Take An Order!

for the Palm Computing Platform

Users Guide

Version 2.9
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Chapter 1: Introduction and Installation

Introduction

Take An Order! is a powerful tool for field order taking using a Palm Computing platform handheld device. Orders can be taken manually on a standard unit, such as a Palm III, and can also be taken with the assistance of the built-in barcode scanner of the Symbol SPT 15xx/17xx/18xx, the plug-in barcodes scanners available for the Handspring Visor (the Symbol CSM150 and the PSC Momentum), or the Socket Communications SDIO scanner which plugs into any Palm handheld with an SDIO slot, including most current Zire, Tungsten, and Treo models, as well as some earlier models like the m500 and m505. The resulting information can be printed directly in the field, and also HotSync'ed back to the desktop, creating a simple text file (tab-delimited or comma-separated) which can be easily imported into any existing desktop database, spreadsheet, or other business management software.

The complete software package consists of the following items:

- **Order.prc** is the handheld software which is installed into your Palm or Symbol unit.
- **OrderD.prc** and **OrderE.prc** are German (Deutsch) and Spanish (Espanol) versions of the handheld software which is installed into your Palm or Symbol unit. If you want to use one of these instead of the English version, install the relevant version program in your Palm instead of the `Order.prc` file (you'll find these files in the `Foreign Language` folder inside the `Trial` folder). **Please note:** this software is provided as a convenience for our German- and Spanish-speaking customers only. We do not provide the manual in German or Spanish, and we are not able to offer any technical support in German or Spanish.

For **Windows**, the following two additional files are used:

- **TAOConduit.dll** is a "Conduit" which is run by the Palm HotSync Manager when you HotSync the unit; it reads sales data from the handheld unit and transfers it to a file on the desktop where it can be read by existing desktop software.
- **Install.exe** is a special program which must be used just once to install the software, and to notify the HotSync Manager that a new conduit (**TAOConduit.dll**) is now present and must be run when HotSyncs occur.

For **Macintosh**, the following one additional file is used:

- **Take An Order Conduit** is a Macintosh (PowerPC only) conduit which downloads items (catalog data) into your handheld unit, and uploads sales information back to your desktop computer. **Note that use of this software requires use of version 2 of the Palm MacPac software**.

Installation

Windows:

1. Verify that the standard Palm desktop software, including the "HotSync Manager" software, is installed on your computer. If the HotSync Manager is running, you should see a small red and blue icon in the lower right hand corner of your computer screen, showing two arrows in a circular pattern. **If HotSync Manager is not installed or running, do not proceed,** but return to the manual that accompanied your Palm, Symbol, or Handspring handheld unit, and follow the instructions there to properly install the desktop software.

2. Double-click on **Install.exe** to run it. This program will copy all the contents of the folder it is in (including **Order.prc**, **TAOConduit.dll**, and the files containing the manual) into a `Take An Order` folder inside the folder which contains your Palm software (typically `C:\Palm`). **Install.exe** will also arrange for the handheld software (**Order.prc**) to be installed in your handheld unit at the time of the next HotSync, notify the HotSync manager that a new conduit has been installed (you'll see the HotSync manager icon disappear and then reappear as part of this process), and automatically open this manual file when it finishes.
3. Verify that the conduit is properly installed by clicking on the small HotSync icon in the lower right of your Windows desktop (the HotSync icon is a circle with a blue and red arrow facing in opposite directions). From the menu which appears, click on **Custom**. A window will appear listing all of the Conduits which are active on your system. One of these should be "Take An Order". The different settings of the conduit will be described below. For now, click on **OK**, then click on **Done**.
4. Now put the handheld unit in the cradle and perform a HotSync. This will install the software into your Palm handheld device.
5. When the HotSync process is finished, press the HotSync button *again* and perform a *second* HotSync. This HotSync will create the necessary folders which will be used by **Take An Order** to download and upload information to and from the Palm (this will be discussed below).
6. If you need to install the handheld software in additional Palms (which requires that you purchase multiple licenses for the software), use the standard Palm "Install Tool" (accessed from the Install button inside your Palm desktop software) to install **Order.prc** in one or more additional Palms.

If you should ever wish to deinstall the conduit, you'll find a program named **SCS Conduit Uninstaller.exe** inside the `Take An Order` folder which contains the conduit. Run (by double-clicking) the uninstaller and the conduit will be uninstalled.

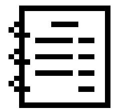
Macintosh:

1. Make sure the Palm desktop software, which includes the Palm HotSync Manager software, is installed on your desktop computer. The Palm desktop software is something that is provided by Palm (or Symbol or Handspring or other Palm licensees), not by Stevens Creek Software. It *must* be installed on your desktop computer prior to continuing with these instructions.
2. Drag the file **Take An Order Conduit** into the `Conduits` folder inside your `Palm` folder (or wherever your Palm software is stored).
3. Start the **HotSync Manager** application (most typically using the "instant Palm menu" on the right end of your menu bar). In **HotSync Manager**, select **Conduit Settings** under the **HotSync** menu. You should now see the conduit named "CatScan" listed. Double-click on it to bring up the settings window. Click the radio button next to the setting which reads **Download New Catalog to Handheld**, and also click on the **Set As Default**. Click on **OK.** Verify at this time that the "Install" conduit is set to "Install files". Close the **Conduit Settings** window by clicking on the close box in the upper left corner.
4. Select **Install** from the **HotSync** menu, click on the **Add To List** button, and use the file browser to locate the file **Order.prc**, and click on **Add File**. Close the **Install Handheld Files** window by clicking on the close box in the upper left corner.
5. Now put the handheld unit in the cradle and perform a HotSync by pushing the button on the cradle. This will install the software into your Palm handheld device, and create the necessary folders which will be used by **Take An Order** to download and upload information to and from the Palm (this will be discussed below).

To de-install the conduit, simply drag it out of the `Conduits` folder.

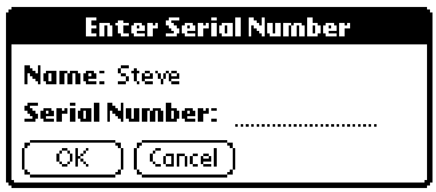
Starting the Application

From the **Applications** window on your Palm device, look for the icon labelled **TakeOrder** which looks like this:



Licensing the Software - Entering Your Serial Number

If you have registered the software, and have obtained a serial number from **Stevens Creek Software**, you enter the serial number by selecting **About Take An Order!** from the **Configure** menu. On the bottom of the information screen which appears telling you about **Take An Order!**, you'll see a **License** button. Tap on that button, and this screen appear:



Use Graffiti (or the on-screen keyboard) to enter your serial number (supplied to you by Stevens Creek Software); when you're done, tap on the **OK** button. If you enter an incorrect number, the software will let you know. If necessary, tap on the **Cancel** button to dismiss the Enter Serial Number screen.

If you have a site license copy of **Take An Order!**, the Name field in the Enter Serial Number screen will also be a dotted line in which you can enter information. In this case, you'll need to enter your "site license name" in that field, as well as the Serial Number in the bottom field.

If you run into a problem, this probably means that when you provided your Palm user name to Stevens Creek Software, you did so incorrectly. Check the name in the Enter Serial Number screen shown above, and write it down exactly (including case, i.e., whether the letters are upper-case letters like THIS or lower-case letters like this) and email it to Stevens Creek Software technical support and wait for a new serial number to be provided to you.

Chapter 2: Setting Up Your Catalog

Setting up a Catalog - Creating a Desktop File

In general, you will want to set up a catalog of items to be installed into your handheld unit. You will be able to add items into the catalog directly on the handheld unit, as described below, but assuming you have a reasonably large number of items, you'll almost certainly want to prepare the catalog on the desktop. Chances are, of course, that you already have a desktop database containing information about your products, so you'll just need to export the required information from that database as described in the next paragraphs.

In order to set up a catalog, you must first prepare an appropriate text file containing the information. This file must be a simple tab-delimited or comma-separated text file, containing one or more columns of information, one line per catalog item. The order of the information is this:

1. The name of the item (REQUIRED)
2. The price (with or without a leading "$", but it MUST have two decimal places at the end, e.g., "14.00" and NOT "14" (OPTIONAL)
3. 0 if not taxable, 1 if taxable (OPTIONAL)
4. 0 if not discountable, 1 if discountable (OPTIONAL)
5. Barcode, up to 13 digits with no dashes or spaces. Note that if you are entering a UPC code, you should enter the 12-digit code, including the "check digit" which is the final number. (OPTIONAL)

Items are "sequentially optional," that is, if any item is present, all preceding items on that line must be present. For example, if you want to specify name, price, and barcode, you must include the 1 (or 0) for taxable and another 1 (or 0) for discountable. If the price is not present, it is assumed to be 0.00. Items are assumed to be taxable and discountable unless specified otherwise.

So each line may look like any of these options (where → represents the tab character):

```
Widget
Widget → 7.95
Widget → 7.95 → 1 → 0
Widget → 7.95 → 1 → 0 → 7559608282
Widget,7.95,1,0,7559608282
```

Each line in the file does not need to be the same; for example you might have barcodes next to most items, but not next to a few.

The order of items in this file is up to you, but once they are installed into the handheld unit, they will be sorted in alphabetical order by the name of the product.

Installing the Catalog in the Handheld Unit

The text file you create must be given the name `Catalog.txt` (Windows) or `Catalog` (Macintosh) (exactly as shown, with an upper-case "C" and the rest of the name lower-case), and it must be placed in a special folder. We'll discuss that folder in the next paragraph, but for now, we'll just note that whenever you HotSync, the **Take An Order Conduit** looks for a file named `Catalog` in the appropriate folder. If the file is found, the contents of that file will be downloaded into your handheld unit to serve as your catalog, either replacing any existing catalog, or being appended to it, depending on how you configure the software. The file will then be renamed as `Catalog.bak` (Windows) or `Catalog (downloaded)` (Macintosh), so that subsequent HotSyncs will *not* reinstall the same catalog, but the file is still there in case you need it. If you later create *another* file named `Catalog` in order to install new information, when *that* file is renamed, the previous backup file will be deleted.

