy Current PO Number to Clipboard Show Detailed Transaction Reports During Application Exit: Default exit behavior Password Protection: Optional for user</p>
<p>Reports</p> <ul style="list-style-type: none"> Purchase Order ▶ Vendor List Order Status ▶ Product Lists ▶ Purchase History ▶ Requisition... 	<p>Purchase Order: Select a purchase order to preview or print Vendor List: All Vendors Order Status: Tracking Reports Product Lists: View Vendor Products Purchase History: Transaction Data Requisition: Preview and print requisitions</p>
<p>Tools</p> <ul style="list-style-type: none"> Expert... Special Data Operations ▶ Purchase Order Tracker ▶ Counts... Product Comparison... ● Local Drive Network Drive... Disconnect Network... Database Maintenance ▶ 	<p>Expert: Help for Getting Started Special Data Operations: Import and Export data Purchase Order Tracker Counts: What's in the Database so far Product Comparison Local Drive Network Drive Disconnect Network Database Maintenance: Backup Data, Clean Tables, Archive Data</p>
<p>Help</p> <ul style="list-style-type: none"> Contents Search Permanent License Code... OrderGen Support ▶ Version Change History... About... 	<p>Contents: Intro to Help file Search: Keyword search of Help file Permanent License Code: Sent after license purchase OrderGen Support: Help us diagnose issues Version Change History: What fixes have been made and what has changed About: Shows version number and registration status</p>

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3. Registration of OrderGen

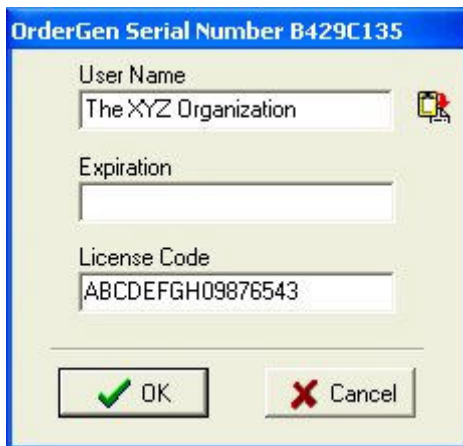
OrderGen is ALWAYS initially installed in *trial mode*, whether downloaded or installed from CD. Once a license is purchased, Applied Analytic Systems issues a *registration code*, which converts the trial mode into a permanently licensed mode.

The information Applied Analytic Systems needs from the buyer to generate a valid registration code is

1. The buyer's company or organization name, and
2. The serial number of the software **after** it is installed

The first one is usually provided with the license order. The second one needs to be emailed or posted to our user database after installation.

Once this information is received, a support technician will email permanent registration information, which is applied by copying and pasting the "User Name" and "License Code" into the corresponding fields of the dialog initiated by the menu item "Permanent License Code" described in the above section.



The screenshot shows a dialog box titled "OrderGen Serial Number B429C135". It has three text input fields: "User Name" containing "The XYZ Organization", "Expiration" which is empty, and "License Code" containing "ABCDEFGH09876543". At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

License Dialog w. Fictitious Data

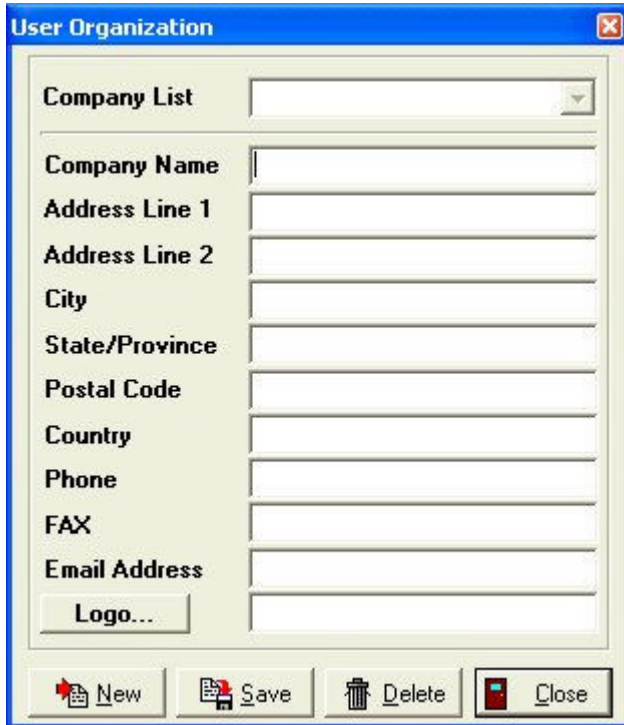
Important note: each new installation will have a *different* serial number. This serial number must be sent to the support department of the software developer so that a valid license code can be created. If the software is to be installed on more than one computer, a different license code will need to be purchased for each machine.

4. Initial Setup

The first thing that should be done is for the user to enter his/her company information into the system. This will be used in the PO header and as the default ship-to address for new purchase orders.

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This information is stored in the database to be used on all future purchase orders created for this company (**Options | Company Data > Add Data...**).



Add Your Company or Organization(s)

The system supports multiple organizations (or organization names) so that purchase orders could be issued on behalf of **Foster's Landscaping Service** and/or **Foster's Gardening Supplies**, for example.

Each of the multiple company names can be added to the database and tracked separately by the OrderGen reports. These company entities will all have access to the full vendor and product databases. Each company can have different employee lists, and completely different purchase order appearances, including fonts, colors, document phrasing, and logo graphic.

4.1 Logo

Add the logo by clicking on the button labeled Logo. This will enable the user to browse the hard drive for the graphic file to use as a logo. The database stores the path and filename of this graphic, not the graphic itself, so this graphic should be stored in a stable location.

Logo guidelines: The best logos for this application are either windows metafiles (wmf) files or print resolution bitmap (bmp) files. The logo is inserted in the left top of the purchase order form in its original size as shown in the purchase order graphic below.

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The logo graphic shown in the sample purchase order below is roughly 113 x 100 pixels.

Our suggestion is to choose a graphic file that is approximately 100 – 200 pixels wide and 100 – 150 pixels high.

Applied Analytic Systems
600 North Bell Ave.
Bldg. 2 Suite 2700
Carnegie
Pennsylvania 15106

PURCHASE ORDER

PO Number: 043000
Date: 07/26/2007
Buyer User ID: B01104
Terms: 61 Payment Enclosed
Ship Via: DHL Express

Vendor:
Parts America

Ship To:
Chris E Wyatt 412.298.2360
Applied Analytic Systems
600 North Bell Ave. Bldg. 2 Suite 2700
Carnegie Pennsylvania 15106

Qty	Units	Product No.	Name	Product Description	Unit Cost	Extended

Approved _____

SUBTOTAL: **072.50**
Discounts: **(00.00)**
Ship Costs: **015.00**
PA Tax: **00.00**
Enclosed: **(007.00)**
BALANCE: **00.50**

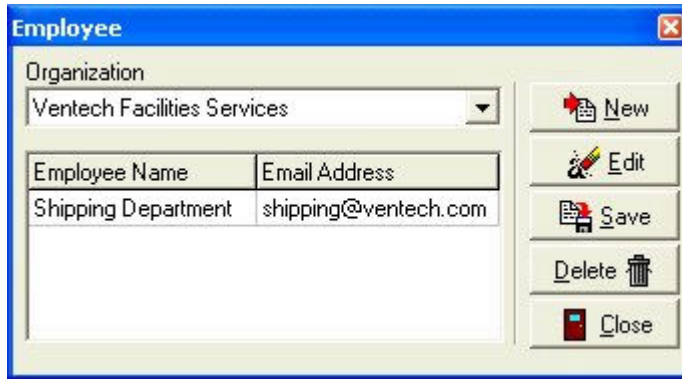
Sample purchase order showing logo graphic

4.2 Employee Names

Open the Employee dialog box (**Options | Company Data > Employees...**) and designate an employee (e.g., Mary Smith) or company department (e.g., Research Lab) as a recipient of products or services ordered -- usually these will only be employees who will actually be requisitioning products to be purchased.

Multiple employees and/or departments can be entered here. There is no limit.

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The 'Employee' dialog box features a blue title bar and a close button. It contains a dropdown menu for 'Organization' set to 'Ventech Facilities Services'. Below this is a table with two columns: 'Employee Name' and 'Email Address'. The first row contains 'Shipping Department' and 'shipping@ventech.com'. To the right of the table are five buttons: 'New' (with a plus icon), 'Edit' (with a pencil icon), 'Save' (with a floppy disk icon), 'Delete' (with a trash can icon), and 'Close' (with a red X icon).

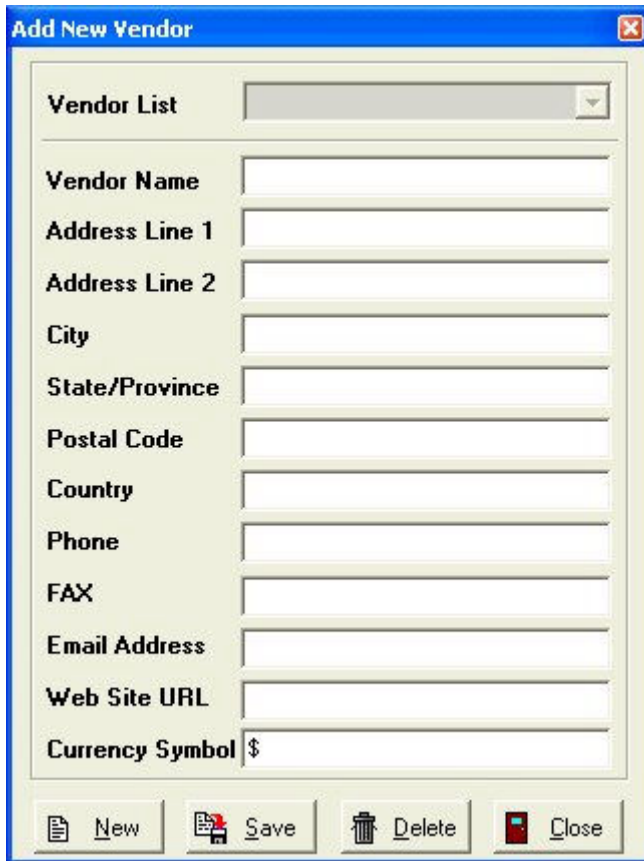
Employee Name	Email Address
Shipping Department	shipping@ventech.com

Purchasing Employee Dialog Box

After the initial setup is complete, we want to add vendors and products to create purchase orders.

