

Using Pen On The Road



Apparel Version 2.0

**Sales Automation
Software**

RUGGEDWARE
OUTFITTERS FOR THE MIND

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Welcome to Pen On The Road iii

Leading-edge features iv

1 Getting Started Quickly 1

Starting Pen On The Road 2

Main Menu 3

Exiting Pen On The Road 4

2 Using the Help System 5

Displaying help on a window 6

Displaying the help contents 7

Selecting help topics 8

Tips, notes, ideas, cautions, and important information 10

Returning to previous help windows 11

Browsing help topics 11

Searching for a help topic 12

Getting help on help 13

Printing a help topic 13

Exiting the help system 14

3 Learning the Basics 15

Using the pen 16

Feedback symbols 17

Menu bars 18

Buttons 19

List boxes 20

Writing areas 21

Display areas and line selection 24

Scroll bars 25

Default values 26

Warnings versus errors 26

Additional help with basics 27

4 Working with Pen On The Road 29

Working with orders 30

Communicating with the home office 36

Inquiring about customers and products 37

5 Working with Orders 39

Writing a new order 40

Using batch sizing to produce an order 42

Writing orders in a hurry 43

6 Communicating with the Home Office 45

Preparing for a *communications session* 46

Exchanging information now 47

Exchanging information later 48

Troubleshooting a *failed session* 49

7 Inquiring about Customers & Products 51

Viewing Customer Information 52

Viewing product information 53

Index 55

Welcome to Pen On The Road

Everyone loathes unnecessary paperwork. Especially the time-consuming paperwork that keeps you from being more productive during the day and night. RuggedWare Ltd. designed the revolutionary Pen On The Road system with powerful features, not only to streamline the order-writing task, but also to lend a strategic advantage to you as a sales professional.

Pen On The Road features pen-based systems with state-of-the-art handwriting recognition. Pen-based computers help non-typists overcome the fear of working with computers. The pen is a natural extension of what most sales reps do every day. With a pen, you simply write on the screen to put information into your computer.

Pen On The Road allows you to take orders from your customers with ease, transmit them to the home office, and track important information on a powerful notebook computer. Pen On The Road sends information to the home office with RoadLink, RuggedWare's interface system to guarantee quick response between the company and field representatives. RoadLink features intelligent order verification through its proprietary Expert Interface to eliminate problems.

RuggedWare's mission is to make the professional sales rep the most proficient individual in the sales field today. With this sales automation system, sales reps can accurately write orders, size them, print them for the customer, and transmit them to the company in minutes, avoiding sleepless nights and huge overnight shipping charges.

CONTENTS:

WELCOME TO PEN ON THE ROAD

- 1 *Getting Started Quickly*
- 2 *Using the Help System*
- 3 *Learning the Basics*
- 4 *Working with Pen On The Road*
- 5 *Working with Orders*
- 6 *Communicating with the Home Office*
- 7 *Inquiring about Customers & Products*

Index

Leading-edge features

RuggedWare leverages today's advanced technologies to empower you as a sales professional. Below are just a few of the reasons you'll be able to work even more effectively with Pen On The Road.

Order Writing

- Easy retrieval of existing orders
- Fast duplication of orders
- Bar-code scanning for quick, accurate entries
- Flexibility to override vendor-provided data
- Handwriting recognition to avoid keyboard-phobia
- Invalid style numbers automatically restricted
- Sizing constraints made simple through graphic layouts of scales and size-grids
- Only manufactured sizes permitted to be ordered
- Automated tracking of desired units against sized units
- Flexibility in line-by-line ship windows
- Powerful reporting tools enhancing customer service

Communications

- Portable modem and quick three-step process for transmitting orders to the home office
- Automatic backup of all data
- Current vendor data maintained through RoadLink

Product Inquiry

- At-a-glance display of style descriptions, pricing, and shipping information
- Instant retrieval of inventory projections, including status of future cuts
- Quick viewing of a style's size-scale, with an exact layout of manufactured sizes

Customer Inquiry

- Easy access to complete customer profiles
- Up-to-date accounts-receivable balances

Chapter 1

Getting Started Quickly

This chapter tells you how to:

- Start Pen On The Road
- Work with the MAIN MENU
- Go to other chapters in this guide
- Exit Pen On The Road

Information in other chapters

To learn about Pen On The Road's help system, go to chapter 2, Using the Help System.

If you are not familiar with pen computing, go to chapter 3, Learning the Basics.

To learn more about Pen On The Road's functionality, go to chapter 4, Working with Pen On The Road.

To work with orders, go to chapter 5.

To communicate with the home office using a modem, go to chapter 6.

To inquire about customers or products, go to chapter 7.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



Tip



Note



Idea



Caution

Important

CONTENTS:

Welcome to
Pen On The
Road

1 GETTING
STARTED
QUICKLY

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

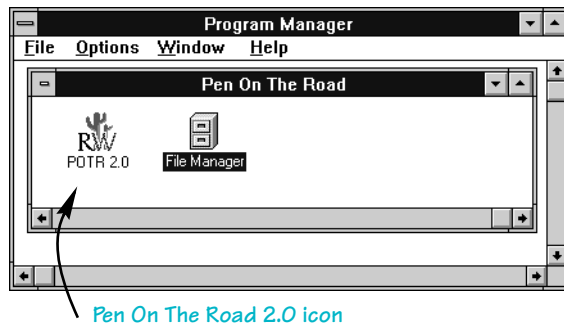
Index

Starting Pen On The Road

Before you start Pen On The Road, exit any other application programs. This gives Pen On The Road the computing horsepower it needs for optimal performance.

To start Pen On The Road:

- ▶ Double-tap on the **Pen On The Road 2.0** icon in the program group named Pen On The Road.



Pen On The Road then displays its MAIN MENU. For more information, go to the next topic: Main Menu.

Go slowly at first!

When working with new software, take your time. Study each new screen as it's presented. Pay attention to the information displayed in the banner area that runs across the top of most windows.

Main Menu

The MAIN MENU window is where you begin each work session after you start Pen On The Road. Like a restaurant menu, the MAIN MENU provides you with a selection of items.

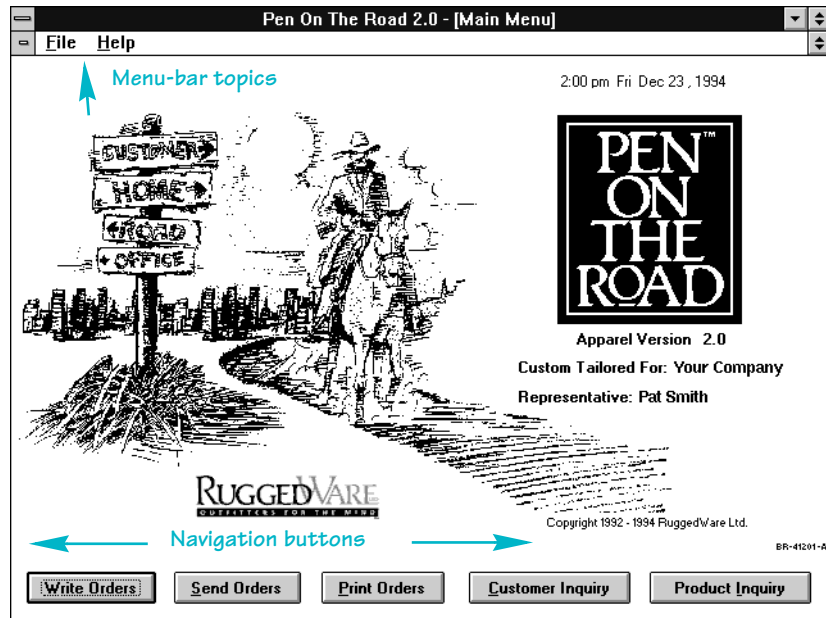
Navigation buttons

Pen On The Road's MAIN MENU provides you with five navigation buttons. Each navigation button takes you to the area you need to work in.

- Tap the **Write Orders** button to work with an order. See chapter 5.
- Tap the **Send Orders** button to link your pen computer, via modem and phone lines, to your home office. See chapter 6.
- Tap the **Print Orders** button to print a paper copy of your order.
- Tap the **Customer Inquiry** button to get information about any of your customer accounts. See chapter 7.
- Tap the **Product Inquiry** button to get information about any style. See chapter 7.

Menu-bar topics

Pen On The Road's MAIN MENU also provides you with two menu-bar topics: **File** and **Help**. For more information, see "Menu bars" on page 18.



Finding your way



In general, buttons along the bottom edge of Pen On The Road windows are navigational; they help you steer your way through a series of tasks. When you tap a navigation button, it takes you to the window or area suggested by its label.

CONTENTS:

Welcome to
Pen On The
Road

1 GETTING
STARTED
QUICKLY

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communicating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Exiting Pen On The Road

As a general rule, return to the MAIN MENU before quitting work with Pen On The Road.

It's also a good idea to back up your orders by copying them to diskette immediately after you exit Pen On The Road. See the Windows for Pen Computing documentation for help with copying electronic files.

To exit Pen On The Road:

- 1 Be sure you're at the MAIN MENU window.
- 2 Tap the **File** menu-bar topic to get a pull-down menu.
- 3 Tap **Exit**, the last item on the File menu.

After a few moments, Pen On The Road closes, saving your complete orders for sending to the vendor and your incomplete orders for future sessions. In place of Pen On The Road's Main Menu, you'll see the Program Manager on your Windows desktop (that is, your screen).

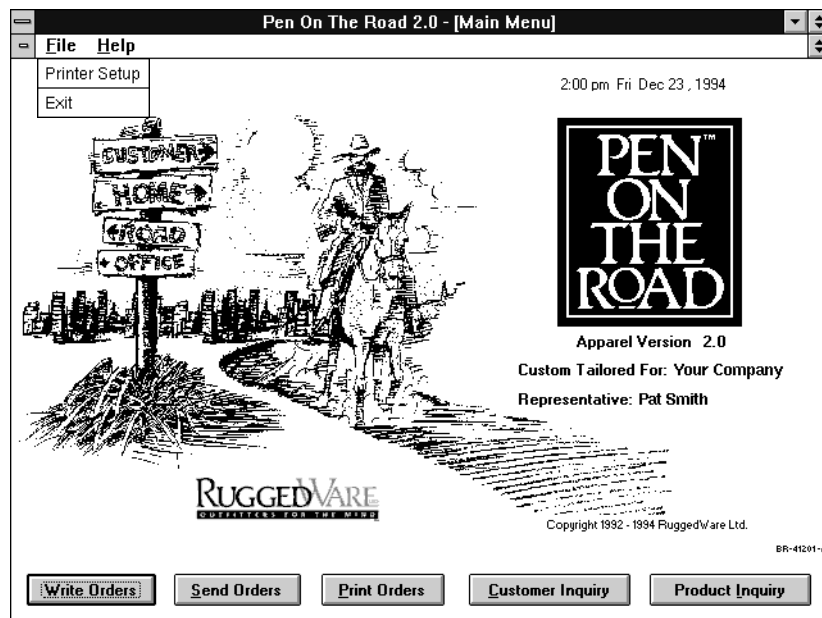
Stopping work safely



Try not to exit Pen On The Road or lose power while working in an order. If you're in an order and need to exit Pen On The Road, first tap the Exit Order button and then the Main Menu button at the bottom of the ORDER STATUS window.

