Order Form Pro

A Complete Inventory and Sales Program for the Newton

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1 Welcome and Registration

1.1   About Order Form Pro

Welcome to Order Form Pro for the Newton OS. Order Form Pro is a complete inventory and sales program that is perfect for a small business. It keeps track of your inventory, handles taxes and shipping costs, and stores all of your client's information as well. It also accepts scanned barcodes, making it easy to keep track of sales.

Included in this archive are the following packages:

•Order Form Pro.pkg
This is the software package that you need to install on your Newton

•Order Form Pro.pdf
This is the users' manual for Order Form Pro. You are reading it right now.

•Order Form Pro.txt
This is the text only version of the users' manual. If at all possible, use the pdf version of the manual, as it has layout and graphics that cannot be shown in the text format. The pdf manual is viewed using Adobe® Acrobat Reader®

•SAStuff.txt
A list of all of the software available from Stand Alone Inc.

•SA reg.pkg
If there isn't a registration option under the [i] button, install this package to register your software.

1.2   System Requirements

Order Form Pro requires Newton OS 2.0 or 2.1, and a Message Pad 120, Message Pad 130, Message Pad 2000, or eMate.

1.3   Registering Order Form Pro

The Order Form Pro Demo will work for a 30 day trial period. At the end of the 30 Days, it will stop working. To avert this tragedy, you will need to get in touch with Stand Alone to register your software. You can register with us by several different methods.

You will need to include the following information, no matter how you choose to register. Most importantly, you need to include your name EXACTLY as it is entered in your Newton, including spaces. We use this to generate your password, so it must be precise. You will need to specify which programs you wish to register, and include payment for each of them. We accept Visa, Mastercard, and American Express. If you are using normal mail, you can send us a check as well. Make sure to include your card number, the expiration date, and what type of card you are using. You also need to give us a way to get in touch with you. Email is the preferred way, followed by your address and phone number. An email address is not strictly necessary, but it will result in much faster service.

For instant gratification, register by phone, and pay using Visa or Mastercard. To do so, call (773) 477-2492 and we will give you a password right over the phone.

Alternatively, you can send us a check to the address below.

You can also email us one of several ways. The application has a Register section under the [i] button. Tap on that to open up a registration slip. If you fill out that slip, and have an email client on your Newton, it will automatically email us and we will send you a registration code. You could also just email us the relevant information from your Newton or a desktop machine, and we'll send you a code. If you are registering through Compuserve, use, GO SWREG.

Once you register, you will receive a password from us. You can install this password one of two ways. There is an option to Enter Password under the [i] menu. Tap on it to bring up a screen that has a space to enter the password. Alternatively, just install the SA Register package enclosed in the Order Form Pro archive. Select "Order Form Pro" from the pop-up menu at the top, and enter the password. You should get a message confirming the password. Afterwards, you may remove the SAS Register application from you Newton.

1.4   Contacting Stand Alone Inc.

There are several ways to get in touch with us here at Stand Alone, Inc. Email is the preferred form of communication, but whatever works for you is fine. If you have any questions, comments, suggestions or compliments, please don't hesitate to contact us through any of the preceding methods.

1.4.1   Business Hours
Stand Alone is open from 9 AM to 9 PM Monday to Friday, and 10 AM to 4 PM Saturday and Sunday. These times are CST and GMT -5.

1.4.2   Email:
internet: info@standalone.com
AOL: Std Alone
CompuServe: 76342,3057

1.4.3   Phone:
Voice: (773) 477-2492
Fax: (773) 477-2579

1.4.4   Regular Mail:
Stand Alone
3171 N. Hudson, Suite 1
Chicago, IL, 60657, USA

1.4.5   World Wide Web:
http://www.standalone.com

1.5   Reporting Bugs

If you find a bug in our software, it would be helpful if you reported the it to us. To report a bug, please email us with Bug Report Request in the subject line. In the email, include the following information:

• What type of Newton you are using (i.e. MP 2000)
• The version number of the system software (i.e. Newton OS 2.1)
• The software name and version number (i.e. Order Form Pro 1.03)
• The error number
• A brief description of how we can recreate the error
• Your name and email address so we can contact you when the bug is fixed

When reporting bugs, it is best to email us, rather than calling, so that the programers have a written record of the information they need to solve the problem.
As soon as we receive your email, the programer will examine the problem, and fix it. It can take a while for us to reply, but we will get back to you as soon as we can.

1.6   Version History

Date	Version	Notes
October 9, 1997	1.0	First Public Release

2 Installation

The first thing that you need to do to get your software up and running is to install it on your Newton. To do this, you need to have Newton Backup Utility, or Newton Connection Utilites, set up to talk to your Newton. If you have problems with this part of the installation, pleast contact consult the documentation that came with your Newton. Once Newton Backup Utility is set up, just follow the steps listed below to for each of the packages you wish to install.

1. Open the Newton Backup Utility , or Newton Connection Utilties

on your Desktop machine.

2. On your Newton, go to the Extras Drawer

and tap the Connection icon .

3. Once the Newton Backup Utility has loaded on your desktop machine, make sure your cables are connected and tap the **Connect** button on your Newton.

4. For each of the packages you wish to install, do the following:

   • Tap the Install Package button in the Newton Backup

   Utility

   • Go to the folder where your packages are, and select the desired package.

   • Click on the "Install" button

3 Taking an Order

The Quick Entry screen is the heart of Order Form Pro.

Form Type

Client

Phone number

Salesperson

Time of Order

Shipping

Entry line

Item Sheet

Status

Sales person ID

Method of Payment

Order Number

Data Columns

Totals

11:20 Tue 9/9	◆Unfiled Orders

◆Form Type **Invoice**   ◆Status **Normal**

◆Client **Stand Alone Inc**

◆Phone **(773) 477-2492**

◆Sold/Serviced By **None selected**   ◆Sales ID **001**
◆Time of order **9/5/97 8:21 pm**
◆Method of Payment **Credit Card**
◆Order Number **2**
◆Method of Shipment **None selected**

◆Item Name	◆Qty	◆Price	◆Sub-tot
Arcade Pack	1	34.95	34.95
Dateman	1	54.95	54.95

Sub-total: $ 89.90
Tax, other charges: $ 26.52
Total: $ 116.42

[i] [◆New] [◆Show] [◆Add]   [▢] [✉] [✕]

The Quick Entry Screen is where you take orders, enter products and services, and track your inventory. This chapter takes you through the basics of the Quick Entry screen and shows you how to customize the Quick Entry screen for each order. To start a new order, tap on the New button at the bottom of the Quick Entry screen. Choose Order from the list that appears, and Order Form Pro will create a new order slip.

3.1   Form Type

Current selection — Quotation / Packing List / ✓Invoice / Delivery Ticket / Sales Order / Edit List — Add new form type

You set what type of form you are filling out at the top of the Quick Entry form To select the form type, tap on the picker to bring up a list of forms. The choice with the check next to it is the current form type. You can add new form types by selecting Edit List. This brings up a window with all the available types of forms. Tap on the New button to enter a new type of form to the list. It is important to note that the Form Type is a label of the current Quick Entry form. The Quick Entry form remains constant no matter what Form Type you choose.

3.2   Client

Add new clients

Stand Alone Inc
Other Name
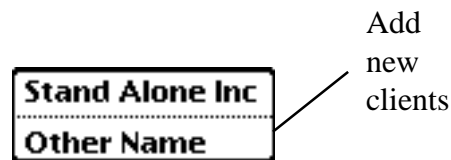
The Client line is where you enter the name of the order's client. Tapping on the Client picker brings up a list of past clients, and the option of Other Names. If the Other Names option is chosen, a list of all the clients pops up. All other information included in the Names file is included in the Order Slip information as well. If the client is not already entered into the Newton, you can write the new name in on the client line. For more information on entering clients into Order Form Pro, please see Section 5.1.