5. Vendors

Given a merchant or service provider to that offers products a user may want to purchase, this vendor is entered into the *vendor database*.



The 'Add New Vendor' form has a blue title bar and a close button. It includes a 'Vendor List' dropdown menu. Below are several text input fields for: 'Vendor Name', 'Address Line 1', 'Address Line 2', 'City', 'State/Province', 'Postal Code', 'Country', 'Phone', 'FAX', 'Email Address', and 'Web Site URL'. The 'Currency Symbol' field is pre-filled with '\$'. At the bottom are four buttons: 'New' (plus icon), 'Save' (floppy disk icon), 'Delete' (trash can icon), and 'Close' (red X icon).

Add New Vendor to Database Form

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Once in the database, this information can be reused whenever we need to order from a particular vendor.

5.1 Adding Vendors

The form above can be used to enter contact information for one or more vendors. The field layout is fairly standard.

The currency symbol shown will be used as the default for any items ordered from this vendor.

5.2 Editing Vendor Data

This same form, in edit mode, is used to edit or delete data from the vendor database.

Users should understand that changing or removing information from the vendor database does not alter the content of any prior transactions involving the edited or deleted vendor. It is not necessary to maintain any information in the vendor database once it is no longer valid or useful.

6. Products

For the purposes of the software construction and usage, the word "product" is used to describe anything that can be purchased on a purchase order, e.g., inventory, supplies, consulting services, transportation, commercial airtime (advertising).

6.1 The Vendor-Product Connection

This is a very basic concept. It is simply this: each product in the *products database* must be attached to a vendor that currently exists in the vendor database.

6.2 Adding and Editing Products

In the dialog graphic below, the new product being added will be associated with the vendor named Master Graphic Services. If the product should be associated with a different vendor, that other vendor must be selected from the drop-down list for Vendor Name.

If another vendor is selected, this vendor's id number will be shown in the (non-editable) field named "Vendor ID."

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The screenshot shows a dialog box titled "Add New Product(s)". It contains the following fields and controls:

- Vendor Name:** A dropdown menu with "Master Graphic Services" selected and a printer icon.
- Product List:** A dropdown menu with a printer icon.
- Vendor ID:** A text box containing the value "22".
- Product ID*:** An empty text box.
- Product Name:** An empty text box.
- Description:** A large empty text area.
- Discount:** A text box containing "0".
- Tax % (Auth 1):** A text box containing "0".
- Tax % (Auth 2):** A text box containing "0".
- Unit Price:** An empty text box.
- Units (Per):** A text box containing "Each".

At the bottom of the dialog are five buttons: "Add", "Find...", "Save", "Delete", and "Close".

Add New Products Dialog Form

One of the most important things for us to emphasize is that each product **must** have a SKU (product id) – this field **cannot** be left blank. Also, the value for the field "Product ID" must be unique for the particular vendor.

In other words, say we have a vendor named Widget Makers Ltd that makes all variety of *widgets* (surprise). Widget Makers can only have one product with product id 123. The red widget must have a product id that is different from the blue widget.

Where does the product id come from? From the software's standpoint, the technical answer to this question is that "it doesn't matter." Typically, the manufacturer or supplier of a product will have an SKU for the product, or the product will have a model number. Or the user can assign his/her own product number to each product for the user's company to reference internally. Again, this is a **required** piece of data.

The "Description" field accepts a maximum of 240 characters. Anything can be used that describes the product adequately.

A "Taxing Authority" is either a type of tax (VAT, GST), or the name of the government entity that is authorized to collect taxes on a purchased item based on the item's cost.

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The values expected in the fields "Tax (Auth 1)" and "Tax (Auth 2)" are a number between 0 and 100. This entry does not have to be an integer. This value represents the percentage of tax associated with the corresponding taxing authority.

For example, if a *taxable* item is being purchased and, if for example, the user's state tax is Pennsylvania with a 6% state tax and the county is Philadelphia with a 1% (additional) tax, the total tax due for the purchase order will automatically be calculated if 6 is entered for "Tax (Auth 1)" and 1 is entered for "Tax (Auth 2)" for each taxable item. Non-taxable items should leave these fields at the default value of 0.

All items are associated with some unit in which the price is quoted by the vendor. This unit is entered into the field "Units (Per)". By default, the software assumes that the units are priced per "Each;" however, items may be priced in lots, ounces, pounds, dozens, gallons, or any other specified measure.

7. Purchase Orders

Once the software has been setup with company and employee (order recipient) information, and there is data in the vendor and product databases, it is possible to create a purchase order in seconds.

The module known as the *PO Builder* is the heart of the software. A screen shot of the PO Builder is shown below. This module is used to connect setup data, and the format preferences, along with the vendor and product databases to create complete purchase orders.

7.1 New Purchase Order

Open the PO Builder by selecting **File | New > Purchase Order...** from the OrderGen menu.

In most cases, the builder simply uses drop-down lists of existing data to populate the fields on the form to create a new purchase order.

Unless "PO Number" is set as "User Can Manually Input Number," this field is **not used**. The purchase order number will be generated once the Vendor and Purchasing Organization fields have been chosen.

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Purchase Order Builder

1) PO Number: 2) Vendor: 3) Terms: 4) Ship By:

5) Purchasing Organization: Header
 Data
 Logo

6) Ship Product To: Acct Code:

7) Products (Services) being Purchased:

Quantity	Product ID	Product Name
0		

8) Ship Cost: 9) Deposit: 10) Special Instructions (Optional):

Add Product Delete Product Delete P O Save P O Close Builder

OrderGen Purchase Order Builder Module

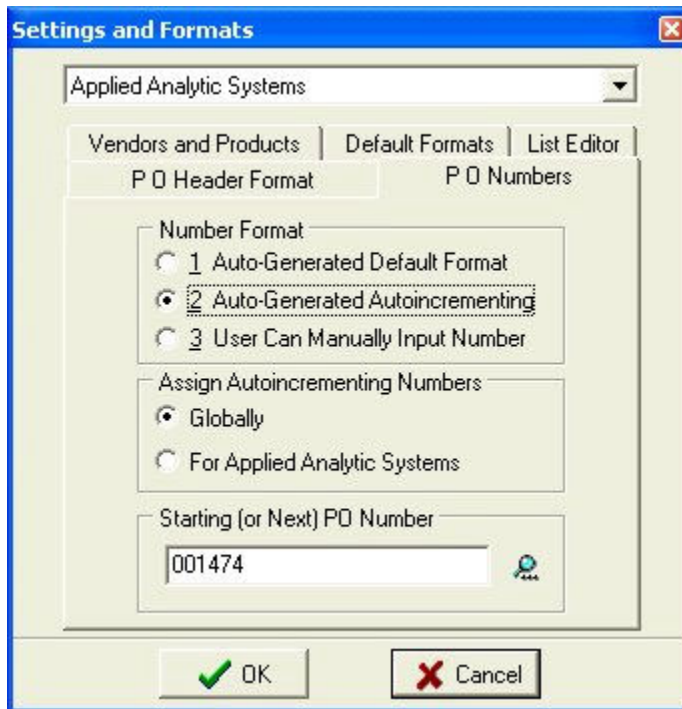
7.2 Purchase Order Numbering

PO numbering requires some thought, but it is not overly complicated. Manual numbering, as a general operational course, is not recommended. Let the system manage PO numbers. This is because the PO number is an indexed field that is used as the “primary key” for the purchase order transaction database.

What this means from a software standpoint is that each PO number must be unique. If a PO number is reused (accidentally or intentionally), a key violation error or some other errors or undesirable action will be the likely result. See Section 10.5 for exceptions to the uniqueness property.

OK, so how do we setup the PO numbering scheme?

Open dialog “Settings and Formats” (**Options | Purchase Order Formats...**) and select the “P O Numbers” tab as shown in the next screen shot.



P O Numbers Settings

The default PO Number format is an alphanumeric string based on the date, time and vendor name.

Most users want to use the “Auto-Generated Autoincrementing” number format. To make this work, the starting PO Number must be set. For the example shown in the screen shot above, all purchase orders will have PO Numbers at or above 1474.

When Number Format 1 or 2 is chosen, any PO number entered into the PO Number field on the Purchase Order Builder form will be overwritten by the auto generated number no later than Step 5) in the Purchase Order Builder.

7.3 Purchase Order Builder Fields and Buttons

The OrderGen user creates a purchase order by completing each of ten (10) *field groups* within the Purchase Order Builder. All of the fields and buttons are contained in one of these groups.

While reading the description, refer to the screenshot labeled “OrderGen Purchase Order Builder Module” in Section 7.1.

1. **P O Number** Group

This group contains only the **p o number** field that was described

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in Section 7.2.

2. **Vendor** Group

This group contains the **vendor** field, a **new vendor** button () and a **category** button ()

The vendor field is actually a drop-down list, so the user can only choose a vendor that is actually in the vendor database. If the user wants to create a purchase order to a supplier who is not in the database, s/he can click on the new vendor button and add the supplier from within the builder.

The category button is particularly useful when there are a large number of vendors in the database. Using categories allows the user to select from a subset of the entire vendor list, showing only the vendors matching a particular user-defined category. For example, if a purchase order is being created for some new "Ink Cartridges," then selecting the category "ink" will show only the vendors that have products containing the word "ink." Such a list most likely includes the vendor from whom ink cartridges were last purchased.

The category list can be created and edited at any time by selecting the *List Editor* tab on the "Settings and Formats" ([Options | Purchase Order Formats...](#)) dialog, and selecting *Product Categories*.

3. **Terms** Group

The Terms group is limited to a combination text field and drop-down list. Term refers to the payment policy agreed upon by the purchaser and the vendor (e.g. Net 30, Pickup, COD).

If the desired terms value is not in the list, it can be typed in directly. A newly added value will be saved to the list for future use when the purchase order is saved.

The values in this list can be modified at any time by opening the *List Editor*, and selecting *Accounting Terms*.

4. **Ship By** Group

Like Terms, this group is also a combination text field and drop-down list. Ship By includes values that tell how the product will be shipped (e.g. Freight, UPS, FedEx).