This location of the special folder and the files it may contain will vary from system to system, but a typical setup is shown here, in a case where we are assuming that the handheld unit (your Palm) has the name "Natasha" (folder or directory names are shown in black, and file names in red):

Macintosh

```
Macintosh HD
  Palm
    Users
      Natasha
        Take An Order
          Catalog
          Catalog (downloaded)
          Orders
          Orders01...Orders09
          Summary
          Summary01...Summary09
```

Windows

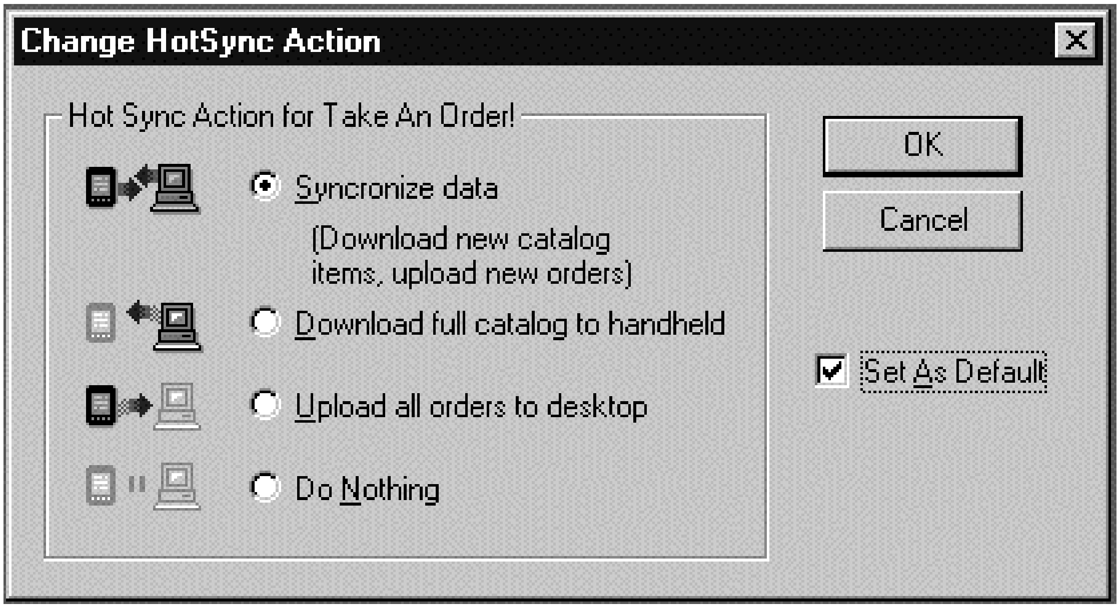
```
C:
  Palm
    Natasha
      Take An Order
        Catalog.txt
        Catalog.bak
        Orders.txt
        Orders01.txt...Orders09
        Summary.txt
        Summary01.txt...Summary09
```

You won't need to create any of these folders (shown in black) yourself. When you install your Palm (or related, e.g., IBM, Franklin, Symbol) desktop software, the main directory (shown as `Palm` above but this name may vary on your system) will be created, and, on a Macintosh, a sub-directory (or folder) named `Users` will also be created. Whenever you HotSync a handheld unit to that desktop computer for the first time, a new sub-folder is then created (shown here as `Natasha`). Note that on a Macintosh, the user's folder always has the same name as the handheld unit, so for example if the name shown on the Palm is "Bullwinkle" the folder will be called Bullwinkle. On Windows, however, the folder name may be different (for example, it might be "Bullwi"). And finally, the first time you perform a HotSync after installing **Take An Order** conduit, the `Take An Order` folder will be automatically created. This means that after installing the conduit (described above), you should do at least one HotSync (to create the `Take An Order` folder) before attempting to install a catalog into the unit (you can avoid this step if you create the `Take An Order` folder yourself). The only thing you as a user will need to be concerned with are the files in that folder (shown in red).

Once you have created the `Catalog` file and placed it in the folder, you need to configure the conduit settings:

Selecting the Conduit Mode

Once you have created the catalog file, you need to set the conduit for the appropriate action. Run the **HotSync Manager** program, and select **Custom** (Windows) or **Conduit Settings** (Macintosh). Double-click on the Take An Order conduit and you'll see a window that looks like this (Windows and Macintosh look slightly different):

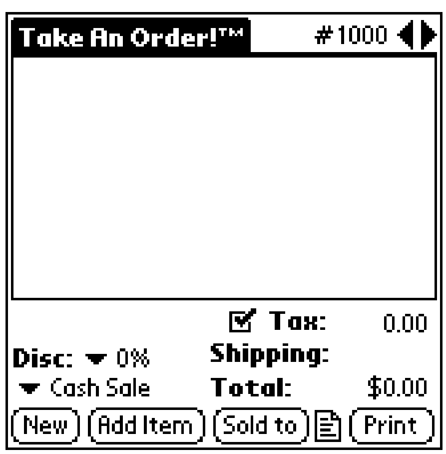


For purposes of downloading a catalog, there are two relevant settings. **Download full catalog to handheld** (labelled **Macintosh overwrites handheld** on the Macintosh) downloads your catalog as is into the handheld unit, replacing any existing catalog (and making any collected orders useless!). **Synchronize** will append the data in your desktop file to an existing catalog on the handheld unit. If you work with very large (thousands of items) catalogs, you will undoubtedly find that appending new items to a catalog is much faster than installing an entire new catalog; with smaller catalogs it won't make much difference.

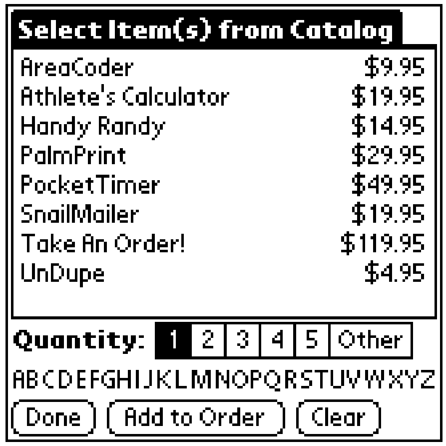
Once you have selected the proper choice and clicked on **OK**, the next time you perform a HotSync the catalog will be installed in your handheld unit.

Creating Catalogs On the Handheld

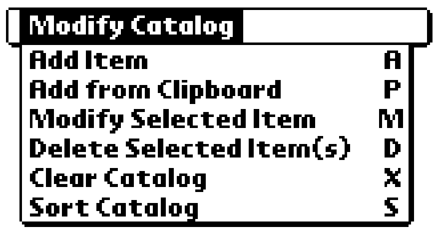
When you launch the **Take An Order!** application, you'll see this screen which is the screen on which orders are normally taken:



Before you create your first order, however, you'll need to set up your product catalog, which contains the items which can be added to your orders. Tap on the **Add Item** button, and you'll be taken to the Catalog screen:

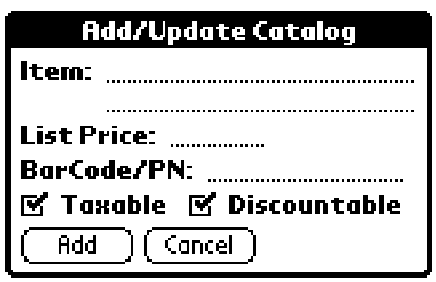


If you haven't created and installed a catalog from the desktop, as described above, you'll see the default catalog (shown above), which is automatically installed to allow you to try out the software. The items it contains are a number of software products from Stevens Creek Software. We'll assume, however, that you want to create your own catalog. Tap on the **Menu** button, and you'll see this menu:



Most of these menu choices are self-explanatory, but we'll explain them anyway:

Add Item brings up this screen which you can use to add an individual item into your catalog:



The catalog lets you enter the name of the item, the list price, a bar-code or part number (PN), and to indicate whether that item is taxable or discountable. If you are using barcode scanning to select items with **Take An Order!**, what you enter in the barcode field must match exactly the number which will be scanned. For example, even though barcodes are often shown in writing with dashes between groups of numbers, typically those dashes are *not* part of the actual barcode which is read by the scanner, so they should not be entered in the BarCode field.

Some items which you may wish to have appear on your order, for example "Installation," don't have a list price. You can leave that field blank to and the list price will be zero; you'll then be able to set that price manually on any particular order.

Add from Clipboard is a way to add items to the catalog in bulk directly on the handheld. Although in general you'll create catalogs on your desktop as described at the beginning of this chapter, this feature does have one important feature - allowing catalog updates to be sent out to the field via email. Create a text file on your desktop which contains the items for the catalog, with tabs separating the fields, and a 0 (or 1) to indicate non-taxable (or taxable) and non-discountable (or discountable). In other words, an individual line in this file will contain the name of the item, a tab, the list price (in the form "xx.yy", i.e., no "$" at the beginning), a tab, a 0 or 1 to indicate taxable status, a tab, a 0 or 1 to indicate discountable status, a tab, and the bar code. Note that all items except the item name are "sequentially optional." This means that you can fill in the item name only (leaving the rest of the line blank), the item name and price (leaving the rest of the line blank), and so on. The price defaults to zero, and the taxable and discountable status discount to 1 (true). Now you can email this file to a salesperson in the field who is receiving email on their Palm (or, if they receive it on their desktop or laptop, they can copy it into a Palm memo and download to the Palm). Now, once it's on the Palm, the user selects the relevant text in either the MemoPad or email application, copies it to the clipboard, and then returns to **Take An Order!** and uses this feature to add the new items to the catalog. Although this same function can be accomplished using Palm's remote HotSync feature, not all users will be able to take advantage of remote HotSync, so this technique offers an alternative.

Modify Selected Item is used to do just that. Tap on an item in the existing catalog so it is highlighted (it will appear in inverse video, white letters on a black background) and then select **Modify Selected Item**. The same dialog shown above will appear, but this time with the existing values filled in. Modify them as you want, and then select **Update** (which appears in place of **Add**) to update the catalog (or **Cancel** to change your mind). Note that modifying an item does NOT affect items which are already on existing orders (which will be described below); it only affects items subsequently added to orders. So you can change the price of an item near the end of the day (for example) without changing the price of the item on orders received up to that point.