3.3   Phone

This line is for the phone number of the client. It is entered automatically if the client's information is available from the client information file. If the client has more than one phone number (for example, a work number and a home number), tap on the Phone picker to choose between the numbers.

3.4   Sold/Serviced By

Salesman #1
✓John
Ben
Edit List

Current Salesperson

Add new salesperson
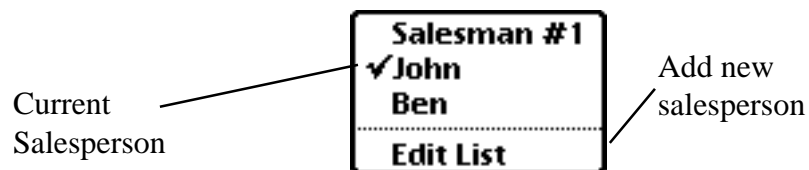
This line is for the name of the salesperson who handled the sale or service. Tap on

Sold/Serviced By to bring up a list of salespeople. You can add new names to the list by selecting Edit list and tapping the New button on the next screen that appears.

3.5   Sales ID

Current
sales
ID

```
✓001
 002
 007
--------
Edit List
```
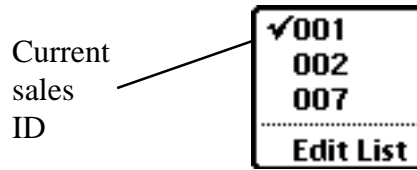
This picker is similar to the Sold/Serviced By picker, except that it uses numbers rather than names. Tap on it to bring up a list of available sales identification numbers. You can add new numbers to the list by selecting Edit List. This brings up a list of all available numbers, and you add new numbers by tapping the New button.

3.6   Time of Order

The time of order is automatically set to the time that the order is created. You can change the date or time of the order by tapping on the Time of Order line. This brings up a calendar where you can set the date and time.

3.7   Method of Payment

Current
method of
payment

```
 Cash
 Check
✓Credit Card
 Money Order
 Purchase Order
 Net 10
 Net 30
 Credit Memo
 Special
----------------
 Edit List
```

Add new
method of
payment
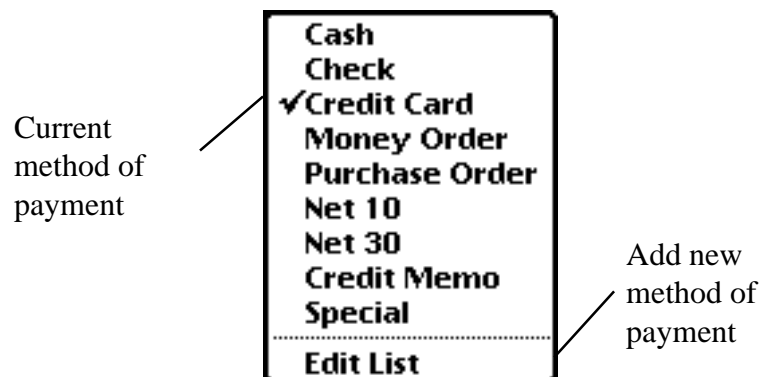
Tapping on this picker brings up a list of methods of payment. Select the desired method from the list by tapping on it. You can add new payment options by selecting Edit List and tapping the New button.

3.8   Order Number

Tap here to bring up the window where you enter the order number for the order.

3.9   Method of Shipment

```
UPS
Air
Ground
US Mail
FedEx
Airborne
DHL
..................
Edit List
```

Add new
shipping
method
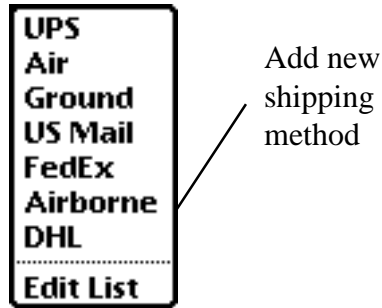
Tapping on this picker brings up a list of methods available for shipping. Select the
one that you wish to use from the list, or create new methods by selecting Edit
List. When the Edit List screen appears, tap the New button to open create a new
item.

3.10   Item Sheet

The Item sheet is where you record the customer's items or services that are
purchased. It lets you adjust the quantity of each item sold, the item's price, and
keeps a running subtotal. You can also modify the data columns to show the Item
Number and the Unit price.

Data
Columns

◆Item Name	◆Qty	◆Price	◆Sub-tot
Arcade Pack	1	34.95	34.95
Dateman	1	54.95	54.95

Entry
Line

Item

3.10.1   Entry Line
The Entry Line is where the item's name, category, or number is entered. By
tapping on the top line, you choose how to sort the entered items.

```
◆Item Name
  ✓Sort by Item Name
   Sort by Item Number
   Sort by Item Category, Name
```
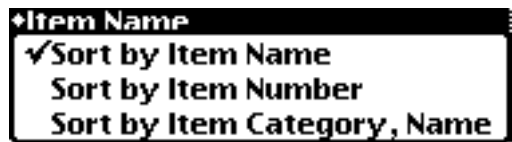
3.10.2   Data Columns
The three columns on the right of the item sheet give you more information about the product. The columns display different information, and are set by tapping on the picker at the top of the column.

Current
information
type

Item Number
✓**Quantity**
Sub-total
Total Price
Unit Price
⋯⋯⋯⋯⋯⋯⋯⋯⋯⋯
Sales Tax

Possible
rates

Item Number
This displays the item number

Quantity
Quantity shows you the number of a particular item that is ordered. If you tap on the quantity box for a specific product rather than the Quantity picker at the top of the column, you can set the quantity. A smaller window opens up showing a + sign and a number. Tap on the upper half of the number to increase it, and on the lower half of the number to decrease it. If you tap on the + sign, it becomes a - sign. This is used for refund items, and it makes the quantity and price of the item negative. Items with negative quantity are added to the Inventory sheet rather then subtracted.
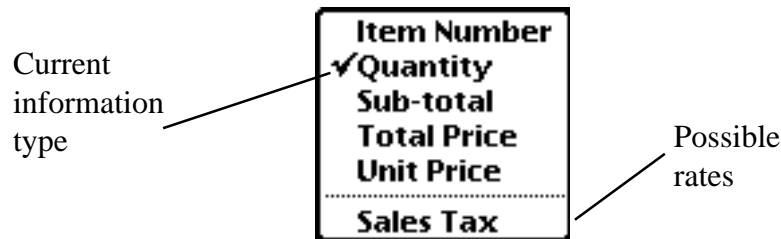
Item subtotal
The subtotal shows you the total cost of a specific type of item. It is found by multiplying the price of an individual item by the quantity of the item.

Item Total Price
The Item Total Price is similar to the item subtotal, but it also includes taxes and per-item fees.

Unit Price
Unit Price shows the cost of a single item.

Include Rates
The section at the bottom of the picker includes all of the Rates, including taxes, that are included in Order Form Pro. To remove a rate from the item, tap on the item name and uncheck the box next to the rate.