Sleep mode saves time and battery power

Use your pen computer's sleep-mode feature when you want to leave your work session for a while and return to it later. In sleep mode, your computer stays on, but it uses minimal battery power. To put the computer "to sleep," simply close the computer's lid while in Pen On The Road (but preferably not in an order). Return to where you left the system by opening the computer's lid.



Chapter 2

Using the Help System

This chapter explains how to use Pen On The Road's help system.

Using Pen On The Road and the help system work together to help you learn Pen On The Road quickly and take full advantage of its many time-saving features.

Chapters 5-7 in this book explain how to use Pen On The Road to perform typical sales activities such as writing orders, communicating with the home office, and inquiring about customers and products.

As you perform sales activities, Pen On The Road's help system provides detailed instructions for specific tasks such as handling new customers, writing styles for order lines, and checking the inventory of available products.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



Tip



Note



Idea



Caution

Important

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 USING THE
HELP
SYSTEM

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Displaying help on a window

Pen On The Road help is context-sensitive, that is, the help system keeps track of the window you are at and gives you help about that window.

For example, when you ask for help at the ORDER HEADER window, the help system displays topics containing information about order-heading tasks. When you ask for help at the ORDER window, the help system displays topics containing information about order-line tasks.

To display help for a window:

- 1 Tap the **Help** menu-bar topic to get a pull-down list of choices.
- 2 Tap **On This Window** to display context-sensitive help about the window.

The Pen On The Road Help System window appears.

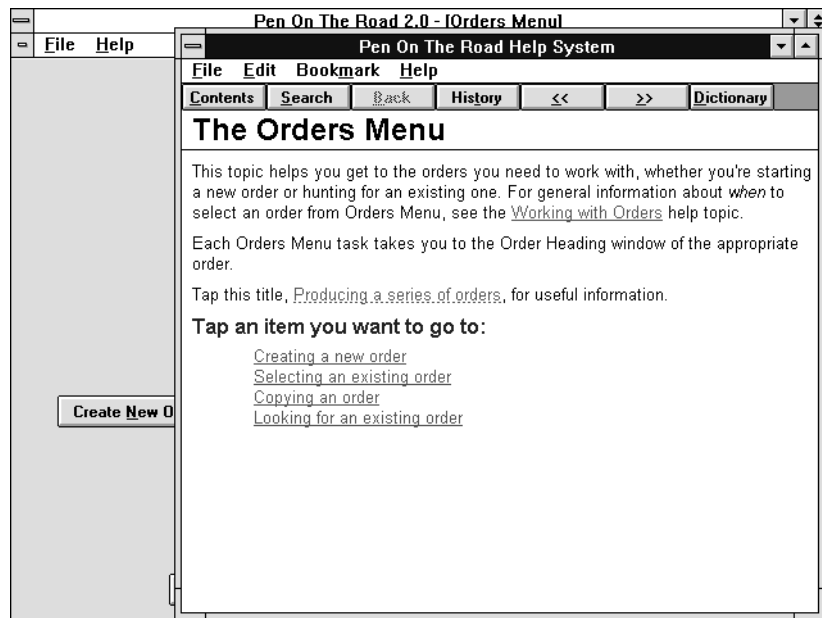
For example, the help topic shown in the illustration appears when you tap **On This Window** at the ORDERS MENU window.

See “Selecting help topics” on page 8 for more information about help topics.

What to do if the help contents list appears



Sometimes when you tap the **Help** menu-bar topic and then tap **On This Window**, the help contents list appears instead of context-sensitive help. When this happens, tap on the topic you want to read about. For more information on using the help contents list, see “Displaying the help contents” on page 7.



Displaying the help contents

Occasionally, you may want to learn about a help topic that is not related to the window you are at.

The Pen On The Road help system lets you choose any of its topics by displaying its contents list.

To display the contents of the help system:

- 1 Display a Pen On The Road help window by any method.

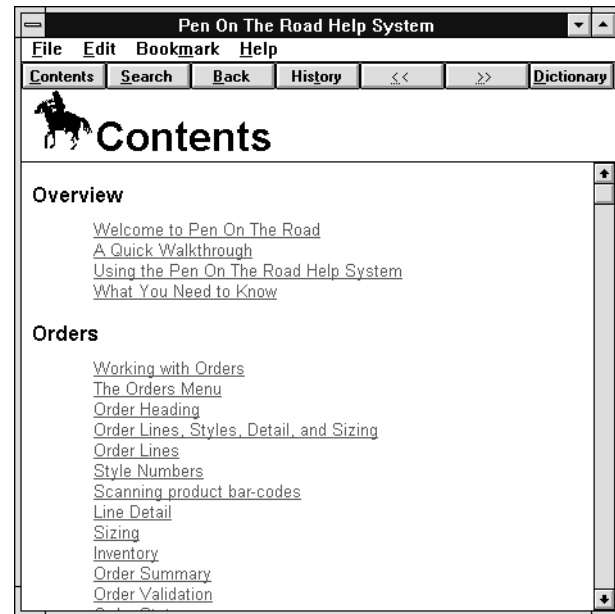
For example, tap the **Help** menu-bar topic to get a pull-down list of choices. Then tap **On This Window**.

- 2 Tap the **Contents** button near the top left corner of the help window.

The help system displays its contents list, which resembles the table of contents in a book.

- 3 Tap on the topic you want to read about.

See “Selecting help topics” on page 8 for more information about help topics.



Some help topics on the list are hidden



The Help contents list is too long to fit within the help window. Use the scroll bar on the right side of the window to display the hidden help topics. For information about using scroll bars, see page 25.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 USING THE
HELP
SYSTEM

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Selecting help topics

In Pen On The Road's help system, you tap on topics to read about them.

Help topics you can tap on are always underlined with either a solid or dotted line. The topics are gray or green depending on whether your computer has a monochrome or color display screen.

To select a help topic:

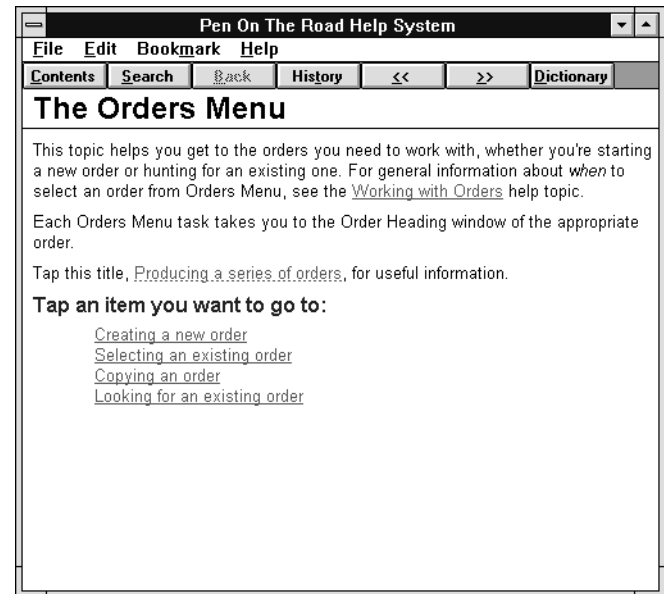
- Tap on any underlined help topic to display it.

The help system replaces the current help topic with the new help topic.

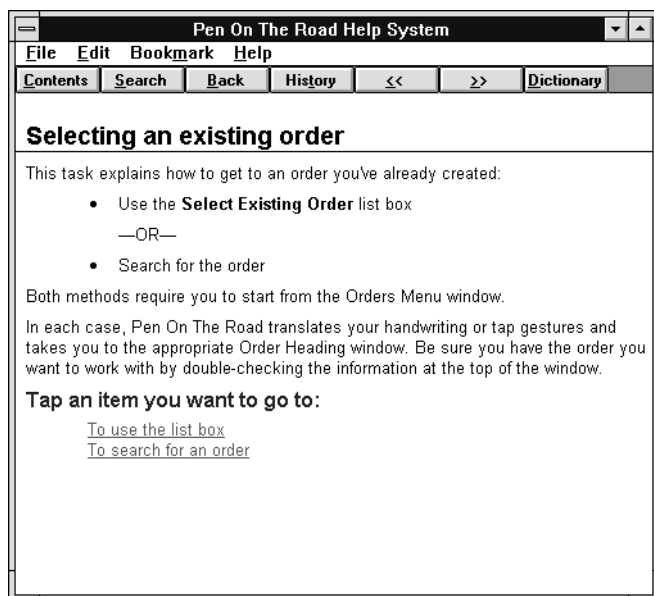
For example, you have just displayed context-sensitive help for the ORDERS MENU. (See “Displaying help on a window” on page 6.)

After reading the ORDERS MENU help topic, you can tap on any of the following help topics:

- Working with orders
- Producing a series of orders
- Creating a new order
- Selecting an existing order
- Coping an order
- Looking for an existing order



To display the Selecting an existing order help topic, tap on it. The following help window appears.



After reading the Selecting an existing order help topic, you can tap on either of the following help topics:

- To use the list box
- To search for an order

Some help topics won't fit in the help window



Whenever possible, Pen On The Road's help system keeps topics short so they fit within the help window. You tap on other topics for additional instructions.

Instructions for some topics, however, are too long to fit in the help window at one time. These topics contain scroll bars for displaying the rest of the instructions. For more information about using scroll bars, see page 25.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 USING THE
HELP
SYSTEM

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Tips, notes, ideas, cautions, and important information

Many help topics contain tips, notes, ideas, cautions, or important information. The titles of these special attention topics are underlined with a dotted line. They are gray or green depending on whether your computer has a monochrome or color display screen, and they appear following the words “Tap this title” within the help topic.

