

# Customer Order Tracker

## Introduction

This application installs on Windows, is network capable and allows any users to quickly see the state of an order your customer has made. It is ideal for retailers, wholesalers and even online businesses that routinely accept sales orders for goods not in stock. It is designed to replace a handwritten book, POS, ticket, or a spreadsheet system that has become unwieldy.

The Customer Order Tracker has no toolbars or menus. All work is done on the main form, save for some initial setting up.

## Prerequisites

Windows 7 SP1 or higher. Other prerequisites will be downloaded from the internet on install.

## Main Functions

Customer Order Tracker by Computing@home  
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Options Help PDF Delete Back Up Close

3 of 3 Clicking (ticking) checkboxes above will populate this box. Edit it by double clicking this box

The application has been designed to be as simple to use as possible. The green section at the top is the search area. The yellow area is where you add a new order, and the rest is mainly the editable list of orders, organised in reverse date order – the last order at the top. Also shown is the zoom pop up box which is optionally opened to add extra employee information after the check boxes are clicked. At the very bottom is a help bar. Mouse hover over any part of the form to see what each button and box does.

## Adding an order

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

## Finding an Order

Most of the search fields are “wild carded” at both the start and end, which simply means the search will find your search text, no matter where it appears in the field. If you search for ‘Shorts’ in the Product field, you will find “Nike Shorts size 4”, as shorts appears in that text. So, if some shorts arrive, and you are curious to know if any are for orders, you can search by typing *shorts*. Employee numbers (or names) are not wild carded. You can use more than one search field to further filter the number of orders found.

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

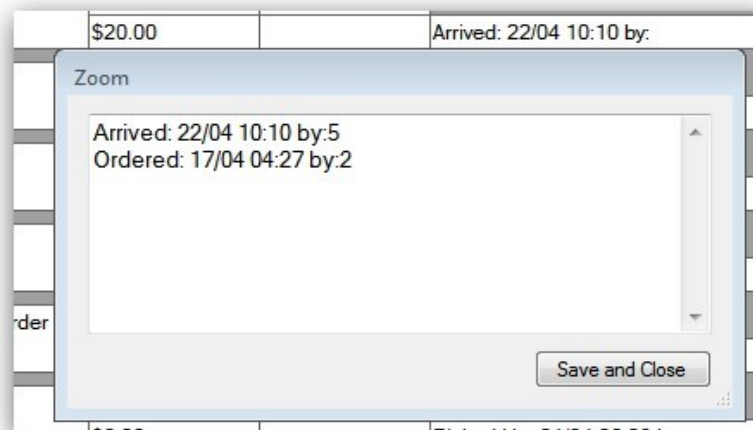
Click ‘All Orders’ to show all orders.

## Editing an Order

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

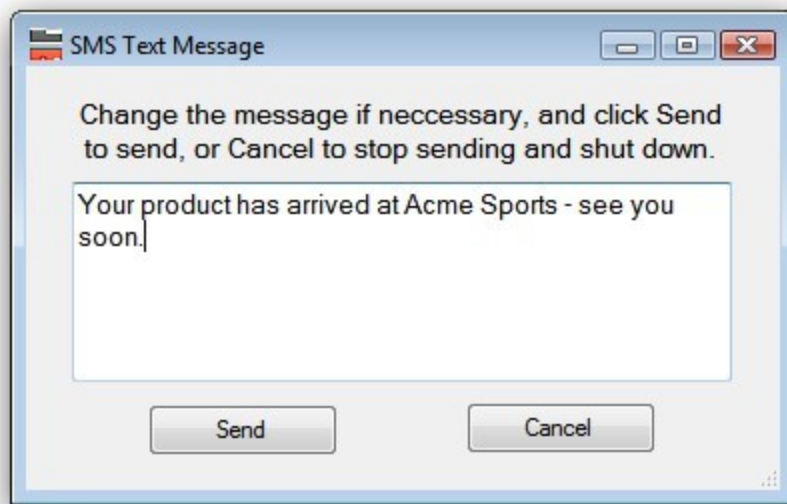
In the example below we can see the product was ordered by Staff member 2 and booked into stock by staff member 5. The 2 and 5 have been typed in.

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



## SMS the Customer

You can SMS the customer just by double clicking on the telephone number. You need to set up an Account with SMS Global and the number must be a number capable of taking an SMS (e.g., mobile number). A default message comes up (which you set in options), and which can be edited.



Just click send. A status (starting with OK) will be returned by Global SMS– it might take 10 or so seconds.

## **Save**

After editing an order its best to click save. That will allow it to be seen on the other computers. The save action is automatically run at various times otherwise.

## **All Orders**

Click it, to see any edits or new records from other computers.

## ***Administrator Tasks***

There are several tasks.

## **Install**

The install routine is very simple. It is explained on a separate document. You can set this up on multiple computers all accessing the same data file on a LAN.

## **Delete.**

We suggest orders are deleted, at some point after they are picked up. You can only delete one order at a time. To delete simply put the cursor into the staff number box of the record to delete and click delete. To delete multiple items you could use Microsoft access (if you have it of course).

## **Backup**

You can back up the customer orders, either by just backing up the data file OrderData.mdb or by using the Backup button on the order form. The backup will be saved with a .bak extension.

## **Options**

There are several options you should set.

### **Connection**

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

Connection

Click Find to connect or Create for a new installation:

Data Source = C:\Users\rod\OneDrive\Documents\OrderData.mdb

Global Settings

Licence Information

Licenced To:

Email:

Licence No:

Licence Type:

Custom Name:

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

Local Settings

SMS Global Settings:

User Name:

Password:

Senders Name:

Not in Aust  Tel No Prefix:

Minimim Data Requirements

Require Staff No

Require Customer Name

Require Tel1

Require Part No

Sign on Ord and Cont

SMS Default Text - Maximum of 160 characters.

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

<https://www.smsqlobal.com/>

[Email Support](#)

Enter GlobalSMS account information and default message.

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

Company Name:

Licence Type: From 2021 all licences are free.

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

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

**Sign on Ord and Cont.** means the employee is required to enter their name or employee number after Ordering the product or contacting the customer.

SMS Global Settings:

If texting customers service is important to you, please open an account with SMS Global. SMS are 10c per text as of 2021.

*Username and Password:*

Found under API and Integrations

*Senders Name* can be (and usually is) your phone number. You can also put a name there – but no spaces or symbols and max of 11 characters.

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

SMS Default Text: Optional – You will have the opportunity to write or change this message when you double click the phone number to send the text.

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