Newly added values will be saved to the list when the purchase order is saved. The values in this list can be modified at any time through the *List Editor* by selecting *Shipping Method*.

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5. **Purchasing Organization** Group

The Purchasing Organization group has several specialized items; however, its usage is fairly simple. Basically, this group controls what objects appear in the header and footer of the purchase order.




The group items include

- a. Seven (7) text fields that will show the purchasing organization's name and address data in the PO Header.
- b. A drop-down list of purchasing organizations. When a value is selected from this list, the seven text fields described in a) will be automatically populated. This data can be edited manually.
- c. An add-a-company button () – used to add purchasing organization and associated contact information if the company is not currently in the organization database.
- d. Two (2) header checkboxes – when checked, these boxes determine whether either the data in a) above or the logo (or both) are displayed in the purchase order header.

Some companies have their company name and address data included as part of the logo graphic, making the text field data unnecessary for inclusion in the header.



The field data in a) will be always included as part of the actual purchase order transaction, but the checkbox labeled "Data" will control whether or not the data is displayed during preview and printing.

- e. A calendar button () . This allows the user to attach a specific date to the purchase order. The default date is the current date.
- f. A logo selection button () . Allows the selection of a logo that is different from the one that may be referenced in the purchasing organization database for the selected organization.
- g. An approval signature selection button () . Users can select a signature (usually a bmp or wmf) file from the hard drive to attach above the "Approval" line in the footer of the

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purchase order.

6. **Ship Product To** Group

This group contains the specific information concerning to whom the items subject to the current purchase order will be delivered.

The items are

- a. Eight (8) text fields that will show the contact information of the person to whom the items in the purchase order will be delivered.

Note that this does not have to be the contact information for the purchasing organization. As an example, a consulting organization can order products to be delivered to a client's location, or to an employee working at a remote location in the field.

- b. A drop-down list of purchasing organizations. When a value is selected from this list, the eight text fields described in a) will be automatically populated. This data can be edited manually.
- c. A drop-down list of authorized purchase recipients associated with one of the purchasing organizations (e.g. departments, employees or clients).
- d. An add-person button (+) – used to add the name of an authorized recipient to the employee database if the individual is not currently in the database.
- e. A combination text field and drop-down list containing a list of accounting codes, project numbers, or job codes to which the current purchase order should be attached.

A newly added value will be saved to the list for future use when the purchase order is saved.

The values in this list can be modified at any time by selecting the *List Editor* tab on the "Settings and Formats" (**Options | Purchase Order Formats...**) dialog and selecting *Accounting Codes*.

7. **Products Being Purchased** Group

This group is where the line items for the purchase order are established.

The associated controls include a list box containing all of the

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products available from the selected vendor, a data grid containing empty fields into which the line item data will be copied, an add-product(s) button (+), and a grid-columns button (...).

The add-products button allows the user to enter data into the selected vendor's products database if the intended product is not currently in the database.

Although product names and descriptions can be typed directly into the data grid, bypassing the product database, the standard data entry mechanism expects the target item to be contained in the product list on the left. It is also important to have the item in the product database if there is any possibility that this product will need to be ordered again in the future.

Once the target item is selected from the list on the left, the user either drags it over to the grid on the right, or clicks the button labeled "Add Product" at the bottom of the form -- a quantity update dialog is shown, allowing the user to accept or change the default quantity (which is 1).

The grid-columns button allows the user to determine which of the fields shown in the grid should actually be displayed on the previewed and/or printed purchase order.

8. **Shipping Cost** Group

This group contains only the **ship cost** field. Here, the user enters the *best information* s/he has concerning how much the total shipping will be for the current items being purchased.

9. **Deposit** Group

This group consists of the **deposit** field and a deposit percentage button (%).

The group governs the total of any credits currently on file with the current vendor plus any payment will be included with the current purchase order.

The percentage button makes it easy to calculate the monetary value for any percentage of the total amount being purchased. If, for example, the vendor requires a 50% deposit, click on the percentage button and drag the slider to 50. This will provide the exact amount of the deposit that needs to be paid with the order.

10. **Special Instructions** Group

This group consists of the **special instructions** field.

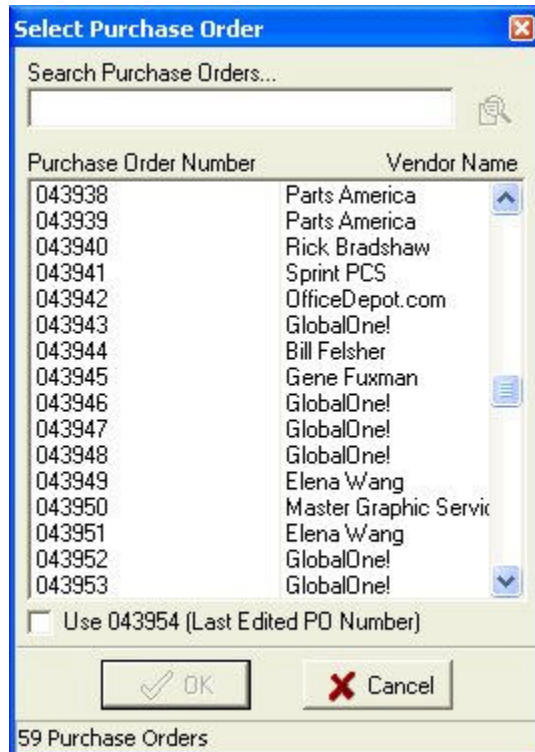
Relevant information not contained elsewhere should be placed in

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the special instructions text field: order needed-by date(s), special product discount codes, location of loading dock, available business hours for freight delivery, contact information for sales person or account representative, and other information such as this.

7.4 Editing Existing Purchase Orders

To edit an existing purchase order, use the OrderGen File menu and select **File | Edit > Purchase Orders...** A selection dialog opens, allowing the user to search for and select a purchase order name to edit.



Purchase Order Selection Dialog

Once selected, the PO Builder will open the selected purchase order transaction with the database in edit mode. In edit mode, any data in the builder can be changed, except for the PO Number and Vendor fields, which will be read-only and disabled.

7.5 Printing Purchase Orders

A purchase order is actually a specialized report. It reports the list of items that the user intends to purchase from a specific supplier. Purchase orders are previewed and printed through the OrderGen "Reports" menu.

8.1 Purchase Orders

This is the main type of report, which has been described above. Through the Reports menu, the most recently edited report can be immediately accessed; also, older open or closed purchase orders can be selected and previewed and printed.

A sample of this type of report is shown in section 4.1.

8.2 Vendor Lists

This is a report of all vendors in the vendor database, sorted according to the user-defined sort order. In the following vendor list sample screen shot, the vendors are sorted by vendor id – the default sort order.

VENDOR LIST				
System Substation, Inc.				
8601 Burnwoody	Suite 140			
Atlanta	GA	30050		
		770-600-6700		
TonerMAX.com				
10 Parkway Center	Suite 232			
Pittsburgh	PA	15220		USA
412-320-4834		206-445-0847		
Sprint PCS				
P.O. Box 215995				
Kansas City	MO	64121-9995		USA
888-755-6665				
Bina Vang				
1719 Westham	#122			
Falls Church	Virginia	22042		USA
Gene Puzman				
4455 Torrance Blvd., #531				
Torrance	CA	90503		
Bill Peltier				
one 61730	1912 North Colony			
Blair NE	Indiana	47715		USA
Master Graphic Services				
9993 New	Building 2			
Chamblee	GA	30041-2825		USA
770-452-1862		770-986-0942		
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				Page 1

Screen shot of Vendor List Report

8.3 Order Status

This report is the result of the order-tracking feature of OrderGen. It provides users with precise, line-item detailed information on what has been ordered, what orders are outstanding, what orders have been fully received, and receipt of partial orders. It also allows recording of the receipt or invoice numbers associated with each full or partial delivery.

The Order Status report is only useful if the tracking feature is being used actively. Otherwise, the same information is available using the Purchase History reports.

TRANSACTION STATUS REPORT					
043937		Applied Analytic Systems			
FROM					
Yonerville, Ohio		Pittsburgh		412.525.4334	
ORDERED BY					
Chris E Wyatt		Applied Analytic		Daphne James	
DETAILS					
10/01/2006		Payment Enclosed		Fedex Ground	
				Prepaid: 509.93	
Q & Ordered	Product	Unit Cost	Order Status		
1.0	Toner Cartridge (3)	\$50.00	None Received		
1.0	Toner Cartridge (5)	\$59.95	Full Shipped	Part Received	Invoice Tracking No.
			SL: 10102006	19200746	
043938		Applied Analytic Systems			
FROM					
Parts America					
ORDERED BY					
Chris E Wyatt		Applied Analytic		None	
DETAILS					
01/17/2007		Payment Enclosed		Intl. Express	
				Prepaid: 587.33	
Q & Ordered	Product	Unit Cost	Order Status		
1.0	Door Handle	\$7.50	None Received		
043939		Applied Analytic Systems			
FROM					
Parts America					
ORDERED BY					
Chris E Wyatt		Applied Analytic		John Smith	
DETAILS					
01/19/2007		Payment Enclosed		Intl. Next Airfreight	
				Prepaid: 581.33	
Q & Ordered	Product	Unit Cost	Order Status		
1.0	Door Handle	\$7.50	None Received		

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Screen shot of Transaction Status Report

The data appearing in green font shows the tracking information for line items that have been received for a given purchase order. The red font indicates items that have not yet been delivered.

8.4 Product Lists

The product list reports provide printouts of complete or partial lists of products that are currently assigned to one or more vendors.

A product report can be generated for all products listed for all vendors, all products for a single vendor, or for all products within a specific category across all vendors.