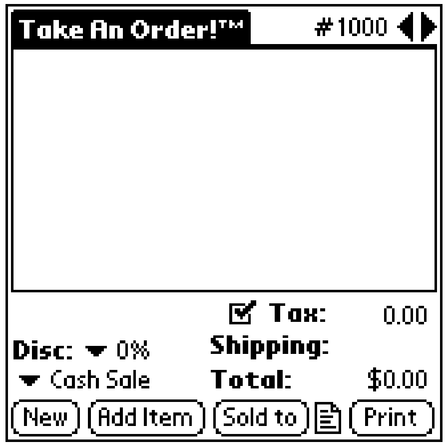
Delete Selected Item does just that; tap on the item to highlight it, then select this menu item.

Clear Catalog is something you'll want to do at first to remove the sample catalog shown at the top of this page; after that you'll obviously want to be more careful about selecting it!

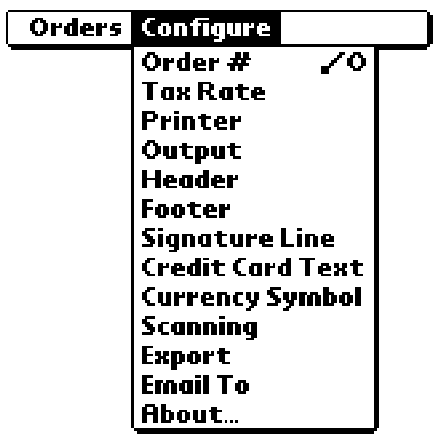
Sort Catalog will only be needed if you have just imported a catalog, and even then, it should happen automatically without you needing to do anything. Likewise, when you create a catalog within **Take An Order!** itself, using either **Add Item** or **Add from Clipboard**, the catalog is automatically sorted into alphabetical order.

Chapter 3: Taking Orders

Once your catalog is configured, let's return to the main screen:



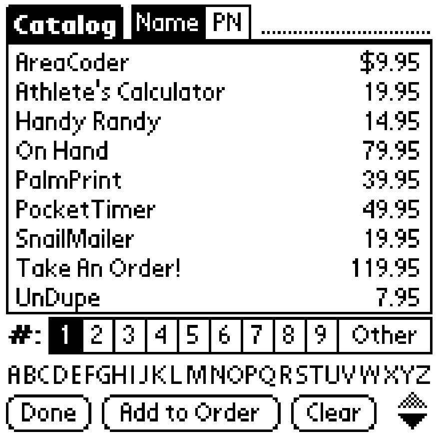
The first thing you'll do is to click on the **New** button to start a new order. If there is a current order that is non-blank (that is, it has some items in it), the order number (shown on the top line of the screen) will increment, and the screen will also be cleared of the existing order.To set the order number to a particular number, after you tap **New**, tap on the Menu button and select **Order Number** from the **Configure** menu (note that instead of tapping on the Menu button, you can also tap on the title "Take An Order!" on the top line of the screen; the menu will drop down just the same way):



This window will appear:

Enter the desired number and tap **OK**. Depending on the system you want to use, you may set this number once only, or once a day, etc. You can only enter numbers to be entered as an order number; letters or other characters are not permitted.

Now you're ready to add items to the order, so tap on the **Add Item** button, and the catalog screen will appear:



To select an item, you simply tap on it. When you do, the item will be highlighted (changed to inverse video, white letters on a black background). You can select multiple items at once simply by tapping on them one at a time (or "tapping and dragging" if they are adjacent to each other on screen). To change the quantity of the item(s) which is (are) selected, just tap on the appropriate quantity; if the quantity is greater than 9, tap on **Other** and a window will appear in which you can enter the actual number. When you have the items and quantity selected, tap on **Add to Order** and the selected item(s) will be added to the order and the selection cleared. You can now select more items if you wish (perhaps with a different quantity), and then return to view the order by tapping **Done**.

If you make a mistake when selecting an item, you can "unselect" (or "deselect") it by tapping on the **Clear** button (which will clear all your selections if you made more than one) or just tap again on a selected item.

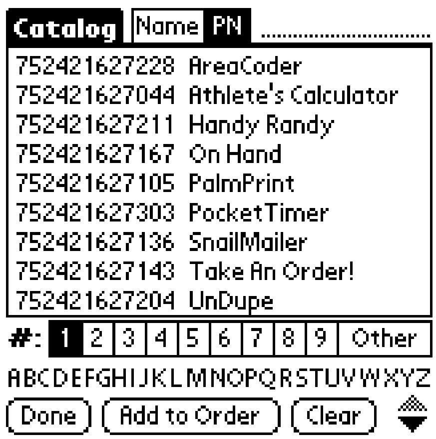
In some cases the limited view of the item on the Catalog screen (a truncated name, or the lack of the part number) may prevent you from deciding if this is the correct item. To view the complete information about any item, you have two options. You can select the item by tapping on it, then select the **Modify Item** menu to view the full details, and finally hit the **Cancel** button on that screen so that you don't really modify the item. A simpler way is to just "double-tap" on the item to bring up the Item Details screen in a "view-only" (editing not allowed) mode. To do this you must tap the same item with the stylus twice within one second. As noted above, to unselect an item, you also tap on an item which is selected, which is quite similar to a double-tap, except that the timing is different. If you tap on an item to select it, and then wait more than one second and tap on the item again, you unselect it. If you wait LESS than one second, the item will pop up in the full detail viewing mode.

When your catalog contains more than 9 items, it will exceed the size of the screen. Two scroll arrows will appear in the lower right of the screen, and you can tap on these to scroll the list up and down. The "hard" scroll buttons on the Palm handheld device will have the same effect. However, you'll find it even easier to find items using **IntelliScroll** (tm), which lets you tap on the first letter of the item and immediately scrolls to that section of the catalog. This is similar to the "Look Up" feature in the Palm Address Book, but doesn't require the use of Graffiti so is much faster in practice.

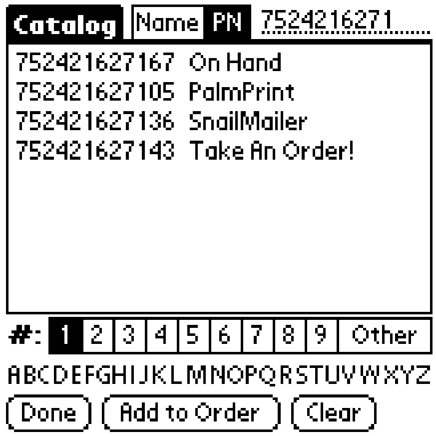
Thus if we tap on "P" (or enter "P" - upper or lower case - with Graffiti), the screen will change to look like the one below; tapping additionally on "A" would then display only "PalmPrint."

Note that this is different than the way some Palm "Look Up" features work; in the Palm Address Book, for example, writing a "P" in the Look Up field will scroll down to the P's but, if you only have a few of those, will also show you the Q's, the R's, etc. **IntelliScroll** will show you ONLY what you are looking for, to make it easier for you to pick them out of the screen.

Some users relate more to part numbers than to item name/descriptions. If this describes you, you can change the catalog screen by tapping on the **PN** button instead of the **Name** button (your choice will be remembered each time you use the catalog). Now the display will change to look like this:



What you see is the part number (or barcode, as in this case) displayed in the first column, and the name of the item displayed in the second column. Now the "winnowing" feature of the display will be active on the barcode/part number field, which may be numeric or may be alphanumeric as you prefer. In either case, enter (using Graffiti or the on-screen alphabet buttons) a part number into the find field, and only matching items will be displayed:



The display and functioning of this screen are affected by the settings on the Configure->Scanning screen (see next section), even if you aren't using the software on a unit with a barcode scanner. If you have "Barcodes are numeric" checked, then the items are sorted in numeric order, and, for example, "1234" will come BEFORE "11111". If the barcodes are of differing lengths, as in that example, then when you use the "winnowing" feature, you MUST enter leading zeroes if you want to search for a barcode whose length is less than the maximum specified. Thus if you specify a maximum length of 5, then you must enter "01234" to see the "1234" barcode; just entering "1" in the search field would display all barcodes matching "1xxxx" which does not include "1234". If you specify a maximum length of 6, you must enter "001234" to find the "1234" barcode;. entering a "1" in the search field would display all barcodes match "1xxxxx".

If, on the other hand, you have the "Barcodes are numeric" box UNchecked, then items in the PN view will be listed alphanumerically, which means "11111" will come before "1234." In this mode, the search is done for characters, not for the numeric value, so entering "1" in the search field will display BOTH "1234" and "11111"; entering "12" in the search field will display just "1234" (or anything starting with "12", which could include "1234" and "12abc" and "123456" etc.). If "Barcodes are numeric" is UNchecked, then the maximum length of barcodes specified on the configuration screen doesn't affect the search for the barcode, but DOES affect the display on the catalog screen (that is, how much of the screen is allocated for barcode display and how much remains for display of the name/description of the item).

When you are done adding items to the order, tap on **Done**. You can always come back to this screen to add more items if appropriate.

Adding Items to the Order by Barcode Scanning

If you have a unit with barcode scanning capability, you don't need to use the catalog screen (accessed by pressing the **Add Item** button) at all. Instead, you'll just point the unit at the barcode of the item you want to add to the order, and press the scan button on the handheld unit (either of the two green buttons on the top of the unit). When you do, assuming you get a valid scan, the software will search your catalog for an item whose barcode matches the scanned item. If one is found, the item is added to the order and the on-screen display of the order is updated. If no match is found, the software will inform you of that fact, and ask you if you want to add the item to the catalog (see below for advice on what to do if you think the item "should have been" in the catalog).