To read a special attention topic:

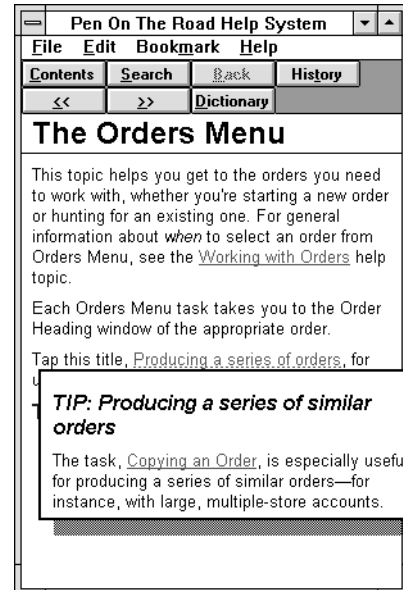
- To read about a tip, note, idea, caution, or important information, tap on its title.

Pen On The Road displays its text in a pop-up window.

For example, if you tap the title, Producing a series of similar orders, in the ORDERS MENU help topic, the pop-up window in the illustration appears.

To close a pop-up window:

- Tap anywhere in the pop-up window to close it.



What to do if the help window disappears



If you tap on the Pen On The Road window instead of the pop-up window, the help window disappears behind the Pen On The Road window. To continue using the help system, re-tap the **Help** menu-bar topic and then tap **On This Window**.

Returning to previous help windows

When you are done reading about a help topic, you can return to previous help windows.

For example, when you have read about selecting an existing order, you can return to the ORDERS MENU help window and select another topic such as Looking for an existing order.

To return to a previous help window:

- ▶ Tap the **Back** button near the top of the help window to return to the previous help window.



You can also use the **History** feature as explained in Windows help.

Browsing help topics

If you want, you can browse through help topics. Browsing help topics is similar to browsing through the pages of a book.

To browse help topics:

- ▶ Tap the >> button to browse forward through the help topics
—OR—
- ▶ Tap the << button to browse backwards through the help topics.



CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 USING THE
HELP
SYSTEM

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Searching for a help topic

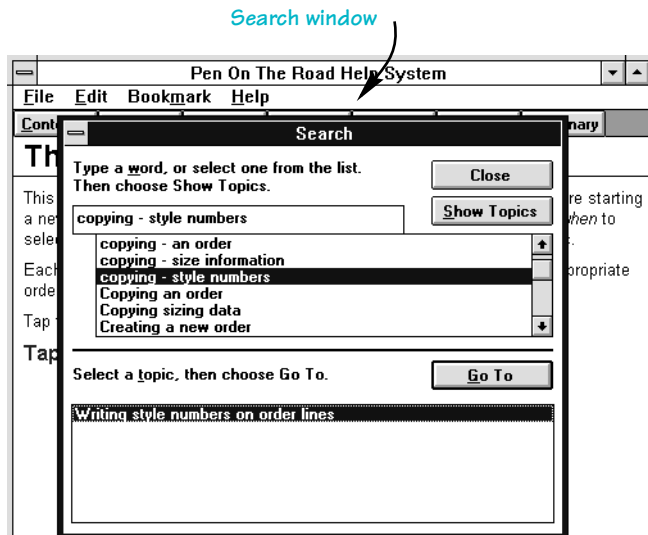
You can search for a specific topic in the help system. This feature resembles the alphabetical index in a book.

To search for a help topic:

- 1 While you are displaying a topic in the help system, tap the **Search** button near the top of the help window.



The Search window appears.



- 2 Type the word or words you are searching for, or tap on one of the items on the list.

You can use the scroll bar to display other items on the list. For more information about using scroll bars, see page 25.

- 3 Tap the **Show Topics** button.

At the bottom of the help window, the help system displays a list of all the topics related to the word(s) you typed or the item you selected.

In the example on this page, the user has selected the item “copying - style numbers” and tapped the Show Topics button. The help system has displayed the topic related to the item: “Writing style numbers on order lines.”

- 4 To select a topic on the list, tap it and then tap the **Go To** button. Or, double-tap on the topic.

The help system displays the help topic.

Getting help on help

Pen On The Road help is based on the Microsoft Windows help system. Microsoft provides help on using its help system.

To get help on help:

- 1 While you are displaying a topic in Pen On The Road's help system, tap on the **Help** menu-bar topic. Then tap on **How To Use Help**.

Windows help displays a list of help topics.

- 2 Tap on the topic you want to learn about.

Printing a help topic

The help system lets you print a help topic.

To print a help topic:

- 1 Make sure your printer is connected properly and loaded with paper.

If necessary, tap the **File** menu-bar topic and then tap **Printer Setup** to review information about how your printer is set up.

- 2 While you are displaying a topic in the help system, tap the **File** menu-bar topic. Then tap **Print Topic**.

The help system prints one topic at a time. It doesn't allow you to print all the subtopics associated with a help topic or any of the "special attention" pop-up windows.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 USING THE
HELP
SYSTEM

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

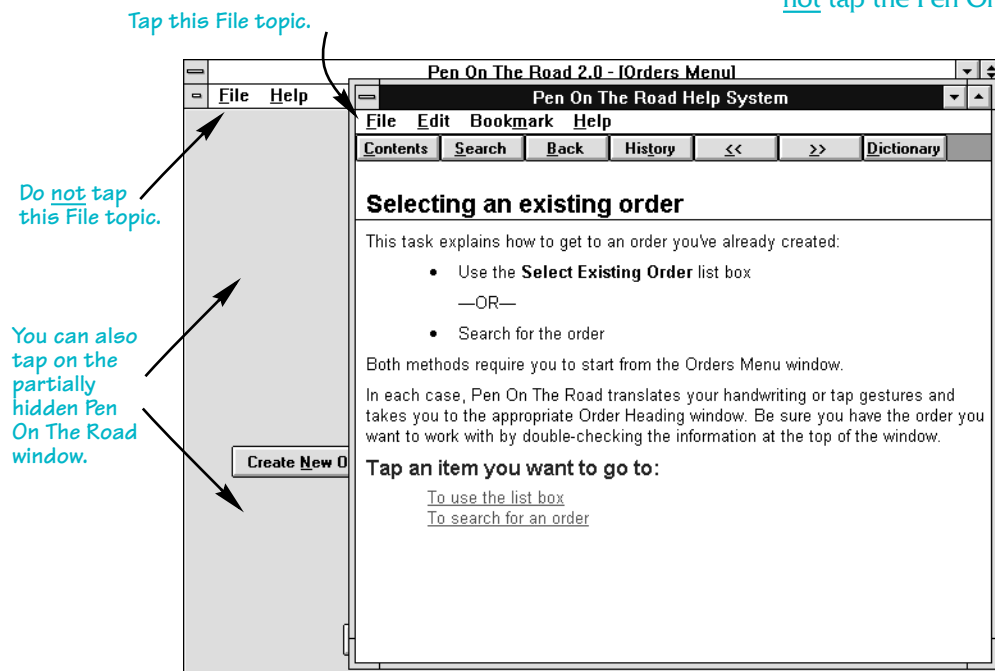
Exiting the help system

When you are done reading help topics, exit the help system and continue working with Pen On The Road.

To exit the help system:

- On the help system's menu bar, tap the **File** topic and then tap **Exit**.

The help window disappears, and Pen On The Road returns you to the window you were at when you displayed help.



Do not exit using Pen On The Road's menu bar!



Always use the help system's menu bar to exit the help system. Do not use Pen On The Road's menu bar. If you tap the **File** topic on Pen On The Road's menu bar and then tap **Exit**, you will exit Pen On The Road. If you are working on an order when you exit Pen On The Road, you will lose all the information you entered on that order.

A quick way to exit the help system

You can exit the help system by tapping anywhere on the Pen On The Road window. Part of this window remains displayed behind the help window while you are using the help system. If you exit the help system using this method, do not tap the Pen On The Road window twice.

Chapter 3

Learning the Basics

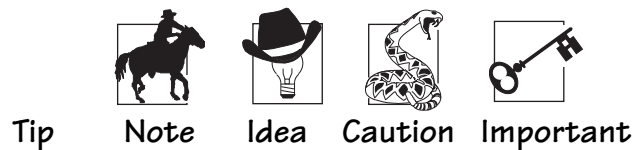
This chapter explains basic information about how Pen On The Road works. Before using Pen On The Road, make sure you understand all the information in the following topics:

- Using the pen
- Feedback symbols
- Menu bars
- Buttons
- List boxes
- Writing areas
- Display areas and line selection
- Scroll bars
- Default values
- Warnings versus errors
- Additional help with basics

If you already know this basic information, go to chapter 4, which provides an overview of Pen On The Road's functionality.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

**3 LEARNING
THE BASICS**

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products



Index

Using the pen

You'll find that using your special pen, directly on the computer's screen, is a very natural way to work with Pen On The Road. Simply tap or write in forms (called windows). Microsoft Windows and Pen On The Road recognize your pen movements and perform actions in response to them.

Tapping

The table below explains how to "tap" and "double tap" on the screen with your pen.

<p>TAP</p> 	<p>Action: Press the pen tip against the screen and then lift the pen tip up.</p> <p>Result: Tapping activates or deactivates a button, displays a "pop-up" list or "pull-down" menu, or selects a value such as a name on a list.</p> <p>Tip: Tap firmly once, then pull your pen away.</p>
<p>DOUBLE TAP</p> 	<p>Action: Tap the pen twice quickly against the screen, in the same spot.</p> <p>Result: In Windows, double-tapping on the upper left corner of a secondary window closes it. Double-tapping the corner of a main window exits you from Pen On The Road altogether.</p> <p>Tip: Make sure both taps are in the exact same location. If you have difficulty double-tapping, adjust the double-tap area and speed in the pen section of the Windows Control Panel.</p>

Don't re-tap until your pen computer responds



When your pen computer performs heavy-duty activities (like making complex computations or searching through the database for information), Pen On The Road may take a moment to respond to your pen actions. Look for feedback symbols to understand what's happening, and always wait for your pen computer to finish processing your instructions. For more information about feedback symbols, see page 17.

Be careful not to repeat any tapping. Unnecessary taps may cause delays if the computer interprets the taps as additional instructions and follows the instructions.

Don't use the pen's button



Pen On The Road does not use the button on the side of the pen. Avoid pressing it as you work.

Using the keyboard and mouse





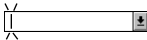
You can also use your pen computer's keyboard and mouse (or TrackPoint stick) to work with Pen On The Road.

Use the keyboard to type words and numbers in the forms.

Use the mouse (or TrackPoint stick) to tap by pointing at an object on the screen and clicking the left mouse-button.

Feedback symbols

As you work, Pen On The Road displays feedback symbols to tell you what's happening. Look for these symbols as you work, and wait for an arrow pointer, pen pointer, or blinking cursor to appear before continuing with the next step.