PRODUCT LIST			
Bill Fisher			
343977195	HP 875 LaserJet toner.		
Buy Addition Item			
Unit Cost: \$188.12			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
Bena Wang			
205724488	NEC MultiSync Phaser 743 VONER COMPLETE SET		
Buy Item			
Unit Cost: \$748.30			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
Gene Puzian			
1234-Buy	For Test Purposes only.		
Buy Item			
Unit Cost: \$771.00			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
341578164	NEC hp LaserJet 8100/8150 Toner Cartridge 828		
Buy Addition Item - 100ea			
Unit Cost: \$118.99			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
GlobalOne!			
0	Next million dollar product.		
Product-Yes			
Unit Cost: \$44.75			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
39542_2189024	Box of 500 No 10 Business Envelopes		
Security Envelopes			
Unit Cost: \$42.95			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
39542_2189019	CD-RW Unlabeled 700 MB CDs, 500ea		
Writable CDs			
Unit Cost: \$12.07			
Discount: 0.00%	Tax1: 0.00%	Tax2: 0.00%	
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			Page 1

A Sample Product List Report for All Vendor Products

Since products data are actually the detail component of a master-detail relationship (vendor > products), all product list reports are printed using the sort order defined for Vendors, then sub-listed using the Products sort order.

8.5 Product Labels

The product label report prints barcode labels for products that have a standard corresponding UPC code. These can be printed on label paper and attached to received orders before placing in inventory.

<p>Bill Pelzer 3433377195 eBay Auction Item NY 425 LaserJet toner.</p> <p>Unit Price: \$109.12 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>GlobalOne! 7424388763 Roller Ball RETRACTABLE BALL POINT CONTRACT GEL TRANSPARENT</p> <p>Unit Price: \$24.95 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>Global One! 2 Product Pen New million dollar product</p> <p>Unit Price: \$46.75 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 
<p>Bana Wang 2837054888 Ebay Item NEW Tokoroa Printer T42 TONER COMPLETE SET</p> <p>Unit Price: \$740.50 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>GlobalOne! 55 Product Dow Our new wedge!</p> <p>Unit Price: \$12.97 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>Master Graphic Services 76958 Lynxite Laminator 4 1/2" Dia. Cover, 12.00" x 18.00", 1 Up, Standard</p> <p>Unit Price: \$430.30 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 
<p>Gene Rusman 1234-dm BallPoint Ebay Item For Use: Fujiwire only.</p> <p>Unit Price: \$115.00 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>GlobalOne! 20540.6134616782 Writtable CDs CD-R Unlabeled 700 MB CD-R, Monsters</p> <p>Unit Price: \$12.17 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>Office Depot.com 42323e 50-145 Envelopes/1000 Count Double-Window envelopes 5 1/2" Laser/Therm. Security/Tab.</p> <p>Unit Price: \$59.99 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 
<p>Gene Rusman 741378364 Ebay Auction Item - Tower NEW Ag LaserJet 6100/6150 Tower Cartridge 625</p> <p>Unit Price: \$119.99 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>GlobalOne! 29540.6138044907 Security Envelopes Box of 500 No ID Business Envelopes</p> <p>Unit Price: \$40.95 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 	<p>Perb America 173-05 Door Handle Back door handle, left side.</p> <p>Unit Price: \$72.99 PA Tax: 0.00% Allegheny Tax: 0.00%</p> 

8.6 Purchase History Reports

Transaction history contains information on every purchase order that has been issued. As previously noted, these reports are very similar to the Order Status reports, without the tracking information. The history reports highlight all taxable line items, records taxes, shipping, and purchase totals.

OrderGen 2000

These reports can be selected and printed for a variety of criteria. A *complete history report* would include all transactions for all vendors across all purchasing organizations. Such reports quickly get to be several hundred pages in length.

Most likely, one would be interested in some subset of the transaction history such as all purchases **greater than \$1000 USD**, all purchases **for the Research Lab**, all purchases **from OfficeDepot.com**, or all purchases **during Q3 of 2006**.

Using the appropriate submenu of Purchase History will allow the user to generate the history reports of interest.

PURCHASE TRANSACTION LIST					
260269260333-JCW					
VENDOR					
The Company Web		EA	412-276-2300		
Caroogie					
FOR					
Megan Danner		CSI Miami			
26 September 2002		NOV 03	Shipings: 50.00	Prepaid: 50.00	
<u>Qty</u>	<u>Rate</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Line Total</u>	
1.0	Web	Hours of custom CGI	\$95.00	\$95.00	
Discount: (50.00)					
Total Taxes: 50.00					
Purchase Order Total: \$95.00					
260269270015-PCB					
VENDOR					
Sprint PCS		PC	688-788-0000		
Kansas City					
FOR					
Patricia Tuttle		Prime Media Group			
27 September 2002		NOV 03	Shipings: 50.00	Prepaid: 50.00	
<u>Qty</u>	<u>Rate</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Line Total</u>	
1.0	PCS Phone	Monthly PCS Telephone Service	\$49.99	\$49.99	
1.0	Adapter Card	AD Adapter Card for Model	\$38.40	\$38.40	
Discount: (50.00)					
Total Taxes: 50.00					
Purchase Order Total: \$93.40					
Totals for all PO's with rates < \$100.00					
Total For Products:		\$1288.48			
Total Discount:		(50.00)			
Total Taxes:		\$78.52			
Total Shipping Charges:		\$75.98			
Total Expenditure:		\$1498.96			
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Purchase History Report for a User-Defined Criterion

9. Formats and Program Behavior

Initially, the most important thing the OrderGen user can do is to get the program set up and the purchase order templates formatted. Once this is done successfully, it seems like the purchase orders practically create themselves.

9.1 Purchase Order Appearance

The modules for controlling the appearance of the purchase orders are accessed through the OrderGen Options menu, specifically through the menu items "Font Settings," "Phrase Settings," and "Purchase Order Formats."

9.1.1 Controlling Purchase Order Fonts

This is done through the Font Settings dialog on the Options menu.

Font Settings for Applied Analytic Systems

Applied Analytic Systems
600 North Bell Ave.
Bldg. 2 Suite 2700
Carnegie
Pennsylvania
15106

PURCHASE ORDER

Facsimile PO
Click any text to edit its font style.

Special instructions.

PO Number: 000005
Date: 10/25/2003 7:31:38 PM
Acct Code:
Terms: NET 15
Ship Via: Fedex Next Day

Vendor:
Sprint PCS
P O Box 219995
Kansas City MO 64121-9995

Ship To:
Sandy Wright 412.278.2360
Applied Analytic Systems
600 North Bell Ave. Bldg. 2 Suite 2700
Carnegie Pennsylvania 15106

Qty	Units	Product No.	Name	Product Description	Unit Cost	Extended
2	Each	1880123	Adapter Ch	AC Adapter Chord for Model :	34.99	34.99

Approval _____

SUBTOTAL 45.00
Discounts 0.00
Ship Costs 1.50
PA Tax 0.00
Allegheny Tax 0.00
Enclosed 7.50
BALANCE 45.00

Close

PO Font Settings Form – Click Text to Change Font

The user can control the font characteristics on the purchase order, including font name, style, size, and color by clicking on any of the following items.

- Company Name (Header Data)
- Address Line 1 (Header Data)
- Address Line 2 (Header Data)

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- ❑ City (Header Data)
- ❑ State (Header Data)
- ❑ Postal Code (Header Data)
- ❑ "PURCHASE ORDER" Label
- ❑ **Common Label Group** (PO Identification)
["PO Number" Label, "Date" Label, "Acct Code"
Label, "Terms" Label, "Ship Via" Label]
- ❑ PO Number Data
- ❑ Date Data
- ❑ Acct Code Data
- ❑ Terms Data
- ❑ Ship Via Data
- ❑ Special Instructions Data
- ❑ "Vendor" Label
- ❑ "Ship To" Label
- ❑ **Common Data Group** (Vendor/Ship To)
[Vendor Name, Vendor Address, Vendor City,
Vendor State, Vendor Postal Code, Purchase Recipient,
Purchasing Company, Purchasing Company Address,
Purchasing Company City, Purchasing Company State,
Purchasing Company Postal Code]
- ❑ **Common Label Group** (Line Item Headers)
["Qty" Label, "Units" Label, "Product Number" Label,
"Product Name" Label, "Product Description" Label,
"Unit Cost" Label, "Line Item Total" Label]
- ❑ **Common Data Group** (Line Item Values)
[Qty, Units, Product Number, Product Name, Product
Description, Unit Cost, Line Item Total]
- ❑ "Approval" Label
- ❑ **Common Label Group** (Totals)
["Subtotal" Label, "Discount" Label, "Shipping Cost" Label,
"Tax 1" Label, "Tax 2" Label, "Deposit" Credits Label,
"Balance Due" Label]
- ❑ **Common Data Group** (Totals)
[Subtotal, Discount, Shipping Cost, Tax 1, Tax 2,
Deposit, Credits, Balance Due]

The items contained in the "common" groups all maintain the same characteristics as the other members of the group, for example Vendor City and Purchasing Company State always have the same font characteristics.

9.1.2 Controlling Purchase Order Phrasing

Obviously, the software comes with defaults for all of the labels shown on the purchase order form. The phrase settings form, which looks a lot like the font settings form, allows editing of **what** these labels actually say.

OrderGen 2000

Label Captions for Applied Analytic Systems

Applied Analytic Systems
600 North Bell Ave.
Bldg. 2 Suite 2700
Carnegie
Pennsylvania
15106

PURCHASE ORDER

Facsimile PO
Click text labels to edit text captions.

Special instructions:

Vendor:
Systems Automation, Inc.
8601 Dunwoody Place
Atlanta GA 30350

Ship To:
Chris E. Whyatt 412.278.2360
Applied Analytic Systems
600 North Bell Ave. Bldg. 2 Suite 2700
Carnegie PA 15106

PO Number: 200203271421-SAI
Date: 3/27/2002
Acct Code:
Terms: Payment Enclosed
Ship Via: UPS Next Day

Qty	Units	Product No.	Name	Product Description	Unit Cost	Extended
1	Ea.	1656-00	TEK016-165	740 HIGH CAP BLACK TONER	114	114
						SUBTOTAL \$100.00
						Discounts \$0.00
						Ship Costs \$15.00
						PA Tax \$0.00
						Allegheny Tax \$0.00
						Enclosed \$75.00
						BALANCE \$45.00

Approval _____

Close

Label Phrase Settings Form – Click Label to Change

Phrase control only applies to the labels. Since the user already has total control of the database content, a purchase order can actually be written in a language other than English, if desired.

The labels can be edited differently for each purchasing organization, and will be hot linked when the mouse is placed over any of the following labels.

