



NewOrder

User Manual

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1. Introduction

NewOrder is an ideal tool to help you manage product catalogs, prepare new orders and keep track on issued orders. You no longer need a notebook PC and wait a few minutes to see the mouse pointer appears on the screen. Your Palm is always ready to serve you in seconds.

You can prepare orders right at the place you need it. It would be easy to capture your client's needs immediately without getting back to the office. It would be easy to replenish consumables accurately when you are reviewing the stock. It would be easy to verify those delivered items effectively as you always have the placed order details on hand.

If you need to place different orders to suppliers in a regular basis, NewOrder can let you work even more efficiently. Perhaps, NewOrder can bring new order to your life.

2. Basic Concepts

a) Catalogs

In NewOrder, all orders are going to be prepared from product catalogs. A typical product catalog can be regarded as a list of products available for our selection when placing an order. Product catalogs can be entered to NewOrder as Catalog. Depending on the nature of the product, the number of items in a catalog varies. A simple product catalog that comes with not so many items can be a simple item list. For example, a catalog for a few types of papers may look like below:

Catalog:

Paper

Paper

▼ (No Order)

▼ All

DESC

A4 Paper

A3 Paper

B6 Paper

Letter

Foolscap

QTY

New

All

Order

Det

Export

However, if a catalog comes with more items, it would not be easy to deal with a long list of items. It is common to have common items grouped under certain title for easy lookup and reference. When the product catalog is being entered to the NewOrder, the Catalog may consist of corresponding Categories and Subcategories. In other words, items can be properly classified into a two levels of categories. For example, a typical catalog may look like below:

Catalog: Food
Fresh

Vegetables

Cauliflower
Cucumber
Eggplant
Lettuce
Tomato
Onion

Fruits

Apple
Lemon
Orange
Plum
Strawberry
Watermelon

Dairy

Butter
Cheese
Milk
Yogurt

Food	(No Order)
▼ Fresh	▼ Vegetables
DESC	QTY
Cauliflower	
Cucumber	
Eggplant	
Lettuce	
Tomato	
Onion	

Food	(No Order)
▼ Fresh	▼ Fruits
DESC	QTY
Apple	
Lemon	
Orange	
Plum	
Strawberry	
Watermelon	

New All Order Det Export

New All Order Det Export

Food	(No Order)
▼ Dairy	▼ Unfiled
DESC	QTY
Butter	
Cheese	
Milk	
Yogurt	

New All Order Det Export

b) Orders

Once catalogs are properly entered to NewOrder, orders can be prepared from catalogs. Based on a catalog, required items from the catalog can be selected by specifying the required quantities accordingly. For example, an order made from the Food catalog:

Order: Oliver
Fresh

Vegetables

Cauliflower
Cucumber 2
Eggplant
Lettuce 1
Tomato 4
Onion 1

Fruits

Apple
Lemon 2
Orange 8
Plum
Strawberry
Watermelon

Dairy

Butter
Cheese
Milk 4
Yogurt 7

Food	Oliver
▼ Fresh	▼ Vegetables
DESC	QTY
Cauliflower	-
Cucumber	2
Eggplant	-
Lettuce	1
Tomato	4
Onion	1

Food	Oliver
▼ Fresh	▼ Fruits
DESC	QTY
Apple	-
Lemon	2
Orange	8
Plum	-
Strawberry	-
Watermelon	-

New All Order Det Export

New All Order Det Export

Food	Oliver
▼ Dairy	▼ Unfiled
DESC	QTY
Butter	-
Cheese	-
Milk	4
Yogurt	7

New All Order Det Export



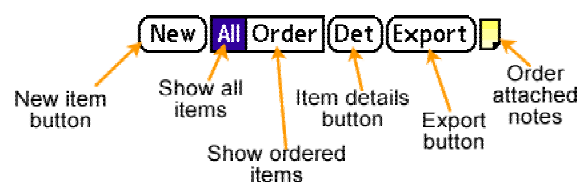
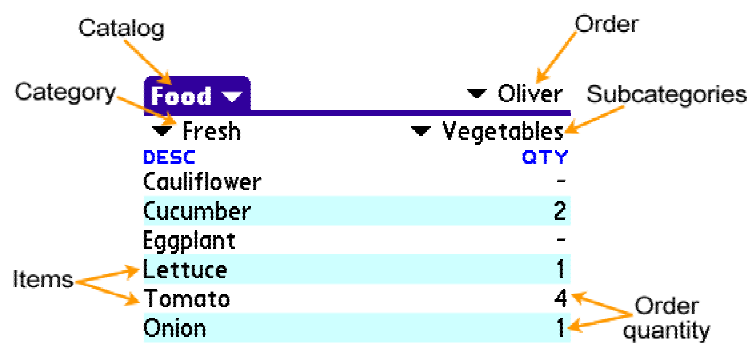
Eventually, the final order would look like below:

Food ▼ Oliver	
▼ All	
DESC	QTY
Cucumber	2
Lettuce	1
Tomato	4
Onion	1
Lemon	2
Orange	8
Milk	4
Yogurt	7

New All Order Det Export

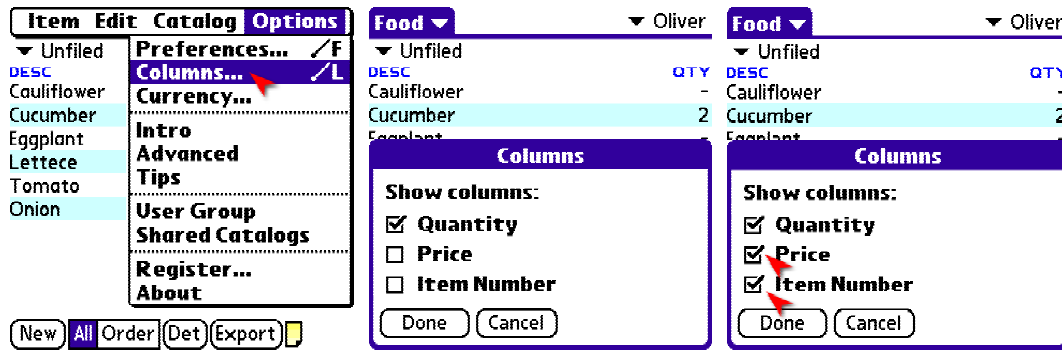
c) Screen Usage

Up to now, we have just briefly explained the two fundamental concepts of NewOrder. In order to get familiar with the operations of the software, it would be helpful to have an overview to the basic information that you can find in the main screen.

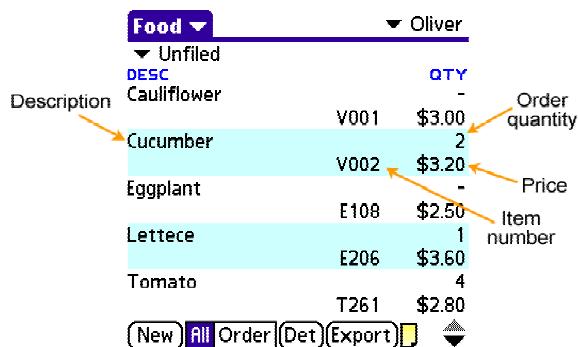


d) Columns

Apart from two basic information item description and quantity, there are two additional columns available for viewing in the main screen. You may change the option on display columns whenever necessary. Please select menu **Options, Columns...** and select columns to be displayed as shown below:



Then all selected columns will be displayed at the same time. Due to the limited space of the screen, item number and price are shown in the next line following the item description.



