

Pine Springs Pottery

# User Manual

Pine Springs Pottery App & Cellica

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## System Documentation

### Background of Pine Springs Pottery

Our employer was Marie Lewis the owner of Pine Springs Pottery. Marie's problem was that since she started her business, she has kept all of her records in paper form. This created stacks of papers she would have to search through to find a specific order or customer. For example, if a customer called and asked about the pattern that her sister ordered, Marie would have to look through all the forms to find that customer's order.

To solve this problem, we created a database for Marie and provided her with a Visual Studio's program to access the database, as well as a Cellica program to view her database from her iPad. These programs allow Marie to access the database and enter information without actually dealing with the database herself.

### Division of Labor

Initially, the work for our project was divided into three part: Teresa creating the database, Tara, Wes, and Amanda sketching user interface designs, and Tara and Amanda working on Cellica. After that, the work was divided by what tasks each group member thought he or she could tackle. Amanda created the forms and profiles in Cellica and the search form in the Visual Studio program as well as implementing Google Maps from the expense form and implementing e-mail from the customer and show form. Amanda also came up with the idea of using Microsoft one drive to back up the database. Tara assisted with and tested Cellica and created the new show, new customer, wish list, and order history forms. Tara was also the person who contacted Marie when the group had questions or wanted to schedule a meeting. Teresa created the Access database and the new order, browse, catalog, and expense forms. Wes created the generate report form.

### Limitations

The first limitation of the Pine Springs Pottery programs is that we have no way of moving an item from the wish list to the order. Marie has to create an order with the item and then remove it from the wish list instead. The second limitation is that the reports are created at runtime because of our use of report viewer. The third limitation is that we do not have a way for Marie to make her mailing labels in the program. The forth limitation is it is difficult to add new entries to the database with Cellica.

### Project Development

Our project started with our original meeting with Marie. We met with her to get an idea of what kind of system we needed. After meeting with Marie and hearing what she needed, we discussed what kinds of systems would be needed. We agreed on Microsoft C#, Access 2007, and Cellica to meet her needs. The first goal was to come up with the GUI. The GUI was developed on Saturday, March 4, 2014 by Amanda, Tara, and Wes. The GUI consists of a main menu that leads to other forms that fulfill each of Marie requirements. The group's design kept

true to the original design mostly throughout the whole project. Next, Marie took us to her workshop in order to view a demonstration of her business processes. This helped us think of how to take Marie's current process and transform them into a digital system.

Armed with knowledge of how Marie conducted her business and suggestions from the interim report, we began to design the system. First, we needed to make sure that Cellica was a system that could meet Marie needs. Amanda and Tara spent the most time working with Cellica. In the time period of March 7<sup>th</sup> to March 14<sup>th</sup>, we did not want to continue work on the project until we were sure that Cellica worked well. We determined that it could allow Marie to view her data. We kept have issues with Cellica all throughout the project. Cellica was worked on until the end of April.

After spring break, we got right back to work, ensuring that each interface had the functionality it would need. Work was split up between group members; Tara was tasked with new show, new customer, wish list, and order history. Amanda was tasked with the search form. Teresa worked on new order, the catalog, browse/listings, and add expense. Wes worked on the reports that Marie would print off while working.

We spent that last week of March and all of April working on the functionality of the C# application. The C# application is meant to protect the database. It took longer than expected due to starting the programing later inexperience with databases. We were able to implement Marie's requested features with only a few of the features unimplemented. We got a working version from Marie to test on the first of May and will fix any problems she might have.

At the end of April, we started our first round of training. Teresa and Amanda were the only two who were able to attend. The first installation was good, since it allowed us to get some more feedback from Marie. This allowed for some more debugging. A second installation is planned for the sixth of May.

## **Anticipated Information Flow and Cycles**

Since Marie did not have software to store her data before this, we were able to start from scratch on this project; however, Marie had kept a lot of data that showed us what the program would need to be able to do. This project may need work done in the future, but it should work well until Marie is ready to expand again.

The Access Database file, located in the program's installed folder, should be backed-up once a week, or at least after data entry from each show. The file is backed-up by copying it into Marie's SkyDrive. It can be restored by copying it from her SkyDrive and replacing the current copy in the program's installed location.

The main software can be restored by the installation CD provided to Marie. The installation CD will contain the PC software, database, and the Cellica forms. To restore the software, Marie can place the CD into her computer and follow the installation wizard. The Cellica forms, database file, and PC software will all be located where the program is installed. The database file will need to be restored to the latest backed up version. If Cellica is reinstalled, a profile will need to be recreated to the database file and the forms loaded.

# **Implementation Manual**

## **Physical Machines**

Since Pine Springs Pottery is a one-woman business, the physical machines are a personal computer running windows 7 and an iPad. There is also no shared network drives or required special permissions, so there is no login to our system other than Marie logging into her devices.

## **Recreating the System**

To re-create the system when Marie gets a new PC, she will use a disk to reinstall the Visual Studio project and replace the database with the back-up version on Microsoft One Drive. For Cellica, she will send an e-mail from her iPad with the download link to download a desktop end of the program. If Marie gets a new iPad to replace Cellica, she will download the app and send Cellica an e-mail to transfer the license. If it has been over a year, Cellica will have her buy a new license. The step-by-step guides for re-installing each program are included.

## **Accounts and Roles**

Currently, Marie is the only person accessing the database, so there are no administrator functions, accounts, or roles.

## Using the Program

### New Customer



After clicking [New Customer], a blank Customer Information form will open. Enter information into the form as known. The first name and last name fields are needed.

The screenshot shows a window titled "Customer Information" with a yellow header. The form is divided into two columns. The left column contains fields for "First Name:" (filled with "Marie"), "Street Address:", "City:", "State:", "Zip:", "Pattern Preference:" (a dropdown menu), "Total Spent:" (filled with "\$0.00"), "Host:" (a checkbox), and "Credit:" (filled with "0.00"). The right column contains fields for "Last Name:" (filled with "L"), "Home Phone:", "Mobile Phone:", "Email:", "Contact Preference:", "Tax Exempt No:", and "Notes:" (a large text area). At the bottom, there are four buttons: "E-mail Customer", "Wish List", "View Purchases", and "Edit". A "Back" button is also visible at the bottom right.

The pattern preference can be chosen through a drop down box, which shows all the patterns.

The screenshot shows the 'Customer Information' window with the following fields and values:

- First Name: Marie
- Last Name: Lewis
- Street Address: (empty)
- Home Phone: (empty)
- City: (empty)
- Mobile Phone: (empty)
- State: (empty)
- Email: (empty)
- Zip: (empty)
- Contact Preference: (empty)
- Pattern Preference: (dropdown menu open showing options: Blue Floral, Calla Lily, Custom, Daisy, Oak Leaf and Acorn, Pine Bough, Stars & Stripes, Stripes, Sunflower, Vine)
- Tax Exempt No: (empty)
- Total Spent: (empty)
- Host: (empty)
- Credit: (empty)
- Notes: (empty text area)

Buttons at the bottom: E-mail Customer, Wish List, Edit, Back.

Credit can be adjusted with the up and down arrows on the side of the credit box or type into the box. If the customer is a host, check the “Host” check box (under “Total Spent”).

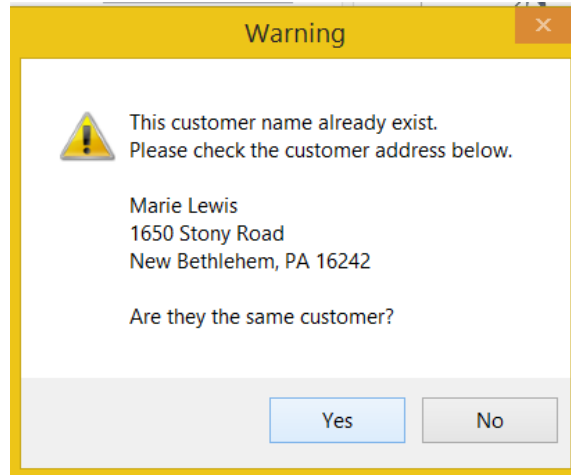
The screenshot shows the 'Customer Information' window with the following fields and values:

- First Name: Marie
- Last Name: Lewis
- Street Address: (empty)
- Home Phone: (empty)
- City: (empty)
- Mobile Phone: (empty)
- State: (empty)
- Email: (empty)
- Zip: (empty)
- Contact Preference: (empty)
- Pattern Preference: (dropdown menu closed)
- Tax Exempt No: (empty)
- Total Spent: \$0.00
- Host: ☒
- Credit: 4.00
- Notes: (empty text area)

Buttons at the bottom: E-mail Customer, Wish List, View Purchases, Edit, Back.

When you are done editing the customer, if you want to save the customer, click the save button at the top of the screen or if you do not want to add the customer, click the delete button at the top of the screen. Once a customer is saved, the customer is checked to see if a first and last name was created and if the first and last name exist for another customer. If a customer already exists with the first name a dialog box will appear asking you if the customers are the same.





If they are click “Yes” and the new customer will not save and the Customer Information form will go to the customer’s information to be edited. At that point, if you want to edit the customer information click on the edit button or you can navigate through the customers using the arrows at the top of the screen. (Note: Do not forget to save after editing.)

A "Customer Information" form window with a yellow border. At the top, it says "Customer Information" in black text. Below that is a navigation bar with "1 of 47" and several icons. The form contains the following fields: "First Name:" with "Marie", "Last Name:" with "Lewis", "Street Address:" with "1650 Stony Road", "Home Phone:" with "(814)764-5626", "City:" with "New Bethlehem", "Mobile Phone:" (empty), "State:" with "PA", "Email:" (empty), "Zip:" with "16242", "Contact Preference:" (empty), "Pattern Preference:" (dropdown menu), "Tax Exempt No:" (empty), "Total Spent:" with "\$0.00", "Notes:" (text area), "Host:" with a checked checkbox, and "Credit:" with "0.00". At the bottom, there are five buttons: "E-mail Customer", "Wish List", "View Purchases", "Edit", and "Back".