<p>ARROW POINTER</p> 	Shows the location of your mouse or pen.
<p>PEN POINTER</p> 	Appears at active writing areas (see page 21) so that you may use electronic ink. Data in inactive writing areas appear dimmed or “grayed out” and will not give you this pointer.
<p>HOURGLASS</p> 	Indicates your computer is busy processing your instructions. Be sure to wait until one of the other symbols appears before continuing
<p>QUESTION MARK</p> 	Indicates an unrecognized pen gesture or character. Once in a while, the Handwriting Recognizer may display a Confirm Writing message box, to which you must respond.
<p>BLINKING CURSOR</p> 	Appears at an active writing area or list box so you can enter data with your pen or keyboard.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 LEARNING
THE BASICS

4 Working with
Pen On The
Road

5 Working with
Orders

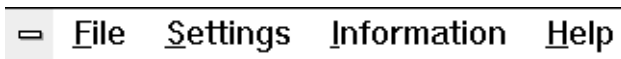
6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Menu bars

The menu bar at the top of each main window helps you work with features relevant to the current task. Each topic on the menu bar displays a pull-down list of choices (called menu items). To work with menu topics, tap directly on the word and then tap on the menu item you want.



- Use the **File** menu to set up the printer or to exit Pen On The Road.
- Use **Settings** to show or hide order totals and style descriptions (after you've written at least one order line).
- When you're working in an order, you can use **Information** to validate the order, recall heading details, and view inventory data.
- Use **Help** to get on-screen assistance with Pen On The Road and information about technical support and the current software version.

To close a menu without choosing any of the items, tap outside the menu in the background of the main window.

Menus, beeps, and dialog boxes



If you hear a beep when you tap the menu bar, Pen On The Road has probably presented you with a dialog box—a small window, centered on top of the main window.

You must respond to a dialog box before you can continue working in the main window (which includes selecting a topic on the menu bar).



Buttons

Pen On The Road provides a variety of buttons that perform actions, select options, or display information:

- Label buttons
- Radio buttons
- Check boxes
- Arrow buttons

Label buttons

Label buttons are rectangular, and they usually have a text label. Pen On The Road uses two kinds of label buttons:

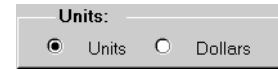
- Action buttons 
- Navigation buttons 

Tapping an **action** button performs an action such as creating a new customer, canceling an order line, or searching for a product style.

Tapping a **navigation** button takes you to another window. For example, the Customer Inquiry button displays the CUSTOMER INQUIRY window.

Radio buttons

Radio buttons let you choose a single option from a set of choices.



Pen On The Road darkens the radio button that is “on.” To select a different option, tap in the circular button. This turns the button on and the previously selected button off automatically. In the example above, the Units button is on, and the Dollars button is off.

Check boxes

Check boxes work like radio buttons, but you can select more than one of the options at a time. Tap a check box to turn it on or off.



Pen On The Road puts an X in a check box while it is on. In the example above, three check boxes are on and one is off.

Arrow buttons

Arrow buttons appear at the right side of list boxes. Tap the button to display a list of options you can choose from.

For more information, see “List boxes” on page 20.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 LEARNING
THE BASICS

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

List boxes

List boxes let you quickly put information into your computer forms. You can add information to a typical list box with just two taps.

To choose information in a list box:

- 1 Tap the arrow button.



A drop-down list holding any number of options appears.

The example in the next column shows the drop-down list that appears after you tap on the arrow button on the Customer Number list box.

- 2 If the data you want appears on the list, tap on it to select it.

Pen On The Road places the item you select in the list box.

If the list holds more items that can be displayed at one time, use the scroll bars to look for the data you need. For more information about scroll bars, see page 25.

Closing a list without choosing an item

Tap the arrow button again, or tap in the background area of the current window. The list disappears without changing the contents of the list box.

To type information in a list box:

If the data you want is not an item on the list, you can enter the data using the keyboard.

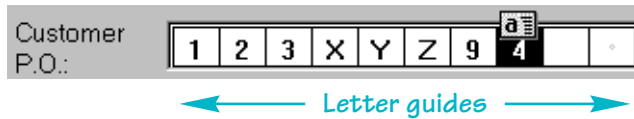
- 1 Tap in the list box to get a blinking cursor.
- 2 Type your information.
- 3 Press the Enter key when you've finished typing.

A screenshot of a software form. At the top, there is a label 'Customer Number:' followed by a text box containing '-000001' and a small square button with a downward arrow. To the right of this button is a 'New' button. A line points from the text 'Drop-down list' to the arrow button. Below the text box is a scrollable list of customer information. The list has four columns: 'Cust #', 'Cust Name', 'City', and 'ST'. The first few rows are visible, and a vertical scroll bar is on the right side of the list. A line points from the text 'New' to the 'New' button. The list contains the following data:

Cust #	Cust Name	City	ST
0314823	SLOANE'S ENTERPRISES INC	TUCSON	AZ
0520684	HOWARD & PHILS	CANYON COUNT	CA
0520692	HOWARD & PHILS	CANYON COUNT	CA
0523589	MORALE WELFARE & REC 0230	EL TORO	CA
0610154	AMPLE DUDS	LAKEWOOD	CO
0611210	CYNDIES AMPLE DUDS	DENVER	CO
0611293	DIANNE'S SQUARE DANCE	LAKEWOOD	CO
0611392	DUMAN'S TAILORS	DENVER	CO
0612093	GUNKEL TACK & FEED	POWDERHORN	CO
0612424	BIGGS HYPERMARKET	MILFORD	OH
0613620	TOP HAND WESTERN WEAR	BERTHOUD	CO
0613844	WESTERN CORRAL INC. DBA	GOLDEN	CO
0910109	ACTON UNIFORMS INC	MIAMI	FL
0912998	FLORIDA RANGER CORP.	TAMPA	FL

Writing areas

Writing areas are made up of a series of connected squares, or letter guides. They resemble the boxes on paper forms and work much the same way. You fill in information, such as a name or number, with “electronic ink” from your pen.



Some writing areas (such as Style Number) let you write numbers only, some (such as Ship Date) let you write dates only, and some (such as Customer Dept. and Line Remarks) let you write nearly any combination of characters—letters, digits, and punctuation.

Date boxes

Date boxes are a special type of writing area. They display dates in the MM-DD-YY (month, day, year) format. For example, October 25, 1994 appears as 10-25-94. You must write your dates in this format for the system to accept them. Certain date boxes set additional restrictions, according to your manufacturer's business policies, and prompt you with messages in small informational windows to meet these requirements.

Required and optional writing areas

The background color of writing areas indicates whether you must enter information in them to complete an order.

Required writing areas are white. You must put information in a required writing area before changing your order's status to Complete.

Optional writing areas are gray. You can leave an optional writing area empty and still change the order's status to Complete.

Inactive writing areas

Some writing areas are inactive. The data in inactive writing areas are dimmed and “locked in” for that window—you cannot write over the data.

Making writing areas easier to view



If both required and optional writing areas appear to be the same color or if you are having trouble reading the characters in dimmed writing areas, you may need to do one or both of the following:

- Adjust the brightness and contrast dials on the lid of your computer.
- Go to the Colors icon in the Program Manager's Control Panel to correct your system's display settings. (Call RuggedWare technical support for assistance.)

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 **LEARNING
THE BASICS**

4 Working with
Pen On The
Road

5 Working with
Orders



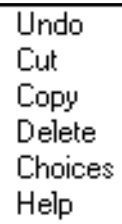
6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Pen controls

To use writing areas with letter guides, you should understand the screen objects that appear in and around them as you use your pen. All of these objects, or pen controls, work with Pen On The Road and the Microsoft Handwriting Recognizer to ensure the right data goes in each letter guide.

PEN-CURSOR BUTTON 	This button appears after you write in (or lightly tap the edge of) a letter guide. You can drag the button left or right to select text you want to change.
PEN-EDITING BUTTON 	This button appears after you select text by tapping or double-tapping in a non-empty letter guide. The pen-editing button is accompanied by a list of alternative characters or words from which you may choose. Simply tap the item you want to replace the selected text.
PEN EDIT MENU 	Tap the pen-cursor button once, to see this drop-down menu of editing options. Note that this menu may pop up in the center of your screen. TIP: To make the menu disappear without choosing an option, tap in the background area outside the menu.

To enter information with your pen:

- Begin writing the first character inside a letter guide and continue writing the remaining characters in the squares provided.

You must print text—the pen computer's Handwriting Recognizer does not recognize cursive handwriting. Parts of characters you write can go outside their boxes, but that can make it harder for the computer to recognize your writing.

Start writing characters inside letter guides



Always start a character inside a letter guide. You can, however, finish the character outside the letter guide's boundaries.

Handwriting pattern recognition



Microsoft's Handwriting Recognizer uses pattern-recognition technology to translate your handwriting. For instance, if you quickly write "1 2 3 A", the Recognizer may expect a series of digits and translate your writing as "1 2 3 4." Therefore, if you mix digits and letters (such as in Customer P.O. codes), pause between the two different character types to let the system translate them separately.

Problems with handwriting recognition

If your pen computer isn't translating your writing correctly, see the Windows for Pen Computing 2.0 user guide or on-screen help for assistance.

To edit a character:

- Write on top of the current character (letter, digit, or punctuation), making sure you start inside the letter guide. Or, tap the character and use the pen-editing button, provided above selected text.

You can't edit dimmed writing areas



Dimmed characters in a writing area mean the information is “locked in” for the current window. For example, if you return to the ORDER HEADER window for an existing order, the Order Date, Ship Date, and Cancel Date writing areas are dimmed. You can't edit them.

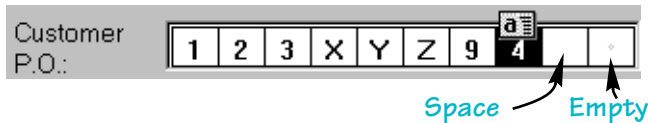
A space is a character!



Letter guides can contain characters—including spaces—or they can be empty and contain nothing at all.

A completely blank letter guide contains a space.

A gray dot means a letter guide is empty.



To edit a word or number:

- 1 Select the word or number by double-tapping inside any of its letter guides, or by dragging the pen-cursor button, until the entire word or number is highlighted.
- 2 Tap the pen-editing button or an option in the word editing drop-down menu.

You can't write characters in scanning mode



If you're unable to write characters at the ORDER window, be sure you're not in scanning mode. The button should read “Scanning is OFF”.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 LEARNING
THE BASICS

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Display areas and line selection

Several windows in Pen On The Road include display areas, which present multiple lines of information in table format. A display area contains

- A line-selection column
- Scroll bars when necessary
- Column and row labels that explain the table's contents

Selecting a line in a display area:

- Tap directly on a line in a display area to select it.

Selecting a line automatically de-selects the previously active line.

The triangular current-line pointer on the line-selection column to the left of the display area tells you what line is currently active.

The ORDER window shows a line selection column for an order with five lines.