DESC	QTY	
Cauliflower	-	
Cucumber	2	
Eggplant	-	
Lettuce	1	
Tomato	4	

3. Working on Catalogs

a) Before You Start

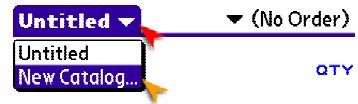
In reviewing our daily purchasing practice, we may order items with or without using a product catalog. Provided that we could clearly state what we want, a purchase order can be made as will. After all, the ultimate result that we would like to have is the prepared order.

Fundamentally, product catalogs can be regarded as a complete item list that you can order from a supplier. For a supplier, it will be a good idea to prepare a well-structured catalog to facilitate subsequent ordering from different customers. In this case, all details of the available items can be captured and sorted by their corresponding classifications.

However, for a customer, it is more practical to create adhoc catalog that only suit individual needs. Instead of dealing with a full list of available items, only interested or frequently ordered items can be included in the catalog. Then all other uninterested items can be ignored as a whole.

b) Starting a New Catalog

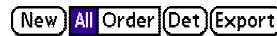
Step 1: Tap the pull-down button (inversed triangle) to see the catalog list.



Step 2: Tap on **New Catalog...**



Step 3: Type the catalog name, say **"Green Home"**. Then a blank catalog will be ready to let you enter the item details.



c) Adding Items

Step 1: Tap the **[New]** button to add an item.



Step 2: Enter item details, i.e. Description, Item Number and Quantity.



Green Home ▼	▼ (No Order)	Green Home ▼	▼ (No Order)	Green Home ▼	▼ (No Order)
▼ Unfiled		▼ Unfiled		▼ Unfiled	
DESC	QTY	DESC	QTY	DESC	QTY
Leather Sofa	0.00	Leather Sofa	B80011 0.00	Leather Sofa	B80011 600.00

New All Order Det Export

New All Order Det Export

New All Order Det Export

Following the same way, more items can be added to the catalog.

There are 4 items added to the catalog as shown in the sample screen.

Green Home ▼	▼ (No Order)
▼ Unfiled	
DESC	QTY
Leather Sofa	B80011 \$600.00
Microfiber Sofa	B80012 \$500.00
Suede Sofa	B80013 \$900.00
Wood Round Coffee Table	T20041 300.00

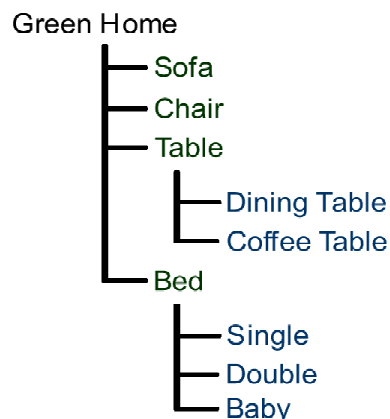
New All Order Det Export

d) Categories and Subcategories

If the number of items within a catalog keeps growing and you would like to group items into certain classifications, then you may start using categories and subcategories so as to organize items into manageable groups.

It all depends on how you would like to classify those items. You may simply group items into categories. Or you may go further to use subcategories as well. In other words, NewOrder can support up to 2-level of grouping hierarchy.

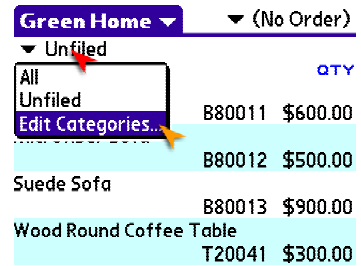
If we have already got the idea how these items should be grouped, we can first layout the category map and simply put items under the right category and subcategory. Say we are going to use the following classification to group items into the catalog:



e) Adding Categories

Step 1: Tap the category pull down list.

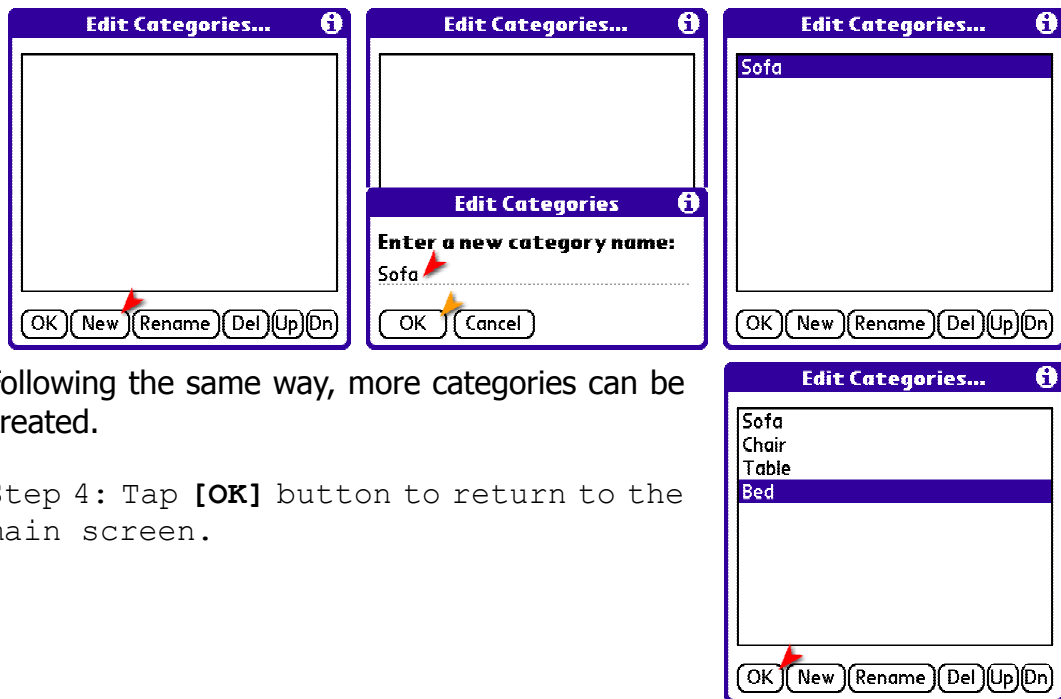
Step 2: Tap on **Edit Categories...**



New All Order Det Export

The category management screen will be shown.

Step 3: Tap the **[New]** button, enter the new category name and tap **[OK]** button to add a category.



Following the same way, more categories can be created.

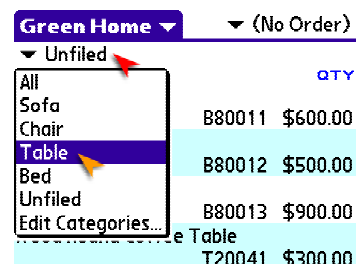
Step 4: Tap **[OK]** button to return to the main screen.

f) Adding Subcategories

Say we would like to add subcategories under the **Table** category. We have to select the target category first.

Step 1: Tap the category pull down list.

Step 2: Tap on **Table**



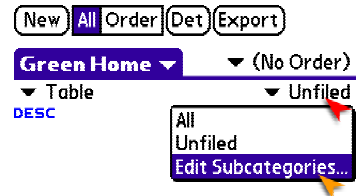
New All Order Det Export

All items belonging to the target category will be shown. Since no items had been added to this category yet, only an empty list can be seen.