If they are not the same customer, click “No”. This will save the customer and show you the information that was just entered. At this point, you can edit the customer (click edit button), navigate the customers (use arrows).

If you open a customer's information, the Customer Information form will open to that customer's information filling in all information that is stored. The back button will close the form. See "E-mail Customer", "Wish List", and "View Purchases" to learn more about the buttons not mentioned.

## Wish List

After clicking on the "Wish List" button on the Customer Information form, a Wish List form will open adding any wish list items to the table that that customer have. If the customer does not have any wish list item the table will appear empty.

| Item No | Piece Name     | Pattern Name | Clay Size | Customizations | Quantity | Date Wished |
|---------|----------------|--------------|-----------|----------------|----------|-------------|
| 1       | Egg Plate      | Daisy        | 3.00      |                | 1        | 05/05/2014  |
| 2       | Chip and Di... | Calla Lily   | 5.00      |                | 1        | 05/05/2014  |

To add an item to the wish list, click "Add Item" and follow the "Catalog" instructions. To remove an item select the row the item is in and click "Remove Item".

Wish List

Customer Name: Marie Lewis

|   | Item No | Piece Name     | Pattern Name | Clay Size | Customizations | Quantity | Date Wished |
|---|---------|----------------|--------------|-----------|----------------|----------|-------------|
| ▶ | 2       | Chip and Di... | Calla Lily   | 5.00      |                | 1        | 05/05/2014  |

Add Item Remove Item Back

To exit the form, you can click “Back”.

## Order History

After clicking “View Purchases” button on the Customer Information form or searching for order history, an Order History form will open. If there are an orders related to a customer, the orders will fill in the rows.

Order History

Customer Name: Nancy Wolbert

|   | OrderNo | OrderDate | PieceName      | TotalPounds | PatternName      | Quantity | Customization | ItemPrice | Subtotal | Discount |
|---|---------|-----------|----------------|-------------|------------------|----------|---------------|-----------|----------|----------|
| ▶ | 9       | 2/16/2013 | Pie Plate      | 3.00        | Stars & Strip... | 1        | blue          | 24        | 70.5     | 17.63    |
|   | 9       | 2/16/2013 | Plate          | 3.00        | Stars & Strip... | 1        | blue          | 19.5      | 70.5     | 17.63    |
|   | 9       | 2/16/2013 | Wine and Fl... | 4.00        | Stars & Strip... | 1        | blue          | 27        | 70.5     | 17.63    |
| * |         |           |                |             |                  |          |               |           |          |          |

< >

## New Show

After clicking a new show button, a blank Show Information form will open. Enter information into the form as known. A show name, show type, and show date are needed. You can select a show type by the drop down box.

Show Information

7 of 7

Show Name:

Show Type: Craft Show

Host Name:

Show Date:

Show Location:

Notes:

Non Order Sales Total: 0.00

Total Sales: \$0.00

Guest List

Select Customer New Customer

| Cust. No | First Name | Last Name | Response |
|----------|------------|-----------|----------|
|          |            |           |          |

Pieces

Pieces Taken

Add Piece

|   | Piece Name | Pattern Name | Total lbs |
|---|------------|--------------|-----------|
| * |            |              |           |

Pieces Sold

|   | Piece Name | Pattern Name | Total lbs |
|---|------------|--------------|-----------|
| * |            |              |           |

Edit Back Go To E-mail

To add a host, click the “Select” button. This will bring you to a customer browse with all the customers listed. Double click on the customer that is the host. If the wrong host is selected click “Remove” and try again. Non Order Sales Total can be adjusted by clicking the arrows in the box or typing in the box.

The screenshot shows the 'Show Information' window. The 'Host Name' field contains 'Susan Allen' and the 'Select' button is highlighted. The 'Show Date' is set to '5/ 5/2014'. The 'Non Order Sales Total' is '0.00' and the 'Total Sales' is '\$0.00'. The 'Guest List' section has buttons for 'Select Customer' and 'New Customer'. The 'Pieces' section has 'Pieces Taken' and 'Pieces Sold' tables, each with columns for 'Piece Name', 'Pattern Name', and 'Total lbs'. The 'Pieces Taken' table has a row with an asterisk in the first column. The 'Pieces Sold' table also has a row with an asterisk in the first column. There are buttons for 'Add Piece', 'Edit', 'Back', and 'Go To E-mail'.

The show date is auto set for the current day, you can change that by clicking on the calendar button to view a calendar and select a day.

The screenshot shows the 'Show Information' window with the 'Show Date' calendar open. The calendar displays May 2014, with the date '5/ 5/2014' selected. The 'Non Order Sales Total' is '0.00' and the 'Total Sales' is '\$0.00'. The 'Guest List' section has buttons for 'Select Customer' and 'New Customer'. The 'Pieces' section has 'Pieces Taken' and 'Pieces Sold' tables, each with columns for 'Piece Name', 'Pattern Name', and 'Total lbs'. The 'Pieces Taken' table has a row with an asterisk in the first column. The 'Pieces Sold' table also has a row with an asterisk in the first column. There are buttons for 'Add Piece', 'Edit', 'Back', and 'Go To E-mail'.

To add guests to a show, click “Select Customer” and browse the customer listings to find the customer you want to add and double click. If the customer does not exist, click “New Customer” and follow the steps for entering a new customer. Once you select a guest, you can change their response it “YES”, “NO”, or “NORESPONSE” using the drop down box. At this

point, you can show the show or chose to delete it. (Note: once you save a show you cannot delete it.)

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Show Name:

Show Type: Host Home

Host Name:  Select Remove

Show Date: 5/22/2014

Show Location:

Notes:

Non Order Sales Total: 0.00

Total Sales: \$0.00

Guest List

Select Customer New Customer

| Cust. No | First Name | Last Name | Response    |
|----------|------------|-----------|-------------|
| 15       | Teri       | Rhoads    | NORES...    |
| 18       | Nancy      | Wolbert   | YES         |
| 17       | Sheila     | Miller    | NORESPON... |

Pieces

Pieces Taken

Add Piece

| Piece Name | Pattern Name | Total lbs |
|------------|--------------|-----------|
| *          |              |           |

Pieces Sold

| Piece Name | Pattern Name | Total lbs |
|------------|--------------|-----------|
| *          |              |           |

Edit

Back

Go To E-mail

After saving a show or opening a pre-existing show, you can navigate the shows with the arrow buttons at the top of the form or you can edit the show. At this time you can enter any pieces that you are planning to take to the show by clicking the “Add Piece” button (Follow Catalog instructions).

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Show Name: Test

Show Type: Host Home

Host Name:  Select Remove

Show Date: 5/22/2014

Show Location:

Notes:

Non Order Sales Total: 0.00

Total Sales: \$0.00

Guest List

Select Customer New Customer

| Cust. No | First Name | Last Name | Response |
|----------|------------|-----------|----------|
| 15       | Teri       | Rhoads    | NORES... |
| 18       | Nancy      | Wolbert   | YES      |
| 17       | Sheila     | Miller    | NO       |

Pieces

Pieces Taken

Add Piece

| Piece Name     | Pattern Name | Total lbs |
|----------------|--------------|-----------|
| Cream and ...  | Stripes      | 2.00      |
| Chip and Di... | Sunflower    | 5.00      |
| Bowl (Deep ... | Sunflower    | 1.00      |

Pieces Sold

| Piece Name | Pattern Name | Total lbs |
|------------|--------------|-----------|
| *          |              |           |

Undo Move

Edit

Back

Go To E-mail

If you sell a piece that you took to the show, you can mark it as sold by selecting the row the piece is in in the Pieces Taken table and click the “>” button and if you relies that it was not sold, you can fix that by selecting the piece again in the Pieces Sold table and click “Undo Move”.

6 of 7

Show Name: Test

Show Type: Host Home

Host Name: [Select] [Remove]

Show Date: 5/22/2014

Notes:

Non Order Sales Total: 0.00

Total Sales: \$0.00

Pieces

Pieces Taken

Add Piece

| Piece Name    | Pattern Name | Total lbs |
|---------------|--------------|-----------|
| Cream and ... | Stripes      | 2.00      |

Pieces Sold

| Piece Name     | Pattern Name | Total lbs |
|----------------|--------------|-----------|
| Bowl (Deep ... | Sunflower    | 1.00      |

Guest List

Select Customer New Customer

| Cust. No | First Name | Last Name | Response |
|----------|------------|-----------|----------|
| 15       | Teri       | Rhoads    | NORES... |
| 18       | Nancy      | Wolbert   | YES      |
| 17       | Sheila     | Miller    | NO       |

Edit Back Go To E-mail

The “Back” button will close the form. See “E-mail” for the “Go To E-mail” button.

## Entering a New Order

1. From the Main Menu, click [New Order] to bring up a screen like below.

Order Information

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Show Name: [Select Show] [Remove]

Customer Name: [Select Customer] [New Customer] [Remove]

Order Date: 2/16/2013

Add Item

Notes:

| Piece | Size | Pattern | Quantity | Price | TotalPrice | Status | Customizations | Gift | Card Mes |
|-------|------|---------|----------|-------|------------|--------|----------------|------|----------|
|-------|------|---------|----------|-------|------------|--------|----------------|------|----------|

Discount/Host Credit: ☒ Percent 0 ☐ Dollar Amount 0.00

Subtotal: 0.00

New Total: 0.00

Tax: 0.00

Shipping: 0.00

Total: 0.00

Amount Paid: 0.00

Payment Type: CHECK

Check No:

Amount Due:

Left Over Credit: 0.00

Paid in full?