The triangular line selection pointer indicates that the second order line is active.

Line selection column

LINE	STYLE	UNITS	PRICE	PREPACK	STATUS	SHIP	PRIORITY	CANCEL
1	3-19-200-402	6	\$3.50		AS	10-00-94	Standard	
2	1-01-101-030	51	\$12.50		AS	10-00-94	Standard	
3	1-01-101-030	12	\$12.50		AS	01-00-95	Standard	
4	1-01-003-850	0	\$14.50		AS	11-00-94	Standard	
5	3-01-531-001		\$178.50		A\$	11-00-94	Standard	

No. 2 Style: Units: Prices: \$ 1 2 . 5 0

Ship Date: 1 0 0 0 9 4

Priority: Standard

Cancel Date:

Back Order: ☒ Yes

Scanner is OFF Cancel Restore Sizing

Heading Order Summary Exit Order

Scroll bars

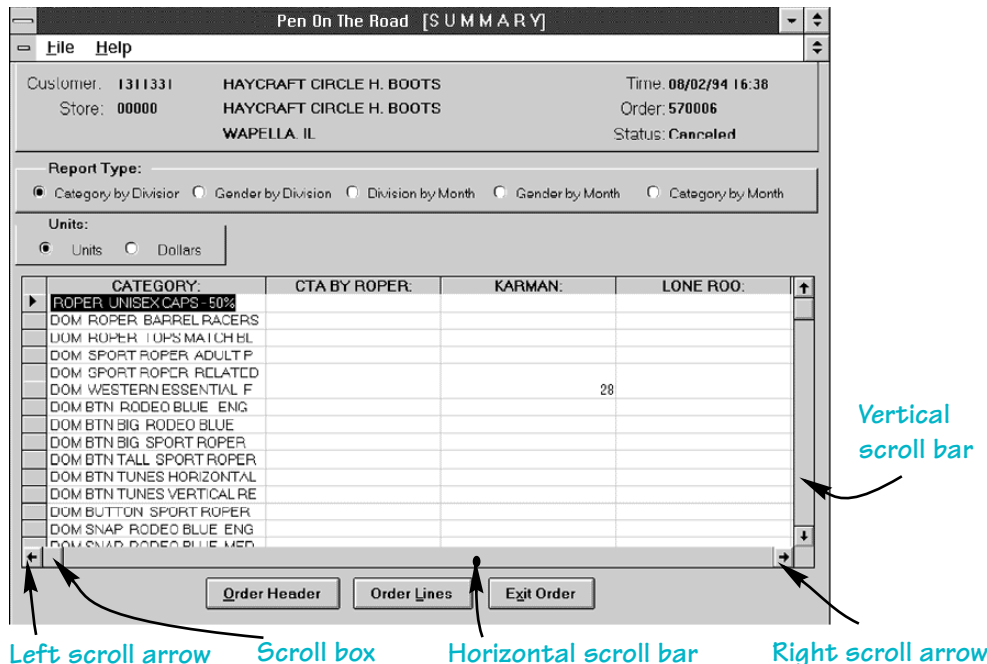
When Pen On The Road must display more information than it can fit in a window, display area, or drop-down list, it provides you with scroll bars to view the extra information.

Vertical scroll bars let you view information to the top or bottom of the displayed information such as additional items on a list.

Horizontal scroll bars let you view information to the right or left of the displayed information such as additional values for each item.

To view information that *does not fit into a window, display area, or list:*

- Drag the square scroll box along the scroll bar, towards the information that is not displayed
- OR-
- Tap the scroll bar on either side of the scroll box to display the information a portion at a time
- OR-
- Tap the scroll arrow at the end of the scroll bar next to the information that is not displayed.



CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 LEARNING
THE BASICS

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Default values

Pen On The Road provides default values in many list boxes and writing areas. A default value is information that Pen On The Road automatically fills in after you've selected something on the computer.

An example of a default value is at the ORDER HEADING window. Once you select a particular customer for a new order, that customer's preferred carrier appears in the Ship Via writing area. The exception to this rule is when your vendor's database does not contain information about a customer's preferences. In this case, if the vendor did not know your customer always uses, say, United Parcel Service, then a general default value would appear in the writing area. Default values save you tremendous time and effort in writing orders. In most cases, you may change or "overwrite" these default values when you feel they are wrong for the situation.

Warnings versus errors

As you work with orders, Pen On The Road brings warnings and errors to your attention in small message windows. You also get a list of any unresolved errors and warning in the ORDER VALIDATION window when you wrap up an order.

Warnings simply caution you against a particular action or data entry. Warnings never prohibit you from completing and sending your order to the home office.

Errors, on the other hand, do prohibit you from completing and sending your order to the home office. To transmit orders to the home office (via RoadLink), they must have a status of "Complete—Not Sent." You can't assign this status to an order until you have fixed all errors.

Additional help with basics

This section tells you where to get additional help that explains how to use:

- your pen computer
- Microsoft Windows
- DOS

Pen On The Road runs on a pen computer—a PC notebook computer with a pen and a screen that recognizes actions made with the pen. The pen computer uses the Microsoft Windows for Pen Computing software. Microsoft Window runs “on top of” the Disk Operating System (DOS), which directs the computer’s activities.

The Pen On The Road help system, the Quick Guide reference card, and this user’s guide work together to help you learn Pen On The Road quickly and to take full advantage of its many time-saving features.

Occasionally, you may need additional information about your pen computer and how it operates. For example, you may want to learn how to save battery power by putting your pen computer to “sleep” without quitting Pen On The Road. Or you may want to learn how to move a window to another position on your display screen.

The following table tells you what resources to see for help with your computer and operating systems.

To learn about:	See:
Your pen computer Example: how to put your pen computer to sleep.	<ul style="list-style-type: none">■ ThinkPad pen computer notebook manual■ Your printer or modem manual
Microsoft Windows Example: how to move a window.	<ul style="list-style-type: none">■ Windows for Pen Computing user’s guide■ Microsoft Windows user’s guide■ <u>Windows for Dummies</u>
DOS Example: how to copy a file using a DOS command.	<ul style="list-style-type: none">■ DOS command reference■ PenDOS user’s guide
Other questions	<ul style="list-style-type: none">■ RuggedWare Technical Support 1-800-754-9992

CONTENTS:

Welcome to Pen On The Road

1

Getting Started Quickly

2

Using the Help System

3

LEARNING THE BASICS

4

Working with Pen On The Road

5

Working with Orders

6

Communicating with the Home Office

7

Inquiring about Customers & Products

Chapter 4

Working with Pen On The Road

This chapter presents an overview of Pen On The Road's three main functional areas:

- Working with orders (chapter 5)
- Communicating with the home office (chapter 6)
- Inquiring about customers and products (chapter 7)

To access these functional areas, tap on the navigation buttons at the MAIN MENU window. For more information, see chapter 1, "Getting Started Quickly" on page 1.

Because RuggedWare provides a customized Pen On The Road system tailored to each client company's needs, the sample windows in this chapter may not match the windows you see when you run Pen On The Road.

Your version of Pen On The Road has been optimized to store the information you need about your customers and products and to support your business policies and procedures.

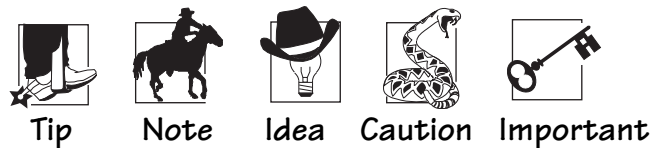
Along with your customized Pen On The Road system, you have a customized help system. It provides detailed instructions for performing specific tasks such as handling new customers, writing styles for an order line, and checking the inventory of

available products for your customized Pen On The Road system. For more information about using the help system, see chapter 2 on page 5.

Although your Pen On The Road system is customized, it shares basic functionality and many features with other Pen On The Road systems. This chapter describes Pen On The Road's functionality and highlights important features.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 **WORKING
WITH PEN ON
THE ROAD**

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Working with orders

Working with orders involves:

- Creating, copying, or selecting an order
- Filling in information that pertains to the entire order
- Writing order lines
- Wrapping up the order by reviewing and validating it, resolving any errors, and getting the customer's signature (if appropriate)

Reports, customized to your company's needs, appear with a tap of your pen to show how much a customer has ordered by month, by category, etc.

For example, you can choose to see only completed orders for a customer, or you can retrieve a specific order by providing a customer P.O. number.

After you select your criteria, Pen On The Road displays a listing of all orders that meet your criteria.

Tap on the order you want, and Pen On The Road displays it for you.

Pen On The Road keeps the listing of orders for you. You can return to it and display other orders on the list.

Creating, copying, or selecting an order

Pen On The Road helps you get to the orders you need, whether you're starting a new order, copying an existing order to save time, or hunting for an existing order.

A typical ORDER SEARCH window, such as the one shown on this page, lets you search for an order using different criteria to narrow your choices.

Pen On The Road [Order Search]

File Help

Primary Search Criteria:

Order Status:

- ☒ Incomplete Orders
- ☒ Complete Orders, Not Sent
- ☒ Complete Orders, Sent
- ☒ Canceled Orders

Select All Clear

Sort Criteria:

- ☒ Cust Name, Order #, Store #
- ☐ Cust Name, Store #, Order #
- ☐ State, City, Store Name

Optional Search Criteria:

Customer Number: [] Customer PO: []

Clear Clear

Order Date: From: [] To: []

Clear

Main Menu Orders Menu Orders List

Filling in information for an entire order

Filling in information for an entire order involves:

- Choosing the appropriate customer and store
- Working with billing and shipping details
- Providing additional information, like Source code and Customer P.O. number, and special instructions

The sample window on this page shows order information for a typical Pen On The Road system. The information your company stores may vary based on your company's unique needs.

You can fill in the information easily by writing it with your pen or selecting an option on a drop-down list.

Pen On The Road 2.0 - [Order Header]

File Settings Information Help

Customer Number: 5015789 New

Store Number: -0001 New

Source: RD Sales Rep: 027

Terms: COD - Only

Customer P.O.:

Customer Dept:

Ship Via: GROUND COMMERCIAL

Your Company's Name & Logo

Sales Order: 610266

Status: Incomplete

Order Date: 1 0 1 5 9 4

Ship Date:

Order Priority: Standard

Cancel Date:

Backorders: ☒ Yes

Order: 69 Units

Totals: \$844.50

Special Instructions Addresses Order Lines Order Summary Exit Order

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 WORKING
WITH PEN ON
THE ROAD

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Writing order lines

Writing order lines involves:

- Writing styles
- Checking inventory for styles
- Setting total units
- Sizing order lines
- Selecting inventory cuts
- Discounting order-line prices, if needed
- Making any required changes to general order information for specific order lines
- Adding line remarks

The sizing and inventory features show items available to sell in each size, for each manufacturing date. As you fill in sized units on the electronic order-form, Pen On The Road's automatic totalling function does all the calculating for you. Pen On The Road handles override processing instructions for individual order lines with ease, too.