- "PURCHASE ORDER" Label
- "PO Number" Label
- "Date" Label
- "Acct Code" Label
- "Terms" Label
- "Ship Via" Label
- "Vendor" Label
- "Ship To" Label
- "Qty" Label
- "Units" Label
- "Product No" Label
- "Name" Label
- "Product Description" Label
- "Unit Cost" Label
- "Line Item Total" Label
- "Approval" Label

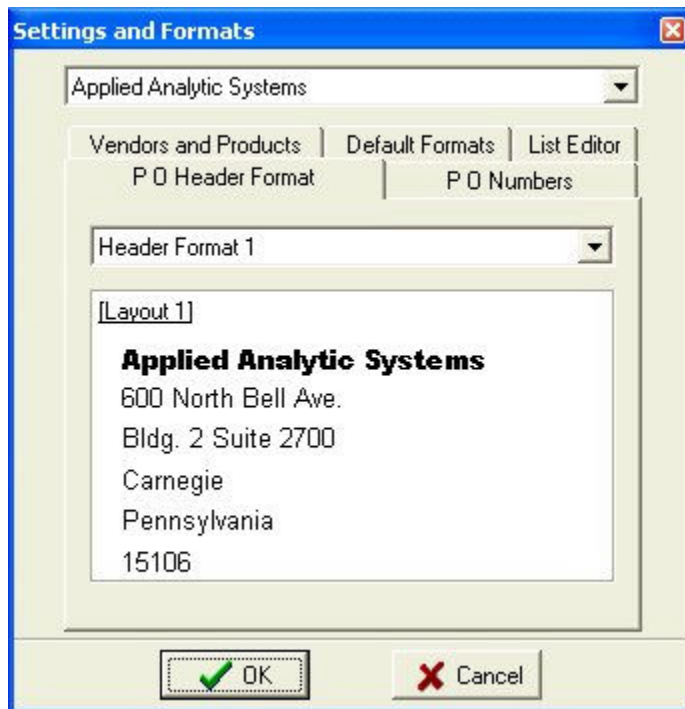
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- ❑ "Subtotal" Label
- ❑ "Discounts" Label
- ❑ "Shipping Cost" Label
- ❑ "Tax 1" Label
- ❑ "Tax 2" Label
- ❑ "Deposit or Credits" Label
- ❑ "Balance Due" Label

There are no groups for labels for phrase settings. All labels are changed individually.

9.1.3 Header Address Layout

This is set on the tab labeled "PO Header Format" on the "Settings and Formats" dialog, which is opened from the OrderGen **Options | Purchase Order Formats...** menu.



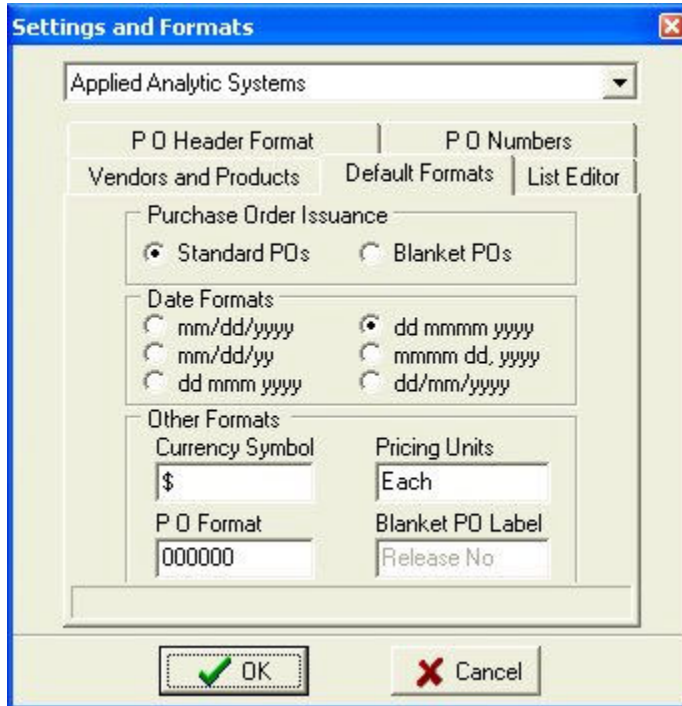
Setting Purchase Order Header Layout

The PO Header Layout is shown using the fonts specified using the Font Settings dialog. Changing the Header Format simply determines which layout will be used on purchase order headers -- specifically, whether the purchasing organization's company name and address data that appears in the purchase order header spans either three (3), four (4), five (5), or six (6) lines.

Typically, US company addresses are displayed on three or four lines, while Canadian and European addresses use four, five or six lines.

9.2 Default Formats

These are the formats that are used until they overridden by a setting that is closer to the action being taken. For example, the screen shot below shows that the default currency symbol is \$ (USD) and the default value for line item units is "Each."



Miscellaneous Default Formats

When adding a new product to the products database, the value of "Each" will automatically be entered into the Units field. It can be changed during data entry, if necessary.

The usefulness of the default formatting is that, if, for example, it turns out that the user almost always orders products by the carton instead of single unit items, the default format value of "Pricing Units" should be changed from "Each" to "Cartons."

The PO Format of '000000' only affects numerical purchase order numbers. The six zeros indicates that all PO numbers should have six digits, padded by leading zeros if necessary. Thus, the PO number 1476 would be printed as 001476.

The *Purchase Order Number Field* and *Release No Label* and described in Section 10.5.

9.3 Automatic Behaviors

On the OrderGen Options menu, the user can select actions that will always occur in concurrence with another action.

Auto Launch Purchase Order Expert - When checked, the Purchase Order Expert will open whenever the OrderGen program is opened.

Auto Quick Check for Database Issues – When this menu item is checked, the OrderGen databases will be checked for remnant records left by abandoned purchase orders (those without any line items) and orphaned line items (those not attached to an existing purchase order) whenever the Purchase Order Builder is initiated.

Remnant records can affect the accuracy of PO number sequencing and cause possible key violations when trying to enter line items.

Copy Current Purchase Order Number to Clipboard – When this is checked, the purchase order number will be placed on the clipboard when a purchase order is created, edited, or viewed.

Detailed Transaction Reports – Check this item to display each item entered and the tax status when viewing transaction history reports. When unchecked, only the transaction totals are displayed in the reports.

During Application Exit > Disconnect Mapped Drive – This affects mapped drives that apply for network version users. Uncheck this option to eliminate the unmapping prompt when the program is closed.

During Application Exit > Prompt for Database Backup – When this item is checked, if there have been any changes to the database, the software will inform the user of the date of last database changes, and the date of last backup. The user will have the option to backup before exiting.

It is not necessary to backup after every usage and to retain all backups indefinitely. Backups are not incremental. Each backup saves everything in the database, so there can be a great deal of redundancy in the backups. The recommended interval for database backup is once or twice per week. No more than three backups should be saved.

9.4 Inventory Requisitions

Requisition forms are for internal organizational use. Requisitions are used in some larger organizations where an official request and approval is required **before** a purchase order can be created.

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For example, Jon needs some new software for the research lab, but doesn't have the budgetary authority to create a purchase order and buy the software. A requisition is created identifying a short list of proposed vendors and the corresponding prices for said software. The requisition is submitted to Jon's boss, Ms. Andrews for approval. Once she returns the signed requisition form, Jon can create a purchase order to one of the proposed vendors.


Requisitioned Items					
	Inventory Control No.	Description/Specifications	Requested By Date	Quantity	Estimated Unit Cost
*				0	0

OrderGen Blank Inventory Requisition Form Dialog

Any number of items can be entered into the *Requisitioned Items* grid, and any number of vendors can be added to the *Recommended Vendors* list.

It is usually assumed that the Recommended Vendors listed are capable of supplying all of the items in the requisitioned items list. Specific product numbers and exact pricing information is not entered into the requisition database or the vendor and product databases at this point.

INVENTORY REQUISITION FORM



Date: 10/27/2004
Requisition No.: 00076511-1
Requested By: Myca Johnson
Approved By: Chris L. Sparr
Signature: _____
Charge Account: General Accounting

Requesting Organization or Department: Applied Analytic Systems

Recommended Supplier(s):
 -All Computers
 -Best Buy Corp.
 -Exxon City
 -Dell Computer

Item No.	Description / Specifications	Requested By	Quantity	Est. Unit Cost	Total Cost
1000-1	Keyboards	10/19/2004	45.00	\$8.00	\$520.00
1000-3	Monitors	12/09/2004	82.00	\$88.00	\$7216.00
1000-4	Small Black & White Telephones	10/07/2004	175.00	\$17.50	\$3062.50
TOTAL			322.00		\$10798.50

SUBMITTED BY:
 Name: _____ Signature: _____
 Title: _____

Applied Analytic Systems 444 North 1st Ave. Dept. 1 Suite 100 Chicago Pennsylvania 19104

A Completed Requisition Form Report

10. Advanced Features and Tools

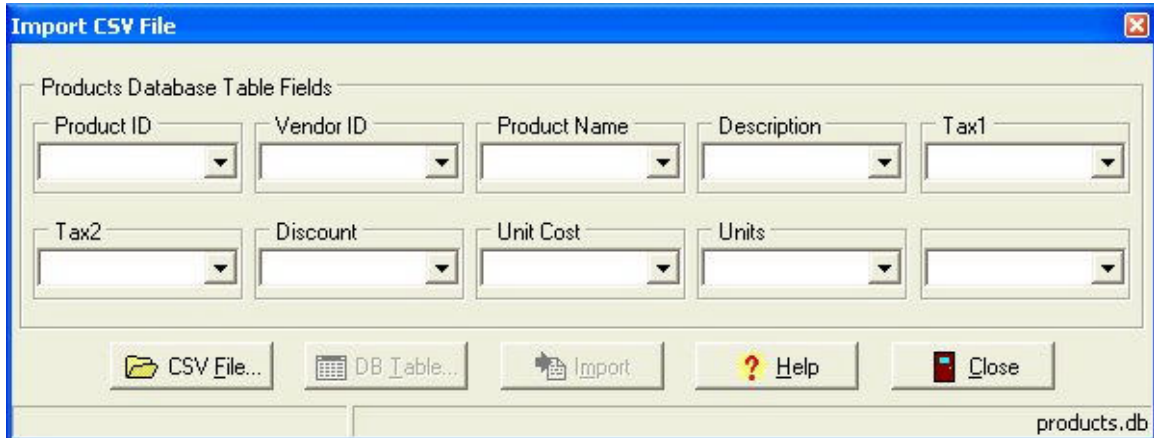
Even though these items are being described in the “Advanced Features” section, it does not mean that they are difficult to understand or to implement. Like requisition forms, most advanced features are not likely to be used by most users; however, a complete description is provided for those who choose to employ them.