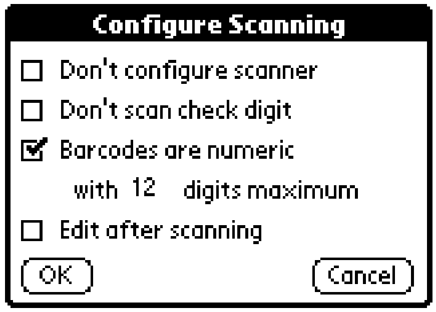
With a Handspring Visor with a plug-in scanner or an SDIO scanner, there is no dedicated scan button as there is on the dedicated Symbol units. Instead, the **Print** button on the lower right-hand corner of the main screen is replaced with barcode scanner icon (with a printer icon to its left, as shown below). You can tap this button directly, or press the Palm MemoPad button (immediately below it) to trigger the scan.

When an item is scanned into your order in this way, it is entered with a default quantity of one. You can change the quantity manually by tapping on the item as discussed in the next section of this manual, and you can also change the number with the barcode scanner. Immediately after you scan the barcode for an item, you can scan a "CODE39" barcode representing a number from 1 to 99. Scans of CODE39 barcodes with numbers between 1 and 99 are interpreted as a quantity, and are used to change the last item entered on the order (to change other items, use the manual method discussed below).

For some users it may be convenient not to carry actual products, but to prepare a printed catalog containing names (and descriptions) of items in the catalog, with bar code numbers adjacent to them which can be scanned in. An example of this technique, which will work with the sample items which are installed in your product catalog when you first install **Take An Order!**, is found in Appendex I of this manual. To see how this concept works, you can print out that page (no, scanning doesn't work off the screen of your computer!) and then use it to scan and select items from our sample catalog. If the idea appeals to you, you might be interested to know that the barcodes on that page were generated online at the Barcode Server, http://www.milk.com/barcode. If your catalog is small enough, or you have enough patience, you can do the same. At the bottom of this same page in the Appendix you'll find numbers from 1 to 4 representing quantity which you can use to scan in the quantity of an item.

Configuring the Scanner

There are several configuration settings for the barcode scanner itself, including one which affects the sorting of the catalog items even on units which do not use barcode scanning. Select the **Configure->Scanning** menu and you'll see this screen:



- **Don't configure scanner: Take An Order!** normally configures the scanner to scan a fixed set of barcode types (UPCA, CODE39, etc.), which should include all the common barcodes, and leaving this box unchecked allows that to happen. For more flexibility in not only what types of barcodes are scanned, but also such things as automatic conversion of UPCE (short) barcodes to UPCA (full) barcodes, you can check the **Don't configure scanner** box. In this mode, **Take An Order!** will allow settings generated by other programs to "carry over" while you are using **Take An Order!**. In particular, **Take An Order!** is designed to work with an external scanner configuring program from **Stevens Creek Software** called **ScanConfig**. For more information about that, see the **ScanConfig** manual. If you have a copy of **ScanConfig** installed on your unit, you can access it to configure the scanner parameters by selecting the **Run ScanConfig** button (instead of the **OK** button) when you are finished configuring this screen [This button won't appear if **ScanConfig** is not installed on your handheld unit].
- **Don't scan check digit** should be checked if your catalog contains barcodes which do not include the check digit (the last digit of certain barcodes such as UPCA), and should be left UNchecked if the barcodes in your catalog are "complete" barcodes. If you have downloaded a catalog, and scanning does not seem to find the item you think it should, an incorrect setting of this checkbox may be the cause. If the **Don't configure scanner** button is checked, then the **Don't scan check digit** button has no effect.
- **Barcodes are numeric:** This checkbox (and the field which follows it) are used to create a database index to provide a speedup in locating items in the catalog when barcodes are scanned. In order to do this as rapidly and efficiently as possible, the software needs to be configured to know something about the barcodes stored in your database - are they numeric, or do they include letters, and, if they are numeric, how many digits do they have? **The setting of this checkbox MUST be done even if you are NOT using a barcode-enabled handheld unit. Also, the maximum number of digits must be set even if the barcodes are NOT numeric; this is required to optimize the display of the catalog screen.**
- **Edit after scanning** will pop up the "item modification" screen (discussed further below) whenever an item is added to the order by scanning. This will allow you to immediately change the quantity (or the discount) of the item. If typical quantities are one, you probably will NOT want to check this box; if typical quantities are more than one, then checking this box will save you a step in order entry.

Item not in catalog?

If you scan an item and are told it wasn't found in the catalog, and you think it "should have been," there can be a number of reasons why:

1. When you loaded the catalog, you included dashes or other characters in the barcode field which are not actually part of the barcode read by the scanner.
2. When you created the catalog file on the desktop and downloaded it into the handheld, you inadvertently included a blank space or spaces at the end of the barcode. These will be installed into the **Take An Order!** catalog, but will probably not match the scanned barcode (unless it too ends with a space or spaces, which is quite rare).
3. When you downloaded the catalog into **Take An Order!**, the file was incorrectly configured and the barcode is in the wrong field.
4. You have configured **Take An Order!** (on the **Configure->Scanning** screen) to ignore check digits, but the barcodes in your catalog include check digits, or vice-versa.
5. You told **Take An Order!** (on the **Configure->Scanning** screen) that the barcodes were numeric with 12 digits, but they really have 13 digits.
6. The barcode read isn't what you expect. This is particularly common with books, which carry a unique "dual" barcode. This barcode can either be read as a "Bookland" barcode, which corresponds to the ISBN number and might look like "0471390879", or as an EAN-13 barcode like "9780471390879." The latter also frequently has something called "supplementals" which encode the price, e.g., "01995." Depending on which barcode scanner you are using, it might be, for example that the default way to read the barcode is as the Bookland code, so if you have the EAN-13 code in your catalog, they won't match. You can gain control over precisely which variation is read by Take An Order! if you configure it (on the **Configure->Scanning** screen) to "Don't configure scanner," and use our **ScanConfig** application to externally, and precisely, configure the scanning options.

No matter what the precise cause of the failure to match the catalog, one method of diagnosis you might want to use it to go to the **Catalog** screen (tap on **Add Item** on the main screen), locate the item in question manually, tap on it to select it, and then use the **Modify Selected Item** menu. Now examine carefully the number in the BarCode/PN field. You can check for trailing (or leading) spaces by tapping in the end (or beginning) field, and observing if the blinking cursor comes out right next to the barcode, or if there is a space there. When you're done checking, make sure to tap **Cancel** if you don't want to change the item.

Viewing and Refining the Order

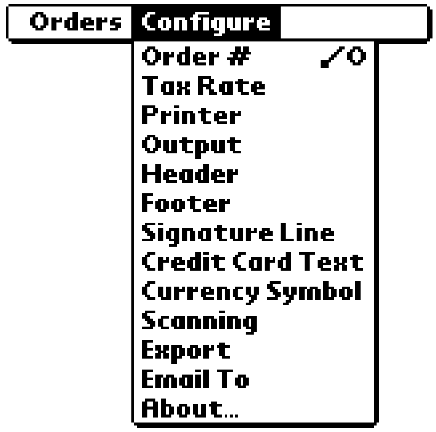
Once the order is taken you'll see it on the main screen above (remember, you can always tap on **Add Item** to return to the catalog to add more items to the order as well). There are several ways in which you can modify this order. **Disc.** lets you set a discount for the order by selecting an appropriate discount percentage from a pop-up list which ranges from 0-25% and includes an "Other" choice so you can enter any other discount percentage (this version will not let you enter a dollar discount, but see below for modifying individual items).

Cost-plus pricing

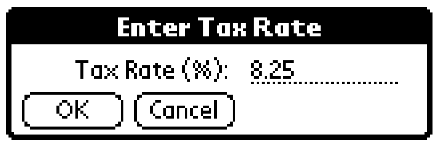
> If you enter a "negative discount" (e.g., -10), the software treats this as a markup from the price stored in the catalog. This allows you to store your cost (instead of a price) in the catalog, and then mark the cost up by fixed amounts to provide a quotation for a customer. Unlike the discount, which appears on the order as a separate line item "Discount," the markup is bundled into the price of each item, so that the price which appears on the order (or quotation) for each item reflects the base cost plus markup for that item (note that markup for each item must be the same in this model, although, as discussed below, the price of any individual item can always be changed on the order itself).

To indicate the type of order, a second popup list appears below the discount line. Tapping on it will show you this list (discussed in more detail below):

If you check the **Tax** box, tax will be added to the order; otherwise it will not. The tax rate is set by tapping the menu button, and selecting **Tax Rate** from the **Configure** menu:



When you select **Tax Rate** you'll see this screen:



Enter the tax rate as a percentage.

To add a shipping charge to the order, tap on the word **Shipping** and a screen will appear into which you can enter a dollar amount for the shipping charge.

Sometimes, you may wish to modify an item in the order. You might want to delete it, change the quantity, or you might want to set a special price for the item for this particular order (as opposed to modifying the price of the item in the catalog itself, which we learned how to do in the previous chapter). To do this, tap on an item in the order and a window like this one will appear:

This screen shows you the item, barcode/PN, and list price of the item, and then the quantity currently chosen in an editable field. To change the quantity, just edit the number shown, either manually (with Graffiti) or by using the up/down arrows to increment or decrement the quantity; when you tap on **Update** the quantity and total price in the order will change (you can also push the up/down scroll button (the physical button) on your handheld unit itself to change the quantities). To provide a special price just for this item (perhaps it's damaged or you just want to offer a special discount on this one item for some reason), you can either fill in the TOTAL price for the quantity of items being ordered on the last line, or you can fill in the "list price" for this item (but don't change both of them), OR you can tap on the Discount button to enter a percentage discount. Tap **Update** when you are done and wish to update the item. Tap **Delete** to delete the item from the order entirely, or tap **Cancel** to change your mind and leave this item unchanged. Note that changing the "list price" does not affect the price in the catalog; it simply has the effect of offering a specific discount for this item on this order.

Note that setting the price to a negative number is NOT allowed, but setting the QUANTITY to a negative number IS allowed. This is the way the software handles returns. If a customer is returning two of an item, add it to the order, then set the quantity to minus two. Setting the quantity to zero will delete that item from the order (as will tapping the **Delete** button, of course).