3.10.3   Items
If you tap on an item in the item sheet, a screen appears which modifies the item.

Item
Sheet

Item
name

Item: Arcade Pack

Title **Arcade Pack**

Item
quantity

Quantity **1**

◆Price ($) **34.95**

☑ Sales Tax: 7.25%

Tap to
change
price or
margins

[ℹ] [◆Note] [Original]   [Remove] [✕]

Show
original
Item sheet

Remove Item
from list
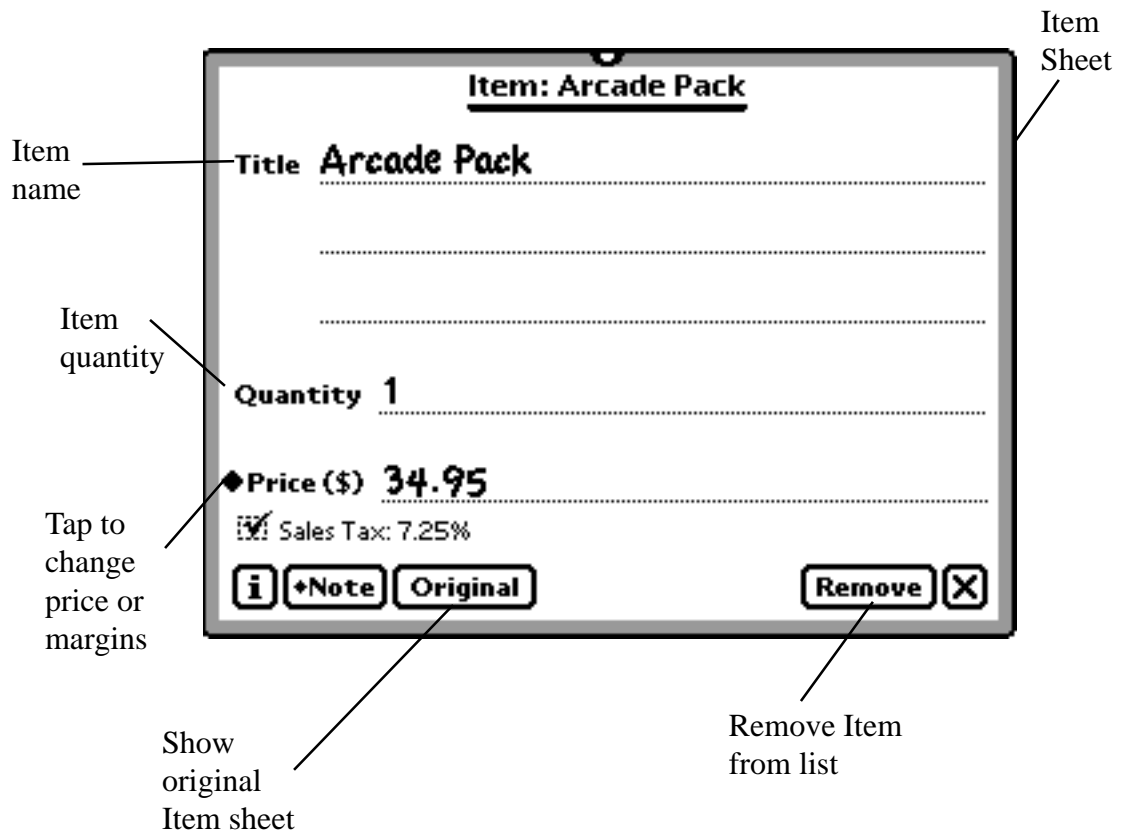
This item slip modifies only the item in the list, and not the statistics for all items of this type. To modify all instances of the type of item, tap the Original button to bring up the original Item slip. For more information on Original item slips, refer to Section 5.2.

Title
Rename the item here.

Quantity
The Quantity line changes the number of the item in the order.

Price
You can modify the price of the item in this window. Write a new price in on the line, or, to change the price, tap on the price ($) picker to bring up the Price and Margin screen.

Price and Margin Screen

Cost
Cost gives you the cost of the item. Enter a new value on the line to change the cost.

Price
Price is the selling price of the item. You can change the price of the item by entering a value on the line.

Margin
Margin reports the percentage profit on the item. You can also use the Margin (%) picker to set the price of the item. Tap on the picker to bring up a list of percentages. Select one of them, and the price of the item is set to the item cost plus the percentage of the item cost.

3.11   Totals

The totals for the order are in the lower right hand corner of the order slip.

3.11.1   Subtotal
The order slip subtotal includes all the subtotals of the various items. It is the basic cost without taxes or additional charges.

3.11.2   Tax, other charges
Taxes and charges, such as shipping, are included here. To set taxes and other charges, please see section 6.4.

3.11.3   Total
This is the total price for the entire order. It includes the cost of each item and all taxes and charges. It is also the total of the order subtotal and the tax, other charges line.

3.12   Filing Orders

```
✓Unfiled Orders
·····································
 Completed Orders
 Expense Reports
 Miscellaneous
 Proposals & Bids
 Purchase Orders
·····································
 All Orders
```

The folder tab at the top of the Quick Entry form lets you file the order just as you would a note. Order Form Pro includes five folders where you can file notes: Completed Orders, Expense Reports, Miscellaneous, Proposals & Bids, and Purchase Orders.

3.13   Status

Current status
```
✓Normal
 Urgent
 Emergency
·····················
 Edit List
```
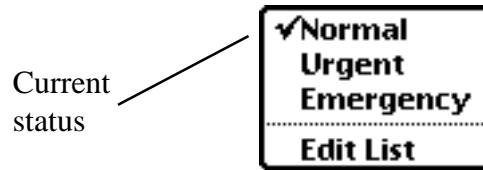
The Status sets the status of the order. Tap on it to bring up the list of availible status options. You can add new status options by selecting Edit List.

4 Finishing an Order

When the order is finished, the Action button gives you a number of choices.

```
┌─────────────────────────┐
│ 🖨  Print Order          │
│ 📠  Fax                  │
│ ⸬  Beam                  │
│ ▣  Mail                  │
│·························· │
│ ▤  Export to Works       │
│ 🏷  Post                 │
│ %  Margins               │
│·························· │
│ 🗑  Delete               │
│ 🗐  Duplicate            │
└─────────────────────────┘
```
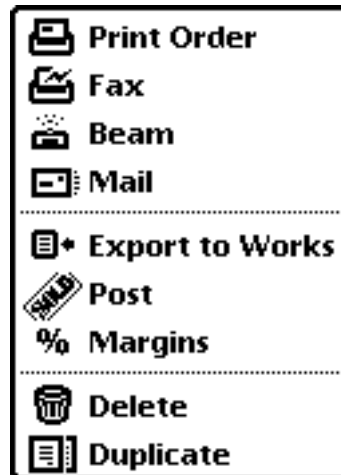
4.1   Printing, Faxing, or Beaming an Order

All of these options work just like they normally would on the Newton. Tap on any one of them to select the option.

4.2   Mail

Order Form Pro lets you email you orders. However, this only works if you have an email client installed. You can set what is included in the email through the Emailing Order Preference. For details on the preference settings, please see Section 7.6.

4.3   Post

The post command tells Order Form Pro that you are finished with the order. It is the last thing that you do to an order, and it cannot be undone. When an order is posted, the inventory list is updated, and it tells you if any items need to be back-ordered.

4.4   % Margins

The % Margin choice gives you the margin of the order. It computes as a percentage the difference between the cost of the item (what it cost you) and the price of the item (what it is being sold for). This lets you keep track of how much money you are making per order.

ⓘ **Order Form Pro**
Your overall margin for this order
(including discounts) is 131.11%

4.5   Delete and Duplicate

These two functions work as they normally would on the Newton.

4.6   Export to Works

If this option is selected, it copies the order into a Newton Works document.

5 Building Your Database

Order Form Pro isn't only a convent way to take orders, but it is also a complete database of all of your products, services and customers.

5.1   Adding Customers

Order Form Pro gives you three ways to enter new clients into the customer database.

5.1.1   From the Quick Entry Form
The Client picker on the Quick Entry form gives you a names picker to select your clients. If the Client line is blank, a list of all the clients appears. Select a client by checking the box next to their name and closing the window with the client list. To create a new client, tap the New button at the bottom of the client list. When the New button is tapped, enter a new client just as you would a name in the Names function of the Newton.