10.1 Importing Data

Some users have vendor and/or product data in Excel worksheets or other programs that save data to Excel format files. These data can be imported into the OrderGen databases, saving valuable time avoiding tedious data entry tasks.

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To perform an import operation, select **Tools | Special Data Operations > Import and Export Data > Import [Vendor or Product] List** from the OrderGen menu.



Dialog to Import CSV File Into the Products Database

If both databases are empty, the Vendors **should be imported first**. This will enable the products to be automatically associated with the correct vendor at the time they are imported. Otherwise, the association will need to be done manually for each product, which could be a serious hassle if there are a lot of products to import.

Open an Excel csv (comma separated variable) file containing the information to be imported. The first line in the csv file must be the name of the field associated with the given position in the file.

The following data is a sample of a valid format for a csv file containing vendor data:

```
Vendor Name, Vendor City, Vendor State, Vendor Zip, Vendor Phone
TonerMAX.com, Pittsburgh, PA, 15220, 412.920.4036
Sprint PCS, Kansas City, MO, 64121-9995, 888-788-5009
...
Systems Automation Inc., Atlanta, GA, 30350
Master Graphic Services, Chamblee, GA, 30341-2525, 770.452.1982
GlobalOne!, Sun Valley, CA, 91352
```

A minimum amount of data must be available in the file in order to have a successful import. Particularly, the key fields are required. Missing or blank data is skipped.

1. A value for **Vendor Name** is required for importing into the vendor database.

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2. *Product ID* is the only **required** value for import into the products database; however, if a value for Vendor ID is provided and if that value matches the value for Vendor Name in the Vendor database, the products will be automatically associated with the correct vendor during import.

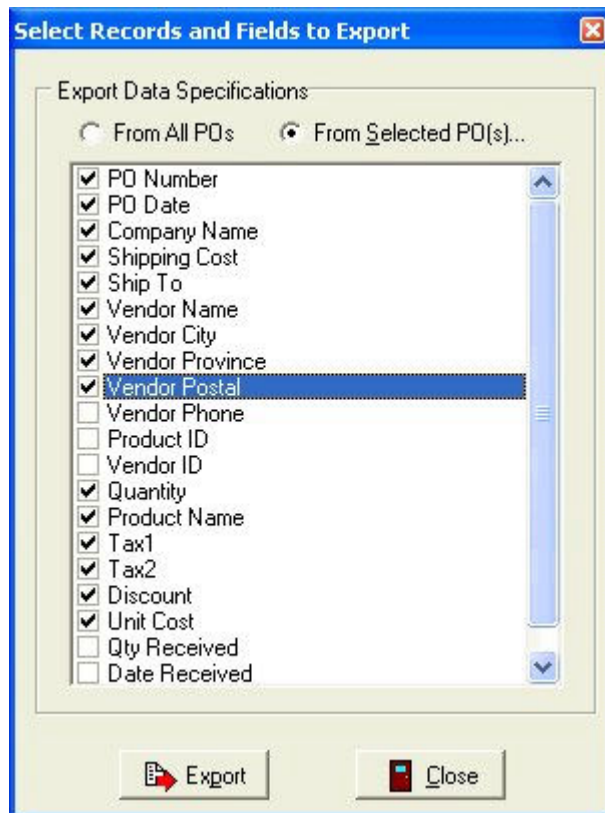
As noted above, this is particularly important when there are many products to import.

In each drop-down box, select the field from the csv file containing the data that matches the corresponding database table field. Once the fields are set, thousands of records of data can be imported in seconds.

10.2 Exporting Data

This is a requested feature for users who want to analyze their purchasing data in another program like Excel.

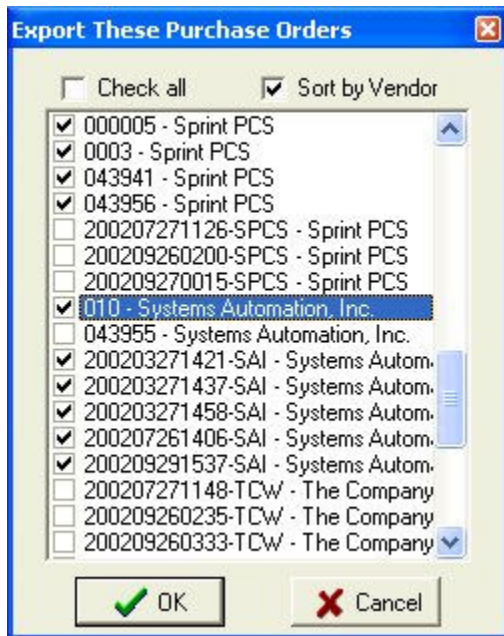
Save transaction data from specific fields to Excel (csv) through OrderGen menu **Tools | Special Data Operations > Import and Export Data > Export Transaction Data**.



Export Transaction Data Fields to CSV File

The user defines subset of purchase orders to export.

OrderGen 2000



Select Purchase Orders to Export

Once the fields and purchase orders of interest have been selected, exporting purchase order transaction data is a fairly straightforward activity.

10.3 Tracking Purchase Orders

OK, purchase orders have been issued, products have been shipped and some have arrived. Many users find it convenient to be able to identify which orders have been fulfilled in full or in part.

By recording orders as they arrive, users can keep track of the *open* and *closed* purchase orders. A purchase order is considered closed only when the full quantities of every item requested in the PO has been received. Open purchase orders are those having one or more line items that have not been fully received.

In PO tracking, all full or partially fulfilled orders are entered into the receipt database by selecting **Tools | Purchase Order Tracker > Open Purchase Orders...**

The PO Selection form shown in section 7.4 then displays the list of **open** purchase orders from which the user selects the PO Number of interest, and opens the tracking form.

OrderGen 2000

Purchase Order Tracker

Applied Analytic Systems
600 North Bell Ave. Bldg. 2 Suite 2700
Carnegie PA 15106

Sprint PCS
P O Box 219995
Kansas City MO 64121-9995

200207271126-SPCS
7/27/2002 Sandy Wright Order Received in Full

Product Number	Description	Qty Ordered	Qty Received
0000-111	Months of PCS Telephone Service	1	0
1880123-71	AC Adapter Chord for Model Sanyo 711 PCS telephone	1	0

Close

PCS Service Unreceived Balance: 91.98

Open Purchase Order Tracking Form

If the order was received in full, the user checks the corresponding box and enters the receipt or invoice number. The software then considers the purchase order to be closed. If this is a partial order, the user clicks on the small ellipsis button (...) in the Qty Received column, and enters the quantity and date of the line item received, and the associated invoice information.

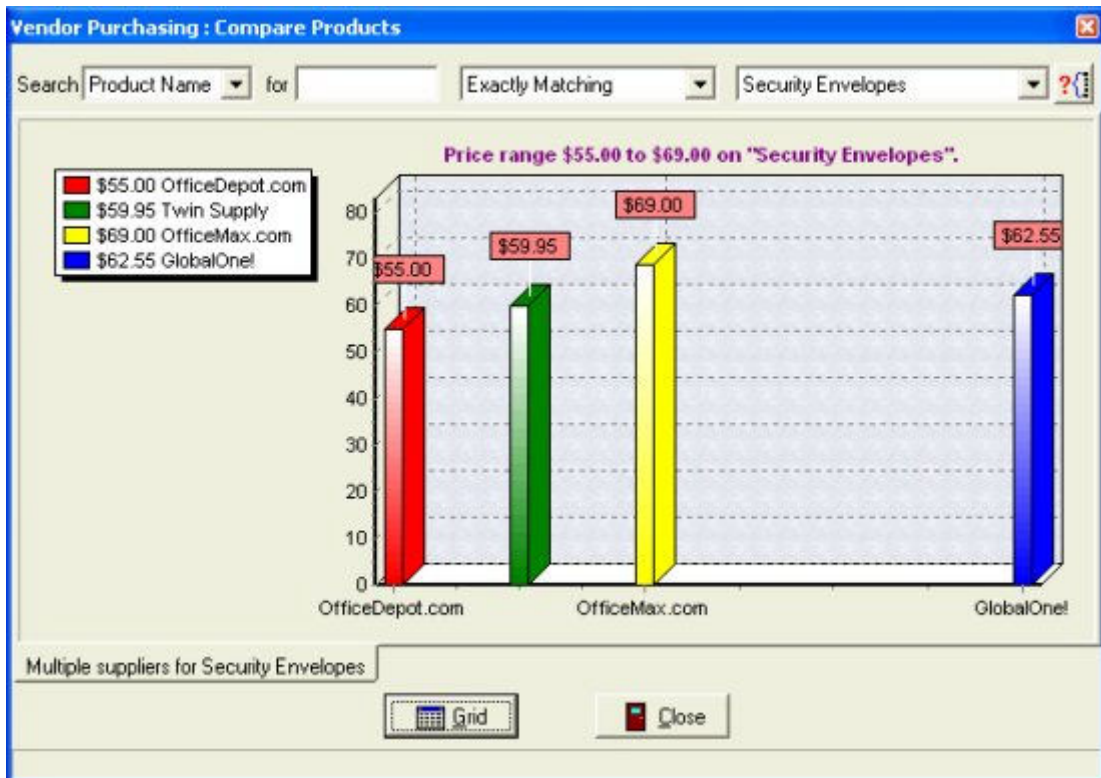
This *partial receipt* purchase order will remain open until **all line items** have been received in full.

10.4 Product Comparison

With usage over a period of time there will be several identical or similar products in the database that are available from multiple different vendors. Once this happens, a user of the software may want to minimize the cost of ordering a certain product.

For example, suppose that four different vendors sell cases of #10 Business Security Envelopes, however, one of these vendors charges 15% less than the others for this particular product.

Using the product comparison module and selecting or searching for security envelopes, the following screen is shown.



Fictitious Data for Price Comparison on Security Envelopes

The graph quickly shows that OfficeDepot.com has the best price for this product (\$55).

Of course it is necessary for the user to satisfy him/herself that the actual products being compared are similar enough for the comparison to make sense. Using a very specific search term increases the relevance of the comparisons.