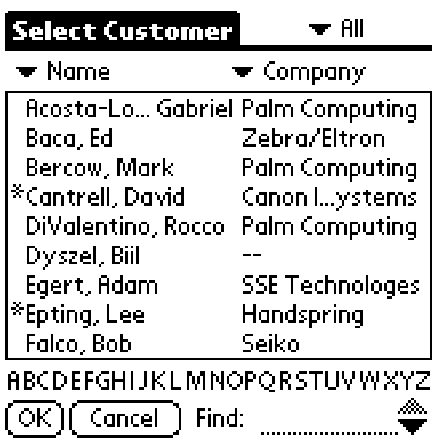
Another use for the **Edit Item** window is with items which are entered in your catalog without a price. For example, you might have an item "Installation" in your catalogwith a price of zero. Select that, then tap on the item in the order and you'll be able to enter an appropriate price for this particular situation, without having a fixed price in the catalog.

Adding a Note to the Order

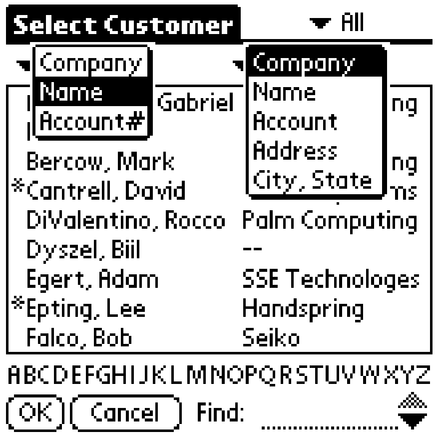
To the right of the "Sold To" button you will see a small "Memo" icon which is provided to allow you to add a memo (note) to the order. Tap on the icon, and a screen will appear, into which you can enter up to 511 characters of text. This text will be printed on the order (if you want it to, as described below) and will also be part of the order when it is uploaded to the desktop, emailed, or transferred to the Palm MemoPad. Note that it IS permissible to have multiple lines of the note, and however you enter the note, that's the way it will be printed out on the receipt. However, when it is uploaded to the desktop, all "new lines" will be replaced by the "\" (backslash) character so that the entire note appears on one line in the upload file.

Method of Payment and Customer

In some situations you'll be taking orders (or issuing quotations or delivery receipts) from customers who are part of a known customer base. If that customer is in the Address Book of your Palm handheld device, tap the **Sold To** button and you'll see this view of your Address Book:



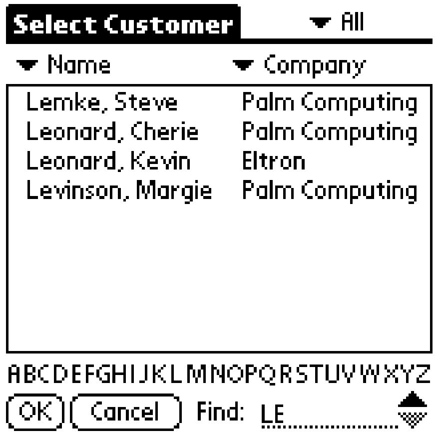
There are two columns of information which are displayed for the names in your Address Book. Both have "popup menus" which let you select what is displayed:



Column 1 is the main "search" field. You can set this column to display the Company, Name (Last name, First name), or Account# (taken from the "Custom 1" field). Column 2 displays one more piece of information (Company, Name, Account, Address, or City/State) which can be used to help you distinguish between similar customers (e.g., multiple customers at the same company). The "*" in column 1 of this screen is used to identify customers who have a "standing order" (see next section).

To provide you with better ability to distinguish between similar entries, "double-tapping" on an entry will bring up this "Details" screen which shows you ALL the information about a customer:

The "Find" field in the lower right of the customer screen, which can be filled in either "by hand" (e.g., Graffiti or the popup keyboard) or more quickly by tapping on the A-Z letters below the names, narrows down the displayed names to only those which start with the contents of the field (that is, if column 1 displays the Company, then only entries in which the company name starts with the letter or letters in the Find field; if column 1 displays the Name, then only entries in which the customer's last name starts with that letter or letters, and if column displays the Account#, then you can enter numbers (using Graffiti) into the Find field to find that Account#). Here, for example, we have tapped on "L" followed by "E" to display only customers whose last name starts with "LE".



Note that the standard "Category" selector in the upper right is also still active and valid in narrowing down the list of displayed choices.

Note that the column 1 "search field" is NOT necessarily the same as the "Sort Order" of the Address Book itself. IF it is (that is, if your Address Book is sorted by Company and you display Company in column 1), then the search will be very fast. If the two do not match, the search will be slower (since the software has to search more diligently through the Address Book), but will still work.

Using custom fields in the Address Book

The Palm Address Book provides four custom fields - "Custom 1", "Custom 2", etc. **Take An Order!** allows you to use two of these fields to enhance its operation. **NOTE:** Earlier and later versions of the Palm desktop software, and versions on different platforms (Windows vs. Mac) have differences in their use of the custom fields. On some of them, Custom 1 has become "Website", while the former Custom 1 field has shifted to become Custom 2, etc. You may need to experiment to determine which field in your Palm desktop software is actually the correct one to match the needs of **Take An Order!**

Customer ID

The "Custom 1" field can be used to contain a "customer #" or "customer ID" that you use in your business to identify a customer. When orders are uploaded from the Palm to the desktop using the HotSync software (see Chapter 6), each order (at least, each order for which a customer has been selected) is labelled with the customer name, company, and whatever information is found in the Custom 1 field. Thus if you put a customer ID# in that field, that information will be attached to the order which is uploaded to the desktop, making it easier to integrate into your desktop software. This feature is specifically exploited by BusinessVision 32 software. The customer # contained in the Custom 1 field will also print out on any receipts, if you configure the software to do so (see below).

If you have any other information written in the Custom 1 field, it will be uploaded with the order, but of course you can ignore it if you are not using this feature of **Take An Order!**.

Standard discount

The "Custom 2" field can be used to contain a standard discount. That is, when you select a customer, the discount setting in **Take An Order!** will be set automatically based on this information. In order to lessen the chance that this feature will conflict with any other information you might store in the Custom 2 field, the discount must end with the "%" character (in other words, if you don't want to use this feature of **Take An Order!**, you can store any other information in Custom 2 that you like, even numbers, and as long as it doesn't end in "%", it won't change the discount when you select that customer). For discounts, the number is positive, e.g., "10%", "2.5%". If you operate on "cost-plus" pricing, the number will represent a markup (a "negative discount"), so the number will be negative, e.g., "-20%". The discount can be specified to three digits, e.g., "10%", "10.1%", "10.01%" or "10.001%". Trailing zeroes need not be included, thus "10%" is just fine, you don't need "10.0%" although that will produce the same result. Note that this discount will be applied to the order when you select the customer, but you can then change the discount (as described above) if appropriate.

"Standing Orders"

Many users call on customers who place similar orders week after week. Furthermore, some users also offer different prices to different customers. Both of these needs can be accomodated with "Standing Orders." A standing order is simply an order you have created within Take An Order!, but then you enter the number of that order in the "Custom 2" field of the Address Book entry for that customer. Now when you tap on **Sold To** from the main screen and select a customer with a standing order, all aspects of that order (not only the items, quantities, and prices of each item but also the discount level, the purchasing method (Cash, Check, P.O., etc.), the taxable status of orders for that customer) are recalled and used to initialize the new order. So now you have only to adust the quantities for those items which have changed, delete any items that the customer doesn't want to re-order, etc., rather than starting with a "blank slate" and having to add each of the customer's items to that order.

If a customer has a standing order but you know in advance that this order will be an exception (perhaps their standing order has 20 items on it and today they are just placing a special order for one item), then you simply first add one or more items to a blank order, and *then* tap on **Sold To** to select the customer. Now the "other" aspects of the standing order (purchasing method, taxable status, etc.) will be copied to the current order, but the individual items from the standing order will *not* be copied.

Because of the way in which order numbering works, the simplest way to work with standing orders is to give them all numbers in a certain, low range, e.g., 100-999, and then start your "real" orders at a number above that. Now, for example, when you want to clear out old orders from your Palm, just tell the software (see elsewhere in this manual) to purge orders with order numbers of 1000 or higher, and all the standing orders will be left untouched.

To create a standing order in the first place, just go through all the normal steps of creating an order, including tapping on the **Sold To** button (if the order number matches the customer's standing order number, then the software is smart enough not to try to "recall" the same order). To modify a standing order, just recall that order and make the appropriate changes.

If the "Custom 2" field ends with the "%" symbol, the field is used to create a standard discount only, as described in the previous section. Thus if you had "10%" entered in Custom 2, selecting that customer would set the discount to 10%. To use the more powerful "standing order" feature, the number entered in Custom 2 must *start* with the "#" symbol. Thus if you set up Order #100 to be the standing order for a customer, you'll need to enter "#100" in the Custom 2 field for that Address Book entry.

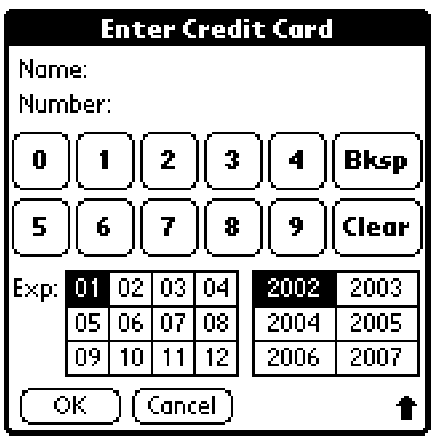
Note that "standing orders" do not have to have actual items on them; it is permissable just to use standing orders to set the "other" aspects for a customer (taxable status, method of purchase, etc.).

Renaming the custom fields

Incidentally, you can rename custom fields (using the standard Palm desktop software) to something meaningful, so if you are taking advantage of the two features described above, you could rename "Custom 1" as "Customer ID" and "Custom 2" as "Std. Discount" or "Standing Order" something similar.