Thanks to the technology operating behind the scenes, Pen On The Road order-writing protects you from entering invalid style numbers, incorrect prices, and so on. Working with Pen On The Road order-writing also provides you a wealth of up-to-date, strategic information.

Style descriptions, inventory, and sizing—a step-by-step example

This example shows how Pen On The Road lets you specify a style description for an order line, check the available inventory for that style, and then size the order line.

The sample ORDER window on this page shows an order with five lines. As with other sample windows, the information your company stores for order lines may vary based on your company's unique needs.

- 1 After filling in styles and units for five lines, the sales rep selects line 2, which orders 51 units of style 1-01-101-030.

LINE	STYLE	UNITS	PRICE	PREPACK	STATUS	SHIP	PRIORITY	CANCEL
1	3-19-200-402	6	\$9.50		AS	10-00-94	Standard	
2	1-01-101-030	51	\$12.50		AS	10-00-94	Standard	
3	1-01-101-030	12	\$12.50		AS	01-00-95	Standard	
4	1-01-003-850	0	\$14.50		AS	11-00-94	Standard	
5	3-01-531-001		\$178.50		A\$	11-00-94	Standard	

No. 2 Style: Units: Prices: \$12.50

Ship Date: 100094 Priority: Standard Cancel Date: Back Order: ☒ Yes

Scanner is OFF Cancel Restore Sizing Heading Order Summary Exit Order

2 The sales rep taps the **Information** topic on the menu bar and then taps **Inventory** to display the available inventory for style 1-01-101-030.

The INVENTORY FOR STYLE window appears on top of the ORDER window.

Inventory for Style: 101101030				
Cut	Avail Date	Cut Status	Avail	% Avail
00	10-00-94	FIRM	1227	74.09%
48	01-00-95		1923	100.00%
19	05-00-95		1200	100.00%

3 Knowing that inventory is available, the sales rep taps the **Sizing** button to display the sizing grid for style 1-01-101-030.

Pen On The Road 2.0 - [ORDER]

FileSettingsInformationHelp

Style SearchStyle DescriptionCopy SizingLine RemarksDetailClearSizingCancelSizing

Customer: 5015789SNOWY RIVERSOrder: 610266Total Units: 69
Store: -0001New CustomerTotal: \$844.50

Q

Increments

3

+

-

C

	14	14%	15	15%	16	16%	17	17%	18
2									
3									
4									
5									
6									

No. 2

Style: 101101030

Units:

Prices: \$ 1 2 . 5 0

Ship Date: 1 0 0 0 9 4

Priority: Standard

Cancel Date:

Back Order: ☒ Yes

CancelRestoreOrderLinesSize Next

HeadingOrder SummaryExit Order

Time Elapsed: 3.571 Sec

Inventory for Style: 101101030

Cut	Avail Date	Cut Status	Avail	% Avail
00	10-00-94	FIRM	1227	74.09%
48	01-00-95		1923	100.00%
19	05-00-95		1200	100.00%

Close

Pen On The Road displays different sizing grids for different styles. For style 1-01-101-030, the sizing grid covers neck sizes from 14 to 18 and sleeve sizes from 32 to 36.

4 Next, the sales rep taps the cut line for cut 48 in the INVENTORY FOR STYLE window.

Pen On The Road displays the number of units available in each size, specific to that cut.

CONTENTS:

- Welcome to Pen On The Road
- Getting Started Quickly
- Using the Help System
- Learning the Basics
- WORKING WITH PEN ON THE ROAD
- Working with Orders
- Communicating with the Home Office
- Inquiring about Customers & Products

Index

Working with orders 33

Pen On The Road 2.0 - [ORDER]

File Settings Information Help

Style Search Style Description Copy Sizing Line Remarks Detail ClearSizing CancelSizing

Customer: 5015789 SNOWY RIVERS Order: 610266 Total Units: 69
Store: -0001 New Customer Total: \$844.50

Q

Increments: 3 + - C

	14	14%	15	15%	16	16%	17	17%	18
2			6						
3		12	27	108	93	51	21		
4			24	84	177	171	102	45	18
5				27	108	123	120	174	105
6				18	33	81	33	72	90

No. 2 Style: Units:

New Line

Inventory for Style: 101101030

Cut	Avail Date	Cut Status	Avail	% Avail
00	10-00-94	FIRM	1227	74.09%
48	01-00-95		1923	100.00%
19	05-00-95		1200	100.00%

Close

Prices: \$ 1 2 . 5 0

Ship Date: 0 1 0 0 9 5

Priority: Standard

Cancel Date: - - - - -

Back Order: ☒ Yes

Cancel Restore OrderLines Size Next

Heading Order Summary Exit Order Time Elapsed: 3.571 Sec

When multiple cuts are available, the sales rep can tap different cuts in the INVENTORY FOR STYLE window to find the best inventory and ship-date combination for the customer.

- 5 The sales rep now fills in units for each size based on the available inventory.

Pen On The Road automatically totals the units.

Q

Increments: 3 + - C

	14	14%	15	15%	16	16%	17	17%	18
2	3		3	3	4				
3		12	27	108	93	51	21		
4			24	84	177	171	102	45	18
5				27	108	123	120	174	105
6				18	33	81	33	72	90

Wrapping up the order

Wrapping up an order involves:

- Reviewing it for accuracy
- Working with Order Summary reports
- Validating the order to resolve any errors or warnings
- Changing the order's status
- Getting the customer's electronic signature (if needed)

The SUMMARY window on the upper right shows a typical example of the reports you get with Pen On The Road.

The window on the lower right shows an ORDER VALIDATION dialog box with two errors.

Pen On The Road [SUMMARY]

File Help

Customer: 1311331 HAYCRAFT CIRCLE H. BOOTS Time: 08/02/93
Store: 00000 HAYCRAFT CIRCLE H. BOOTS Order: 570006
WAPELLA IL Status: Cancelled

Report Type: ☒ Category by Division ☐ Gender by Division ☐ Division by Month ☐ Gender by Month ☐ Category

Units: ☒ Units ☐ Dollars

CATEGORY:	CTA BY ROPER:	KARMAN:	LONE R
▶ ROPER UNISEX CAPS - 50%			
DOM ROPER BARREL RACERS			
UOM ROPER TOPS MATCH BL			
DOM SPORT ROPER ADULT P			
DOM SPORT ROPER RELATED			
DOM WESTERN ESSENTIAL F		28	
DOM BTN RODEO BLUE ENG			
DOM BTN BIG RODEO BLUE			
DOM BTN BIG SPORT ROPER			
DOM BTN TALL SPORT ROPER			
DOM BTN TUNES HORIZONTAL			
DOM BTN TUNES VERTICAL RE			
DOM BUTTON SPORT ROPER			
DOM SNAP RODEO BLUE ENG			
DOM SNAP RODEO BLUE LEE			

EXIT ORDER / STATUS

File Settings Order Info... Validation Info... Inventory... Help

Customer: 0612012 BOB'S WESTERN WEAR Time: 11:26 am Thur Dec 30, 93
Store: 00000 BOB'S WESTERN WEAR Order: 400012
DENVER, CO Status: Incomplete, Not Sent

Order Status: ☒ Incomplete (Not Sent)
☐ Complete (Not Sent)
☐ Canceled

Customer Signature Validate Order Copy Order Print Order

Main Menu Orders Menu Heading Order Lines

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 WORKING
WITH PEN ON
THE ROAD

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Communicating with the home office

Tap the Send Orders button and Pen On The Road is ready to send completed orders to the home office. Tap another button and the completed orders are off. When RoadLink receives your orders, it automatically sends back the company's latest information—everything that has changed since the last time you sent in an order. The two-way highway between sales rep and home office is instant and effortless.

The window on this page shows a typical COMMUNICATIONS window with communications instructions and buttons for Dial Now and Dial Later.

The screenshot shows a software window titled "Pen On The Road 2.0 - [C O M M M A I N]". It has a menu bar with "File" and "Help". The main area is titled "Communication Steps" and contains three numbered instructions:

1. Connect the Modem to the Phone Jack.
2. Enter Phone Prefix (If Necessary) : [][][][][] Delay: [1]
3. [Dial Now] or [Dial Later]

Below the instructions, it displays "Total Number of Orders to be Sent to the Host: 1" and "Total: 25 Units \$362.50". A table shows order details:

Customer Number	Store Number	Order Number	Order Date	Store Name
-000001	-0001	610265	10-15-94	

At the bottom, there is a "Main Menu" button.

Inquiring about customers and products

Tap the Customer Inquiry button and Pen On The Road supplies complete, up-to-date customer information including: shipping and billing addresses; receivables; and customer profiles and preferences. Each company using Pen On The Road specifies exactly how much customer information they wish to display. Now you don't have to call the credit department to check on a customer—the information is in your pen computer.

The window on this page shows customer information.

Tap the Product Inquiry button to look up details of any inventory item. Write in the style number and product details pop up on your screen. Tap the Inventory menu option and manufacturing dates appear, allowing you to check product availability for individual sizes. Again, these details are customized to each company's needs.

Pen On The Road 2.0 - [Customer Inquiry]

File Help

Customer Number: 5411236 Store Number: 00000

Bill To: LA ROSA AMARILLA WESTERN WEAR JUAREZ 1001 COL. CENTRO CHIHUAHUA, CHIH	Ship To: LA ROSA AMARILLA WESTERN WEAR JUAREZ 1001 COL. CENTRO CHIHUAHUA, CHIH
--	--

Owner/Mgr: NEHEMIAS FLORES Phone: (000) 000-0000 Credit Cont: NEHEMIAS FLORES Phone: (000) 000-0000 Buyer: (000) 000-0000 Phone: (000) 000-0000 Credit Limit: 0

Main Menu Orders Menu Product Inquiry Addl. Customer Info

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 WORKING
WITH PEN ON
THE ROAD

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Chapter 5

Working with Orders

This chapter presents three activities that show different ways of writing your orders with the Pen On The Road system.

Each activity describes a typical path through order-writing sessions.

■ Writing a new order

The most common way to write orders, for an existing single-store account

■ Using batch sizing to produce an order

Another way to size your order, using the Size Next button

■ Writing orders in a hurry

A fast and simple way to take an order from your customer

For instructions on specific tasks, refer to the Pen On The Road help system.

Updating your support data



If it's been a while since your last data exchange with RoadLink, update your pen computer's support data. See the Communications help topics for more information. You can hold a communications session with RoadLink at any time. You don't need to have completed orders.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



Tip



Note



Idea



Caution



Important

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 **WORKING
WITH ORDERS**

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Writing a new order

Follow these basic steps to produce a new order.