10.5 Blanket POs and PO Number Reuse

In the standard usage of purchase orders, PO numbers must be unique, as discussed in Section 7.2. In some organizations, reusable purchase order numbers occur in the context of blanket purchase orders, in which there is a need, repetitively, to purchase miscellaneous supply items from a single vendor. Such a blanket purchase order may be issued for a specific dollar amount and used until the approved budget is exhausted.

For such situations, there may be dozens of purchase orders issued to a vendor (or perhaps multiple vendors) using the same purchase order number. In this case, the user creates the purchase order number *manually*, and OrderGen tracks unique *Release Numbers* instead of the (blanket) purchase order number.

Default Formats

Purchase Order Issuance	
<input type="radio"/> Standard POs	<input checked="" type="radio"/> Blanket POs
Date Formats	
<input type="radio"/> mm/dd/yyyy	<input checked="" type="radio"/> dd mmmm yyyy
<input type="radio"/> mm/dd/yy	<input type="radio"/> mmmm dd, yyyy
<input type="radio"/> dd mmm yyyy	<input type="radio"/> dd/mm/yyyy
Other Formats	
Currency Symbol	Pricing Units
\$	Each
PO Format	Blanket PO Label
000000	Release No

Reusable PO Numbers

What the software is doing here is mostly semantics. Under Blanket PO issuance, the field that is used for accounting codes under the Standard PO issuance is used for the purchase order numbers. This allows *multiple orders* to be placed against a single PO Number over the lifetime of a PO Number (the lifetime being determined by the user's organization).

Some Rules for using Blanket POs

1. The PO Number **cannot** be left blank; otherwise, the Blanket PO setting will be ignored and will be printed as a Standard PO.
2. When **first** issued, the manually created purchase order number needs to be different from any previously used PO number.
3. Special care must be taken to avoid confusing standard purchase orders previously issued with those issued under this special blanket issuance context.

When printing older *standard* purchase orders, open the "Settings and Formats" dialog and reset "Purchase Order Issuance" to Standard PO, if necessary, before printing.

4. Searching the database using a blanket purchase order number will return all purchase orders issued under that purchase order number, sorted by Release No.

10.6 Emailing Purchase Orders

More organizations are accepting purchase orders by email. OrderGen allows users to email any purchase order to the vendor from the **Tools | Special Data Operations > Email Attached PO...** menu item.

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Before using this function, users should check the PO for correctness and be sure that an approval signature has been attached using the mechanism outlined in Part g) of The Purchasing Organization group discussion in Section 7.3.

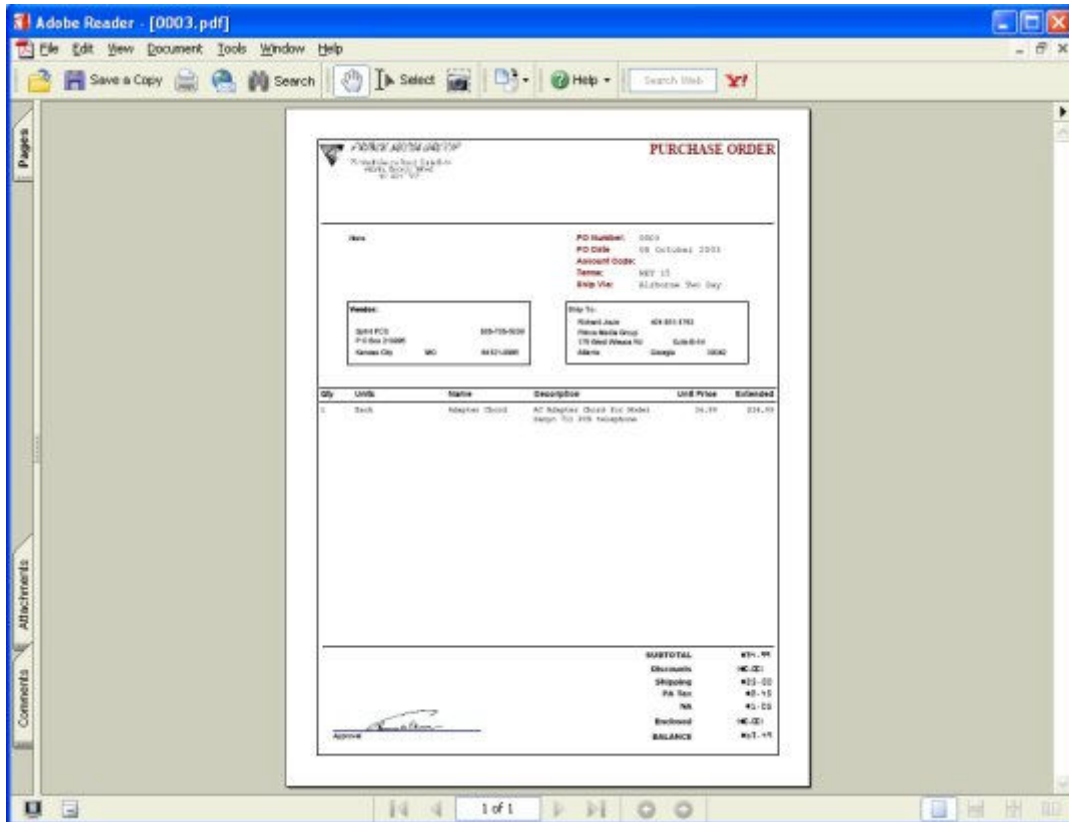
Once the PO is approved and the appropriate signature has been attached and saved, select the purchase order number from the *Select Purchase Order* Dialog. The following dialog opens



Rename File and Location to Export PDF Document

In this example, Purchase Order 0003 is being exported to Portable Document Format file. The default file name for this document will be 0003.pdf. This name can be changed to something that may be more relevant or meaningful to the vendor concerned. After clicking the button "OK," the purchase order is converted to a PDF file, and opened in the Adobe Acrobat Reader for review.

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Purchase Order Number 0003 Opened in Acrobat Reader as 0003.pdf

The purchase order along with the approval signature is shown in Acrobat. At the same time, OrderGen also opens the default email utility, allowing the user to attach this PDF file to an email message addressed to the vendor.

Of course, this particular OrderGen functionality assumes that the **vendor** has Acrobat Reader or another PDF file viewer installed – a likely, but not guaranteed assumption. The user should check with the vendor before emailing PDF file attachments.

11. Database Issues

OrderGen 2000 is a database program – subject to the issues that are well established for database software. This section describes some the things that can be done to avoid database problems.

OrderGen is built in Delphi (5 and 6) with Paradox database tables. It uses the Borland Database for access and manipulation of the data entered into the system by OrderGen users.

11.1 The Borland Database Engine

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The Borland Database Engine (BDE) is the database engine provided by The Borland Software Corporation that allows software access to Paradox and dBase databases in addition to other popular database other formats.

It provides the database interface for Borland products such as Borland C++, Borland C++ Builder, Borland Delphi, and Borland J Builder. Borland provides library files and header files to facilitate direct access to the BDE API.

What this means for a user of OrderGen is that the BDE will be installed in the process of installing OrderGen, unless it is already present on the target machine. As a popular development tools provider, there may be other programs installed on the user's computer that use the BDE. This is fine; multiple programs can safely access the database engine concurrently.

11.2 Proper Care and Feeding of Paradox

Like the book of a similar name by a well-known author and radio host, Paradox is fairly simple to deal with and easy to please.

Paradox creates a network control file and lock files to manage concurrent access to database files. This issue is primarily for the multi-user version of the software, where everyone on the network uses the same database tables.

1. There should be only one Pdoxusrs.net file, one Paradox.lck and one Pdoxusrs.lck file. These files are created when the software starts and are usually deleted when the software closes.
2. Multiple net and lck files may cause errors. The only situation that will cause this is some form abnormal program termination. Close the software normally using File | Exit or the equivalent speed button.
3. Set the temporary directory on the target machine to a drive with a lot of space. This is where temporary query results are stored.

11.2.1 Key Violations

What is a key violation? This is an error that causes concern among users. When it happens, it usually happens multiple times. This is the easiest error to fix.

A key violation happens when the user tries to enter a data record that has primary index (key) data that already exists in the database.

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Example 1: Inserting these records into the database will not cause any problem.

PO Number*	Product ID*	Quantity	Product Name	Unit Cost ...
23456	W-0988	2	Red Widget	122.57
23456	W-0189	4	Yellow Widget	122.57
23456	W-0997	1	Green Widget	122.57

Example 2: This is how key violations happen. Trying to insert the third record into the database **is guaranteed** to cause a key violation and will not be allowed.

PO Number*	Product ID*	Quantity	Product Name	Unit Cost ...
23456	W-0988	2	Red Widget	122.57
23456	W-0189	4	Yellow Widget	122.57
23456	W-0988	1	Green Widget	122.57

The combination PO Number and Product ID of (23456,W-0988) is the same as the values in the first record. **DON'T DO THIS.**

As long as the pair (PO Number, Product ID) is unique for each record there will NEVER be a key violation.

11.3 Avoiding Database Corruption

An excellent treatise on Paradox Database table corruption can be found at The Paradox Community web site – particularly, please read Mike Robinson's 2004 article "How to Recognize and Prevent Corrupt Tables and Indexes"

http://www.thedbcommunity.com/index.php?option=com_content&task=view&id=248&Itemid=46

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Appendices

These Database Appendices are provided for users who may want to create additional reports using Crystal Reports or another reporting tool of their choice. The OrderGen Database tables are all Borland Paradox 7 table files.