Edit Save Order Cancel/Close

2. To add this order to a specific show, click [Select Show], and double click on the desired show.

The 'Listing' window displays a table of shows. A red arrow points to the 'Show Name' column header. The table contains the following data:

|  | ShowNo | Show Name            | HostName          | ShowDate       | Show Time | ShowLocation | ShowType    | TotalSales | NonO |
|--|--------|----------------------|-------------------|----------------|-----------|--------------|-------------|------------|------|
|  | 2      | Mystery Host         | Marie Lewis       | 3/21/2013      |           | My Studio    | Craft Show  | 229.25     | 0.00 |
|  | 3      | Marianne's Studi...  | Marianne Reynolds | 3/26/2013      |           | My Studio    | Studio Show | 129.00     | 0.00 |
|  | 4      | Focus Group          |                   | 2/16/2013      |           | My Studio    | Studio Show | 247.12     | 0.00 |
|  | 5      | Holly's Studio Sh... | Holly N/A         | 4/9/2013       |           | My Studio    | Studio Show | 111.50     | 0.00 |
|  | 6      | Dawn's Studio S...   | Dawn Jeannerat    | 4/27/2013 1... |           | My Studio    | Studio Show | 424.00     | 0.00 |
|  | 1      | Sheila's Studio S... | Sheila Miller     | 3/7/2013       |           | My Studio    | Studio Show | 290.50     | 0.00 |

You will see the name and date of the selected show appear on the order form.

The order form displays the selected show name and date. A red arrow points to the 'Show Name' field, which contains 'Marianne's Studio Show'. Another red arrow points to the 'Order Date' field, which contains '3/26/2013'.

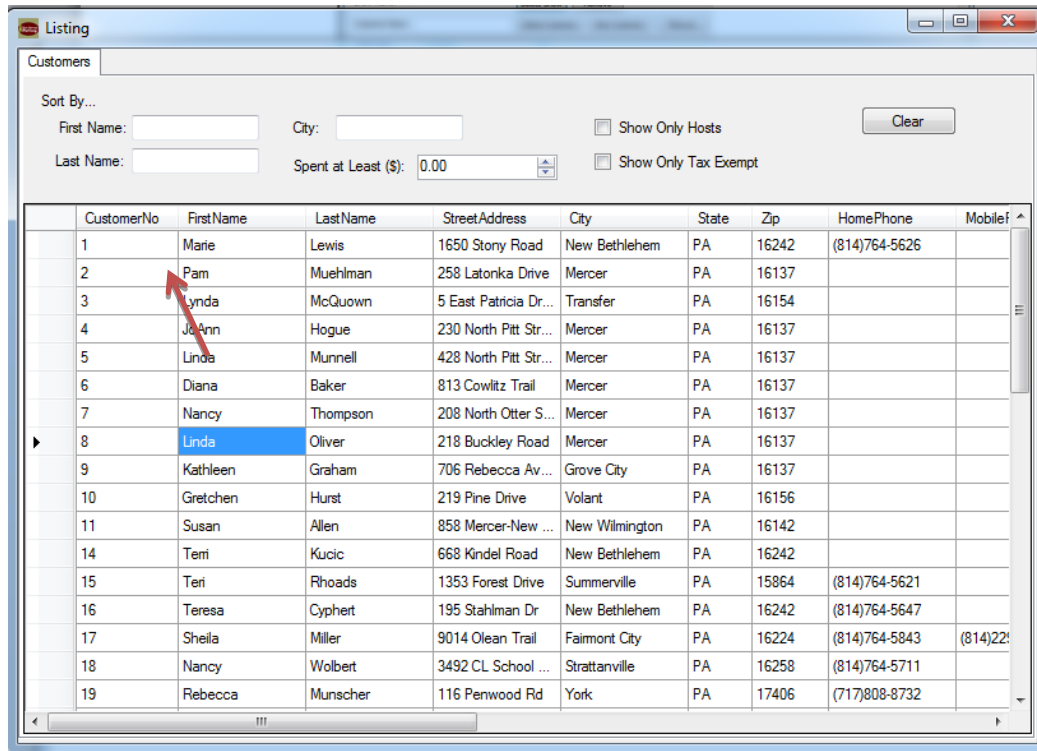
Show Name: Marianne's Studio Show [Select Show] [Remove]

Customer Name: [Select Customer] [New Customer] [Remove]

Order Date: 3/26/2013

The show may be changed by clicking [Select Show] again. The show may be removed by clicking [Remove] next to the show.

- To add a customer to this order, click [Select Customer], and double click on the desired customer.



Listing

Customers

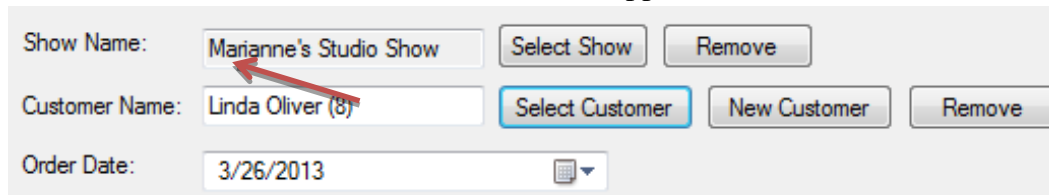
Sort By...

First Name:  City:  ☐ Show Only Hosts

Last Name:  Spent at Least (\$):  ☐ Show Only Tax Exempt

| CustomerNo | FirstName | LastName | StreetAddress         | City           | State | Zip   | HomePhone     | Mobile     |
|------------|-----------|----------|-----------------------|----------------|-------|-------|---------------|------------|
| 1          | Marie     | Lewis    | 1650 Stony Road       | New Bethlehem  | PA    | 16242 | (814)764-5626 |            |
| 2          | Pam       | Muehlman | 258 Latonka Drive     | Mercer         | PA    | 16137 |               |            |
| 3          | Lynda     | McQuown  | 5 East Patricia Dr... | Transfer       | PA    | 16154 |               |            |
| 4          | Je Ann    | Hogue    | 230 North Pitt Str... | Mercer         | PA    | 16137 |               |            |
| 5          | Linda     | Munnell  | 428 North Pitt Str... | Mercer         | PA    | 16137 |               |            |
| 6          | Diana     | Baker    | 813 Cowlitz Trail     | Mercer         | PA    | 16137 |               |            |
| 7          | Nancy     | Thompson | 208 North Otter S...  | Mercer         | PA    | 16137 |               |            |
| 8          | Linda     | Oliver   | 218 Buckley Road      | Mercer         | PA    | 16137 |               |            |
| 9          | Kathleen  | Graham   | 706 Rebecca Av...     | Grove City     | PA    | 16137 |               |            |
| 10         | Gretchen  | Hurst    | 219 Pine Drive        | Volant         | PA    | 16156 |               |            |
| 11         | Susan     | Allen    | 858 Mercer-New ...    | New Wilmington | PA    | 16142 |               |            |
| 14         | Teri      | Kucic    | 668 Kindel Road       | New Bethlehem  | PA    | 16242 |               |            |
| 15         | Teri      | Rhoads   | 1353 Forest Drive     | Summerville    | PA    | 15864 | (814)764-5621 |            |
| 16         | Teresa    | Cyphert  | 195 Stahlman Dr       | New Bethlehem  | PA    | 16242 | (814)764-5647 |            |
| 17         | Sheila    | Miller   | 9014 Olean Trail      | Falmont City   | PA    | 16224 | (814)764-5843 | (814)22... |
| 18         | Nancy     | Wolbert  | 3492 CL School ...    | Strattanville  | PA    | 16258 | (814)764-5711 |            |
| 19         | Rebecca   | Munscher | 116 Penwood Rd        | York           | PA    | 17406 | (717)808-8732 |            |

You will see the name of the selected customer appear on the order form.



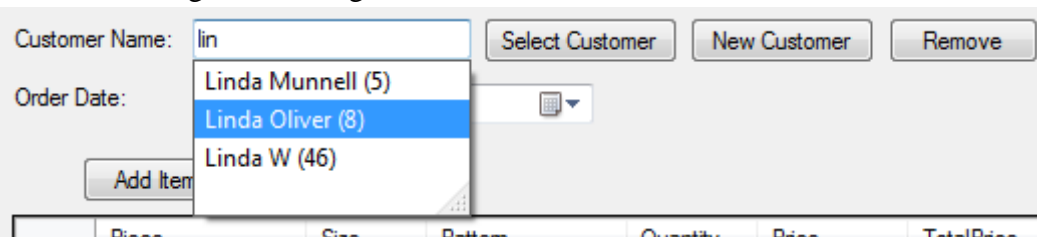
Show Name:

Customer Name:

Order Date:

The customer may be changed by clicking [Select Customer] again. The customer may be removed by clicking [Remove] next to the customer.

The customer may also be selected by AutoComplete. Start typing the first name of the customer, navigate to the right one, and click or hit enter.



Customer Name:

Order Date:

Add Item


Linda Munnell (5)  
Linda Oliver (8)  
Linda W (46)

Place Size Pattern Quantity Price TotalPrice

You may also enter a new customer by clicking [New Customer] and following the instructions for "Entering a New Customer." After that customer is saved, you may now select him/her from [Select Customer].