After you select a customer in this way, and the software returns to the order screen, the words **Take An Order!** in the upper left of the screen will be replaced by the name of the customer, or, if the name is blank, the company name, providing visual feedback of the customer selection.

If you are actually collecting payment in a field situation, you'll want to indicate how the order is paid for. From the popup list of choices, select **Cash Sale**, **Check**, **Credit Card**, **Quotation**, **Invoice**, or **Purchase Order ("Purch. Order")** as appropriate. If you select **Credit Card**, a screen will appear in which you can enter the customer's name and credit card number (the name will already be filled in if you selected it from your Address Book as described above:



If you have a separate credit card machine, this won't be relevant, but if you enter a credit card number here, it will print out on the receipt along with a signature line, allowing you to use the **Take An Order!** receipt as a credit card slip which can be signed by the customer.

Using a Magnetic Stripe Reader

Beginningwith version 2.7, **Take An Order!** supports the use of the Symbol MSR 3000, a Magnetic Stripe Reader designed as an accessory for the Symbol SPT17xx and SPT18xx devices. In order to take advantage of this feature, you will need an additional program (sold separately) from **Stevens Creek Software** named **MSR3000** (or just **MSR**). If you have a copy of this program installed in your unit, and if the MSR 3000 if physically attached to your unit, when you select a Credit Card payment in **Take An Order!** you will see a screen advising you to swipe the card (or press a **Cancel** button). If you swipe the card and it reads properly, the name and credit card number will be read into **Take An Order!** and you will never see the screen shown above. If the credit card reads improperly, or if you press the **Cancel** button because the card won't read at all (or for some other reason), then you will be returned to the screen above for manual input of the credit card information.

If the select **Check** or **Purchase Order** as the method of payment, the same form will appear, labelled "Enter Check#" and with the expiration date month and year choices missing. Now you can enter a name (if it's not already entered) and the check number or purchase order number. Unlike credit card entries, which are verified for the correct digits, you can enter any numbers at all as a check number or purchase order number.

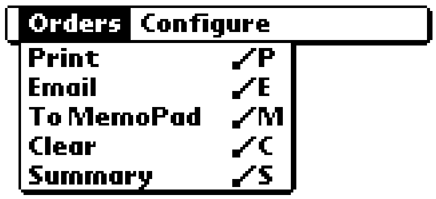
Scrolling Through Your Orders

Use the left and right arrows in the upper right hand of the screen to "scroll through" your orders, or, if you are using a handheld with a "5-way navigator," use the left and right buttons to move backwards and forwards through the orders (or, just use the **Configure->Order#** menu if you know which order you want to look at). There is no "search" facility provided to allow you to search for a particular order.

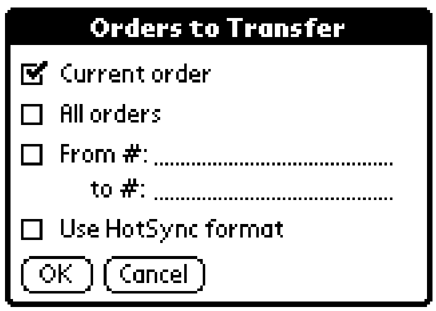
Chapter 4: Creating Receipts

Take An Order! allows you to print your receipts directly to a printer (this requires a copy of **PalmPrint** from **Stevens Creek Software** which does the actual printing). You can also transfer one or more orders to a memo in the Palm MemoPad application, or to the outbox of several email programs.

Select the type of output you want from the **Orders** menu - **Print**, **Email**, or **To MemoPad**:



In each case, you'll see this screen which allows you select what orders you want to output:



You can check just the **Current Order**, **All Orders**, or orders in a certain range of order #'s. In the last case, you don't necessarily have to fill in both lines. Filling in just the **From** line and leaving the **To** line blank will print all orders with a certain number of higher, that is, **From** the specified number on up. Conversely, filling in just to **To** line will output all orders whose order number is less than or equal to the specified number.

For printing only, there is also a **Print** button on the lower right of the main order screen. Tapping that **Print** button is equivalent to selecting the **Orders->Print** menu and then selecting **Current Order** (**Note:** on a Handspring Visor with a plug-in barcode scanner module, this button is changed to be a **Scan** button to trigger the scanner, so you must use the **Print** menu to print).

If you are transferring the orders to your email software (see below for more details) or to the MemoPad, the **Use HotSync format** checkbox appears as part of this screen, as shown above. If this box is UNchecked, the order is transferred in a "receipt-like" format, similar to the printed receipt although not identical (for example, the headers and footers are omitted). In this box is checked, then the format is identical to that used when the orders are uploaded to your desktop using HotSync.

If a summary of orders is displayed on screen (which you do by select **Summary** from the **Orders** menu) when you select **Print**, **Email**, or **To MemoPad** from the **Orders** menu, you will not see this screen; instead, the summary will be printed, emailed or transferred to the MemoPad.

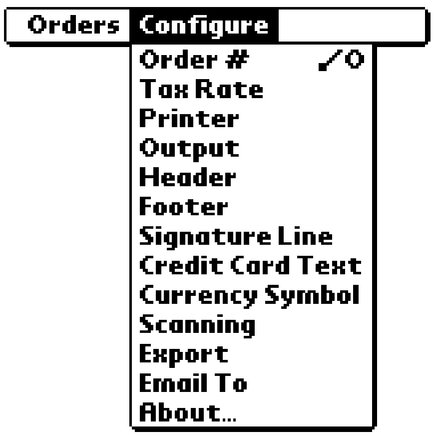
Printing

Take An Order! uses **PalmPrint** from **Stevens Creek Software** to do its actual printing. **PalmPrint** has its own manual, and you'll want to read that before doing any printing from **Take An Order!** You'll need to run **PalmPrint** once and configure the type of printer you're using (HP, Canon, etc.) and the method you're using to print (infrared or serial printing), as well as some other items, including the number of characters per line of the printer you are using and the number of lines per page. Having set these parameters, you won't need to do so again unless the situation changes, and you won't need to return to **PalmPrint** itself unless you want to use its functionality directly (to print a memo, for example) or unless you need to change one of the printer parameters.

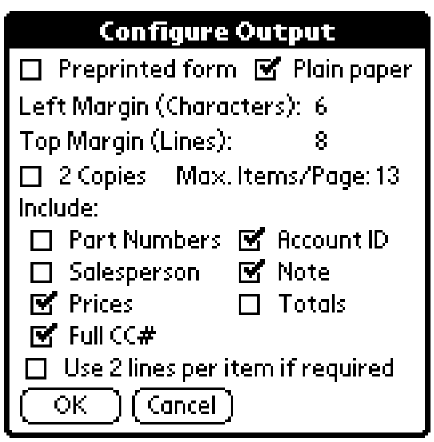
Take An Order! prints in two different ways - on plain paper, or on preformatted forms on which you have printed your company logo, etc. The current version of the software requires preformatted forms to confirm to specific requirements.

Configuring the Output

Configuration of the receipt printout, as well as the export of the orders to the MemoPad or Email, is done using the **Configure** menu on the main screen:



Select **Output** and you'll see this window:



Your first choice is between a preprinted form and a plain paper form; check the appropriate box. In almost all cases this will be "Plain Paper"; "Preprinted Form" applies ONLY to a special preprinted form designed by Stevens Creek Software. You also set the left margin (in numbers of characters) and top margin (in lines). As with the settings in **PalmPrint**, you probably won't need to change these once you have set them correctly.

There are seven optional items to add to (or suppress from) the output, depending on the presence (or absence) of a corresponding checkbox:

- **Part Numbers**: the barcode or part number will be printed just before the name/description information, separated by a space (in the case of printed output) or a tab or comma (in the case of the saving the order to the MemoPad or Email).
- **Account ID:** prints the information from the Custom 1 field of the selected customer, assuming a customer has been selected for the order from the Address Book and assuming the Custom 1 field of that customer is not blank.
- **Salesperson:** will include a "Sold By" line in the header of the order, and will take the information from the HotSync name of the handheld unit.This will enable you to identify which handheld unit was used to make the sale when looking at the printed or emailed output.
- **Note** prints the optional note you have added to the order (you might want to NOT print the note, for example, if you use the note feature to make notes to yourself about the order, like "Be sure to check this guy's credit!").
- **Prices** prints the prices for individual items on the receipt.
- **Totals** prints the totals (and subtotals, tax, discount) on the order.
- **Full CC#** prints the entire credit card number on the receipt; if unchecked, the receipt will display a series of "X's" and then the last four digits of the credit card and its expiration date.

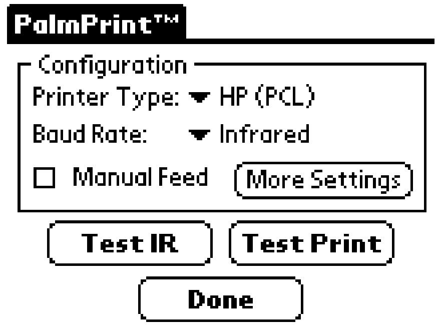
You can also specify whether you want to use up to two lines to print any item. Normally, the item name/description will appear on just a single line, truncated if it is too long to fit in the space available on your output. With the **Use 2 lines per item if required box checked**, longer items will wrap around and be output on two lines. You can also specify whether you want **2 Copies** of the receipt to print (or just one).

If you are printing on preprinted forms (a feature which is being discontinued), there is one additional item to configure - the **Max. # Printed Items**. After the "header" on the preprinted form, there are a fixed number of lines for printing out items on the order; at the end appears the tax, shipping, and total. The maximum number of lines available for printed items will be 13 if your preprinted form is designed to be a half-sheet of 8 1/2 x 11 paper, and 39 if your preprinted form uses a full 8 1/2 x 11 sheet (these numbers may vary depending on form design; adjust as appropriate).

