

Customer Order Tracker

Introduction

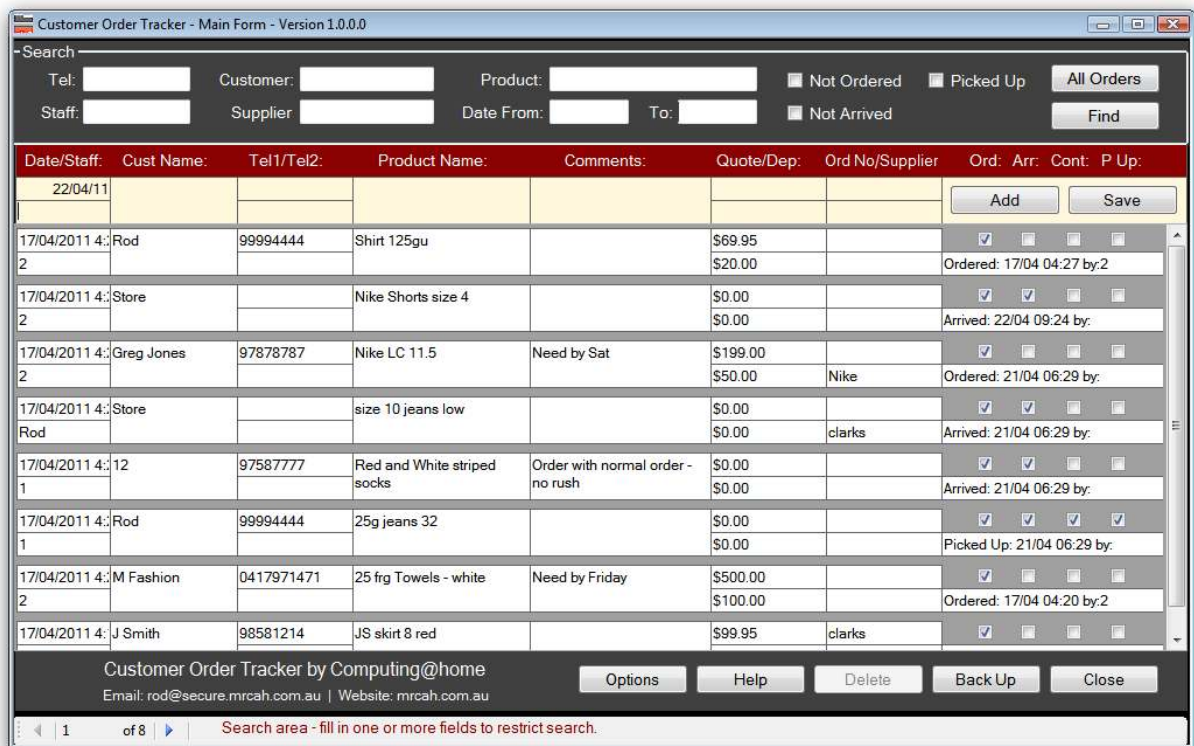
This application installs on a network, and allows any users to quickly see the state of an order your customer has made. It is ideal for retailers, wholesalers and even online businesses that routinely accept sales orders for goods not in stock. It is designed to replace a handwritten system – book or ticket, or a spreadsheet system that has become unwieldy. It can even replace inbuilt systems in Point of Sale software that can be slow or complex to use.

The Customer Order Tracker has no toolbars or menus. Ease of use is its main feature. All work is done on the main form, save for some initial setting up. The licence you get when your purchase this application is a network or site licence so can be set up on as many computers on your local network as you like – all for the one price.

Prerequisites

Windows XP SP2 or higher, Vista or Windows7 32 or 64 bit systems.
Other prerequisites will be downloaded from the internet on install. If you have not got internet you will need to make sure .Net 3.5 or better is installed and the Visual Basic Power pack from Microsoft.

Main Functions



The application has been designed to be as simple to use as possible. The black section at the top is the search area. The yellow area is where you add a new order, and the rest is mainly the editable list of orders, organised in reverse date order – the last order at the top.

At the very bottom is a help bar. Mouse hover over any part of the form to see what each button and box does.

Adding an order

Simply fill in the yellow section. Required fields are set in the options, there might be none. Tab to the end (past Supplier – the last field) to add, or click Add.