4. You may change the day of the order using the Calendar tool.



Order Date:  

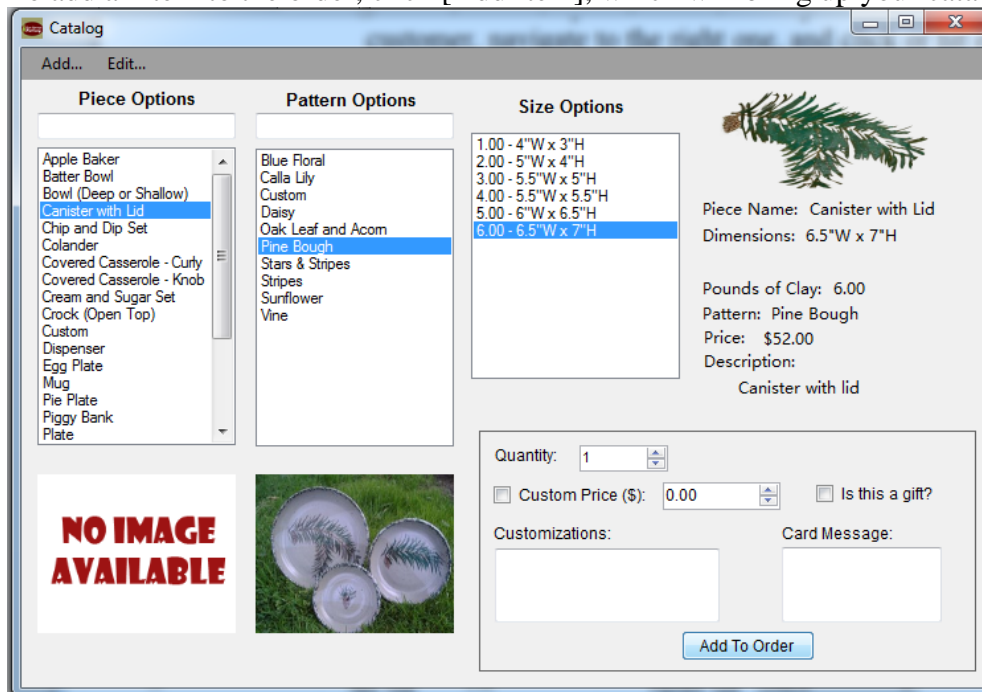
|  | Piece | Quantity |
|--|-------|----------|
|  |       |          |

◀ March, 2013 ▶

|     |     |     |     |     |     |     |
|-----|-----|-----|-----|-----|-----|-----|
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
| 24  | 25  | 26  | 27  | 28  | 1   | 2   |
| 3   | 4   | 5   | 6   | 7   | 8   | 9   |
| 10  | 11  | 12  | 13  | 14  | 15  | 16  |
| 17  | 18  | 19  | 20  | 21  | 22  | 23  |
| 24  | 25  | 26  | 27  | 28  | 29  | 30  |
| 31  | 1   | 2   | 3   | 4   | 5   | 6   |

Today: 5/5/2014

- To add an item to the order, click [Add Item], which will bring up your catalog.



**Catalog**

Add... Edit...

**Piece Options**

- Apple Baker
- Batter Bowl
- Bowl (Deep or Shallow)
- Canister with Lid**
- Chip and Dip Set
- Colander
- Covered Casserole - Curly
- Covered Casserole - Knob
- Cream and Sugar Set
- Crock (Open Top)
- Custom
- Dispenser
- Egg Plate
- Mug
- Pie Plate
- Piggy Bank
- Plate


**Pattern Options**

- Blue Floral
- Calla Lily
- Custom
- Daisy
- Oak Leaf and Acom
- Pine Bough**
- Stars & Stripes
- Stripes
- Sunflower
- Vine

**Size Options**

- 1.00 - 4"W x 3"H
- 2.00 - 5"W x 4"H
- 3.00 - 5.5"W x 5"H
- 4.00 - 5.5"W x 5.5"H
- 5.00 - 6"W x 6.5"H
- 6.00 - 6.5"W x 7"H**

**NO IMAGE AVAILABLE**



**Piece Name:** Canister with Lid  
**Dimensions:** 6.5"W x 7"H

**Pounds of Clay:** 6.00  
**Pattern:** Pine Bough  
**Price:** \$52.00  
**Description:**  
 Canister with lid

**Quantity:** 1

☐ Custom Price (\$): 0.00 ☐ Is this a gift?

**Customizations:**

**Card Message:**

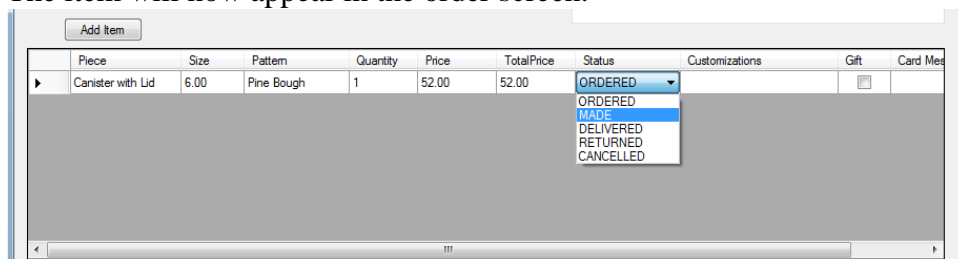
**Add To Order**

Select the piece, pattern and size by clicking on the corresponding options. The details will show on the right-hand side. The selected piece and pattern will show in the pictures below. The input boxes for piece and pattern may be used for searching and will limit the options to match your search.

To change the quantity, enter the desired quantity in the quantity box. You may also change the price by checking the box next to "Custom Price" and entering a new value. There is also input for customizations, gift option, and a card message.

Click [Add To Order] to add the item.

- The item will now appear in the order screen.



|  | Piece             | Size | Pattern    | Quantity | Price | TotalPrice | Status  | Customizations | Gift                     | Card Mes |
|--|-------------------|------|------------|----------|-------|------------|---------|----------------|--------------------------|----------|
|  | Canister with Lid | 6.00 | Pine Bough | 1        | 52.00 | 52.00      | ORDERED |                | <input type="checkbox"/> |          |

You can still change the quantity, price, status, customizations, gift option, and card message from this screen.

To delete an item, click on the far left box of that row to select the whole row and hit "Delete" on your keyboard.

You may continue to add items until the order is filled.

7. You can add an overall discount to the order by percent or dollar amount. Also if the selected customer has credit, it will show below the discount box. To use the credit, click the checkbox next to “Use Previous Credit”.

8. The order’s money summery appears at the bottom of the screen.

Add tax by clicking the checkbox next to “Tax”, and it will be auto-calculated.

Add shipping by clicking the checkbox next to “Shipping” and entering the amount.

If the customer paid in full, click the checkbox to autofill in the amount paid. If they did not pay in full, enter in the amount they paid and the amount they owe will be displayed.

Select the payment type from the dropdown box. If check is selected, a place to enter the check number will be provided.

9. Click [Save Order] to save the order.  
Click [Close/Cancel] or the red X at the top to cancel adding the order.

## Viewing an Order

1. Order information may be opened from another form or viewed from [New Order].
2. After a new order is saved or cancelled, the order information is displayed like below.

The 'Order Information' window displays the following details:

- Show Name: Dawn's Studio Show
- Customer Name: Sue Jeannerat (43)
- Order Date: 4/27/2013

| Piece         | Size | Pattern    | Quantity | Price | TotalPrice | Status    | Customizations | Gift                     | Card Mes |
|---------------|------|------------|----------|-------|------------|-----------|----------------|--------------------------|----------|
| Egg Plate     | 3.00 | Calla Lily | 1        | 27.00 | 27.00      | DELIVERED |                | <input type="checkbox"/> |          |
| Triple Server | 0.00 | Calla Lily | 1        | 36.00 | 36.00      | DELIVERED |                | <input type="checkbox"/> |          |

Summary:

- Subtotal: 63.00
- Discount/Credit: 0.00
- New Total: 63.00
- Tax: 3.78
- Shipping: 0.00
- Total: 66.78

Payment Information:

- Amount Paid: 66.78
- Payment Type: CHECK
- Check No: 7920
- Amount Due: 0.00

Buttons: Add Item, Edit, Save Order, Cancel/Close

3. The blue arrows will navigate the orders. The yellow plus will add a new order.
4. Customizations and Card Message may be view easier by double clicking on it.

The 'Order Information' window shows a new order for 'Wine and Flowers ...' with a size of 4.00 and a pattern of 'Sunflower'. The status is 'DELIVERED'. A 'Customizations' dialog box is open, displaying the text: 'green, not black top edge speckle'.

| Piece                | Size | Pattern   | Quantity | Price | TotalPrice | Status    | Customizations                    | Gift                     | Card Mes |
|----------------------|------|-----------|----------|-------|------------|-----------|-----------------------------------|--------------------------|----------|
| Wine and Flowers ... | 4.00 | Sunflower | 1        | 27.00 | 27.00      | DELIVERED | green, not black top edge speckle | <input type="checkbox"/> |          |

Summary:

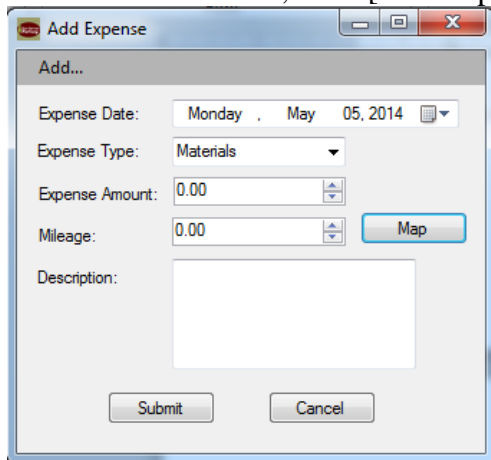
- Subtotal: 27.00
- Discount/Credit: 0.00
- Amount Paid: 28.62

Buttons: Edit, OK

5. To edit an order, click [Edit], make the changes, and click save.

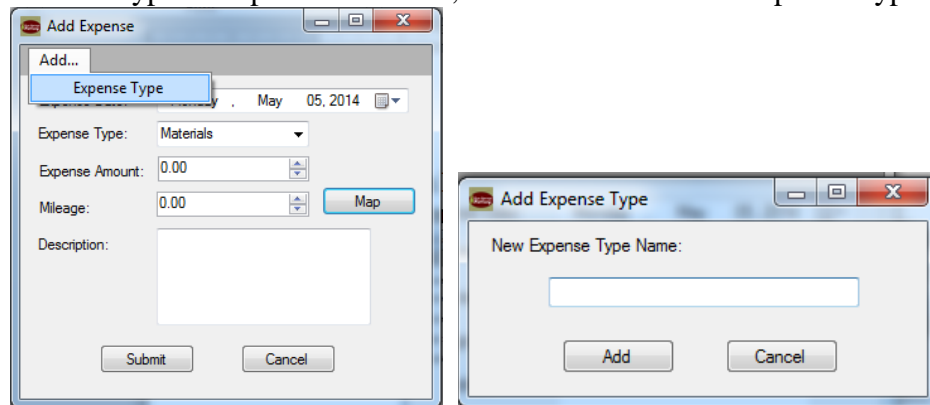
## Adding an Expense

1. From the Main Menu, click [Add Expense].



The 'Add Expense' dialog box is shown. It has a title bar with a close button. Inside, there's a tab labeled 'Add...'. Below the tab, there are fields for 'Expense Date' (set to Monday, May 05, 2014), 'Expense Type' (set to Materials), 'Expense Amount' (0.00), 'Mileage' (0.00), and a 'Description' text area. There are 'Submit' and 'Cancel' buttons at the bottom. A 'Map' button is next to the 'Mileage' field.