If there is a client in the list and you want to enter a new name, select Other Name, to bring up the list of names.

Client picker
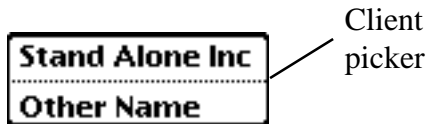
Once there, tap the New button and enter the new client just as you would a name in the Newton's Names function.

5.1.2   From the Client Info Screen
You can also enter new clients from the Client Info Screen. When in that window, tap on the New button and select either Client (Person), or Client (Company).

When you have selected the new client, tap on the Add button to add new

information. The Add button gives you a list of options for information, just like the Add button in the built-in Names function.

```
Person Info
Company
Address
Phone
E-Mail
Pager
Dates
Affiliate
Notes
```
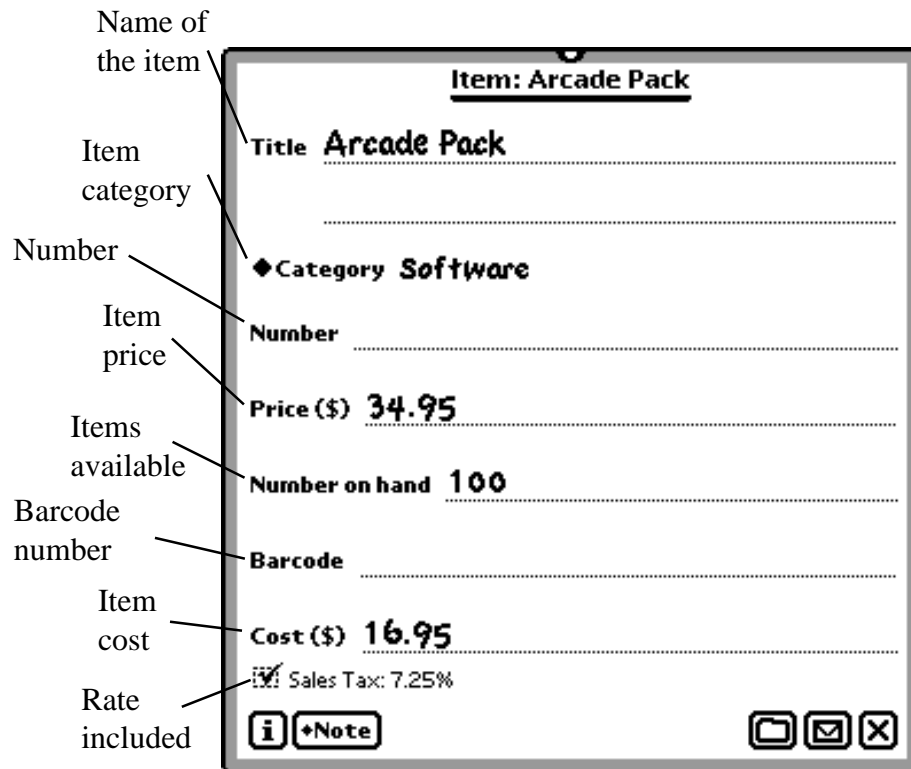
For more information on the Client Info Screen, please refer to Section 6.1.

5.1.3   From Within the Names File
If you are using the Names file to store your customer info, you can enter a client just as you would any other name. For more information on using the Names file to store Order Form Pro clients, please refer to Section 7.4.

5.2   Adding Products

To add a new product into the database, start by tapping the New button at the bottom of the screen. Select Product, and the Item widow will appear.

Name of
the item

Item
category

Number

Item
price

Items
available

Barcode
number

Item
cost

Rate
included

Item: Arcade Pack

Title **Arcade Pack**

◆Category **Software**

Number

Price ($) **34.95**

Number on hand **100**

Barcode

Cost ($) **16.95**

☑ Sales Tax: 7.25%

ⓘ ◆Note   ▢ ✉ ☒

5.2.1   Title

Title is where you enter a descriptive name of the item.

5.2.2   Category

You can assign the item to an item category with this picker. You can choose no category by picking the blank spot, one of the given categories, or make your own categories by choosing the Edit List option.

5.2.3   Number
If the item has an item number, enter it here.

5.2.4   Price
Enter the amount that you are charging for the item here.

5.2.5   Number on Hand
Enter the quantity of the item that you have available here.

5.2.6   Barcode
If the item has a barcode number, it is entered here. You can enter a barcode by placing the cursor at the beginning of the line, and scanning the product barcode in to the Newton.

5.2.7   Cost($)
Enter the amount that the item cost you here.

5.2.8   Rates and Costs:
Check this box if a rate or cost, such as sales tax, is to be applied to the item. See Section 6.4 for how to set the value for the sales tax.

5.2.9   Note
You can add a note to the item here.

5.2.10   Add Now
When you are done creating the item, tap this button to add it to both the database and the current order. If you close the window, it the item is only added to the database.

5.3   Adding Services

Order Form Pro tracks services as well as items. To enter a new service to the data base, tap the New button and select Service from the menu that appears.

Service
name

Service
number

Service
rate

Barcode
number

Service
category

Included
rates and
costs

5.3.1   Title
The Title line is where you enter a descriptive name for the service.

5.3.2   Number
If the service has a number, enter it here.

5.3.3   Rate
This line sets the cost of the service. Enter the dollar amount in the first blank, and then set the time picker at the far right. The combination gives you a cost per time statement, such as ten dollars per hour, for the service.

5.3.4   Barcode
If the service has a barcode number associated with it, you can scan the barcode number into this space. To do so, place the text cursor on this line and scan the barcode into the Newton.

5.3.5   Category
Assign the service to a category with this picker. Tap on the Category picker to bring up a list of available categories. If you don't want to assign a category to the service, select the blank line. To add a new category, select Edit category and tap on the New button on the screen that appears.

5.3.6   Rates and Costs
This section of the Service form shows all the rates or costs that can be included. Check the box next to each rate or cost to apply it to the service.

5.3.7   Note
Tap here to add a note to the service. This note is just like a note from the NotePad.

5.3.8   Add Now
When you are finished creating the statistics for a new service, tap this button to add the service to the database.

5.4   Adding Groups of Products and Services

Order Form Pro lets you create groups of products and services to make it faster to enter these products into the order sheet. To create a group of products and services, tap on the New button and select Group. When you have included all the items that you want into the group, just tap on the close box. From then on when you add the group to an item list, it automatically adds all of its member items to the list.

5.4.1   Title
Enter a descriptive title for the group on these lines.

5.4.2   Number
If there is a group number, enter it onto this line.

5.4.3   Barcode
If there is a barcode associated with the group of products, scan it onto this line. To do so, place the text cursor on the line and scan the barcode.

5.4.4   Category
You can assign the group to a category with this picker. Tap on the Category picker to bring up a list of available categories. If you don't want to assign a category to the service, select the blank line. To add a new category, select Edit category and tap on the New button on the screen that appears. For more information on categories, see Section 5.2.2.

5.4.5   Note
Tap here to add a note to the service. The note will be just like a note from the NotePad.

5.4.6   Item List
This list works just like the list in the Quick Entry screen. For more information on the item list, see Section 3.10.

5.4.7   Adding Items to the Group
Adding items to the group is just like adding them to the item list. Tapping the Add button brings up a list of all available goods and services. Select the one you wish to add from the list, and it will appear on the item list.

5.4.8   Total for Group
The group total gives you the total price of all the items in the group.

5.5   Inventory

Order Form Pro tracks your inventory as well as specific items. To see your inventory, tap the Show button and select Inventory.