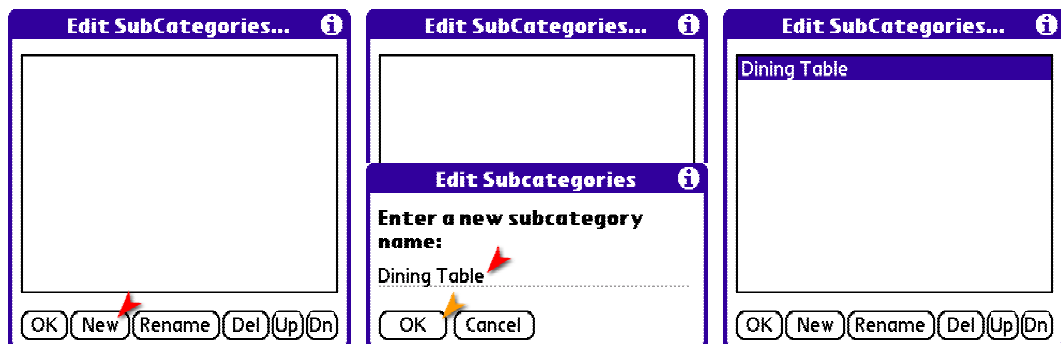
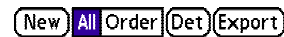
Step 3: Tap the subcategory pull down list.

Step 4: Tap on **Edit Subcategories...**



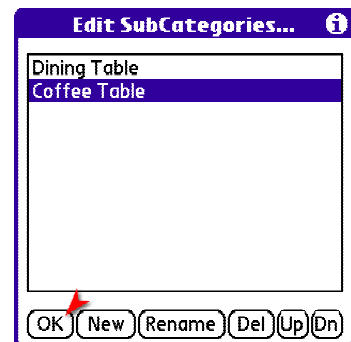
The subcategory management screen will be shown.

Step 5: Tap the **[New]** button, enter the new subcategory name and tap the **[OK]** button to add a subcategory.



Following the same way, more subcategories can be created.

Step 6: Tap **[OK]** button to return to the main screen.



g) Adding Item to Category/Subcategory

Say we would like to add an item under category **Table** subcategory **Coffee Table**. We have to select the target category and subcategory first.

Step 1: Tap the category pull down list.

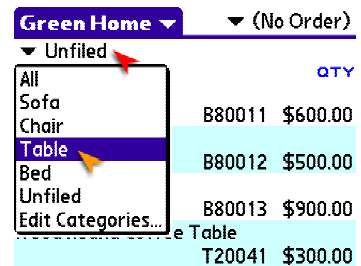
Step 2: Tap on **Table**

Once the category has been switched to **Table**, the subcategory pull down list will appear.

Step 3: Tap the subcategory pull down list.

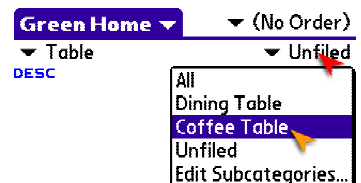
Step 4: Tap on **Coffee Table**

Since no item has been added to this category/subcategory yet. Only an empty list is shown.



	QTY
B80011	\$600.00
B80012	\$500.00
B80013	\$900.00
T20041	\$300.00

New **All** Order Det Export



	QTY
B80011	\$600.00
B80012	\$500.00
B80013	\$900.00
T20041	\$300.00

New **All** Order Det Export



	QTY
B80011	\$600.00
B80012	\$500.00
B80013	\$900.00
T20041	\$300.00

New **All** Order Det Export

Step 5: Tap the **[New]** button.

Step 6: Enter the item details.



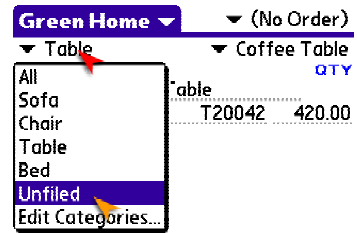
	QTY
B80011	\$600.00
B80012	\$500.00
B80013	\$900.00
T20041	\$300.00

New **All** Order Det Export

New **All** Order Det Export

h) Moving Item between Category/Subcategory

Say we would like to move the previously created item back to the correct category **Table** subcategory **Coffee Table**. We have to select the aim category and subcategory first, i.e. the category **Unfiled**.

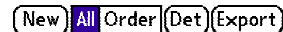
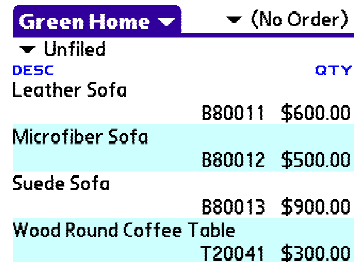


Step 1: Tap the category pull down list.

Step 2: Tap on **Unfiled**



The item list will then switch back to the aim category.



Step 3: Tap on the item that wanted to change the category/subcategory.

Step 4: Tap the **[Det]** button to bring up the item details screen.

Step 5: Tap the target category.



The subcategory pull down list will immediate change as well once the category has been changed.

Step 6: Tap the subcategory pull down list.

Step 7: Tap the target subcategory.

Step 8: Tap the **[OK]** button.



Green Home ▼ (No Order) ▼

Unfiled

Item Details ⓘ

Cat: ▼ Table
Subcat: ▼ Dining Table
Description: Wood Round Coffee Table
Item No: T20041
Price: \$300.00 Qty: 0
OK Cancel Note Delete

Green Home ▼ (No Order) ▼

Unfiled

Item Details ⓘ

Cat: ▼ Table
Subcat: ▼ Dining Table
Description: Wood Round Coffee Table
Item No: T20041
Price: \$300.00 Qty: 0
OK Cancel Note Delete

Green Home ▼ (No Order) ▼

Unfiled

Item Details ⓘ

Cat: ▼ Table
Subcat: ▼ Coffee Table
Description: Wood Round Coffee Table
Item No: T20041
Price: \$300.00 Qty: 0
OK Cancel Note Delete

Afterwards, the current category and subcategory will be automatically switched and the item have just moved is appended to the end of the item list.

Green Home ▼	(No Order) ▼
▼ Table	▼ Coffee Table
DESC	QTY
Glass Top Coffee Table	T20042 \$420.00
Wood Round Coffee Table	T20041 300.00

New All Order Det Export

Similarly, we can move all other unfiled items back to their right categories accordingly. Eventually, our remaining items can be properly classified and look like the sample screen.

Green Home ▼	(No Order) ▼
▼ Sofa	▼ Unfiled
DESC	QTY
Leather Sofa	B80011 \$600.00
Microfiber Sofa	B80012 \$500.00
Suede Sofa	B80013 \$900.00

New All Order Det Export

i) Rearranging Item Resequenece

Instead of limiting items in a specific sorting sequence, it is encouraged to arrange item in a sequence that favor later reference and ordering.

Step 1: Tap the title to see the menu bar.

Note: Tapping the title has a different meaning from tapping the pull down list inverse triangle.

Green Home ▼	(No Order) ▼
▼ Table	▼ Coffee Table
DESC	QTY
Glass Top Coffee Table	T20042 \$420.00
Wood Round Coffee Table	T20041 \$300.00

New All Order Det Export



Step 2: Select menu **Item, Resequence Item...**

It will bring up the Resequence Items screen and items currently listed under the category and subcategory will be shown.