If you are printing on plain paper, there are four additional things for you to configure - the **Header** (the fixed information at the top of the receipt), the **Footer** (the fixed information at the bottom of the receipt), the **Signature Line** and **Credit Card** text (additional information that prints at the bottom when the sale is a credit card sale), and the **Currency** symbol. To access and configure each of these items, select the corresponding menu item from the **Configure** menu. The currency symbol is limited to 3 characters maximum (e.g., "USD", "Dm", "$"). Note that **PalmPrint** is unable to print certain international symbols (for example, the Yen symbol) which can be input on the Palm, so if you want the printout to be correct, you are limited to "normal" A-Z characters (upper or lower case) plus a handful of other characters (such as "$").

The **Footer** is typically configured to print a statement like "Thank you for your order" or "All quotations valid for 30 days" or whatever you would like to print at the bottom of the page. It's also possible for you to change the text for each order, if you want some sort of custom note printed at the bottom of a particular order. Just remember that that text is NOT saved as part of the order, and anything you enter will remain to print out on subsequent orders unless you change it.

Finally, the very first time you are using your handheld for printing, you should select **Print** in the **Configure** menu to configure the printing portion of the software. On the screen you will see a modified view of our standard **PalmPrint** software, that looks like this:



Configure the printer type, baud rate, and other parameters (found by tapping on **More Settings**), perform a **Test Print** if you like, and tap **Done** to return to **Take An Order**. Note that, on the **More Settings** screen, the left and top margin settings are overridden by the settings within **Take An Order** (on the **Configure Output** screen), so don't worry about those (insofar as printing receipts from **Take An Order** is concerned).

Printing the Receipt

When an order is ready, tap the **Print** button under the order and a copy (or two, depending on your settings) of the order will print, assuming that the handheld unit and the printer are in contact (for IR printing, this means that you are pointing the IR port at the top of the handheld unit towards the IR port of your printer; for serial printing, it means that you have connected a cable between your handheld unit and the printer).

Emailing Orders

Instead of (or in addition to) printing orders, you may wish to email your orders somewhere. **Take An Order!** will create a single email per order (limit: 4000 characters) when you select the **Orders->Email** menu. As noted above, you can either email orders in a "normal" (receipt-like) format, or in "HotSync format" which duplicates the format used when orders are uploaded to the desktop using HotSync.

To automatically set the "To" line of the email, use the **Configure->Email To** menu. The subject is always set to "Order #nnn." Of course, you can change the To and/or the Subject (or the body of the email for that matter) before actually sending the email.

If you have a Palm VII, **Take An Order!** places the order in the outbox of the iMessenger application. It does *not* send the email; you need to switch to the iMessenger program and do that yourself by tapping **Check & Send**. If you have a Kyocera 6035 Smartphone, or any other Palm with the Eudora email software installed, **Take An Order!** places the order in the outbox of the Eudora application. If you have a Palm with the email software **VersaMail** installed (newer devices from PalmOne come with **VersaMail**), **Take An Order!** places the order in the outbox of the **VersaMail** application. If you have a Palm with the email software **M/S Mail** from Mark/Space (www.markspace.com) installed, **Take An Order!** places the order in the outbox of the **M/S Mail** application. In all these cases, the email is *not* automatically sent; when you want to send the emails, you need to switch to the email application and use the "Send" function of that software. Finally, with any other Palm which has the standard Palm "Mail" program installed, the order is placed in the outbox of the standard Palm **Mail** program, from where it can be transferred to the outbox of your desktop Email program by the next HotSync. Note that if you have a Palm i705, neither iMessenger or Mail is present, and you must install an additional program such as **M/S Mail** for this feature in **Take An Order!** to be useful.

With all of the other email applications mentioned in the previous paragraph, **Take An Order!** transfers the order to the outbox of the email program and remains in the **Take an Order!** application. Because of a bug in newer versions of **VersaMail**, this is no longer true if you are using that email application, which comes with all current generation PalmOS models. In that case, you end up inside the **VersaMail** application at the end, and must return to **Take An Order!** yourself. Because of that limitation, when transferring orders to **VersaMail**, you can only transfer the current order; with other email applications, you can transfer multiple orders into multiple outgoing emails in one operation.

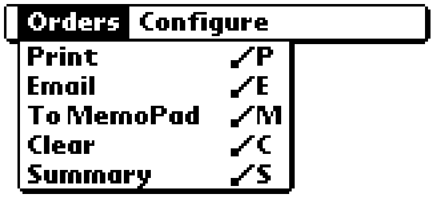
Transferring Orders to the MemoPad

Selecting **Orders->To MemoPad** lets you transfer one or more orders to the Palm MemoPad. A single memo is limited to 4000 characters, but the software will create multiple memos as needed.

Chapter 5: Order Summaries

When you take an order with **Take An Order!**, the information is automatically recorded.

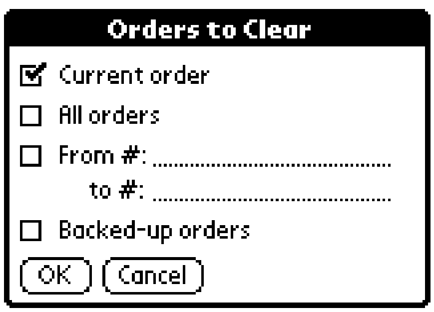
In order to review existing orders, tap on the menu button and select the **Orders->Summary** menu:



The order # in the upper right of the screen will be replaced by the word "Summary". To return to a display of the current order, just tap on the word "Summary".

Clearing Orders

Order summaries always reflect all orders stored in the unit. To clear out old orders so that the summaries reflect only current orders (perhaps today's sales, select **Clear** from the **Orders** menu. You'll typically do this after you have transferred your stored orders to your desktop, and wish to start a new "batch" of orders on your handheld unit. You might do this every day, at the end of a trade show or business trip, or at other times. When you select **Clear**, you'll see this screen:



As you can see, you can check one of four options. **Current order** clears the current order (perhaps you made a mistake, or the customer backed out of the sale). **All orders** clears (purges) all orders (after asking you for a confirmation) from the handheld unit. **Backed-up orders** clears only those orders which have already been backed up to the desktop. And **From...to** lets you specify starting and ending order numbers to clear (as noted above, it's ok to fill in just the "From" or just the "To").

Chapter 6: Uploading Information to the Desktop

Order information (individual orders and summary information) is uploaded to your desktop using the HotSync process. When you are ready to upload inventory from the handheld unit to the desktop, you need to configure the HotSync settings. Bring up the settings window as described in Chapter 2. There are two settings which are relevant. **Synchronize** uses the standard "Palm paradigm" and uploads only the orders from the handheld unit which have been changed since your last HotSync. **Upload All Orders to Desktop** uploads *all* the data which have been collected on your handheld unit, whether or not it has been changed since the last HotSync. Of course, if you want to temporarily disable the conduit, you can also select **Do Nothing** from the configuration window.

In either configuration, whenever you transfer data back to the desktop, it is written into a text file named `Orders.txt` (Windows) or `Orders` (Macintosh), which will be located in the `Take An Order` folder described in Chapter 2. This file can then in turn be imported into other desktop software (or into any database, spreadsheet, or even word processor). Each time you HotSync, the previous file is renamed, from `Orders` (or `Orders.txt`) to `Orders01` to `Orders02` and so on up to `Orders09`. Thus you will always have available not only the most recent orders list but the previous nine lists as well, just for safety. Optionally, the conduit will also write the order summary information info a file named `Summary` (which is similarly renumbered).

Tip: You may be using some other desktop software to import the information from the `Orders` file and merge it with your corporate data. You may wish that the `Orders` file were placed in the same folder as your other files, rather than in the `Take An Order` folder where it is uploaded. The solution is simple. Just create a shortcut (Windows) or alias (Macintosh) and place that shortcut in the folder where you would like the information to be found. Because of the way the files are renamed (described in the previous paragraph), your alias will always point to the latest `Orders` file, and you'll be able to access it as if it were in your desired folder.

Uploading the Catalog to the Desktop

In most cases, the catalog of items is downloaded from the desktop, so there is no reason to go in the other direction. However, some users find it desirable to enter items into the catalog on the Palm, and want to back those up. In versions prior to 2.4, this was not done at all. Starting with version 2.4, if the conduit is set to **Upload All Orders to Desktop**, then the complete catalog is ALSO uploaded to the desktop, to a file named `Catalog.bak` (Windows) or `Catalog (Downloaded)` (Macintosh). Note that these "backup" names are deliberately chosen so that the catalog will not be immediately reloaded back into the Palm during the next HotSync; they are on the desktop only as backup files. To download them again into the Palm (should something happen to the Palm) they need to be renamed as `Catalog.txt` or `Catalog`, respectively.

In the **Synchronize** mode, this feature is NOT active, and CHANGES to the catalog are not uploaded. Only the complete catalog can be uploaded, which is done by selecting the **Upload All Orders to Desktop** mode.

Configuring the Export File

The actual data which is sent back to the desktop is controlled by the **Export** item in the **Configure** menu. Selecting that menu will display the screen below, which will allow you to configure the exported `Orders` file in exactly the way you need it for subsequent use on your desktop.In the

"Separator" section, you can choose between having items separated by tabs or commas.

If you check **Export orders**, then the `Orders` file is uploaded to the desktop. If you check **Export summary**, then the `Summary` file is uploaded to the desktop. You can check one or both of these boxes, as you prefer. And finally, if you check **Clear orders after export**, the orders on the handheld unit are deleted after the HotSync process is complete. Obviously, this option is fraught with peril, and you should definitely NOT select it until you are ABSOLUTELY SURE that the HotSync process is working properly and uploading your orders as you expect. You can always clear the orders on the handheld unit from within **Take An Order!** itself (running on the handheld).

Format of the Orders File

The `Orders` file is uploaded in a format designed to be readable by desktop databases. We show the items here in tab-delimited format, but as outlined in the previous section, they can just as easily be exported in comma-separated (CSV) format. This section outlines the contents of the file.