Alphabetical
tabs

Check to
select item

Item
list

List
picker

Select all

11:42 Tue 9/9		◆ All Items
ab cd ef gh ij kl mn op qr st uv wx yz		

◆Item Title	◆Item #	◆# On	◆Price
☐ Arcade Pack	-	100	34.95
☐ Board game set	-	0	52.55
☐ Dateman	-	1000	54.95
☐ Dice	13	81	1.30
☐ font Pack	-	0	20.00
☐ font Pack 2	-	100	15.00
☐ fonts	-	0	45.00
☐ Game	-	13	49.95
☐ Set	18	0	109.00
☐ Set up	1	0	50.00
☐ Styles Pack	-	150	10.00

◆List **All Items**
⊞New ✓All   ▢ ✉ ☒
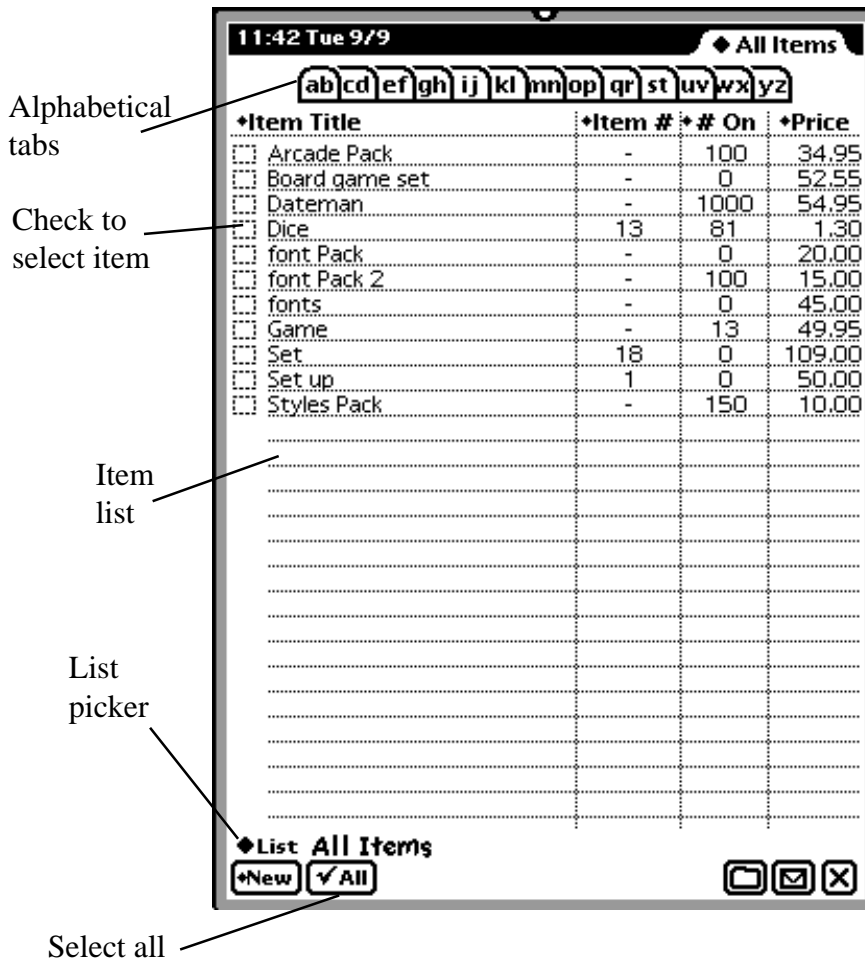
5.5.1   Alphabetical Tabs
These tabs work just like the ones in the Names file. Tap on a lettered tab to show all the items starting with the letter on that tab.

5.5.2   Item List
This list works just like the list in the Quick Entry screen. For more information on the item list, see section 3.10.

5.5.3   List
The list picker lets you determine what items are shown in the Item list. The current selection has a check next to it.

All items
This displays all of the items and services included in the database.

In-stock Items
In-stock items includes only items that have a quantity of one or more.

Out-of-stock items
Out-of-stock items displays only items with a quantity of zero.

Back-ordered Items
Back-ordered items displays all items with a quantity of less than zero.

Out-of-stock and back-ordered items
Out-of-stock and back-ordered items displays all of the items with a quantity of zero or fewer.

5.5.4   Adding New Items
You can add new items directly from the inventory list. Tap the new button to add a new group, product, or service. For more information on adding new items, refer Sections 5.2 to 5.4.

5.5.5   Check All
Check all selects all of the items in the inventory. This makes it faster to beam or delete large amounts of data.

5.5.6   Routing the Inventory
If an item or items are checked, the Action button gives you two options to rout the date. You can beam the data to another Newton by selecting the Beam Item option, or you can delete the data by selecting Delete.
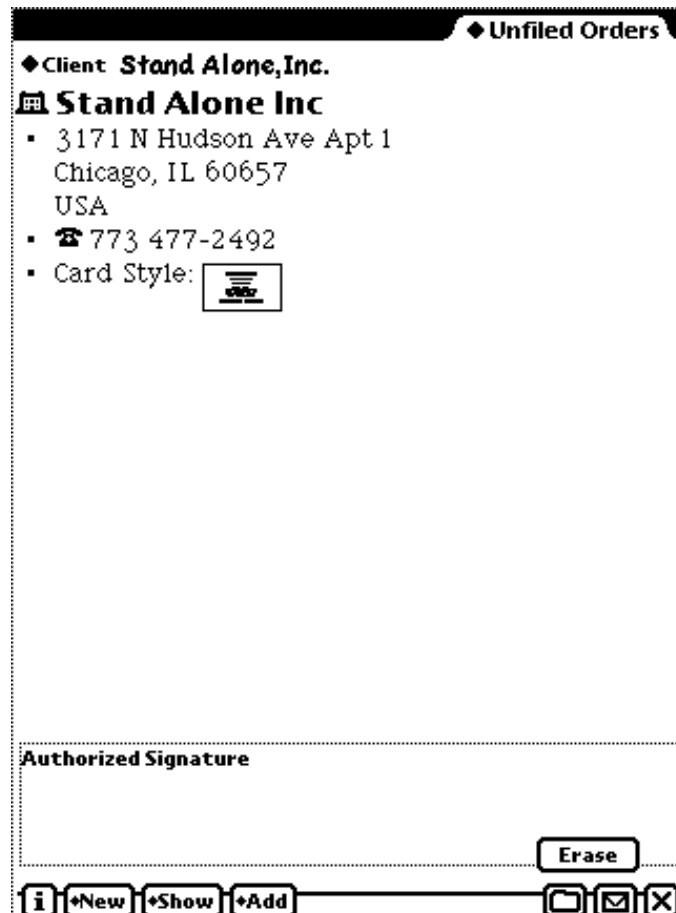
5.6   Client List

Order Form Pro stores client information in either the Names soup, or one that it creates. You determine where Order Form Pro stores clients in the Preference section. For more information, please see Section 7.1. Either way, the client list behaves exactly like the Names file. To access the client list, tap the Show picker and select Client List. The file with the client list appears, and you can work with it just as you would the Names file.

6 Order Details

Order Form Pro has six screens with information. The Quick Entry screen, addressed in Chapters 3-5, is the main screen. There are six other screens: Client Info, Line Items, Notes, Graph Paper, Rates and Cost, Credit Card, and Payment/Address. All of these screens are accessed through the Show picker.

6.1   Client Info

The Client Info screen contains all of the information on a client. It is identical to the Show All Info screen in the Names files with a few exceptions.

6.1.1   Authorized Signature
The authorized signature window holds the client's signature. To enter a signature, write in the Authorized Signature box. To remove a signature, tap the Erase button.

6.1.2   Scroll Arrows
The scroll arrows in the button bar work slightly differently than in the Names file. Instead of going to the next or previous Name card from the Names file, they go to the Client Info screen of the next or previous order in Order Form Pro.