Finding an Order

Most of the search fields are “wild carded” at both the start and end, which simply means the search will find your search text, no matter where it appears in the field. So if you search for ‘Shorts’ in the Product field, you will find “Nike Shorts size 4”, as shorts appears in that text. So if some shorts arrive, and you are curious to know if any are for orders, you can search by typing ‘shorts’. Staff numbers are not wild carded – otherwise 5 will find 15 etc. You can use more than one search field to further restrict the number of orders found, but is rarely necessary.

Another common example is when the customer comes in, you might find it easier to search by some other way – the customer might not know what the order was.

Try searching for telephone - no need to put the whole number in, just the last 3 or 4 digits is all you need.

Click ‘Find’ to activate the search or just tab twice.

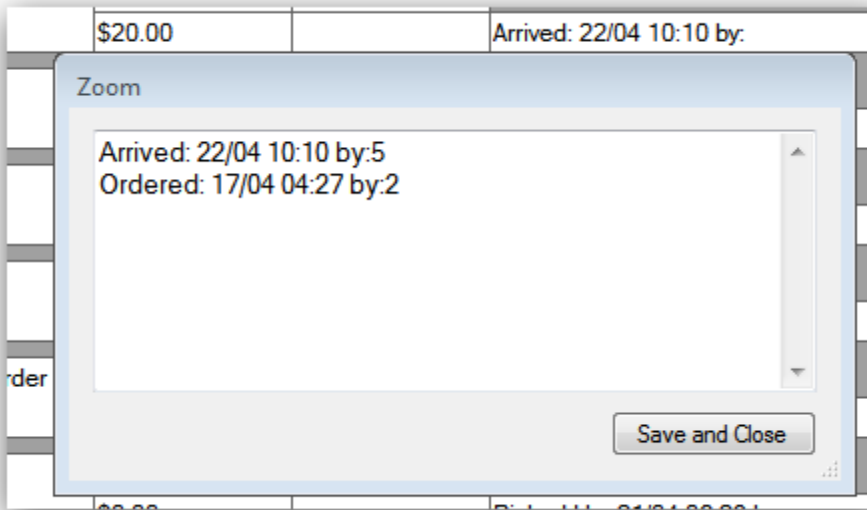
Click ‘All Orders’ to show all orders.

Editing an Order

The most common edits are clicking the Ordered (Ord), Arrived (Arr), Contacted (Cont) and Picked Up (P Up) check boxes. Clicking these boxes will automatically put the date/time this click took place. To further edit – maybe to say who actually has done the ordering contacting etc; double click on the tracker box.

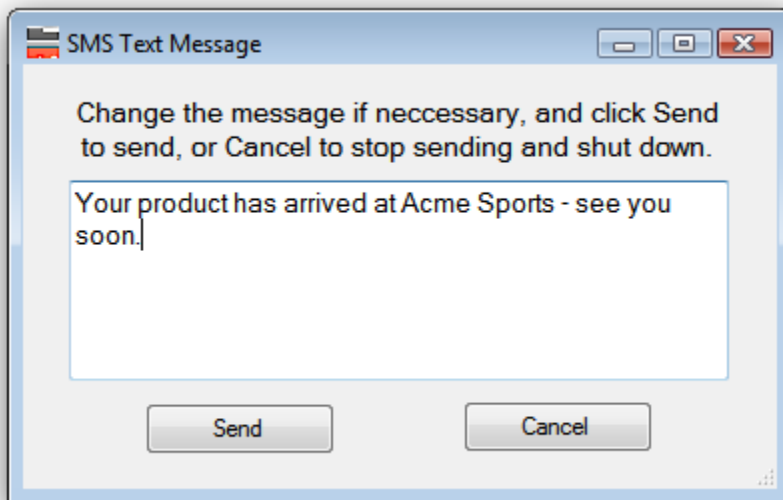
In the example below we can see the product was ordered by Staff member 2 and booked into stock by staff member 5. The 2 and 5 have been typed in.

The zoom is also available on the comments box, and the product box. All fields are editable, except the date the order was placed by the customer.



SMS the Customer

A handy extra (it might not work in some countries) is the ability to SMS the customer just by double clicking on the telephone number. You need to set up an Account with 'SMS over the Internet' provider Exetel (as explained in Options), and the number has to be a number capable of taking an SMS (e.g. mobile number). A default message comes up (which you set in options), and which can be edited.



Just click send. A status (hopefully OK) will be returned – it might take 10 or so seconds.

Save

After editing an order its best to click save. That will allow it to be seen on the other computers. The save action is actually automatically run on most actions, including Close and the clicking the 4 check boxes, so if it is not done no great damage is done.