First, an example of a typical (albeit short) file (the represents the tab character):

```
1000	ORDER
1000	DATE	4/21/99, 10:22 PM
1000	AMOUNT	59.85	0.00	4.94	0.00	64.79
1000	PAYMENT	Cash
1000	CUSTOMER	Wiley-Bunnell, Jeansie	Canon Information Systems
1000	ITEM	1	3	59.85	SnailMailer	752421627136

1003	ORDER
1003	DATE	4/26/99, 11:58 AM
1003	AMOUNT	24.80	0.00	2.05	0.00	26.85
1003	PAYMENT	Credit Card	4123456789012345 01/00	Stephen Brown
1003	CUSTOMER	Brown, Stephen	Palm Computing	13246
1003	NOTE	This is a note\with a second line
1003	ITEM	1	1	9.95	AreaCoder	752421627228
1003	ITEM	2	3	14.85	UnDupe	752421627204
```

Now for the explanation of each item on each line:

1. The first field on each line is the **order number**; different orders are separated by a blank line for human readability.
2. The second item on the line is an **identifier** which describes the information on the remainder of the line. Possible identifiers, and the information which follows that identifier, are:
   - **ORDER** - A new order follows (the preceding blank line, or the top of the file, can also be used to identify the start of a new order, as can the change of number in column one, so this line is largely redundant, but is provided to make it easier to write a macro or the like which imports the data into another database)
   - **DATE** - Date and time of the order follow in a single field, with a comma and a

space in between, in a format determined by the system settings of the desktop computer

- **AMOUNT** - Five numbers follow this identifier. Each number is expressed as a real number with two decimal places, in the currency in which the order was taken. In order, they are:
    - **Subtotal** (gross price)
    - **Discount**
    - **Tax**
    - **Shipping**
    - **Total** (net)
- **PAYMENT** - Indicates the type of payment that was chosen for the order - Cash, Check, Credit Card, Quotation, or Invoice.If payment form is by Check, two additional fields follow - the check # (if recorded) and the name of the customer (also if recorded). If payment form is by credit card, again two additional fields follow - the credit card number and expiration date (separated by a space), and the customer name.
- **CUSTOMER** - Customer information. Three additional fields follow:
    - **Customer name** (last name, first name)
    - **Company**
    - **Customer ID**, taken from the "Custom 1" field of the Palm Address Book. Since we don't upload ALL the information from the Palm Address Book about each customer with each order, the presence of this Customer ID field, if you choose to use it, allows you to cross-reference the customer with some ID in the customer database you maintain on your desktop. You need only make sure that the ID is downloaded into the Palm in the "Custom 1" field (which you can rename "Customer ID" or anything else appropriate).
- **NOTE** - The note attached to this order. If there is no note, this item will not appear in the output file. If there are multiple lines as part of a note, then the "newline" character (return or return plus line feed, depending on whether you are using Macintosh or Windows) is replaced by a backslash "\" character so that the entire note will appear on one line in the Orders.txt file.
- **ITEM** - Information about each item on the order:
    - The **Item #** (a number from 1 to N which simply shows which is the first item on the order, which the second, etc.
    - The **Quantity** of items ordered
    - The **Total Price** for the total quantity of the item. We do not show the list price since you presumably have that in your catalog, and we don't bother to show the unit price (which you might have adjusted for this particular item on the order), since that would be nothing more than the Total Price divided by Quantity.
    - The item **Name/Description**.
    - The **BarCode** (or part number, if you filled the BarCode field with a different kind of number). This allows you to cross-reference this item into a desktop database.

Format of the Summary File

The `Summary` file is also uploaded in a format designed to be readable by desktop databases. We show the items here in tab-delimited format, but as outlined in the previous section, they can just as easily be exported in comma-separated (CSV) format. This section outlines the contents of the file.

First, an example of a typical (albeit short) file (the represents the tab character):

```
1→AreaCoder→752421627228→9.95→9.95
```

```
1	Athlete's Calculator	752421627044	19.95	19.95
4	Handy Randy	752421627211	14.95	59.80
3	PocketTimer	752421627303	49.95	149.85
239.55	Subtotal
0.00	Discount
19.76	Tax
0.00	Shipping
259.31	TOTAL
64.73	Cash Subtotal
0.00	Check Subtotal
0.00	Credit Card Subtotal
0.00	Quotation Subtotal
194.58	Invoice Subtotal
0.00	Purchase Order Subtotal
```

At the top of the file, each item in the catalog is listed, with the quantity, item name/description, barcode, list price, and the total dollar (or other currency) amount sold. Note that because some items are sold at a discount, the quantity times the list price will NOT necessarily equal the total dollar amount sold.

After all the items, come a series of items, each with an amount leading off the line and then the description separated by a tab (or comma). This section should be self-explanatory.

Automatic Program Execution

Yet another feature of the conduit allows you to automatically execute a program (Windows) or AppleScript (Macintosh) following the upload of the data. On Windows, create a file named `OnUpload.txt` inside your `Take An Order` folder. The contents of that file should be a single line of text, containing a typical Windows command line (such as might be entered using **Run**), for example, `Notepad C:\Palm\Natash\Take An Order\Orders.txt` (which would automatically open the newly uploaded `Orders` file using the Notepad application). Of course, if you want to execute more than one command, you can simply make a batch file of commands, and use your one command to execute the batch file. On a Macintosh, the file is named `OnUpload` and should be an executable AppleScript file; anything you can do with AppleScript can be used in this file. The creation of suitable batch files and AppleScripts is left as an exercise for the reader.

Appendix I: Notes on the Socket Communications SDIO Scanner

There are several special things to note about the use of **Take An Order!** in conjunction with the Socket Communications SDIO scanner.

Requirements

The SDIO scanner works on all Palm OS 4.1 and higher devices (through 5.x; not including the as-yet-unreleased PalmOS 6.x at this time). It requires a Palm handheld device with an SDIO slot, which include (as of this writing) the following Palm devices: Zire 31, Zire 71, Zire 72, Tungsten C, Tungsten E, Tungsten T, Tungsten T2, Tungsten T3, Tungsten W, Treo 600, m125, m130, m500, m505, m515, and i705. Some of these devices (e.g., the m-Series) were originally released with PalmOS 4.0; they must be upgraded to PalmOS 4.1 before attempting to use the SDIO scanner (this update is available at no charge from Palm).

Insertion of the Scanner

Different Palm devices have differing orientations of the SDIO slot. In the newer devices, like the Tungsten T3 shown below on the left, the slot is "normal", and the SDIO scanner is inserted as shown in the picture, with the word "Socket" facing the user. Some of the older devices, like the m505 shown below on the right, have a "reversed" slot, so the SDIO scanner must be inserted with the word "Socket" facing *away* from the user. Also, depending on the physical characteristics of the individual device, it will be preferable on some (as shown on the T3 below left) to include the rubber "collar" on the SDIO scanner; on others, as on the m505 shown below right, it is essential to *remove* the collar, because with it in place the scanner will not fully insert into the slot.

Left: Tungsten T3 with Socket Communications SDIO scanner inserted in the "normal" configuration
Right: Palm m505 with SDIO scanner inserted as required in the "reverse" configuration

Scanning Tips

Here are some tips provided by Socket for obtaining the best scanning performance from the SDIO Scanner. Note in particular the non-intuitive suggestion #4.

1. The SDIO scanner is not a laser, it's a camera. While users of laser scanner are used to sweeping the laser beam across the bar code, the red aiming beam of the SDIO ISC must be held reasonably steady on the target for a short period of time while the camera focuses and captures a clear image. This time should not be more than a quarter to a half of a second.

2. The red light from the SDIO scanner is simply an aiming beam - it doesn't add any auxiliary lighting to the the target bar code. Like any camera, the target must be fairly well lighted by ambient lighting in order to get a clear picture. The SDIO ISC works better when the target bar code is well lighted.

3. Like all cameras, the SDIO ISC has a "focal length" (minimum and maximum distance from the target) where the captured image will be clearer. While the focal length of the laser is quite large, the focal length of the SDIO scanner is pretty small by comparison. For best results scanning 'normal' sized bar codes, the SDIO scanner should be held from about 4 to 7 inches (10 to 18 cm) from the target.

4. Just like the laser scanner, the SDIO scanner should **NOT** be positioned at exactly 90 degrees (perpendicular) from the target bar code, but at least 15 degrees above or below the target.

Configuring the Scanner

As of this writing, our **ScanConfig** program does not work with the Socket SDIO scanner. However, Socket provides a somewhat similar program (with more limited functionality) called **SocketScan**. If you want to override the default barcode choices of **Take An Order!**, use the Configure->Scanning menu in **Take An Order!** and check the "Don't Configure Scanner" box. In that case, the configuration you set up with **SocketScan** will remain in effect when **Take An Order!** is operating. Note, however, that regardless of the "scan trigger" you select in **SocketScan**, **Take An Order!** will override that choice, because it is "hard-coded" so that the MemoPad button is used to trigger the scan (you can also tap the on-screen button if you prefer).

Appendix II: Sample Catalog

Stevens Creek Software
Product Catalog

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7 52421 62710 5

PalmPrint ($39.95) Print directly from your Palm Computing handheld computer to a wide variety of printers, via infrared or serial (cable not included).

SnailMailer ($19.95)
Mailing list manager for the Palm Computing platform. Print out batches of envelopes or sheets of mailing labels. Saves up to eight different mailing lists. ***Requires PalmPrint to function.***

7 52421 62713 6

7 52421 62714 3

Take An Order! ($119.95)
Take orders (or issue quotations, bids, estimates, delivery reports, etc.) and print receipts in field situations. *Includes a free copy of* ***PalmPrint*** *software.*

UnDupe ($7.95)
Removes duplicates that can occur in the Palm databases (Address Book, Date Book, etc.). *An essential tool for every Palm owner!*

7 52421 62720 4

7 52421 62722 8

AreaCoder ($9.95)
Area Codes are constantly being added and your Address Book becomes incorrect whenever they are. AreaCoder goes through all the phone numbers in your Address Book and updates them for you.

Select Quantity:

1 **3**

2 **4**

Handheld Solutions to Real-World Problems.SM

Technical Support

If you need technical support for **Take An Order**, we encourage you to do so by email at supportmail@stevenscreek.com. You can also call Stevens Creek Software technical support at 1-408-725-0424 during regular business hours (9:00 a.m. - 5 p.m. Pacific time, M-F).