6.2   Line Items

The Line item view is similar to the Quick Entry screen item sheet, except it only shows the item sheet and the order's totals. For details on using the item sheet, see section 3.10.

6.3   Notes

The Notes screen brings up a screen with all of the notes attached to the order. If you wish to create a note for the order, tap on the show button and select Notes. The Notes screen works just like the NotePad with a few exceptions. The notes that are created are specific to Order Form Pro. If you tap the scroll arrows to go through the notes, you scroll only through Order Form Pro' notes.

6.4   Graph Paper

Graph Paper works in a similar fashion to Notes, except that the back ground is a grid.
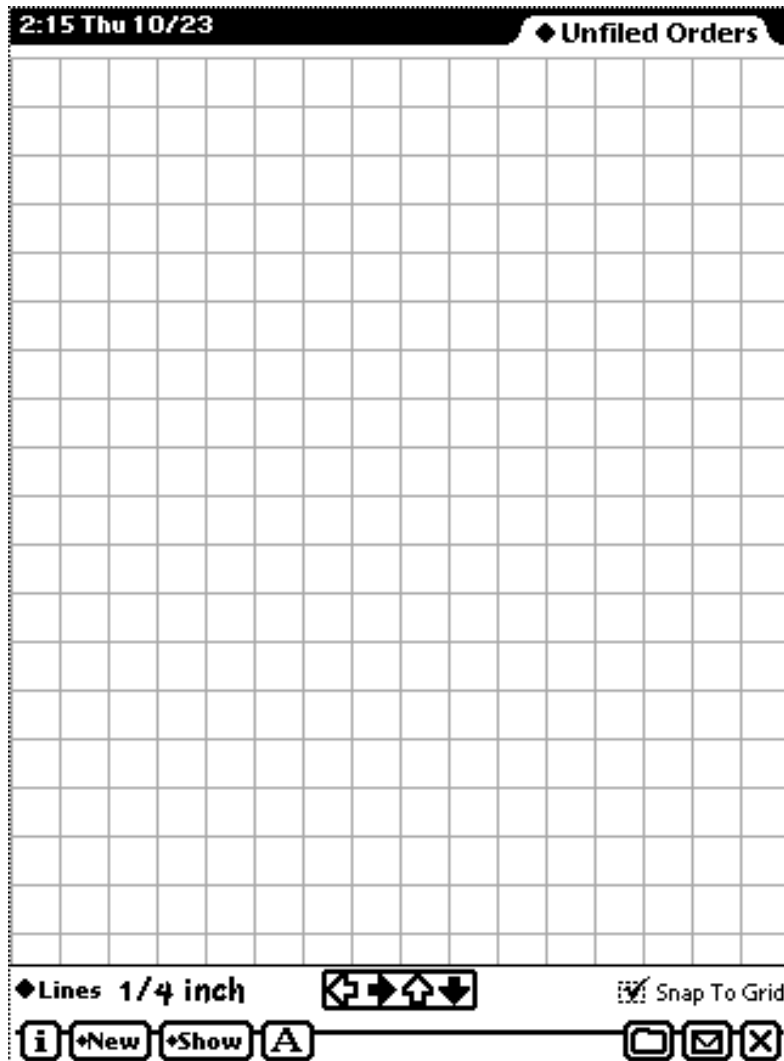
6.4.1   Lines
This picker lets you set the spacing between the lines if the grid. Tap on the picker
to bring up a list of spacings in either inches or millimeters.

```
┌──────────────┐
│  1/16 inch   │
│  1/8 inch    │
│ ✓1/4 inch    │
│  1/2 inch    │
│  1 inch      │
│  25 mm       │
│  20 mm       │
│  15 mm       │
│  10 mm       │
│  5 mm        │
│  3 mm        │
└──────────────┘
```
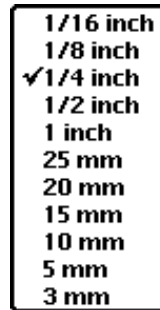
6.4.2   Scroll Arrows
The scroll arrows are used to view different portions of the graph paper. A dark-
ened arrow tells you that there is a section of the graph paper off of the screen in
that direction. Tap on the darkened arrow to view the hidden portion of the paper.

6.4.3   Snap To
If this box is checked, then any text or graphics that you enter onto the graph paper
will automatically align themselves with the paper's grid.

6.4.4   Printing the Graph Paper

To print the graph paper, tap on the Action Button ⌧ and select Print Order.
Then, when the printing slip appears, tap on the Format picker and select Graph
Paper.

```
┌─────────────────────────────────────┐
│ ◆ John Ball              Print  ┌─┐  │
│   Chicago                       │🖶│  │
│                                 └─┘  │
│       ◆Printer StyleWriter (I & II)  │
│                                      │
└─────────────────────────────────────┘
┌─────────────────────────────────────┐
│ ◆Format Graph Paper                  │
│ ┌─────────┐          ┌───────┐┌──┐   │
│ │ Preview │          │◆Print ││✕ │   │
│ └─────────┘          └───────┘└──┘   │
└─────────────────────────────────────┘
```
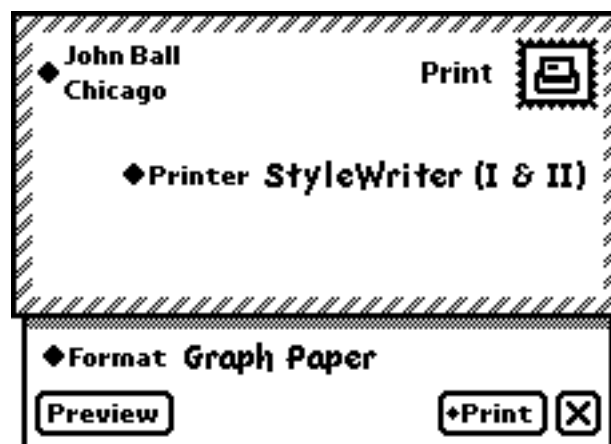
Finally, tap Print to print the graph paper.

6.5   Rates and Costs

Selecting Rates and Costs brings up a screen with two windows. The top window shows all the available options for taxes, discounts, and other rates. The lower window shows all of the available fixed costs. Next to each item is a checkbox. If this is checked, then the rate or cost is included in the Tax, other Charges section of the order form.