2. Choose the date and type of expense.
  - a. If a new type of expense is needed, click “Add...” then “Expense Type”

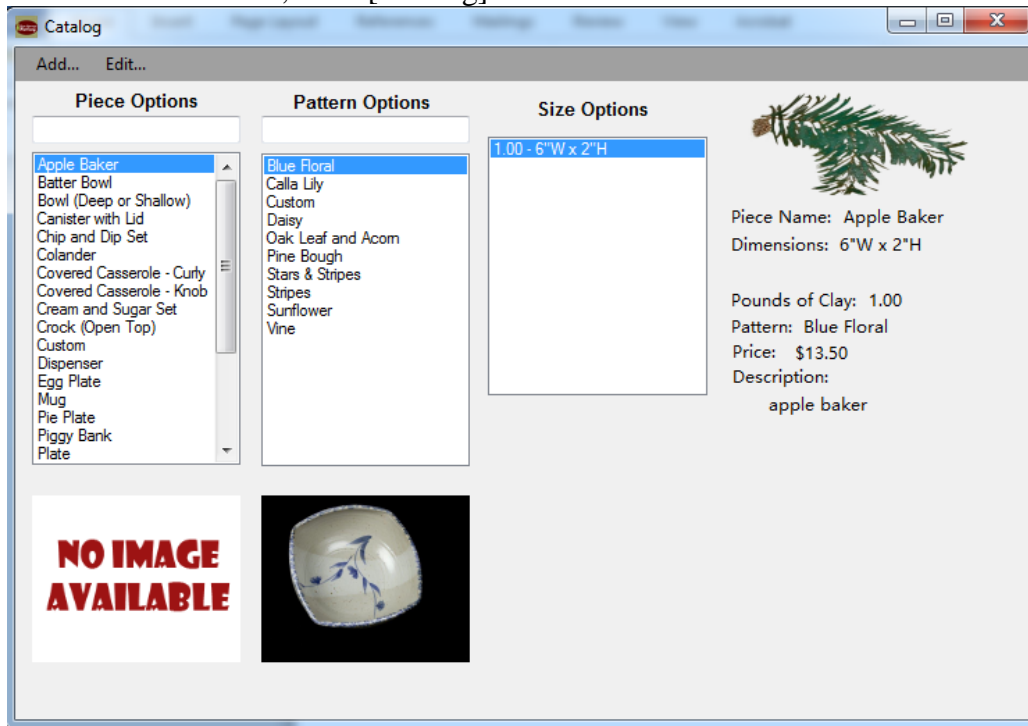


The first screenshot shows the 'Add Expense' dialog box with the 'Add...' tab selected. The 'Expense Type' button is highlighted. The second screenshot shows the 'Add Expense Type' dialog box, which has a title bar and a single text field labeled 'New Expense Type Name:'. There are 'Add' and 'Cancel' buttons at the bottom.

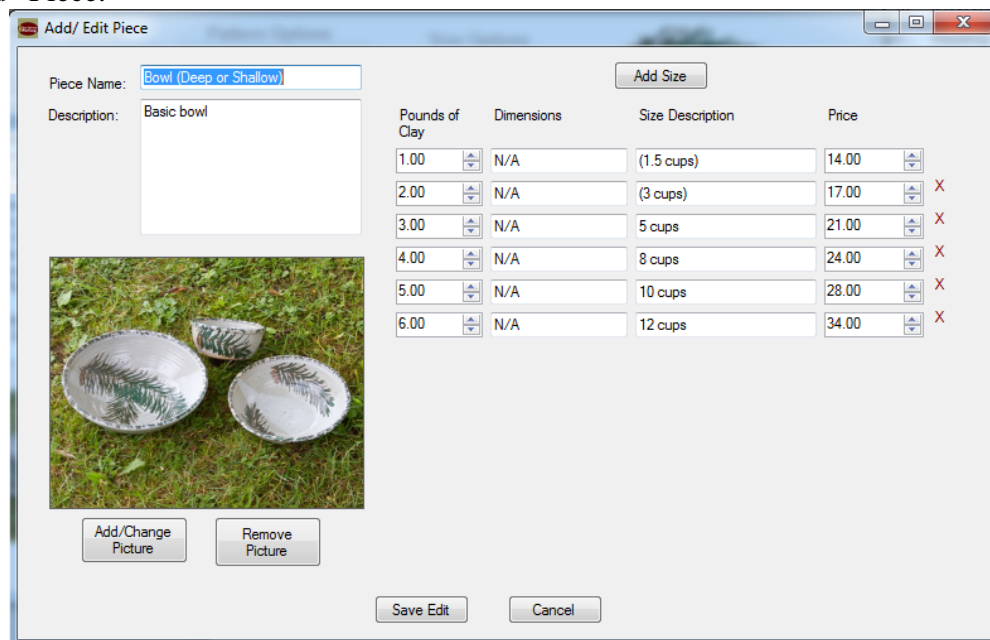
- b. Type in the name for the new expense type and click [Add].
  - c. Click [Cancel] to go back without adding a type.
3. Enter the amount for the expense and mileage if applicable.
    - a. Click [Map] for quick access to Google™ maps for mileage calculations.
  4. Add a description of the expense, if desired.
  5. Click [Submit] to save the expense or [Cancel] to go back to the Main Menu.

## Editing the Catalog

1. From the Main Menu, click [Catalog].

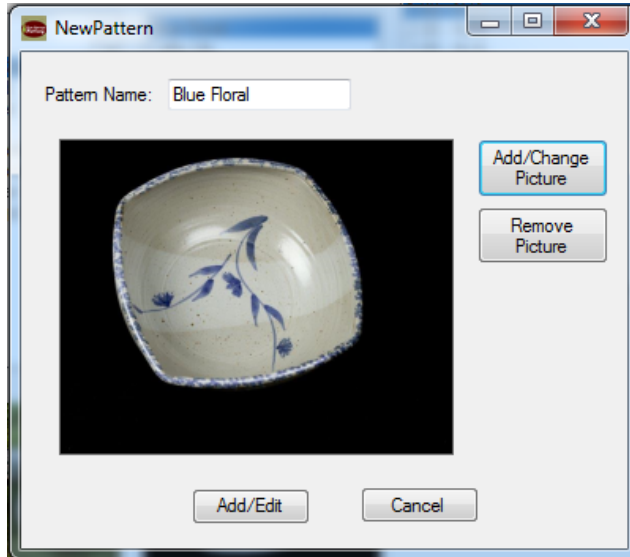


2. To add a piece, click “Add...” and “New Piece” or to edit the selected piece click “Edit” and “Piece.”



- a. Enter a name and description for the piece
- b. Add/Change/Remove the picture.
- c. Add/Edit information about each size on the right.

- i. Add a new size option by clicking [Add Size].
    - ii. Remove a size option by clicking the red X on the right of the price.
  - d. Click save to save the new piece or save changes.
  - e. Click cancel to go back to the catalog without making changes.
3. To add a pattern, click “Add...” and “New Pattern” or to edit the selected pattern click “Edit” and “Pattern.”



- a. Enter a name for the pattern
- b. Add/Change/Remove the picture.
- c. Click save to save the new pattern or save changes.
- d. Click cancel to go back to the catalog without making changes.

## Browsing Customers/Orders/Shows/Expenses

1. From the Main Menu, click [Browse] to bring up a screen like below.

The screenshot shows a software window titled 'Listing'. At the top, there are four tabs: 'Customers', 'Orders', 'Shows', and 'Expenses'. The 'Customers' tab is selected. Below the tabs, there is a 'Sort By...' section with input fields for 'First Name', 'City', 'Last Name', and 'Spent at Least (\$)' (set to 0.00). There are also two checkboxes: 'Show Only Hosts' and 'Show Only Tax Exempt', and a 'Clear' button. The main area of the window contains a table with the following columns: CustomerNo, FirstName, LastName, StreetAddress, City, State, Zip, HomePhone, and MobilePhone. The table lists 19 customers, with the first row (Marie Lewis) highlighted in blue.