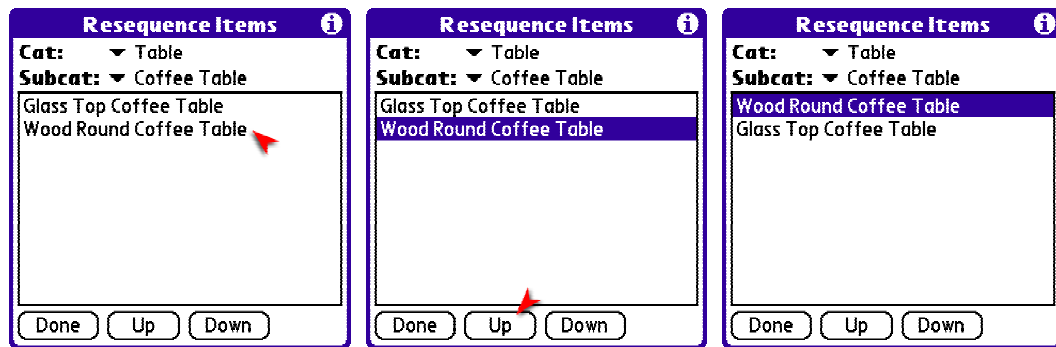
Item	Edit	Catalog	Options
Delete Item...	/D		able
Copy Item	/Y		QTY
Resequence Item...	/Q		
Purge Item...	/I		0.00
Import from Memo...	/I		0.00
Reset Order...			
Order Total	/T		
Export to Memo...	/E		
Export to Mail...	/M		

New All Order Det Export

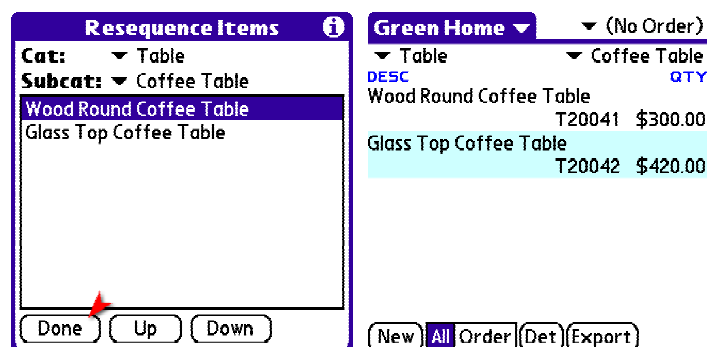
Step 3: Tap on the target item.

The selected item will be highlighted.

Step 4: Tap either **[Up]** or **[Down]** button to move the item around within the list until it has reached the desired position.



Step 5: Tap the **[Done]** button to return to the main screen.



j) Copying Item

If the item going to be added does have some similarities with an existing item, we can simply copy the item and then modify the duplicated item.

Step 1: Select a target item and tap the item.

Green Home		(No Order)
▼ Sofa	▼ Unfiled	
DESC		QTY
Leather Sofa	B80011	600.00
Microfiber Sofa	B80012	\$500.00
Suede Sofa	B80013	\$900.00

New All Order Det Export

Step 2: Select menu **Item, Copy Item**

The duplicated item will be appended to the list.

Item	Edit	Catalog	Options
Delete Item...	/D	filed	
Copy Item	/Y	QTY	
Resequence Item...	/Q		
Leather Sofa			
Import	B80011	\$	
Reset Order...			
Order Total	/T	0.00	
Export to Memo...	/E		
Export to Mail...	/M		

Green Home		(No Order)
▼ Sofa	▼ Unfiled	
DESC		QTY
Leather Sofa	B80011	\$600.00
Microfiber Sofa	B80012	\$500.00
Suede Sofa	B80013	\$900.00
Leather Sofa	B80011	600.00

New All Order Det Export

New All Order Det Export

Step 3: Amend the item.

Green Home		(No Order)
▼ Sofa	▼ Unfiled	
DESC		QTY
Leather Sofa	B80011	\$600.00
Microfiber Sofa	B80012	\$500.00
Suede Sofa	B80013	\$900.00
Leather Sectional Sofa	B80021	860.00

New All Order Det Export

k) Deleting Item

If you want to remove an item from the list, simply select the item and delete it.

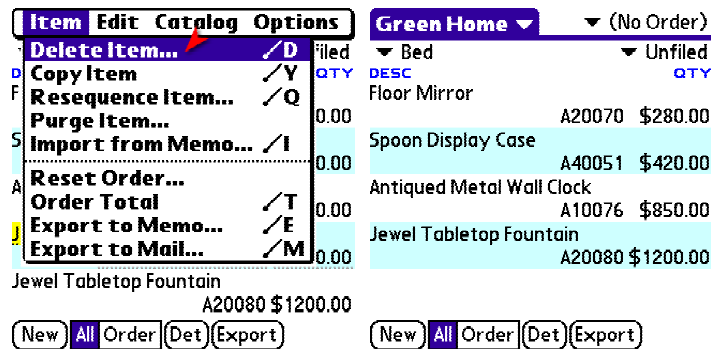
Step 1: Select a target item and tap the item.

Green Home		(No Order)
▼ Bed	▼ Unfiled	
DESC		QTY
Floor Mirror	A20070	\$280.00
Spoon Display Case	A40051	\$420.00
Antiqued Metal Wall Clock	A10076	\$850.00
Jukebox	A20056	340.00
Jewel Tabletop Fountain	A20080	\$1200.00

New All Order Det Export

Step 2: Select menu **Item, Delete Item**

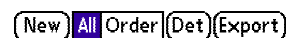
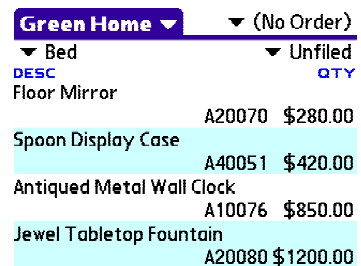
The unwanted item will be deleted right the way.



1) *Purging Items*

If you want to remove all items in the list, you may consider perform a purging. In other words, all items that listed under the current category and subcategory will be removed.

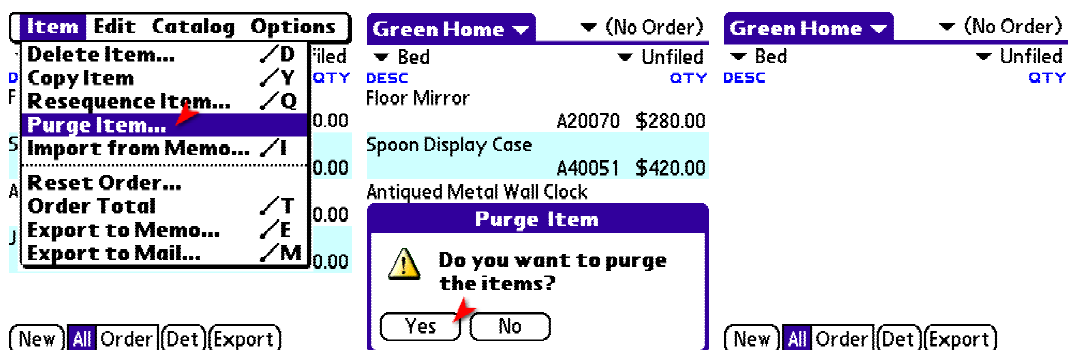
Step 1: Make sure you are viewing the target category and subcategory.



Step 2: Select menu **Item, Purge Item**

Step 3: Tap **[Yes]** button to confirm.

All listed item will be deleted right the way.



m) Item Details and Item Note

In order to view all details about an item, you may open the dedicated item details screen for further manipulations.

Step 1: Select a target item and tap the item.

Step 2: Tap **[Det]** button.

You can see more information about the item; it includes the current category and subcategory of item, a full description, item number, price, quantity (can be ignored when working on the catalog). You can open the item note for editing if necessary.

Step 3: Tap **[Note]** button.

Step 4: Tap **[Done]** button upon finished editing the item note.

It will bring back the item list. Notice that a small red corner mark has been placed to the description field.

Leather Sofa		Green Home ▾		▾ (No Order)	
Color:	Black	▼ Sofa		▼ Unfiled	
Set:	3 pieces	DESC			ITY
Height:	1.2m	Leather Sofa			
Width:	2.4m		B80011	600.00	
Depth:	1m	Microfiber Sofa	B80012	\$500.00	
		Suede Sofa	B80013	\$900.00	
		Leather Sectional Sofa	B80021	\$860.00	

n) Importing Items from Memo

The basic item maintenance features described in sections before are very handy when you are dealing with a few items. If the product catalog came with more than a hundred items, adding items one by one would be a very time consuming process. In alternative, you may prepare Palm memos that contain the item details for importing to NewOrder.