Appendix 1 - OrderGen Database Tables

a. company.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
Company ID

Company [Case Insensitive, Maintained]
Company Name

Fields:

No.	Field Name	Type	Length	Req'
1	Company ID	AutoInc	-	N
2	Logo File	String	80	N
4	Address Line 1	String	25	N
5	Address Line 2	String	25	N
6	City	String	20	N
7	State Prov	String	20	N
8	Postal Code	String	15	N
9	Country	String	20	N
10	Phone	String	15	N
11	Fax	String	15	N
12	EMail Address	String	45	N
13	Web Site	String	60	N

b. people.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
Product Recipient Name
Your Company Name

Company Name Lookup [Case Insensitive, Maintained]
Your Company Name

Fields:

No.	Field Name	Type	Length	Req'
1	Product Recipient Name	String	50	N
2	Your Company Name	String	40	N
3	Email Address	String	60	N

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c. podetail.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
PO Number
Product ID

Vendor Lookup [Case Insensitive, Maintained]
Vendor ID

Fields:

No.	Field Name	Type	Length	Req'
1	PO Number	String	30	N
2	Product ID	String	30	N
3	Vendor ID	Integer	-	N
4	Quantity	Float	-	N
5	Product Name	String	40	N
6	Description	String	240	N
7	Tax1	Float	-	N
8	Tax2	Float	-	N
9	Discount	Float	-	N
10	Unit Cost	Float	-	N
11	Qty Received	Float	-	N
12	Date Received	Date	-	N
13	Vendor Invoice	String	30	N
14	Units	String	15	N

d. poheader.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
PO Number

Vendor [Case Insensitive, Maintained]
Vendor Name

Total Descending [Descending, Case Insensitive, Maintained]
Total PO Amount

Total Ascending [Case Insensitive, Maintained]
Total PO Amount

Date [Case Insensitive, Maintained]
PO Date

Company [Case Insensitive, Maintained]
Company Name

Fields:

No.	Field Name	Type	Length	Req'
1	PO Number	String	20	N

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2	PO Date	Date	Time	-	N
3	Logo File		String	80	N
4	Show Address		Boolean	-	N
5	Company Name		String	40	N
6	Address Line 1		String	25	N
7	Address Line 2		String	25	N
8	City		String	20	N
9	State Prov		String	20	N
10	Postal Code		String	15	N
11	Country		String	20	N
12	Phone		String	15	N
13	Fax		String	15	N
14	E-Mail Address		String	45	N
15	Web Site		String	60	N
16	Terms		String	30	N
17	Shipping Company		String	35	N
18	Shipping Cost		Float	-	N
19	Deposits Credits		Float	-	N
20	Total PO Amount		Float	-	N
21	Special		String	200	N
	Instructions				
22	Ship To		String	30	N
23	Shipee Account		String	25	N
	Number				
24	Ship Company		String	35	N
25	Ship Address1		String	30	N
26	Ship Address2		String	30	N
27	Ship City		String	25	N
28	Ship Province		String	25	N
29	Ship Postal		String	15	N
30	Ship Phone		String	15	N
31	Ship Email		String	40	N
32	Vendor Name		String	35	N
33	Vendor Address1		String	30	N
34	Vendor Address2		String	30	N
35	Vendor City		String	25	N
36	Vendor Province		String	25	N
37	Vendor Postal		String	15	N
38	Vendor Phone		String	15	N
39	Vendor Email		String	40	N
40	String Field 1		String	40	N
41	String Field 2		String	40	N
42	Numeric Field 1		Float	-	N
43	Numeric Field 2		Float	-	N

e. products.db

Table Properties:

Indexes :

Primary [Unique, Maintained]
 Product ID
 Vendor ID

Descending Cost Lookup [Descending, Case Insensitive,
 Maintained]

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Unit Cost

Vendor Lookup [Case Insensitive, Maintained]
Vendor ID

Product Name Lookup [Case Insensitive, Maintained]
Product Name

Ascending Cost Lookup [Case Insensitive, Maintained]
Unit Cost

Fields:

No.	Field Name	Type	Length	Req'
1	Product ID	String	30	N
2	Vendor ID	Integer	-	N
3	Product Name	String	40	N
4	Description	String	240	N
5	Tax1	Float	-	N
6	Tax2	Float	-	N
7	Discount	Float	-	N
8	Unit Cost	Float	-	N
9	Units	String	15	N

f. receipts.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
PO Number
Product ID
Receipt Date

Fields:

No.	Field Name	Type	Length	Req'
1	PO Number	String	30	N
2	Product ID	String	30	N
3	Receipt Date	DateTime	-	N
4	Quantity	Float	-	N
5	Invoice Number	String	40	N

g. reqhead.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
Requisition No.

Fields:

No.	Field Name	Type	Length	Req'
1	Requisition No.	String	20	N
2	Req Date	Date	-	N
3	Requested By	String	40	N
4	Charge Account	String	35	N
5	Approved By	String	40	N

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6	Requesting Dept	String	50	N
7	String Field1	String	40	N
8	String Field2	String	40	N

h. reqitems.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
Requisition No.
Inventory No

Requisition [Case Insensitive, Maintained]
Requisition No.

Inventory [Case Insensitive, Maintained]
Inventory No

Fields:

No.	Field Name	Type	Length	Req'
1	Requisition No.	String	20	N
2	Inventory No	String	24	N
3	Description	String	240	N
4	RequestBy Date	Date	-	N
5	Quantity	Float	-	N
6	Estimate Unit Cost	Float	-	N
7	String Field1	String	30	N
8	String Field2	String	30	N

i. reqvend.db

Table Properties:

Indexes:

Primary [Unique, Maintained]
Requisition No.
Recommended Vendors

Vendor Name [Case Insensitive, Maintained]
Recommended Vendors

Requisition [Case Insensitive, Maintained]
Requisition No.

Fields:

No.	Field Name	Type	Length	Req'
1	Requisition No.	String	20	N
2	Recommended Vendors	String	50	N
3	String Field2	String	30	N

j. vendors.db

Table Properties:

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Indexes:

Primary [Unique, Maintained]
Vendor ID Number
Vendor Name

Name Lookup [Case Insensitive, Maintained]
Vendor Name

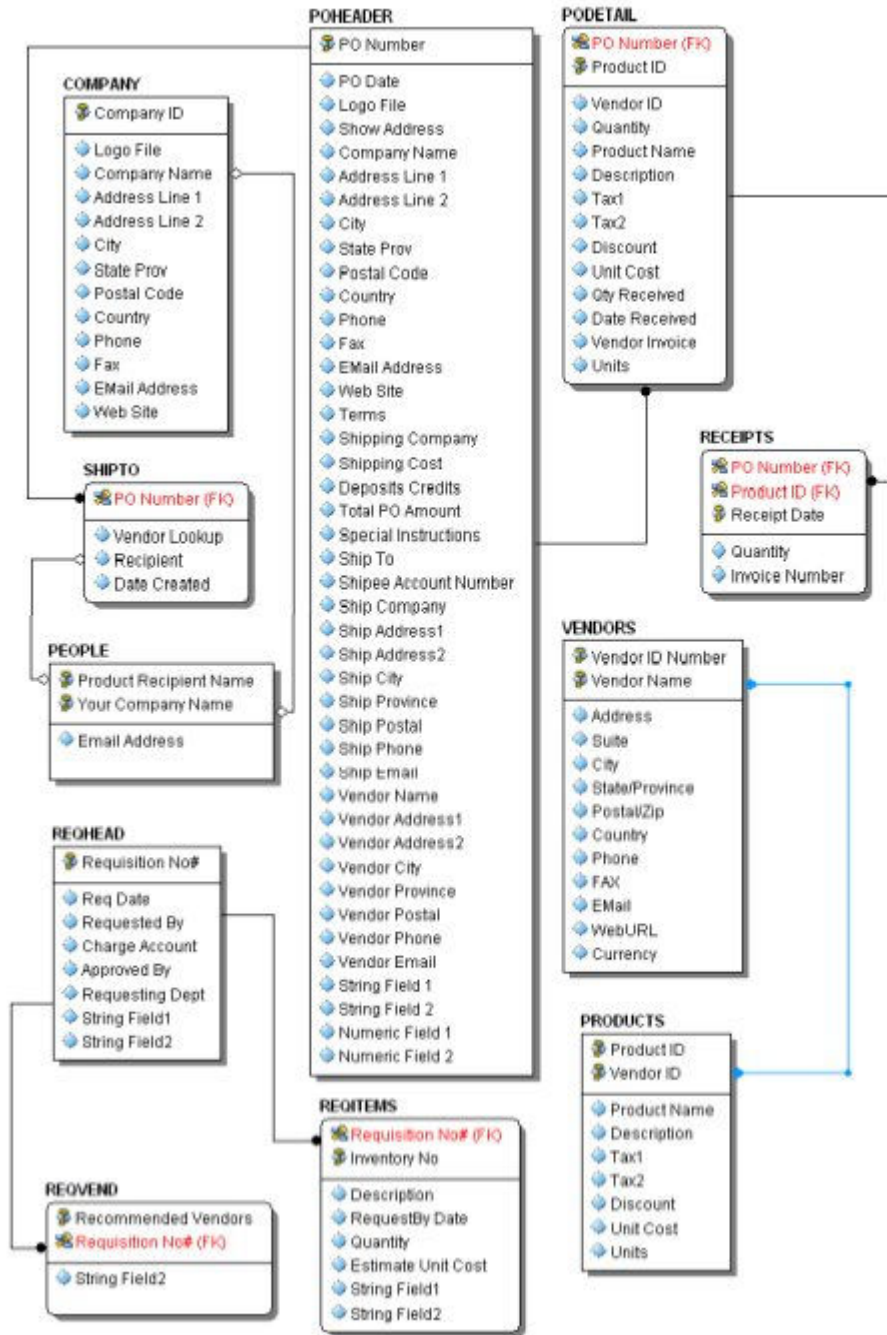
City Lookup [Case Insensitive, Maintained]
City

Postal Code Lookup [Case Insensitive, Maintained]
Postal/Zip

Fields:

No.	Field Name	Type	Length	Req'
1	Vendor ID Number	AutoInc	-	N
2	Vendor Name	String	40	N
3	Address	String	40	N
4	Suite	String	40	N
5	City	String	20	N
6	State/Province	String	20	N
7	Postal/Zip	String	15	N
8	Country	String	15	N
9	Phone	String	13	N
10	FAX	String	13	N
11	EMail	String	60	N
12	WebURL	String	100	N
13	Currency	String	6	N

Appendix 2 – ER Model Diagram for OrderGen Database



OrderGen Database IDEF1X Entity-Relationship Diagram

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References

Accessing the Borland Database Engine (BDE) from Visual C++
by Robert Pittenger

<http://www.codeproject.com/KB/database/bdedatabase.aspx>

How to Recognize and Prevent Corrupt Tables and Indexes
by Mike Robinson

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OrderGen Support Site
Applied Analytic Systems

<http://support.ordergen.com/>