| CustomerNo | FirstName | LastName | StreetAddress         | City           | State | Zip   | HomePhone     | MobilePhone |
|------------|-----------|----------|-----------------------|----------------|-------|-------|---------------|-------------|
| 1          | Marie     | Lewis    | 1650 Story Road       | New Bethlehem  | PA    | 16242 | (814)764-5626 |             |
| 2          | Pam       | Muehlman | 258 Latonka Drive     | Mercer         | PA    | 16137 |               |             |
| 3          | Lynda     | McQuown  | 5 East Patricia Dr... | Transfer       | PA    | 16154 |               |             |
| 4          | JoAnn     | Hogue    | 230 North Pitt Str... | Mercer         | PA    | 16137 |               |             |
| 5          | Linda     | Munnell  | 428 North Pitt Str... | Mercer         | PA    | 16137 |               |             |
| 6          | Diana     | Baker    | 813 Cowlitz Trail     | Mercer         | PA    | 16137 |               |             |
| 7          | Nancy     | Thompson | 208 North Otter S...  | Mercer         | PA    | 16137 |               |             |
| 8          | Linda     | Oliver   | 218 Buckley Road      | Mercer         | PA    | 16137 |               |             |
| 9          | Kathleen  | Graham   | 706 Rebecca Av...     | Grove City     | PA    | 16137 |               |             |
| 10         | Gretchen  | Hurst    | 219 Pine Drive        | Volant         | PA    | 16156 |               |             |
| 11         | Susan     | Allen    | 858 Mercer-New ...    | New Wilmington | PA    | 16142 |               |             |
| 14         | Terri     | Kucic    | 668 Kindel Road       | New Bethlehem  | PA    | 16242 |               |             |
| 15         | Teri      | Rhoads   | 1353 Forest Drive     | Summerville    | PA    | 15864 | (814)764-5621 |             |
| 16         | Teresa    | Cyphert  | 195 Stahlman Dr       | New Bethlehem  | PA    | 16242 | (814)764-5647 |             |
| 17         | Sheila    | Miller   | 9014 Olean Trail      | Faimont City   | PA    | 16224 | (814)764-5843 | (814)22...  |
| 18         | Nancy     | Wolbert  | 3492 CL School ...    | Strattanville  | PA    | 16258 | (814)764-5711 |             |
| 19         | Rebecca   | Munscher | 116 Penwood Rd        | York           | PA    | 17406 | (717)808-8732 |             |

2. Click the tab at the top for the desired category to browse.
3. Enter information to limit the results displayed in the grid.
4. Click clear to reset the results and clear all criteria.
5. Double click on a cell for any item to bring up a screen with its details.

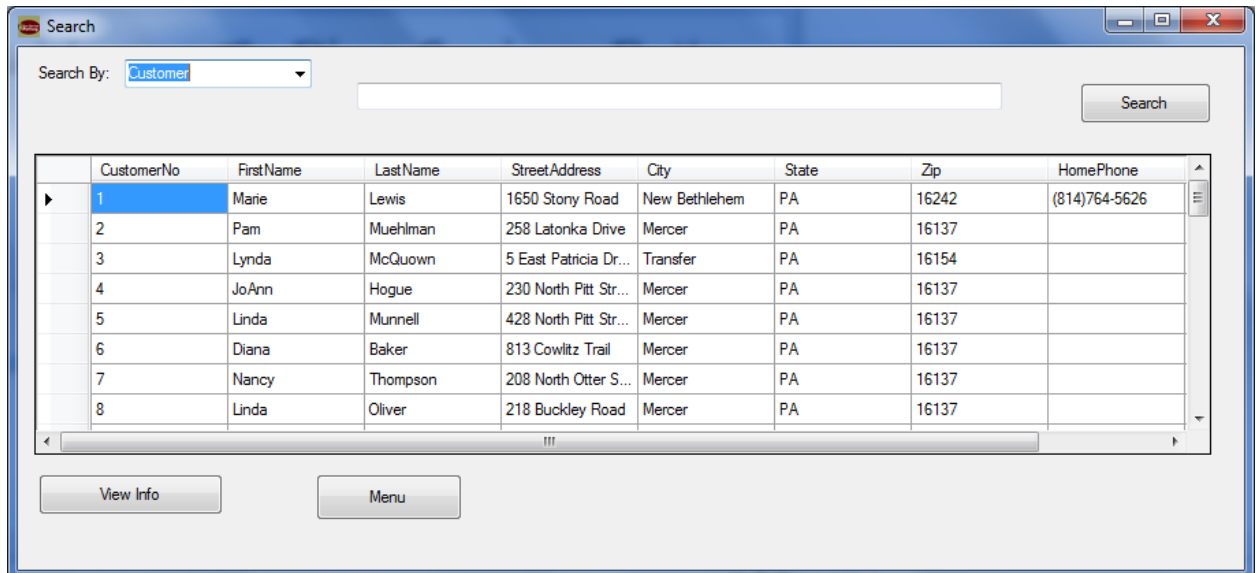


## Searching

1. From the drop-down menu select the desired search option
  - a. Customer Name
  - b. Host Name
  - c. Show Name
  - d. Show Date
  - e. Order Date
  - f. Orders of a Customer
  - g. Receivables (Partially Paid/Unpaid)
  - h. Undelivered
  - i. Pattern
  - j. Piece

2. Enter search criteria and click search

For Customer Name, Host Name, Show Name, and Orders of a Customer the enter the criteria in the search box



The screenshot shows a window titled "Search" with a search interface. At the top, there is a "Search By:" label followed by a dropdown menu currently set to "Customer". To the right of the dropdown is a text input field and a "Search" button. Below this is a table with the following columns: CustomerNo, FirstName, LastName, StreetAddress, City, State, Zip, and HomePhone. The table contains 8 rows of data. At the bottom of the window, there are two buttons: "View Info" and "Menu".

| CustomerNo | FirstName | LastName | StreetAddress         | City          | State | Zip   | HomePhone     |
|------------|-----------|----------|-----------------------|---------------|-------|-------|---------------|
| 1          | Marie     | Lewis    | 1650 Stony Road       | New Bethlehem | PA    | 16242 | (814)764-5626 |
| 2          | Pam       | Muehlman | 258 Latonka Drive     | Mercer        | PA    | 16137 |               |
| 3          | Lynda     | McQuown  | 5 East Patricia Dr... | Transfer      | PA    | 16154 |               |
| 4          | JoAnn     | Hogue    | 230 North Pitt Str... | Mercer        | PA    | 16137 |               |
| 5          | Linda     | Munnell  | 428 North Pitt Str... | Mercer        | PA    | 16137 |               |
| 6          | Diana     | Baker    | 813 Cowlitz Trail     | Mercer        | PA    | 16137 |               |
| 7          | Nancy     | Thompson | 208 North Otter S...  | Mercer        | PA    | 16137 |               |
| 8          | Linda     | Oliver   | 218 Buckley Road      | Mercer        | PA    | 16137 |               |

For Show Date or Order Date select the start of the date range and the end of the date range from the calendar tool

Search

Search By: Show Date

From: Monday, May 05, 2014 To: Monday, May 05, 2014

Search

|   | ShowNo | ShowName             | ShowDate           | Show Time | ShowLocation | Show Type | NonOrderSalesTot | Description | Ho |
|---|--------|----------------------|--------------------|-----------|--------------|-----------|------------------|-------------|----|
| ▶ | 2      | Mystery Host         | 3/21/2013          |           | My Studio    | 2         | 0.0000           |             | 1  |
|   | 3      | Marianne's Studi...  | 3/26/2013          |           | My Studio    | 1         | 0.0000           |             | 29 |
|   | 4      | Focus Group          | 2/16/2013          |           | My Studio    | 1         | 0.0000           |             |    |
|   | 5      | Holly's Studio Sh... | 4/9/2013           |           | My Studio    | 1         | 0.0000           |             | 35 |
|   | 6      | Dawn's Studio S...   | 4/27/2013 12:34... |           | My Studio    | 1         | 0.0000           |             | 20 |
|   | 1      | Sheila's Studio S... | 3/7/2013           |           | My Studio    | 1         | 0.0000           |             | 17 |

View Info Menu

For search by receivables and undelivered, the table will fill as soon as the search by option is changed.

For search by pattern or piece, select the pattern (or piece) and the start & end dates

Search

Search By: Pattern

Pattern Name: Custom

From: Monday, May 05, 2014 To: Monday, May 05, 2014

Search

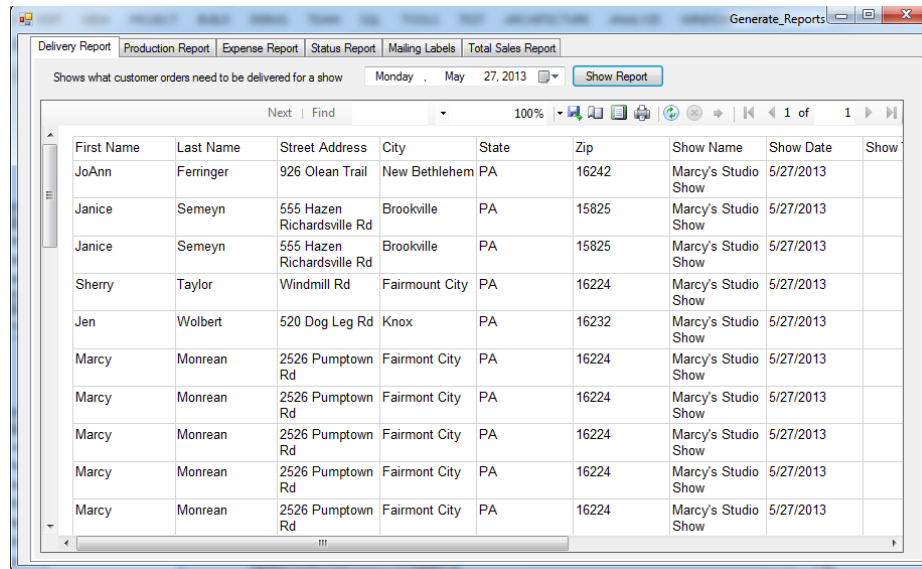
|   | OrderNo | ItemLineNo | OrderDate | PatternName     | PieceName          | TotalPounds | Quantity | Status    |
|---|---------|------------|-----------|-----------------|--------------------|-------------|----------|-----------|
| ▶ | 7       | 1          | 2/16/2013 | Calla Lily      | Wine and Flower... | 4.00        | 1        | DELIVERED |
|   | 7       | 2          | 2/16/2013 | Calla Lily      | Plate              | 4.00        | 1        | DELIVERED |
|   | 7       | 3          | 2/16/2013 | Calla Lily      | Square Bowl        | 4.00        | 1        | DELIVERED |
|   | 6       | 1          | 2/16/2013 | Sunflower       | Wine Goblet        | 3.00        | 2        | DELIVERED |
|   | 5       | 1          | 2/16/2013 | Sunflower       | Wine and Flower... | 4.00        | 1        | DELIVERED |
|   | 9       | 1          | 2/16/2013 | Stars & Stripes | Pie Plate          | 3.00        | 1        | DELIVERED |
|   | 9       | 2          | 2/16/2013 | Stars & Stripes | Plate              | 3.00        | 1        | DELIVERED |
|   | 9       | 3          | 2/16/2013 | Stars & Stripes | Wine and Flower... | 4.00        | 1        | DELIVERED |

