**Notes:**

You can start the searching by pressing the Enter key while typing in the search boxes.

It’s not required for the searching that the names, titles etc. be entered in full but what is entered does need to be spelt correctly.

None of the searches are case sensitive

Order ID and Invoice Number are the same number.

You can quickly move to the next textbox during any parts that require typing by pressing the “Tab” key.

Remember this is still an early working version and there are still many improvements to be made and more features to be added.

If the program crashes it will be greatly appreciated if you could note down the error message displayed and what steps you took to make this happen. This will help to figure out what the problem was and will allow it to be fixed more easily.

Import Buttons:

These are used for the initial setup to transfer the data from the old database system into this system. They work by reading through a text file that is formatted as a comma separated value file. Instead of using commas they use a ‘|’ because some of the entries contain commas so it interfered with the import process. These buttons can also be used to reset the database back to the state that the data was exported from the old Access database if the text files from the export are kept.

**Setup:**

It’s required if you want to have invoices and mailing labels and use the file exporting features that you click the “Set Storage Location” from the main menu. The storage location is where all of these files will get stored. It will create 3 folders in the selected location called “Invoices”, “Mailing Labels” and “Export Files”. This is where all of the documents will get stored once created.

**Main Menu:**

This menu will allow you to navigate to the different features of the program.

**Customers menu:**

From here you can search for customers based on their ID, their first name and or last name. If an ID is entered then it won’t search using the names entered. Capitalization doesn’t affect the search. It will work off of both first and last name if they have been entered or it will work off of one.

After a search has been completed you can double click on a customer or click a customer and click the “Customer Details” button to bring up the rest of the information about the customer.

New customers can be added from this menu by clicking the “New Customer” button on the left side under the search button. You will find information about adding a customer below.

**New Customer menu:**

In this menu you can add a new customer by filling in all of the information you have about the customer in the labelled boxes. Once you have entered in the information you can click the “Save” button on the bottom right to save the customer into the database. Entry of a new customer can be cancelled at any time by clicking the “Cancel” button in the bottom right.

To enter a customer at least one of the following has to be entered

* Customer first name
* Customer last name
* Address1
* Address2
* Address3

**Customer Details Menu:**

Reached through the customers menu by double clicking on a customer that has been searched or clicking on a customer then clicking the “Customer Details” button.

This menu displays all of the information that has been stored about a customer. The information is locked and can’t be edited until the “Update” button in the top right is clicked, this will unlock the boxes and allow you to type in them. Once you have finished editing the information you can click the “Save” button under the “Update” button to lock the boxes and save the information to the database. All of the information can be edited except for the Customer ID.

This menu will also allow you to view any orders the customer has made previously by clicking the “View Customers Orders” button located on the bottom left. More information can be found about this menu below.

The customer details menu also allows you to create a new order for the customer from here by clicking the “Create New Order” button located underneath the “View Customers Orders” button. More information can be found about creating orders below.

**Customers Orders Menu:**

This menu will allow you to look through all of the previous orders made by a customer. You can get here through the customers details menu.

The orders made by the customer are shown in a list at the top of the screen. This displays the order ID/invoice Number (the order ID and invoice number are the same), the order reference and the invoice date to allow you to identify them more easily.

Clicking on the orders in the menu at the top will update the rest of the information on the screen. The books that the customer purchased for this order are displayed in another list at the bottom of the screen.

**Stock Menu:**

Here you can search through your stock, create new stock and import stock data from the previous database system.

To search you can enter in and BookID which is the code used to find the book when it is stored. Or you can search using the books author, title or subject or any combination of the three will work as well. The author, title and subject boxes aren’t case sensitive. The authors name can be entered by their first and or last name, in any order, separated by spaces or a comma. The books title must be entered in with correct spelling but it’s not required the title be entered in full. It’s recommended if a subject is entered that you only enter one subject.

The stock can also be filtered to display books that are currently in stock or all stock current or previous. This is done by clicking the buttons underneath the boxes for typing in the searching area. A search be initiated by pressing enter while one of the boxes for typing is still selected or by clicking the “Search” button.

After a search has been completed the list will fill up with any stock that is found and will display some basic information about the stock. If no stock has been found nothing will display in the list. From here you can double click on an item in the list or just click once and then click the “Stock Details” button below for more information about the book. Information about the stock details menu can be found below.