A sample of such memo is shown below:

Description	Price	Item Number
Oak Wood Chair,	240,	C90041
Bar Stool,	199,	C90042
Parson Chair,	350,	C90043
Ladderback Chair,	220,	C90044
Walnut Wood Chair,	300,	C90045

Each line presents an item. Description, price and item number should be arranged in the specific order as shown above and separated by commas.

If you have Microsoft Excel (or any other spreadsheet software), you may prepare the item list using a spreadsheet with three columns as shown below. Then save the spreadsheet as CSV file type (i.e. comma separate values) into a text file.

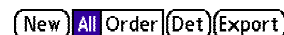
	A	B	C
1	Oak Wood Chair	240	C90041
2	Bar Stool	199	C90042
3	Parson Chair	350	C90043
4	Ladderback Chair	220	C90044
5	Walnut Wood Chair	300	C90045
6			

Then using Memos under the Palm Desktop software, you may put these plain item list text into your Palm in form of memos. After you have got these memos ready, you may follow steps below to import the memo into a catalog.

Say we are going to import items under the Chair category.



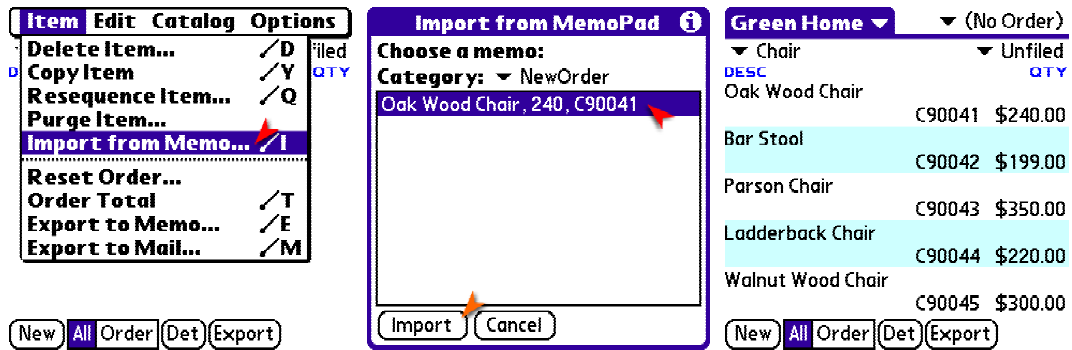
Step 1: Navigate to target category and subcategory.



Step 2: Select menu **Item, Import from Memo...**

Step 3: Locate the target memo from the list.

Step 4: Tap the **[Import]** button to capture item details from the selected memo.



Remarks:

1) If you are using Outlook instead of Palm Desktop to sync with your Palm, you should create the required memo in Note under Outlook. It works more or less the way.

2) You should avoid using "," in the item description and item number as comma will be recognized as separator between individual data. Prices should be written with plain numbers without comma(s) or dollar sign, for example 2340.50. Decimal point is acceptable. By default, it caters for 2 decimal places. However, you may specify the required price format via the Currency options.

3) Individual item list memo should be prepared for according to its target category/subcategory. In other words, separate item list memos are needed so that they can be correspondingly imported to their target categories/subcategories.

4) If you need adding remarks to the item list text, please marks the beginning of the line with "//". See the example below. All lines begin with "//" will be ignored while importing.

```
// Chairs - price updated on April
Oak Wood Chair, 240, C90041
Bar Stool, 199, C90042
Parson Chair, 350, C90043
Ladderback Chair, 220, C90044
Walnut Wood Chair, 300, C90045
```

Remarks

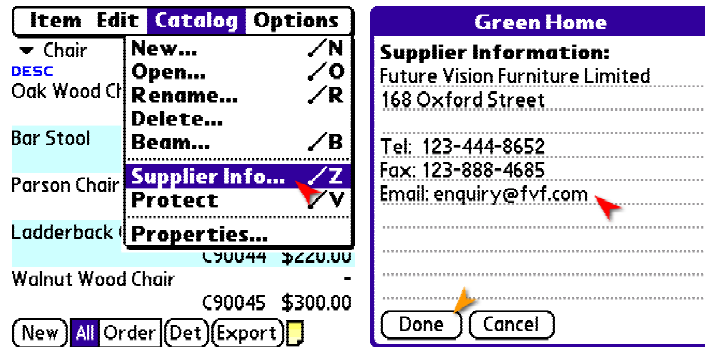
o) Supplier Information

In general, product catalogs can also be regarded as order forms issued by certain suppliers. It usually comes with additional information about the supplier, e.g. supplier name, contacts, instructions on using the order form, etc. If so, we had better enter these information into the catalog as a whole for later reference.

Step 1: Select menu **Catalog, Supplier Info...**

Step 2: Enter supplier information.

Step 3: Tap **[Done]** button when finished.



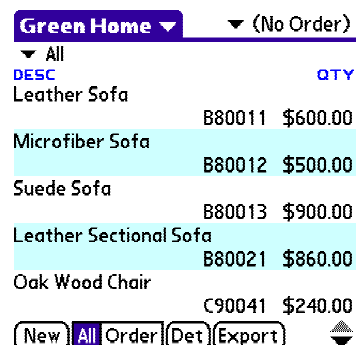
4. Preparing Orders

Based on your actual ordering needs, NewOrder may help you manage a number of product catalogs. Then whenever you want to prepare an order, you can select required items from the product catalog stored in NewOrder. Since catalogs organize items in a systematic fashion, you can browse through those available items and decide what to order effectively.

a) Columns Options

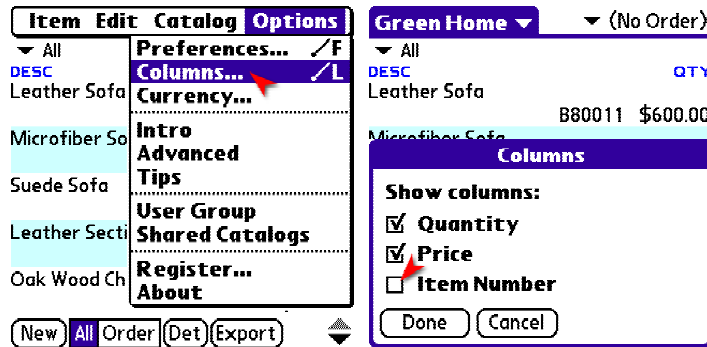
When you are placing an order, you may first look for the right items by reading item descriptions. Meanwhile, the item number or the price may become less important. In this case, you may temporarily hide those unwanted column(s) so that more room can be freed to display item descriptions.

If all columns are visible, each item occupies two rows and totally five items can be viewed at one time.



Step 1: Select menu item **Options**,
Column...

Step 2: Uncheck the **Item Number**
checkbox.



Then a more compact screen can be seen as shown.

Green Home ▼ (No Order)		
▼ All		
DESC	PRICE	QTY
Leather Sofa	\$600.00	
Microfiber Sofa	\$500.00	
Suede Sofa	\$900.00	
Leather Sectional Sofa	\$860.00	
Oak Wood Chair	\$240.00	
Bar Stool	\$199.00	
Parson Chair	\$350.00	
Ladderback Chair	\$220.00	
Walnut Wood Chair	\$300.00	
Wood Round Coffee T...	\$300.00	
New All Order Det Export		

b) Creating the First Order

If no order has ever been placed with this catalog, a **(No Order)** sign will be shown at the top-right corner.

A dialog box for entering the name of the order will be popped up once you switch the view from **All** to **Order**.