Check to
include
Rate or
Cost

◆ Unfiled Orders

Taxes, discounts, and other rates
☑ Sales Tax: 7.25%

Fixed Costs
☑ Delivery: $20.00
☐ fed Ex: $12.00

[i] [+New] [+Show] [Edit R & C]   ☐ ✉ ☒
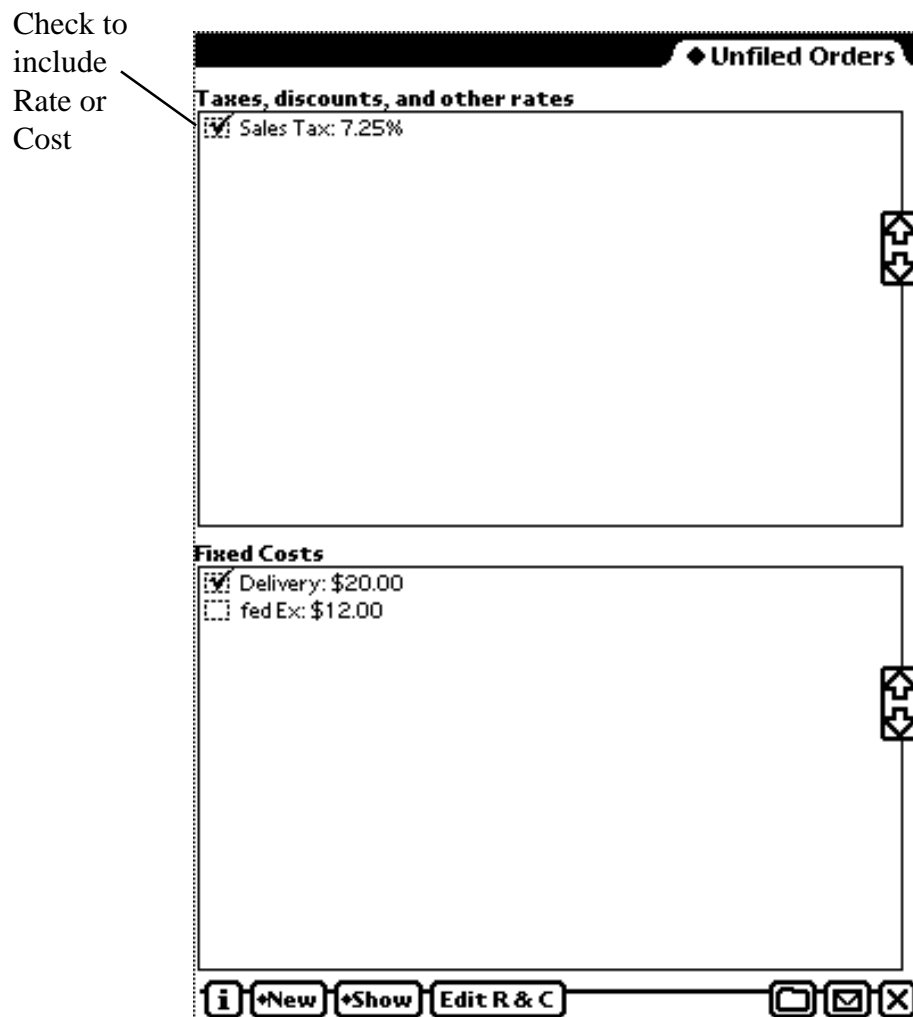
To create a new rate or cost, or edit an existing one, tap on the Edit R&C button. To modify an existing item, tap on the item line. The detailed window for that item then appears. If you want to create a new rate or cost, tap the New button and select either rate or cost.

Tap entry to modify the existing Rate or Cost

Tap to create a new Rate or Cost
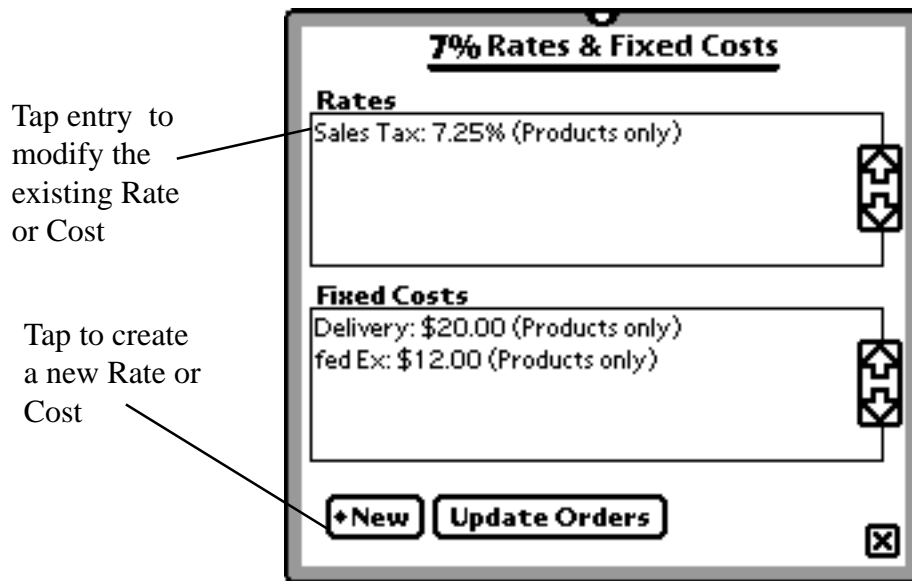
6.5.1   Rates
When creating or modifying a rate, you use the Rate Editor.

Desc
Enter a description of the rate here.

Rate
The rate line is for the percentage rate. If the rate is positive, it will be added to the price of the item. If it is negative, the rate will be deducted from the price.

Applicable Items
There are two choices under applicable items. You can choose to include products, services, or both. Check the box next to products or services to include them. The Rate is not applied to items that are not checked.

Add
Tap the Add button to add the new rate to the list of rates.

Delete
Tap the delete button to remove the Rate or Cost.

6.5.2   Fixed Costs
The Cost Editor works like the Rate Editor, except it only has entry lines for
Description and Cost.

Desc
Enter a description of the fixed cost here.

Cost
Enter the amount of the cost here.

Add
when you are finished creating or modifying the fixed cost, tap the add button to
add it to the list of fixed costs.

6.5.3   Updating Orders
Updating Order updates the new rate or cost on all of your orders to include the
new rate or cost. This can take a bit of time, so only do it when you change a rate
or cost.

6.5.4   Discounts with Rates and Costs
Order Form Pro uses Rates and Costs to figure in discounts. Enter a rate or cost as
you normally would, but make the value negative instead of positive.

6.6   Credit Card

The credit card screen is where you enter the information for a client's credit card.
You set the type of card at the picker at the top, and enter the account information
into the spaces given below. You can also have an authorized signature for the card
entered into the box at the bottom. This works just like the authorized signature
from the Client Info screen explained in section 6.1.

6.7   **Payment/Addresse**s

The payment/addresses screen contains information on the person to be billed, or the place the order is to be shipped. The information is taken from the client information if it is available. The sheet has two pickers at the top, and a number of entry lines. The entry lines for information work as they normally would on the Newton, and the two pickers are detailed below.

6.7.1   Method of Payment
Tap on this picker to set the method of payment used by the client.

6.7.2   Bill To
Use this picker to set whether this slip is the Bill To slip, or the Ship To slip.

6.7.3   Same as Client
If this button is tapped, all of the information for the Payment/Addresses screen are taken from the Client information. If the client information doesn't have needed information, then the entry line is left blank.

7 Preferences

Order Form Pro has an extensive preferences section to let you customize the program to your needs. To access the preferences, tap the [i] button and select Prefs.

7.1   Address Format

The address format sets how Order Form Pro presents the addresses.

Check to
include item
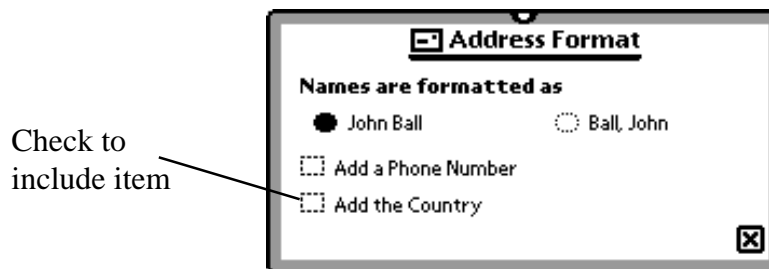
You may view names either in the standard way, or with the last name first. You can also choose to add a phone number or the country to an address. Check either of their boxes to add them to the address.

7.2   Barcode Wand

There are two options under the barcode preferences.

Check to
include item
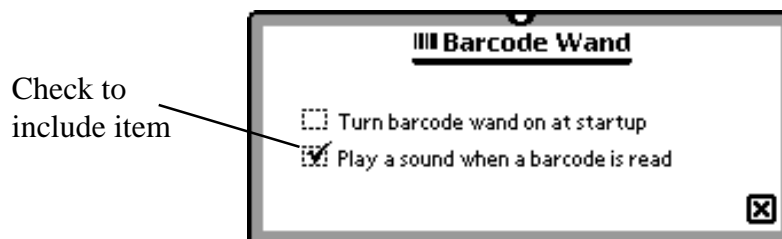
You may choose to turn the barcode wand on at start-up, and to have the Newton make a sound when a barcode is scanned. Check the box next to an option to include it.