View Info Menu

3. To view info of a result
  - a. Click that row of the table
  - b. Click view info button and the information for that entry will open
    - i. Customer & receivables opens Customer Information
    - ii. Host Name, Show Name, and Show Date open show information
    - iii. Order Date, Pattern, and Piece open order information
    - iv. Orders by Customer opens order history of customer
    - v. Undelivered does not link to any information

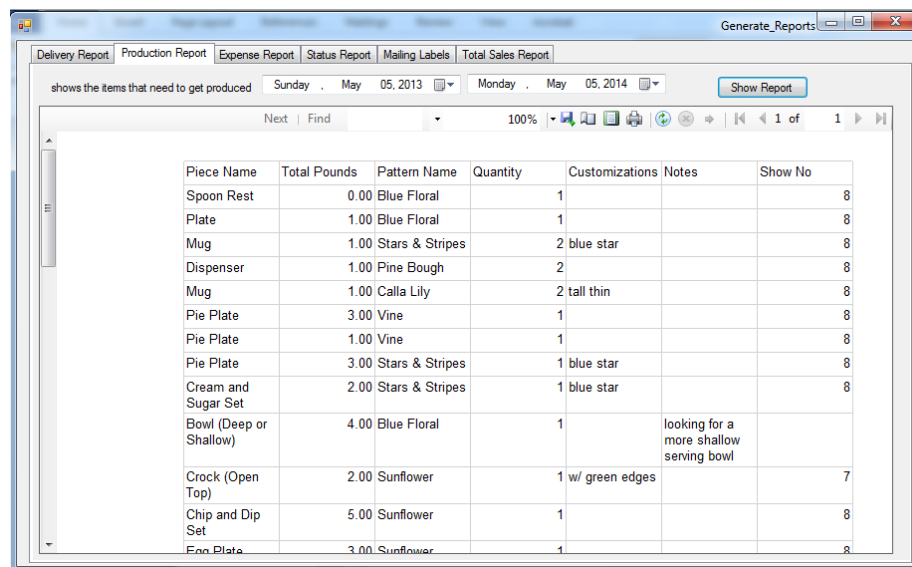
## Generate Reports

On the Main Menu, click [Generate Reports]. The screen below will show. All the forms allow you to search through them, save them, or print them. The first tab is Delivery Report. This report lets you choose a date that a show was on and create a report of all the orders that need to be delivered for that show.



| First Name | Last Name | Street Address             | City           | State | Zip   | Show Name           | Show Date | Show |
|------------|-----------|----------------------------|----------------|-------|-------|---------------------|-----------|------|
| JoAnn      | Ferringer | 926 Olean Trail            | New Bethlehem  | PA    | 16242 | Marcy's Studio Show | 5/27/2013 |      |
| Janice     | Semeyn    | 555 Hazen Richardsville Rd | Brookville     | PA    | 15825 | Marcy's Studio Show | 5/27/2013 |      |
| Janice     | Semeyn    | 555 Hazen Richardsville Rd | Brookville     | PA    | 15825 | Marcy's Studio Show | 5/27/2013 |      |
| Sherry     | Taylor    | Windmill Rd                | Fairmount City | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |
| Jen        | Wolbert   | 520 Dog Leg Rd             | Knox           | PA    | 16232 | Marcy's Studio Show | 5/27/2013 |      |
| Marcy      | Monrean   | 2526 Pumtown Rd            | Fairmont City  | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |
| Marcy      | Monrean   | 2526 Pumtown Rd            | Fairmont City  | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |
| Marcy      | Monrean   | 2526 Pumtown Rd            | Fairmont City  | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |
| Marcy      | Monrean   | 2526 Pumtown Rd            | Fairmont City  | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |
| Marcy      | Monrean   | 2526 Pumtown Rd            | Fairmont City  | PA    | 16224 | Marcy's Studio Show | 5/27/2013 |      |

On the second tab, we find the Production Report. This report allows us to choose a day range and builds a report that shows what was produced in that range after clicking [Show Report].



| Piece Name             | Total Pounds | Pattern Name    | Quantity | Customizations | Notes                                   | Show No |
|------------------------|--------------|-----------------|----------|----------------|---|---------|
| Spoon Rest             | 0.00         | Blue Floral     | 1        |                |   | 8       |
| Plate                  | 1.00         | Blue Floral     | 1        |                |   | 8       |
| Mug                    | 1.00         | Stars & Stripes | 2        | blue star      |   | 8       |
| Dispenser              | 1.00         | Pine Bough      | 2        |                |   | 8       |
| Mug                    | 1.00         | Calla Lily      | 2        | tall thin      |   | 8       |
| Pie Plate              | 3.00         | Vine            | 1        |                |   | 8       |
| Pie Plate              | 1.00         | Vine            | 1        |                |   | 8       |
| Pie Plate              | 3.00         | Stars & Stripes | 1        | blue star      |   | 8       |
| Cream and Sugar Set    | 2.00         | Stars & Stripes | 1        | blue star      |   | 8       |
| Bowl (Deep or Shallow) | 4.00         | Blue Floral     | 1        |                | looking for a more shallow serving bowl |         |
| Crock (Open Top)       | 2.00         | Sunflower       | 1        | w/ green edges |   | 7       |
| Chip and Dip Set       | 5.00         | Sunflower       | 1        |                |   | 8       |
| Egg Plate              | 3.00         | Sunflower       | 1        |                |   | 8       |

On the third tab, Expense Report makes a report of all the expenses that exist in a given date range.

Generate\_Reports

Delivery Report | Production Report | **Expense Report** | Status Report | Mailing Labels | Total Sales Report

Enter the date range for expenses

Start Date: Sunday, May 05, 2013 | End Date: Monday, May 05, 2014 | Display Report

Next | Find | 100% | 1 of 1

| Expense No | Expense Type | Expense Date         | Amount | Mileage | Description      |
|------------|--------------|----------------------|--------|---------|------------------|
| 1          | 4            | 4/5/2014 12:00:00 AM | 39.99  | 0.00    | Cellica purchase |
| Totals     |              |                      | 39.99  | 0.00    |                  |

This is a screenshot of the status report; it shows any orders that are not paid or that are not delivered.

Generate\_Reports

delivery report | production report | expense report | **status report** | Mailing Labels | total sales report

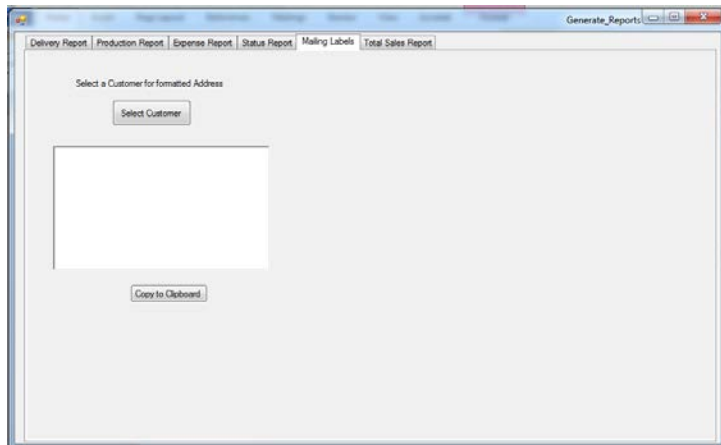
shows the status of orders grouped by delivered or in production an order wont show in it has been paid and delivered

Next | Find | 100% | 1 of 1

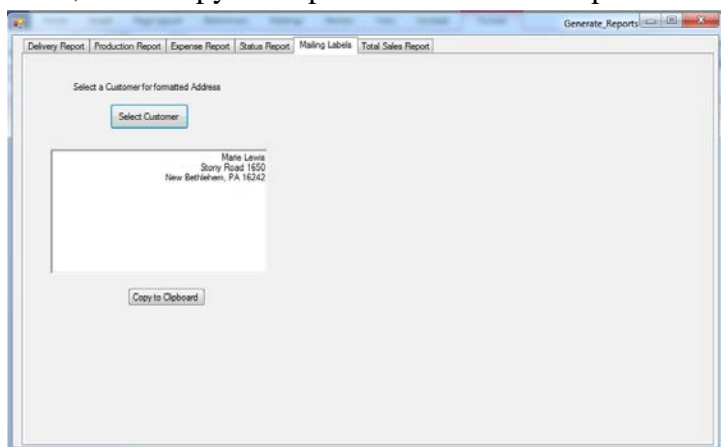
| Status | First Name | Last Name | Order Date | Status | Amount Paid | Total | Payment Type | Order No |
|--------|------------|-----------|------------|--------|-------------|-------|--------------|----------|
|        |            |           |            |        |             |       |              |          |

This is a way to create mailing labels (there is also a second from the Access database).

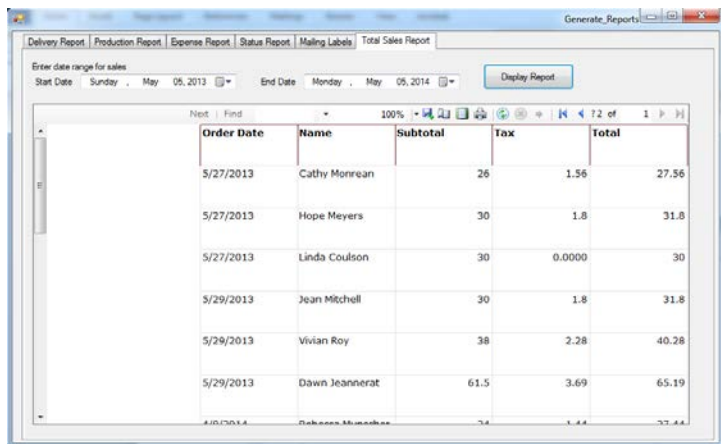
First, select a customer.