Step 1: Tap on the **Order** radio button to indicate that you want to show ordered items.

Green Home ▼ (No Order)		
▼ All		
DESC	PRICE	QTY
Leather Sofa	\$600.00	
Microfiber Sofa	\$500.00	
Suede Sofa	\$900.00	
Leather Sectional Sofa	\$860.00	
Oak Wood Chair	\$240.00	
Bar Stool	\$199.00	
Parson Chair	\$350.00	
Ladderback Chair	\$220.00	
Walnut Wood Chair	\$300.00	
Wood Round Coffee T...	\$300.00	
New All Order Det Export		

Green Home ▼ (No Order)		
▼ All		
DESC	PRICE	QTY
Leather Sofa	\$600.00	
Microfiber Sofa	\$500.00	
Suede Sofa	\$900.00	
Leather Sectional Sofa	\$860.00	
Oak Wood Chair	\$240.00	
Bar Stool	\$199.00	
Parson Chair	\$350.00	
Ladderback Chair	\$220.00	
Walnut Wood Chair	\$300.00	
Wood Round Coffee T...	\$300.00	
New All Order Det Export		

Step 2: Enter the order name.

Step 3: Tap the [OK] button when finished.

Notice that **"George"** is now shown on the top-right corner. Since no item has been selected so far, only a blank item list is shown.

Step 4: Tap on the **All** radio button to indicate that you want to show available items.



Instead of showing a blank, you can see a "-" in the quantity column indicating the item has a nil quantity.

c) Selecting Item Quantity

Say we are going to order four Oak Wood Chairs and one Wood Round Coffee Table.

Step 1: Select a target item.

Step 2: Tap on the "-" sign and pick a quantity number.



Then we can specify the quantity of the coffee table in the similar way.

Green Home ▼	George	Green Home ▼	George	Green Home ▼	George
▼ All		▼ All		▼ All	
DESC	PRICE QTY	DESC	PRICE QTY	DESC	PRICE QTY
Leather Sofa	\$600.00 -	Leather Sofa	\$600.00 -	Leather Sofa	\$600.00 -
Microfiber Sofa	\$500.00 -	Microfiber Sofa	\$500.00 -	Microfiber Sofa	\$500.00 -
Suede Sofa	\$900.00 -	Suede Sofa	\$900.00 -	Suede Sofa	\$900.00 -
Leather Sectional Sofa	\$860.00 -	Leather Sectional Sofa	\$860.00 -	Leather Sectional Sofa	\$860.00 -
Oak Wood Chair	\$240.00 4	Oak Wood Chair	\$240.00 4	Oak Wood Chair	\$240.00 4
Bar Stool	\$199.00 -	Bar Stool	\$199.00 -	Bar Stool	\$199.00 -
Parson Chair	\$350.00 -	Parson Chair	\$350.00 -	Parson Chair	\$350.00 -
Ladderback Chair	\$220.00 -	Ladderback Chair	\$220.00 -	Ladderback Chair	\$220.00 -
Walnut Wood Chair	\$300.00 -	Walnut Wood Chair	\$300.00 -	Walnut Wood Chair	\$300.00 -
Wood Round Coffee T...	\$300.00 -	Wood Round Coffee	\$300.00 -	Wood Round Coffee	\$300.00 -
New All Order Det Export		New All Order Det Expo Other...		New All Order Det Export	

Step 3: Tap on the **Order** radio button to view all ordered items.

Green Home ▼	George	Green Home ▼	George
▼ All		▼ All	
DESC	PRICE QTY	DESC	PRICE QTY
Leather Sofa	\$600.00 -	Oak Wood Chair	\$240.00 4
Microfiber Sofa	\$500.00 -	Wood Round Coffee T...	\$300.00 1
Suede Sofa	\$900.00 -		
Leather Sectional Sofa	\$860.00 -		
Oak Wood Chair	\$240.00 4		
Bar Stool	\$199.00 -		
Parson Chair	\$350.00 -		
Ladderback Chair	\$220.00 -		
Walnut Wood Chair	\$300.00 -		
Wood Round Coffee	\$300.00 1		
New All Order Det Export		New All Order Det Export	

d) Order Total

The total amount of the entire order can be reviewed by following steps.

Step 1: Select menu item **Item, Order Total**

Item Edit Catalog Options	Green Home ▼	George
▼ All	▼ All	
QTY	DESC	PRICE QTY
4	Oak Wood Chair	\$240.00 4
1	Wood Round Coffee T...	\$300.00 1
Reset Order...		
Order Total		
Export to Memo...		
Export to Mail...		
New All Order Det Export		

Order Total
Total:
2 Items
\$1260.00
OK

Once we have confirmed all item quantities in the order, the order can be regarded as well prepared. Afterwards, we can create another order if needed. All prepared orders are associated with their corresponding parent catalogs. You can always go back to a previously prepared order to review or further modify its details.

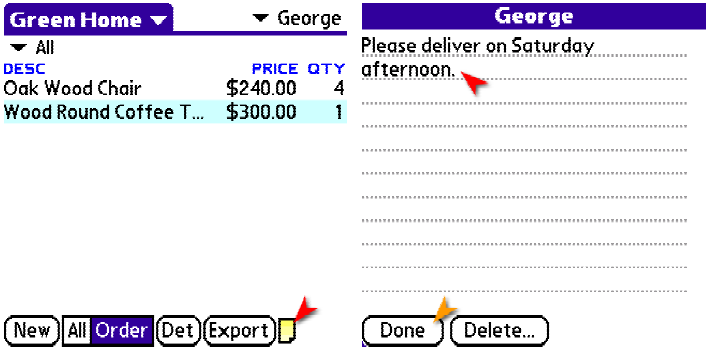
e) Order Note

If we want to add a few lines of remarks about the order, we can attach some text to it.

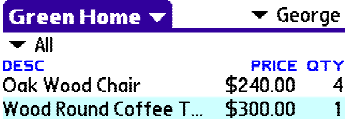
Step 1: Tap the **Note** icon at the bottom of the screen.

Step 2: Enter some remarks.

Step 3: Tap the **[Done]** button.



Finally, the icon will come with some marks to indicate that this order has a few lines of remarks.



f) Maintaining Orders

If you need to create more orders from the catalog or you want to review an existing order, you may access the Edit Orders screen with following steps.

Step 1: Tap the order pull down list at the top-right corner of the screen.



Within the Edit Orders screen, we can create new orders as well as copy, rename and delete those existing orders.

For example, say we are going to create another order. We may follow steps below to complete the task.

Step 1: Tap **[New]** button.

Step 2: Enter the order name.

Step 3: Tap the **[OK]** button when finished.



After going back to the main screen. You may change to another order and work starting on it with following steps.

Step 4: Tap the order pull down list at the top-right corner of the screen.

Step 5: Select the target order from the list.



5. Exporting Orders

Once you have a prepared order, NewOrder may help you list out the order details in a readable form. Ultimately, you may wish submitting the order to the supplier so that your order request can be handled accordingly.

NewOrder provides two ways for exporting prepared orders. Firstly, prepared order can be exported as a memo stored in Palm's Memos. After you have performed a HotSync, the order text can be accessed through the Palm Desktop software. In this way, you can further transfer the order text to any other applications (e.g. Microsoft Word) with copy and paste operations.

Secondly, prepared can be exported as a mail stored in Palm's Mail/VersaMail outbox. You can further send the prepared order email instantly if your Palm is already connected or via your connected desktop PC after HotSync.