If you edit a record, and do not save it, or otherwise use the application on that machine, and someone subsequently changes that record on another computer, and then you try to save, you will receive a concurrency error. This just means the application can no longer make the change. Just OK the error click save (to be sure) and try again. This should be rare, as why would two people be trying to edit the same record at the same time anyway?

All Orders

This is also activated by various other actions, but you will need to click it, to see any edits or new records from other computers. Again no problem if it is not clicked.

Administrator Tasks

There are several tasks.

Install

The install routine is very simple. It is explained on a separate document, because this document can only be accessed if the application is already installed. Your Licence allows you install across the LAN. This includes VPN and Remote Desktop for users on the road, at home etc. Setting up a LAN, VPN or Remote Desktop is not covered by support for this application.

Delete.

We suggest orders are deleted, at some point after they are picked up. So searching for picked up orders made before a certain date will give you the list to delete. You can only delete one order at a time.

To delete simply put the cursor into the staff number box of the record to delete, and click delete. You will get no warning.

Backup

You can backup the customer orders, either by just backing up the data file OrderData.mdb or by using the Backup button on the order form. The backup also compresses the data file, so we suggest you do a backup after deleting a lot of orders. You will ne asked to save your backup with a name. The backup will be saved with a .bak extension. To restore (this would be VERY rare) just rename the file [yourName].bak to OrderData.mdb, and in Options click find to reconnect to it.

Options

There are several options you should set.

Connection

The connection area is talked about in the install instructions. Just note the location of the data files here – for backup purposes or if you want to install the tracker on another computer.

Global Options: These are options that are stored in the database, so if you change them on one computer they will be reflected on all.

Customer Order Tracker - Options Form - Version 1.0.0.0

Connection

Click Find to connect or Create for a new installation:

Data Source = C:\Users\Rod\Desktop\VB Cust Orders\OrderData.mdb

Global Settings

Licence Information

Licenced To:

Email:

Licence No:

Licence Type:

Custom Name:

Custom name is a field on the Customer Order datagrid you can use. Suggested uses include Order Number or Days to arrive. Keep name to less than 6 or 7 letters.

Local Settings

Exetel SMS Settings:

User Name:

Password:

Senders Name:

Not in Aust Tel No Prefix:

Minimim Data Requirements

Require Staff No

Require Customer Name

Require Tel1

Require Part No

[Purchase](#)

[Online Help](#)

[Email Developer](#)

SMS Default Text - Maximum of 160 characters.

Your product has arrived at Acme Sports - see you soon.

Note that senders name can only be max of 11 letters and numbers - no spaces allowed.

<http://www.exetel.com.au/business-sms.php>

Tick if staff number or initials required for each entry.

Licenced To: Please enter the same name as you entered on the form when you PURCHASED the product, to allow us to identify you if you ask for support.

Email: Enter the email address you used when you purchased the product. This is only used for support purposes. In fact you should always leave this the same – even if the email becomes obsolete.

Licence No: This is your licence number, and needs to be entered after your purchase the Customer Order Tracker. It will be emailed to you, with your receipt. Do not divulge this, or use this licence number on any other site. If the licencing server detects several sites, it will try to deregister the number. There is a \$50 support charge to sort this out. (You will be issued a new licence number). Remember you can use this licence number on as many computers on the same network as you like. (Possibly 20 is a practical limit).

Licence Type: Trial, Licenced or Unlicenced. There is a 60 days trial period- you MUST use this to determine if this program suits your needs. There will be no refund if you purchase and then find it does not suit your needs. After the trial period has finished the ability to add new orders is disabled. You can still search and edit existing orders.

Custom Name: On the main page one field is given over to User Choice. We have suggested Order Number, but you can use it for other things (such as Freight Company, date of expected delivery etc). Note that the comments section can also be used in much the same way.

Minimum Data Requirements: Check (tick) the boxes you would like to make compulsory. If none are ticked it is possible to have an order with nothing but the order date. These need to be set on each machine.

Exetel SMS Settings: Exetel is an Australian Internet service provider. They offer a SMS over the Internet service (they call it SMS over ADSL for some reason – not all Internet is ADSL). While Australian, it should work for nearly every country. You do need to realise that, to them, any call that ends up in any country besides Australia is an international call, and so you will be charged at International rates. However that is still less than 10cents Australian a call.

If this service is important to you, please buy a \$10 prepaid plan from Exetel, and see if it works for you.