For information about each step, use the Pen On The Road help system. For more information, see chapter 2, “Using the Help System,” on page 5.

To write a new order:

- 1 Tap the **Write Orders** button at MAIN MENU.
The ORDERS MENU appears.
- 2 Tap the **Create New Order** button.
The ORDER HEADING window appears.
- 3 Fill in general information about the order at the ORDER HEADING, ADDRESSES, and SPECIAL INSTRUCTIONS windows.

For instructions, see the following topics in the ORDER HEADING help window:

- **Filling in order heading information**
- **Handling new customers**
- **Specifying new stores for existing customers**
- **Showing or hiding running totals**
- **Verifying billing and shipping addresses**
- **Changing the shipping address for an order**
- **Adding special instructions**

- 4 Write each order line—including style number and optional unit total and pricing—while paying attention to inventory availability.

For instructions, see the following topics in the ORDER LINES help window:

- **Order lines**—Writing an order line
- **Order lines**—Setting total units for an order line
- **Order lines**—Discounting an order-line price
- **Style numbers**—Writing style numbers on order lines
- **Style numbers**—Recalling style descriptions
- **Scanning product bar codes**
- **Inventory**—Checking inventory for styles

- 5 Size each order line.

For instructions, see the following topics in the ORDER LINES help window:

- **Sizing**—Sizing units for an order line
- **Sizing**—Sizing a pre-pack style
- **Inventory**—Selecting inventory cuts in sizing

- 6** If necessary, change the general order information that Pen On The Road automatically assigns to each order line. Add line remarks if needed.

For instructions, see the following topics in the ORDER LINES help window:

- **Line detail**—Changing order information for one line
- **Line detail**—Adding line remarks

- 7** Optional: Review order totals in various reports, making changes as necessary.

For instructions, see the following help topic:

- Working with Order Summary reports

- 8** Exit the order to wrap it up.

- 9** Validate the order by fixing errors and responding to warnings if necessary.

For instructions, see the following help topic:

- Handling errors and warnings

- 10** Change order status to “Complete—Not Sent” when it's finished.

For instructions, see the following help topic:

- Changing your order's status

- 11** Request your customer's signature on the order, after verifying contract terms.

For instructions, see the following help topic:

- Getting the customer's signature

- 12** Optional: Print a paper copy of the order.

For instructions, see the following help topic:

- Printing an order

- 13** Optional: Write confidential special instructions to the home office.

For instructions, see the following topic in the ORDER HEADING help window:

- Adding special instructions

- 14** Copy your order data onto a diskette to guard against losing the electronic order.

- 15** Send the order to the home office electronically.

For instructions, see chapter 6, “Communicating with the Home Office,” on page 45.

- 16** Check the order's processing status through standard procedures.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

**5 WORKING
WITH ORDERS**

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

Using batch sizing to produce an order

Batch sizing uses the Size Next button in Sizing to help you size a group or batch of written styles quickly.

For information about each step, use the Pen On The Road help system. For more information, see chapter 2, “Using the Help System,” on page 5.

To produce an order with the batch sizing feature:

- 1 Begin writing a new order, adding at least three or four unsized order lines.
- 2 For instructions, see “Writing a new order” on page 40.
- 3 Go to the ORDER LINES window.
- 4 Select Order Line 1 in the order-lines display area.

For instructions, see the following topic in the ORDER LINES help window:

- **Order lines**—Selecting individual order lines

- 5 Tap the **Sizing** button to display Line 1's size grid.

- 6 Perform sizing for that style number, using size-specific inventory projections to guide your ship date and quantities.

- 7 Tap the **Size Next** button.

The Sizing window changes to display the sizing information for Line 2.

For instructions, see the following topic in the ORDER LINES help window:

- **Sizing**—Working with the Size Next feature

- 8 Perform sizing for Line 2.

- 9 Repeat steps 6 and 7 until Pen On The Road informs you there are no more style numbers to be sized.

- 10 Complete your order as explained in steps 6 through 16 of the Writing a New Order activity.

Batch Sizing helps you review your order

Use the **Size Next** button to quickly review a written order's distribution of sizes. Simply follow the instructions in this task, starting with step 2.

Writing orders in a hurry

This activity shows you how to get the most crucial data into your order quickly using Pen On The Road. This fast, simple method of creating a new order applies whenever you are rushed, or when you have very little information to construct an order.

For information about each step, use the Pen On The Road help system. For more information, see chapter 2, “Using the Help System,” on page 5.

To create an order in a hurry:

- 1 Go to the Orders Menu window by tapping the **Write Orders** button at MAIN MENU.
- 2 Tap the **Create New Order** button.
The ORDER HEADING window appears.
- 3 Fill in the Customer Number (and Store Number, if multiple locations), and change the information in the Ship Via list box if necessary.

For instructions, see the following topic in the ORDER HEADING help window:

- Filling in order heading information

- 4 Review addresses stored by the home office.

Change the addresses if necessary.

For instructions, see the following topics in the ORDER HEADING help window:

- Verifying billing and shipping addresses
- Changing the shipping address for an order

- 5 Go to the ORDER LINES window.

- 6 Optional: From the **Information** menu, tap the **Inventory** menu topic to show availabilities as you work.

For instructions, see the following topic in the ORDER LINES help window:

- **Inventory**—Checking inventory for styles

- 7 Write valid styles, and total units as necessary.

For instructions, see the following topics in the ORDER LINES help window:

- **Order lines**—Writing an order line
- **Order lines**—Setting total units for an order line
- **Order lines**—Discounting an order-line price
- **Style numbers**—Writing style numbers on order lines
- **Style numbers**—Recalling style descriptions
- **Scanning product bar codes**

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 **WORKING
WITH ORDERS**

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

Index

8 Do sizing if needed, otherwise perform it later.

- **Sizing**—Sizing units for an order line
- **Sizing**—Sizing a pre-pack style
- **Inventory**—Selecting inventory cuts in sizing

9 Add line detail if it is crucial to the order.

For instructions, see the following topics in the ORDER LINES help window:

- **Line detail**—Changing order information for one line
- **Line detail**—Adding line remarks

10 Tap the **Exit Order** button.

11 Tap the **Validation** button to handle any crucial errors.

You can ignore most errors and warnings for now since the order's status may be left as "Incomplete."

For instructions, see the following help topic:

- Handling errors and warnings

12 Optional: Get the customer's signature.

For instructions, see the following help topic:

- Getting the customer's signature

Now you can return to the MAIN MENU and begin a new activity. Remember to complete this order at a later time.

Preparing for appointments

Whether you are working at a customer site or at a trade show, write as much of the order as you can before your appointment. You can even leave Pen On The Road in sleep mode until the appointment.

Chapter 6

Communicating with the Home Office

This chapter explains how to exchange data with your home office through an electronic communications session with RoadLink.

A communications session with your home office has three main goals:

- To transmit your completed but unsent orders to the home office for processing, via RoadLink, the Expert Interface.
- To update your pen computer with the support data you need for accurate information on available and withdrawn styles, new customers, and so on.
- To change the status of successfully-transmitted orders to “Complete Sent” so that these orders aren’t re-transmitted with the next batch of orders you finish and send.

RoadLink, The Expert Interface



Your pen computer must communicate frequently with a system called RoadLink, a software module on a computer at the home office. RoadLink takes your completed, unsent-status orders and, at the same time, updates your pen computer with support data. Support data includes pricing, style numbers and descriptions, customer information, and so on.

Important



Read the section entitled “Preparing for a communications session” on page 46 for a checklist of general precautions to follow any time you connect a modem to a phone line.

Receiving support data



You can use the Send Orders feature to receive the most current support data from your home office. You don’t need to have any completed orders to hold a communications session with RoadLink.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



Tip



Note



Idea



Caution

Important

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 COMMUNI-
CATING WITH
THE HOME
OFFICE

7 Inquiring
about
Customers
& Products

Index

Preparing for a communications session

Here are some things to check whenever you prepare for a communications session and hook up your modem to a phone line.

- Make sure all of the orders you want to send have the status “Complete—Not Sent).”
- Make sure your pen computer’s system clock is set to the correct time of day.
- Using the AC adapter, plug your pen computer into an AC outlet, so you don’t lose power during transmission.
- Make sure you’ve plugged the modem cord into the computer and the phone jack. All connections should be tight and fitted together properly.
- Avoid using the pen computer within five feet of a television or other large electronic equipment.
- Double-check your hotel’s prefix if a prefix is required to dial out.
- If the phone you’re using allows Call Waiting, deactivate it before starting your communications session. If you don’t, call-waiting signals may cause your session to fail.
- Allow at least 20 minutes for the call.
- Always wait for the pen computer to finish before disconnecting the modem.
- If you get a busy signal, wait 15 minutes before trying again.
- If the pen computer is still unable to connect with RoadLink, dial the number with the phone to ensure the server is working. You can tell the RoadLink server is ready if you hear whistling sounds and tones, rather than a busy signal.

Disrupted communications sessions



If a communications session with RoadLink is disrupted at any point, Pen On The Road automatically redials (up to three times) and completes the session.

Exchanging information now

This task explains how to exchange information with the home office immediately.

A communications session with RoadLink takes approximately 15 minutes of dedicated phone time, plus an additional half hour of processing on your pen computer.

Better later than now?

If you want to have the pen computer begin the session at a later time within the next 24 hours, follow the instructions in “Exchanging information later” on page 48.

To exchange information now:

- 1 From the MAIN MENU, tap **Send Orders** to get the initial COMMUNICATIONS window.

Check your phone cord connections. If needed, enter a dialing prefix in the blank writing area provided. For prefix information, call your local or hotel operator.

- 2 If you're ready to let the pen computer handle communications for the next 20 minutes or so, tap the **Dial Now** button.

The COMMUNICATION STATUS window appears.

- 3 Watch the COMMUNICATION STATUS window as Pen On The Road establishes its connection with RoadLink and proceeds to exchange information electronically.

You'll hear a dial tone followed by whistling modem sounds and beeps.

Pen On The Road informs you of the session's status as it performs each step. A “failed” message means that you should troubleshoot the problem by calling Pen On The Road's technical support or by reviewing the session log. See “Troubleshooting a failed session” on page 49.

- 4 When the communications session finishes, Pen On The Road prompts you to disconnect the phone line.
- 5 Once your pen computer has processed the new RoadLink data, you can quit the Send Orders task by tapping the **Main Menu** button.