Depending on the actual practice, if you need some touchups on the order text before sending to your supplier, exporting to memo can give your more flexibility in adding text formatting and supplementary information to the final order.

a) Exporting to Memo

Before exporting prepared orders to memo, it is a good idea to reserve a dedicated memo category to hold all those exported memos. Say having a memo category called NewOrder as shown below:



For example, say we would like to export the prepared order in example above to a memo.

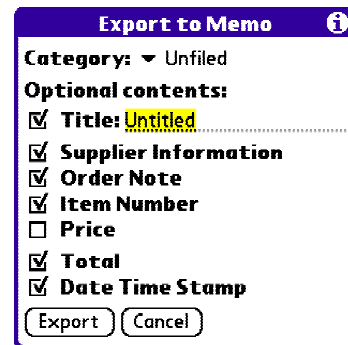
Step 1: Select a target order.

Step 2: Tap on the **Order** radio button to make sure all ordered items are on the list.



A dialog box will show up. The category option can be considered as the destination category where the newly created memo should be kept. All other remaining options are optional, they can be selectively included to the order text whichever applicable.

Say we would like to set the memo title to "George's New Furniture".



Step 3: Tap the category pull down list and select **NewOrder** as the destination.

Step 4: Enter **George's New Furniture** in the title field.

Step 5: Tap **[Export]** button.

Step 6: Tap **[OK]** to dismiss the information dialog.



Afterwards, you may exit NewOrder and check the newly created memo in Memos under the NewOrder category.

A full text of the memo is shown below:

Memos ▼ NewOrder

1. George's New Furniture

New

George's New Furniture
Green Home: George

Future Vision Furniture Limited
168 Oxford Street

Tel: 123-444-8652
Fax: 123-888-4685
Email: enquiry@fvf.com

Please deliver on Saturday
afternoon.

Qty Item
4 Oak Wood Chair
C90041 \$240.00
1 Wood Round Coffee Table
T20041 \$300.00

TOTAL: \$1260.00
Generated by NewOrder: 4/26/06
3:56:44 pm

b) Exporting to Mail

If you are going to send the prepared order directly to the supplier via email, you may let NewOrder automatically compose the email for you. The composed email will then be stored in the email outbox and ready for sending out once your Palm is connected to the Internet.

Step 1: Select menu **Item, Export to Mail...**

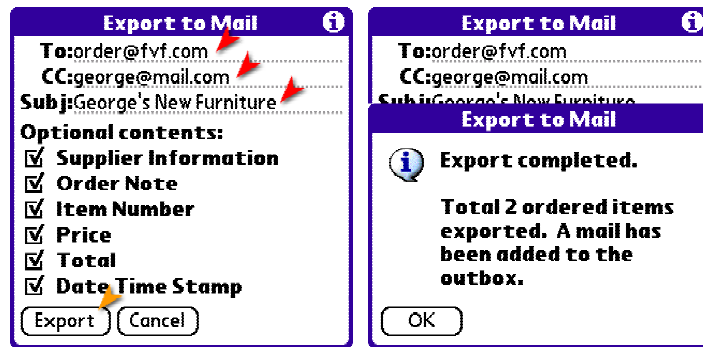
Step 2: Enter **To:** address, **CC:** address (if any), the **Subj:** line and also select required content options.

Step 3: Tap **[Export]** button.

Step 4: Tap **[OK]** to dismiss the information dialog.

Item	Edit	Catalog	Options
Delete Item...	/D		
Copy Item	/Y		QTY
Resequence Item...	/Q		-
Purge Item...			-
Import from Memo...	/I		-
Reset Order...			-
Order Total	/T		4
Export to Memo...	/E		-
Export to Mail...	/M		-
Walnut Wood Chair	£300		-
Wood Round Coffee Ta...	£300		1

New
All
Order
Det
Export



Compatibility Notes:

- 1) This function only works for Palm standard built-in mail application. It refers to Mail or VersaMail that come with the Palm device.
- 2) If you have installed mail client from other third party software developer, following notification may be prompted if you have tried using the Export to Mail function.



6. Sharing Catalogs

A catalog can be shared among many users. In other words, same catalog can be used among staff in the department, team members in the project or clients of a supplier, etc. Instead of making paper copies of the product catalog and order forms, NewOrder can eliminate all these troubles by means of sharing catalogs.

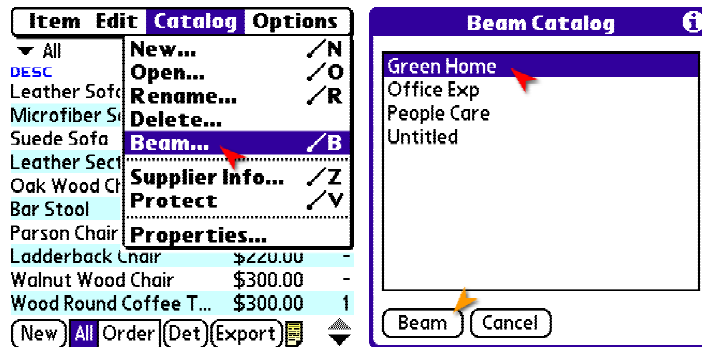
a) *Beaming Catalog*

Like other built-in Palm's applications, e.g. Contacts and Memos, etc., you can beam data via the infrared port to another Palm. NewOrder also allows you to beam catalog to another person using a Palm device.

Step 1: Select menu **Catalog, Beam...**

Step 2: Select the target catalog.

Step 3: Tap **[Beam]** button.



Of course, not every Palm owner you met would have the NewOrder software installed. Thus in order to make sure the recipient can open the newly received catalog, you should beam the NewOrder application to the recipient as well.

b) Sharing Catalog on the Internet

Since a NewOrder catalog can also be extracted as a data file, you can share the catalog data with others by means of email attachment or uploading to a website for downloading. The following steps will show you how to extract such a data file and then how to upload it to Redwood Creative Computing website.

In fact, after you have grasped the procedure, you can further determine your own way of distributing the catalog as well. For example, you can provide a catalog download page at your company website or you can include those catalog data files on a product information CD-ROM, etc.

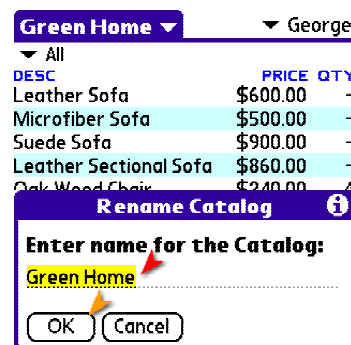
Check the catalog name

Since the catalog will breach more users, a meaningful is very important. Rename a catalog if it is necessary.

Step 1: Select menu **Catalog, Rename...**

Step 2: Edit the catalog name.

Step 3: Tap **[OK]** button.



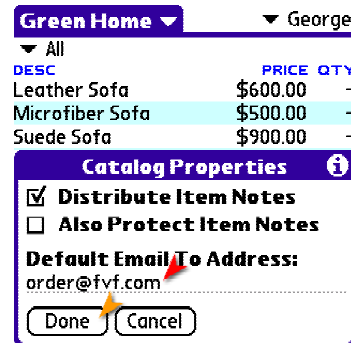
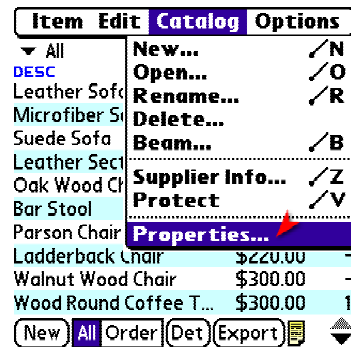
Check the catalog properties

There are a few options that related to how others can make use of the catalog. It is worth to ensure a proper setting on these options before releasing the catalog.