7.3   Categories

When you open up the Categories Pref, a screen appears with all of the available categories listed.

Tap on
category to
change it

Tap to create
new category
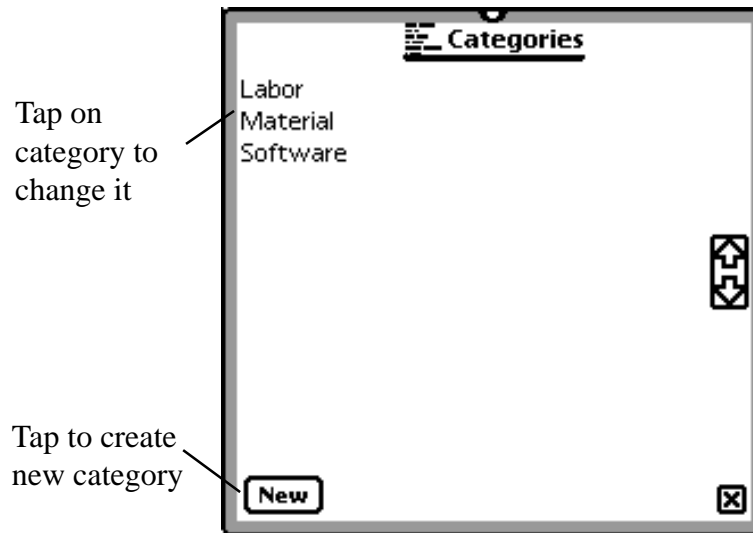
Tap on one of the categories to modify or remove it. You create new categories by
tapping the New button and entering a name for the new category. All of the
categories found in this list can be accessed from the Category picker in the Item
and Service windows. For more information on the Item window and Service
window, please see Section 5.2 and section 5.3.

7.4   Client Storage

Normally, all client information is stored in you names file.

 If you want to keep the client information in a separate location so that your
clients information isn't mixed the other information in your Names file, uncheck
the box in the client storage prefs. Order Form Pro then creates a new soup, which
behaves just like the names file, for your client information.

7.5   Currencies

The Currency pref has two pickers: one for currencies that use a prefix, and one for currencies that use a suffix. Tap on the top picker for US dollars, Australian dollars, or Canadian dollars.
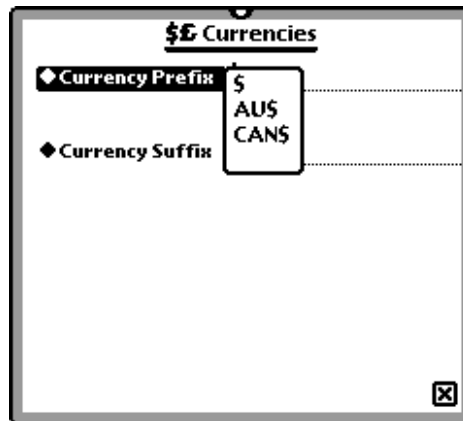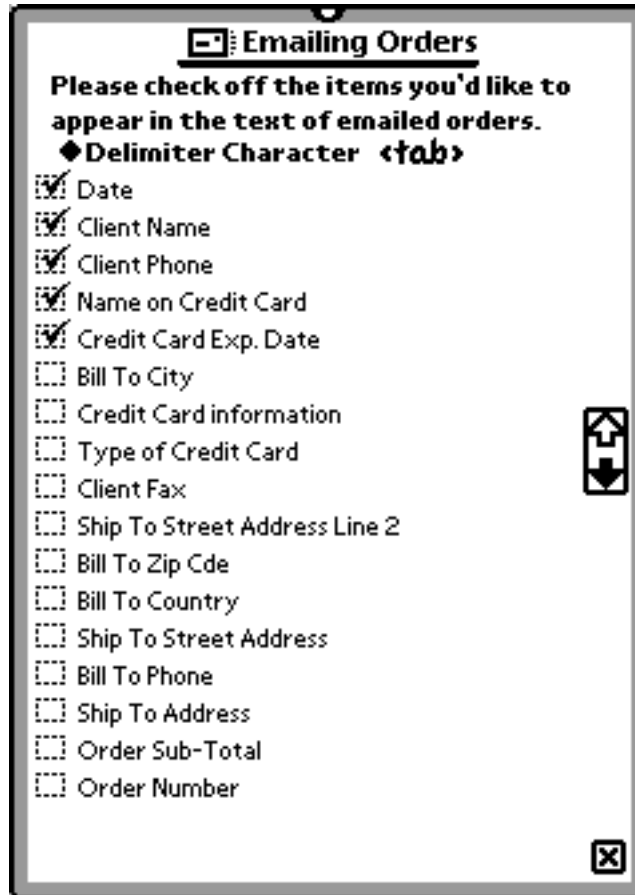
Use the lower picker for pounds, marks, francs, or yen.
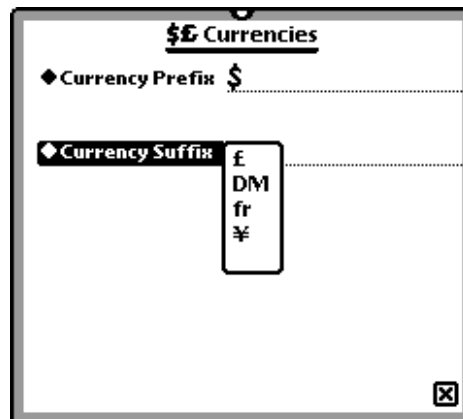
7.6   Email Orders

The email prefs give you a long list of options that can be included in the text of an emailed order. It also lets you choose to place either a comma, a period, or a Return between the item and the information. To do this, tap on the Delimiter picker and select the seperator you wish to use.

```
┌──────────────────────────────┐
│      ⊟┊ Emailing Orders      │
│  Please check off the items you'd like to │
│  appear in the text of emailed orders.    │
│   ◆Delimiter Character  ‹tab›│
│  ☑ Date                      │
│  ☑ Client Name               │
│  ☑ Client Phone              │
│  ☑ Name on Credit Card       │
│  ☑ Credit Card Exp. Date     │
│  ☐ Bill To City              │
│  ☐ Credit Card information   ⬆ │
│  ☐ Type of Credit Card       ⬍ │
│  ☐ Client Fax                ⬇ │
│  ☐ Ship To Street Address Line 2 │
│  ☐ Bill To Zip Cde           │
│  ☐ Bill To Country           │
│  ☐ Ship To Street Address    │
│  ☐ Bill To Phone             │
│  ☐ Ship To Address           │
│  ☐ Order Sub-Total           │
│  ☐ Order Number              │
│                          ⊠   │
└──────────────────────────────┘
```

Check any of the options that you want to include, and uncheck any that you wish left out. You can reorder the list of email options by tapping and dragging an option to a new place on the list. With the Email options, there is a difference between street address and address. Address is the full address, while street address is only the building number and street name.

7.7   Rates and Fixed Costs

The Rates and Fixed Costs pref is another way that you can modify the existing rates and costs. It works exactly like the rates and costs screen explained in section 6.4.

7.8   Return Address

Use the return address pref for the address of the company shipping products.

The basic information for the Return Address is taken from the Owner Info. To change the return address, enter information on the lines provided.

7.9   Text Strings

The Text Strings section of the preferences is the ultimate way to customize Order
Form Pro. Any of the text lines that are listed under Text Strings can be replaced
with text of your own. If you replace a line of text here, every place in the program
that uses that text will have the new text instead.

Tap here for
more text
strings

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