Order status changes automatically



Pen On The Road changes the order status of successfully transmitted orders to “Complete—Sent” at this time.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 COMMUNI-
CATING WITH
THE HOME
OFFICE

7 Inquiring
about
Customers
& Products

Index

Exchanging information later

This task helps you use Pen On The Road's special Dial Later feature. Dial Later lets you make your modem connection to the home office when it is most convenient for you. For example, you can use the Dial Later feature to exchange information overnight while you are sleeping.

- 1 From the MAIN MENU, tap **Send Orders** to get the initial COMMUNICATIONS window.

Check your phone cord connections. If needed, enter a dialing prefix in the blank writing area provided. For prefix information, call your local or hotel operator.

- 2 Tap the **Dial Later** button to get the Set Auto Dial Time dialog box.
- 3 Write the hour (a number from 1 to 12, not military time) and minutes (00-59) of the time you want Pen On The Road to begin the information exchange, in the writing areas provided.
- 4 Tap either the AM or PM checkbox to indicate your choice. Note that 12:00 PM is noon and 12:00 AM is midnight.

Make sure the pen computer translates your handwriting correctly. Pen On The Road will tell you what portion to correct if the time you've specified is invalid.

- 5 Tap **OK** to accept the hour shown.

The Auto Dial Activated box appears and remains on screen until the auto-dial time arrives.

Caution



Do not tap anything else until that time occurs and your session is over.

- 6 When Pen On The Road begins dialing, you may continue with step 3 of "Exchanging information now" on page 47, or you may leave the pen computer unattended.
- 7 Check the pen computer at your convenience to make sure the session was successful.
- 8 Once your pen computer has processed the new RoadLink data, you can quit the Send Orders task by tapping the **Main Menu** button.

Troubleshooting a failed session

If your communications session fails, follow these instructions.

See “Preparing for a communications session” on page 46 for ways to ensure a successful session.

To troubleshoot a failed session:

- 1 Tap the **Display Log** button to get a recap of what occurred during your last session.

You can also see Session Logs for successful transmissions.

- 2 Read the log messages to see what happened, and call Pen On The Road’s technical support if needed.

- 3 Tap the **Cancel Log** button to close the SESSION LOG display.

The **Cancel Log** button appears only when the SESSION LOG window is on your screen.

Need help?



For help with communications problems, contact RuggedWare technical support. See “Additional help with basics” on page 27.

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 COMMUNI-
CATING WITH
THE HOME
OFFICE

7 Inquiring
about
Customers
& Products

Index

Chapter 7

Inquiring about Customers & Products

This chapter explains how to inquire about customer and product information.

Customer Inquiry, available at MAIN MENU and at the PRODUCT INQUIRY window, provides useful information about your accounts:

- Basic information such as addresses, contacts, and phone numbers
- Billing and shipping information
- Accounts receivable balances

Product Inquiry, available at MAIN MENU and at the CUSTOMER INQUIRY windows, presents a variety of information on vendor product styles:

- Vendor information such as style descriptions, pricing, shipping, and handling details
- Sizing information
- Inventory information

Product Inquiry also provides access to the Style Search feature.

Attention symbols

This book uses these five symbols to call attention to tips, notes, ideas, situations requiring caution, and important information.



Tip



Note



Idea



Caution



Important

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 INQUIRING
ABOUT
CUSTOMERS
& PRODUCTS

Index

Viewing Customer Information

You can go to this window from either the MAIN MENU or the PRODUCT INQUIRY window.

Customer information at the CUSTOMER INQUIRY windows is view-only. You cannot change or delete any of the data.

While you are working with orders, however, you can change shipping addresses for a particular order. See Pen On The Road help for specific information about changing the shipping address.

To view *basic* customer data:

- 1 Tap the **Customer Inquiry** button at MAIN MENU.

A CUSTOMER INQUIRY window without any customer data appears.

- 2 Choose a customer account from the Customer Number list box.

Whatever basic account information the vendor has stored for that customer and store appears in the window.

For specific instructions on viewing basic customer data, see the following topic in Pen On The Road help:

- Viewing basic customer data

To view *additional* customer data:

- ▶ Tap the **Addl. Customer Info** button at the CUSTOMER INQUIRY I window.

The CUSTOMER INQUIRY II window appears with billing, shipping, and accounts receivable information for the current customer and store.

For specific instructions on viewing additional customer data, see the following topic in Pen On The Road help:

- Viewing additional customer information

Viewing product information

The PRODUCT INQUIRY window is like an electronic swatch card—it provides basic information about a particular vendor product.

You can go to this window from either the MAIN MENU or the CUSTOMER INQUIRY windows.

You can also get a small recap of style information as you write orders.

All PRODUCT INQUIRY information is view-only. You cannot change or delete any of the data.

To view vendor product information:

When you write a valid style number in the Style writing area, vendor product information automatically appears in the window, including:

- style descriptions
- pricing
- shipping information
- handling details

For instructions on viewing vendor product information, see the following topic in Pen On The Road help:

- To view basic product (style) information

To view sizing information:

After getting a style's basic data in the PRODUCT INQUIRY window, perform this task to check what sizing the vendor permits.

For specific instructions on viewing sizing information, see the following topic in Pen On The Road help:

- To view a size scale and its manufactured sizes

To view inventory information:

This task helps you review the inventory data stored in your pen computer, at two levels

- Total cut information for a product
- Units available by size within a cut

For specific instructions on viewing inventory information, see the following topics in Pen On The Road help:

- To see the first level of inventory information
- To see the second level of inventory information

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Using the
Help System

3 Learning the
Basics

4 Working with
Pen On The
Road

5 Working with
Orders

6 Communi-
cating with
the Home
Office

7 INQUIRING
ABOUT
CUSTOMERS
& PRODUCTS

Index

To use Style Search to choose a product:

Pen On The Road's Style Search feature helps you build valid style numbers, that can be placed automatically in a Style writing area.

Style Search is available both at the PRODUCT INQUIRY window and at the ORDER window. Also, the STYLE SEARCH dialog box appears automatically when you write (or scan the bar code of) an unrecognized style in a Style writing area.

Pen On The Road represents valid style numbers according to how you set the search criteria. Search criteria include division, gender, category, substyle, color, and season codes.

For specific instructions on using Style Search to choose a product, see the following topic in Pen On The Road help:

- To build a valid style number with Style Search

A

accounts, new **See** new customers, new stores
activities
 general order-writing 30-35, 39-44
 writing order lines 32-34, 40
addresses 40
appointments, preparing for 44
arrow buttons 19
attention symbols 1
availability of inventory 32-34, 40

B

basics of Pen On The Road 15-27
batch sizing 42
buttons 19, 22

C

closing drop-down lists 20
comments about orders or lines **See** line remarks, special instructions
communications 36, 45-49
 modem tips 46
 exchanging information 46-48
 troubleshooting 46, 49
completed orders 41
computer, new **See** pen computer
copying an order 30
creating new orders 40-41
 See also writing orders
current-line pointer 24

cursor
 blinking 17
customer information 37, 51-52
customer signature 41
cuts of inventory 33-34

D

date boxes 21
default values 26
dialog boxes 18
discounting prices 40
Disk Operating System 27
display areas 24
DOS **See** Disk Operating System
double-tapping 16
duplicating
 orders **See** copying an order

E

errors 26, 35
exiting Pen On The Road 4

F

features iv
feedback symbols 17

G

general order information 31, 40
getting started 1-4

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Getting
Help

3 Learning the
Basics

4 Pen On
The Road
Overview

5 Working
with Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

INDEX

H

handwriting

- entering information with your pen 22
- recognition 22

heading **See** order heading

help 5-14

- browsing topics 11
- contents 7
- exiting the help system 14
- on a window 6
- on help 13
- other sources of 24
- overview 25
- printing a topic 13
- returning to previous topics 11
- searching for topics 12
- selecting topics 8
- tips, notes, cautions, and important information 10
- topics 8

hiding order totals 40

hourglass 17

I

inquiries

- about customers 37, 51-52
- about products 37, 51, 53-54

inventory 32-34, 40, 53

K

keyboard

- using 16

L

letter guides 21-22

line detail 40

line remarks 40

lines **See** order lines

line selection 24

list boxes 20

lists 20

M

Main Menu 3

menu bar 3, 18

menus 3, 18, 22

modem

- exchanging information 47-48
- tips on using 46
- troubleshooting 49

mouse

- using 16

N

navigation buttons 3, 19

new customers 40

new orders

- activity of writing 32-34, 40-41
- copying to generate 30

new stores 40

O

operating system 27

order heading 31, 40

order lines 32-34, 40-41

- activity of writing 40-41
- inventory at 32-34, 40
- setting units at 40
- writing styles on 40

See also inventory, line detail, sizing

orders

- copying 30
- creating new 30-35, 40-41
- finding and selecting 30
- writing, quickly 43-44
- wrap-up 35

order search 30
order summary 35, 41
order totals
 showing and hiding 40
overview
 help system 5-14
 Pen On The Road iii-iv, 29-37

P

pen
 using 16, 21-23
pen computer 27
pen controls 22
pen edit menu 22
Pen On The Road iii-iv
pen pointer 17
pen-editing button 22
pen-cursor button 22
pre-pack styles 40
prices 40
 discounting 40
printing orders 41
product bar codes **See** scanning
product information 37, 51, 53-54

Q

question mark 17

R

radio buttons 19
remarks, line 40
RoadLink 45, 47-48
running totals 40
 showing and hiding 40

S

scanning
 product bar codes 23, 40
scroll arrow 25
scroll bars
 using 25
scroll box 25
searching for orders 30
sending orders 45-49
shipping address 40
signatures
 customer 41
size grids and size scales 33-34
Size Next 42
sizing 32-34, 40
 viewing sizing information 53
sleep mode 4
special instructions 40
starting Pen On The Road 2
status, order 35, 41
store number 40
 specifying a new 40
style description 32-34, 40
style numbers **See** styles
styles
 pre-pack 40
 reviewing inventory projections for 32-34
 viewing product information about 53
 writing, on order lines 40
Style Search 54
support data 45
symbols **See** feedback symbols

CONTENTS:

Welcome to
Pen On The
Road

1 Getting
Started
Quickly

2 Getting
Help

3 Learning the
Basics

4 Pen On
The Road
Overview

5 Working
with Orders

6 Communi-
cating with
the Home
Office

7 Inquiring
about
Customers
& Products

INDEX

T

tapping 16
technical support
 contacting 27
total units for an order line 40
total units in an order **See** running totals
troubleshooting
 communications problems 49

U

unit price **See** prices
units
 Available, of inventory cuts 32-34, 40

V

validation 35, 41

W

warnings 26
Windows 27
wrapping up orders 35
writing areas 21-23
 required and optional 21
 inactive 21
 editing 23
writing orders 30-35, 39-44
 in a hurry 43-44
 new orders 30-35, 40-41