The *User Name* is your Exetel User Name,

The *Password* is your Exetel Password.

Senders Name can be (and usually is) your phone number. If you use letters like the example, you can use no spaces or Symbols. (Optional)

Remember the SMS is NOT coming from your phone, so the recipient can not press reply.

Australian users do not need to do anything more. Non Australian users will need to click “**Not in Aust**” and put the international prefix (Not the + sign though) for their country. For example all US users will need to put 1.

In addition, if ALL your customers have the same area code you could put that in as well. So US customers, in an area code of 845 would put 1845 in that box.

However if you have customers in different area codes, then you will need to type the area code with the phone number in the Customer Order Tracker. You will need to type in an area code somewhere, but not twice.

SMS Default Text: Optional

Issues, and Suggestions

No bugs reported. However there are some minor points that you should be aware of.

Multiple Orders by One Customer: In a system, such as might be found on a Point Of Sale (POS) System, Customer Orders are handled by creating the Customer on 1 form, then the products on a form of their own, then using yet another form to make the Customer order. So if (in a worse case Scenario) a new customer wanted 5 products you never had in before, you would have to populate 7 forms.

However such a system allows the order to be seen as one order, with a price for each item. In this system you have to make a choice; put everything on one order, with the prices etc put in the comments or products section, and only the total price and deposit, in the Price fields, or do 5 separate orders and risk them not being seen as one. Such is the price you pay for simplicity.

How to handle the deposit: Not a problem if you are coming from a paper or spreadsheet – just handle deposits in your POS system as before. However if you are moving from a built in Customer Order system in your POS, it would have handled the deposit as part of that transaction. You will have to work it out, dependant on the tax laws of your country.

Backing up: You need to be the only one using the Customer Order System. If any are open, you can't backup – you will get an error. Sometimes you get the same error, even if the trackers are all closed – just try again as the tracker you are on has failed to disconnect from the database in time.

Lost install download. Just download it again from the website address on the Options form. Install, put the licence number in and you are away.

Support: Email accessible from Options form (Email developer). It will auto populate the Subject field – you must not change that, otherwise the spam filter will get it. There is no charge for support for Licenced users. However we cannot support network issues.

Starting up with windows: Just drop a copy of the desktop shortcut into the startup folder. So copy the shortcut, go to Start>All Programs, right click on the Startup Folder, click open, and then right click inside the folder and click paste.

Other Uses

We suggest you incorporate other uses into the Customer order Tracker. They will not interfere with its main use.

Store Orders

If a staff member sees something they think needs ordering, we suggest they put in the tracker, with the supplier the product is ordered from, and the Customer Name “Store”. Searching on Customer “Store”, and Supplier and “Not Ordered”, will bring up all potential orders for that supplier that are not Customer orders. Not running out of products is important for the success of many businesses.

Staff To-Do Lists

As staff members think of jobs they have to do (ring suppliers, customers etc), they can enter into the Customer Order Tracker. We suggest you assign a special staff number for Staff to use – e.g. by putting a j (for job) in front of their normal number. So if a Staff member had the number 5 then that staff member would put j5 in the staff number field when adding a job. That staff member could then search on J5 for the list of jobs. A Staff member could tick off the jobs by ticking the Ordered or Arrived box.

Quotes

Keeping track of quotes is as important as keeping track of orders. Customers rarely remember to bring in the quotation. We suggest you just enter the Quotation exactly the same as an order, but Quote in the Supplier Field. If you get a lot of quotes, you could make the Custom Box “Quote Valid To” but fewer letters of course, as that won’t fit.

Conclusion

1. The Tracker is installed on all computers on your network, so wherever you are: Shop, Office, Storeroom or even remotely if that is set up there is no excuse not to enter the new data or find out what’s has been ordered.
2. The powerful and easy search allows you to quickly filter and find what you are looking for.
3. Its one page design, lack of a menu or any toolbar, means all functions of this application are instantly available to the user. This means any user can almost instantly start using this application, with either no training at all, or at most 2 or 3 minutes.
4. The application lacks a set of rules – you can for example add a quote the same as an Order, which on the face of it could lead to a problem, though that makes the application quicker and easier to use. Or a customer could be entered misspelled, as a nickname or any old way the staff member likes. We have found, that instead of causing long term problem, staff members actually agree amongst themselves the best way to enter data, to allow other members to find it. This means, instead of the programmer making decisions on how the program is to be used, responsibility has been transferred to the user. To our surprise it has worked better than expected – maybe more software designers could take note.