Step 4: Select menu **Catalog**, **Properties...**

Step 5: Select appropriate options and enter the default email address.

Step 6: Tap **[Done]** button.



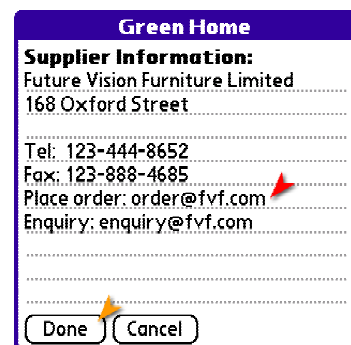
Fill in the supplier information

If the catalog is for a specific supplier, please fill in the supplier's contact information and instructions on how to submit an order.

Step 7: Select menu **Catalog**, **Supplier Info...**

Step 8: Enter any additional information about the catalog.

Step 9: Tap **[Done]** button.

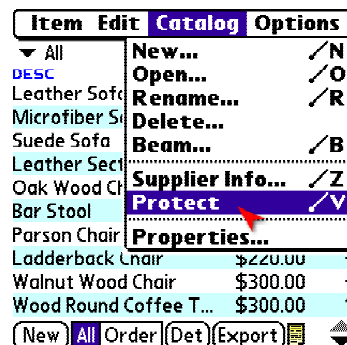


Protect the catalog

It is a good idea to protect a catalog before sharing it with others. Item description, item number and price under a protected catalog can be prevented from any undesired modifications.

Step 10: Select menu **Catalog, Protect**

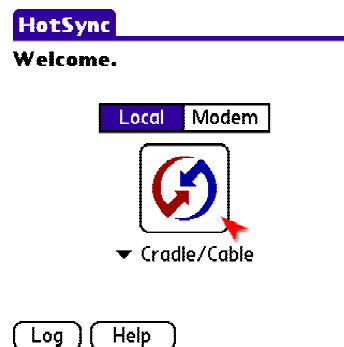
A key icon will be shown at column title position to indicate that all catalog details are frozen and protected from changes.



Perform HotSync

Your finalized catalog data file will be transferred back to your PC after HotSync.

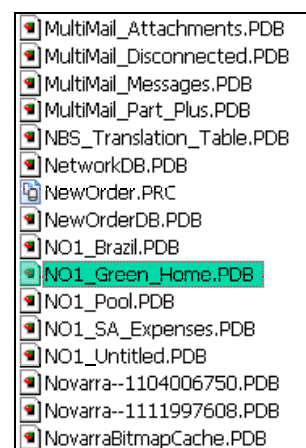
Step 11: Put your Palm into the cradle and start the HotSync.



Locate the catalog data file

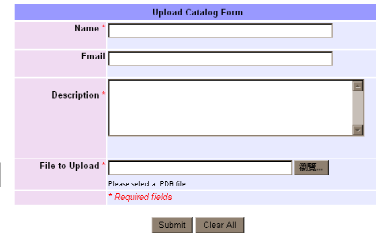
The catalog data file can be found under your Palm Desktop working directory. Usually it is located under **C:\Program Files\Palm**. Moreover, it also depends on your HotSync ID, say your HotSync ID is "John", then the NewOrder catalog "Green Home" can be found at:

C:\Program Files\Palm\John\Backup\NO1_Green_Home.PDB



Upload the file

If you are going to share this catalog under Redwood Creative Computing's web site, please go to the following web page and fill in the upload catalog form:



<http://www.redwood-creative.com/global/no-upload.htm>

Download catalog file

Afterwards, please visit the following web page. A list of shared catalogs can be found there.

<http://www.redwood-creative.com/global/sharedcat.htm>

7. Preferences and Options

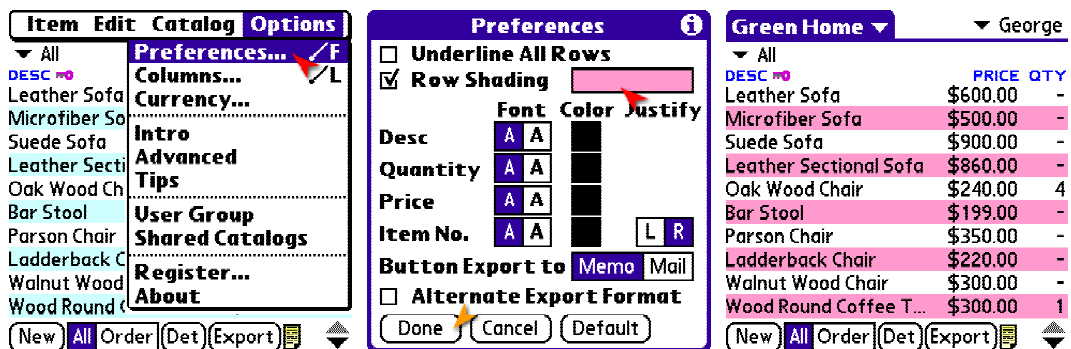
a) Preferences

There are a number of preference options available for further customization. You can change some display styles as well as some alternatives on the export function.

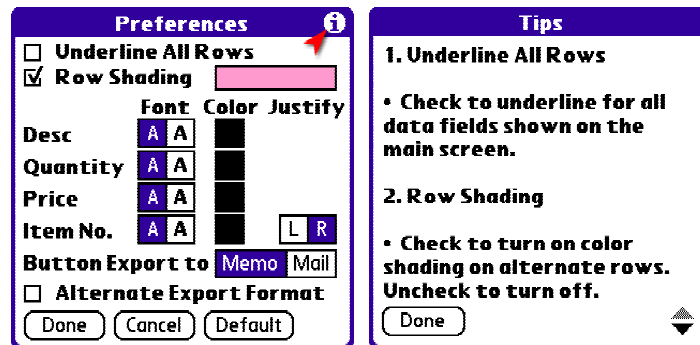
Step 1: Select menu **Options**, **Preferences...**

Step 2: Select desired option settings.

Step 3: Tap **[Done]** button when finished.



More explanations about the usage of these options can be found by tapping the information box.



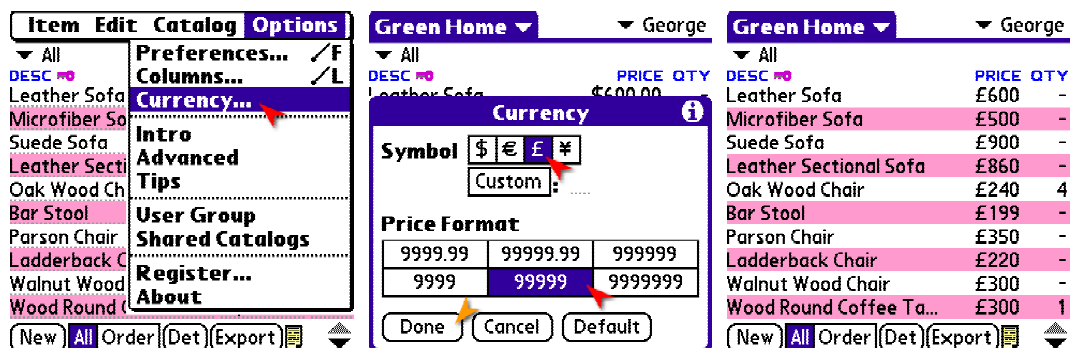
b) Currency

You may change the currency symbol as well as the price amount format if necessary. It helps to give some flexibility in coping with the general practice adopted in your own country.

Step 1: Select menu **Options**, **Currency...**

Step 2: Select desired option settings.

Step 3: Tap **[Done]** button when finished.



8. Technical Support

If you have any question about the usage of this application, please contact us by email at support@redwood-creative.com. Your suggestions and advices about the application are welcome.