New Stock can be created by clicking the “New Stock” button located under the searching area. More information about creating new stock can be found below.

**New Stock Menu:**

Here you can enter all of the details about a new book to be entered into the system. Quantity is automatically set to 1 because it assumes that you are getting at least one new book if you are entering it into the system. The date is also automatically set. Fill in the rest of the information that you have about the book and click the “Save” button to store the book in the database. Or the “Cancel” button can be clicked at any time to cancel the entry.

At minimum for a new book to be entered the quantity, the author, the title and the books ID must be entered. All of the other fields can be left blank if desired.

**Stock Details Menu:**

This works the same as the customer details menu. The information is visible but locked for editing until the “Update” button in the top right is clicked. Any of the information can be edited except for the Stock ID. Once you have finished editing click the “Save” button located beneath the “Update” button in the top right and this will lock the textboxes and save the updates to the database.

**Orders Menu:**

Here you can view any existing orders, create new orders, create invoices, create mailing labels and import order and orderedstock data from the old Access database.

To search for an order you enter in the order ID or invoice number in the top left textbox and click the search button. The information related to the order will fill in on the right. The books that were purchased for the order will be displayed in a list near the bottom of the screen.

New Orders can be made by clicking the “New Order” button located under the “Search” button. More information about creating new orders can be found below.

To create an invoice you must first search and find an order you wish to create an invoice for then click the “Create Invoice” button located beneath the “New Order” button. If you have not done the initial setup it will ask you to do it first before creating the invoice. Once the invoice has been created it will store it in the “Invoice” folder in the location set during the setup. The invoice will also automatically open for you. The invoice requires Microsoft Word or any other program that can read .docx files.

Mailing labels can be created by clicking the “Big” or “Small” button underneath the “Mailing Label” text on the left side of the menu. The mailing labels work in the same way the invoice does. It will ask you to do the setup if not already done. It requires that an order already be searched as found. It will create the file in the location set during setup in the folder labelled “Mailing Labels”. The program will automatically open the document for you so you can print it if desired. The mailing label requires Microsoft Word or any other program that can read .docx files.

**New Order Menu:**

This menu will allow you to create a new order and is reached by going through the Order menu.

To add a customer you can click the “Find Customer” button located near the center of the menu. This menu works the same as the other customer search menu so more information can be found about that above. Once you have found a customer to use, you can double click them from that menu or click the customer then click the “Select Customer” button. Once a customer has been selected the customer’s information will autofill into the new order. The “New Customer” button is still being worked on.

The order reference, progress and comments can be left empty of filled. The date is automatically set to the current day so will need to be changed if the order wasn’t made on the day it’s being entered. The freight is set automatically to $0.00 so will need to be entered if it isn’t.

To add a book onto the order click the “Add new book” button located on the left side of the screen. The search menu that pops up works the same as the other stock search menu so information about it can be found above. Books can be selected from the search menu by double clicking the book or clicking the book and clicking the “Select Stock” button. You can add as many books to the order as you want.

To remove a book, right click on the book in the list you wish to remove and click “Remove Book”.

The information about the book such as quantity, price and discount can be edited by double clicking on the cell in the list you wish to edit.

Once you have completed filling out the order, click the “Save Order” button in the bottom left. Or alternatively the “Cancel” button can be clicked at any time on the bottom right. When an order has been saved the menu will close and take you back to the Order menu will all of the information about the current order filled out.

**File Exports Menu:**

These require the setup of the storage location. If not already done they will ask you to set it up. These will create the files that can be sent up to the websites to display the books currently in stock. After clicking the button of the desired format, the file will be created in the set storage location in the “Export File” folder. A popup menu will inform you when the file is created and let you know where to find it.

**Set Storage Location Button:**

It’s required if you want to have invoices and mailing labels and use the file exporting features that you click the “Set Storage Location” from the main menu. The storage location is where all of these files will get stored. It will create 3 folders in the selected location called “Invoices”, “Mailing Labels” and “Export Files”. This is where all of the documents will get stored once created.

If you click this button after already setting a storage location you can set a new location to store files and it will move all of the existing files over to the new location.