Then, click Copy to Clipboard. You can now paste the formatted text into a word document.



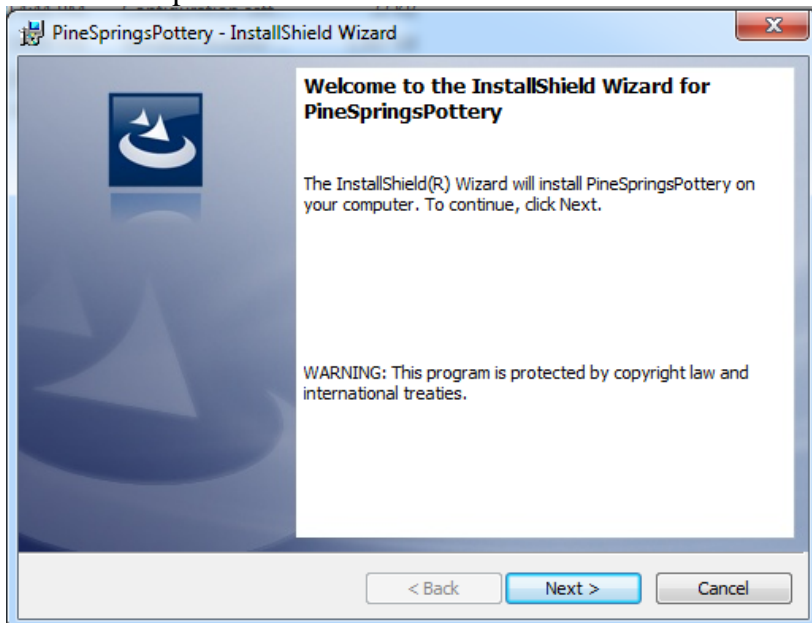
Below is a screenshot of the Total Sales Report. Select the start date and end date from the calendar tool. Then, click Display report to view the report.



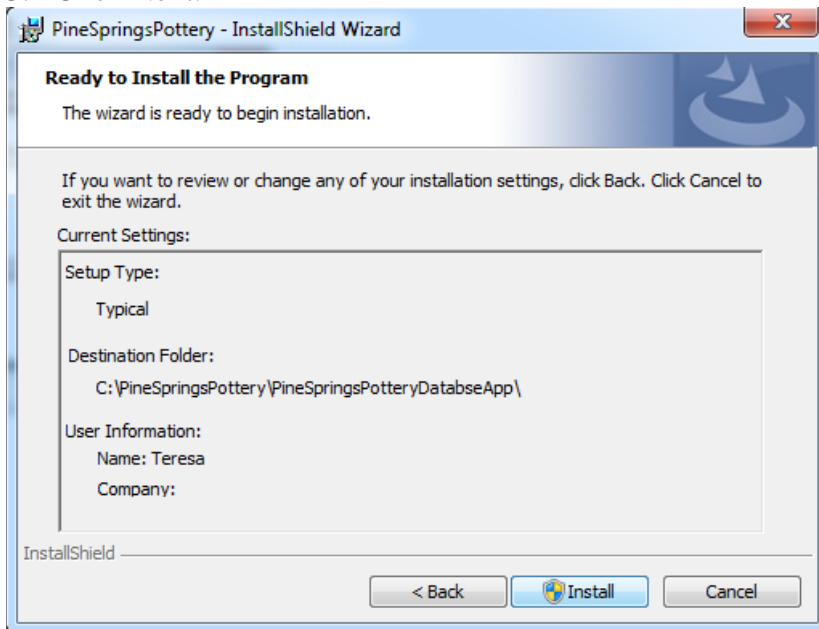
| Order Date | Name               | Subtotal | Tax    | Total |
|------------|--------------------|----------|--------|-------|
| 5/27/2013  | Cathy Monrean      | 26       | 1.56   | 27.56 |
| 5/27/2013  | Hope Meyers        | 30       | 1.8    | 31.8  |
| 5/27/2013  | Linda Coulson      | 30       | 0.0000 | 30    |
| 5/29/2013  | Jean Mitchell      | 30       | 1.8    | 31.8  |
| 5/29/2013  | Vivian Roy         | 38       | 2.28   | 40.28 |
| 5/29/2013  | Dawn Jeannerat     | 61.5     | 3.69   | 65.19 |
| 5/29/2013  | Roberta Mendenhall | 34       | 1.44   | 35.44 |

## Installation

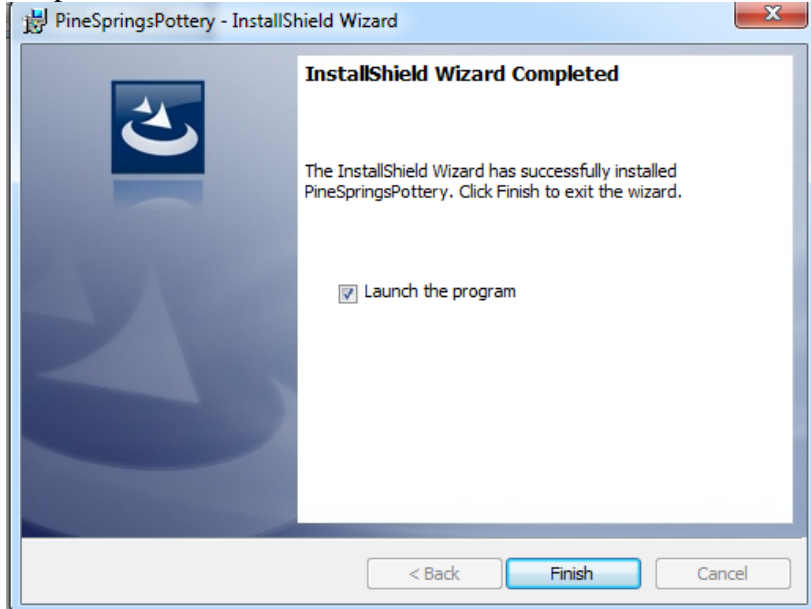
1. Place the Installation CD into CD/DVD drive.
2. Run Setup.exe.



3. Click Next.



4. Click Install and wait for the program to be installed. If a window pops up asking for permission, click Yes.

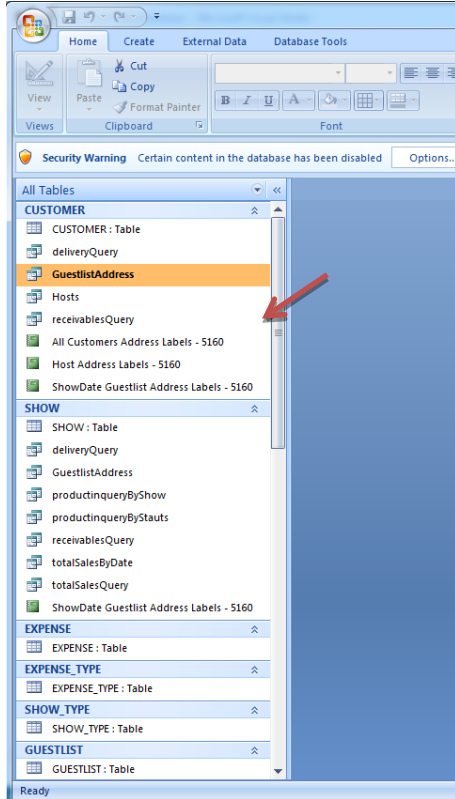


5. Click Finish.
6. A shortcut to the program will be located on your desktop.
7. The installation folder should be  
"C:\PineSpringsPottery\PineSpringsPotteryDatabaseApp"
  - a. This is where the PineSpringsPottery.accdb should be restored if needed.
  - b. This folder also contains the label templates and Cellica forms.

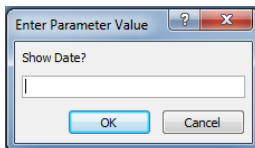
## Making Address Labels from Access (Avery 5160 – Full sheets)

### Guests for a Show

1. Open PineSpringsPottry.accdb
2. Double click ["ShowDate Guestlist Address Labels – 5160"]

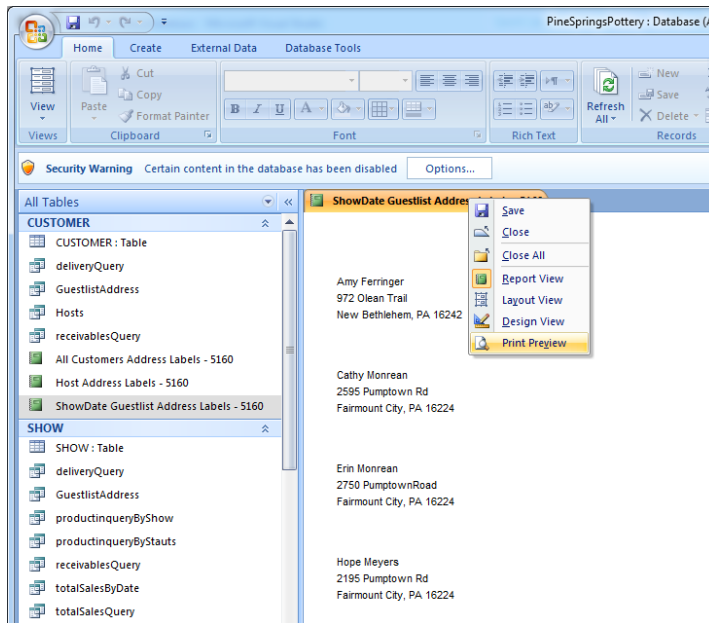


3. Enter the date of the show (M/DD/YYYY) and click [OK]

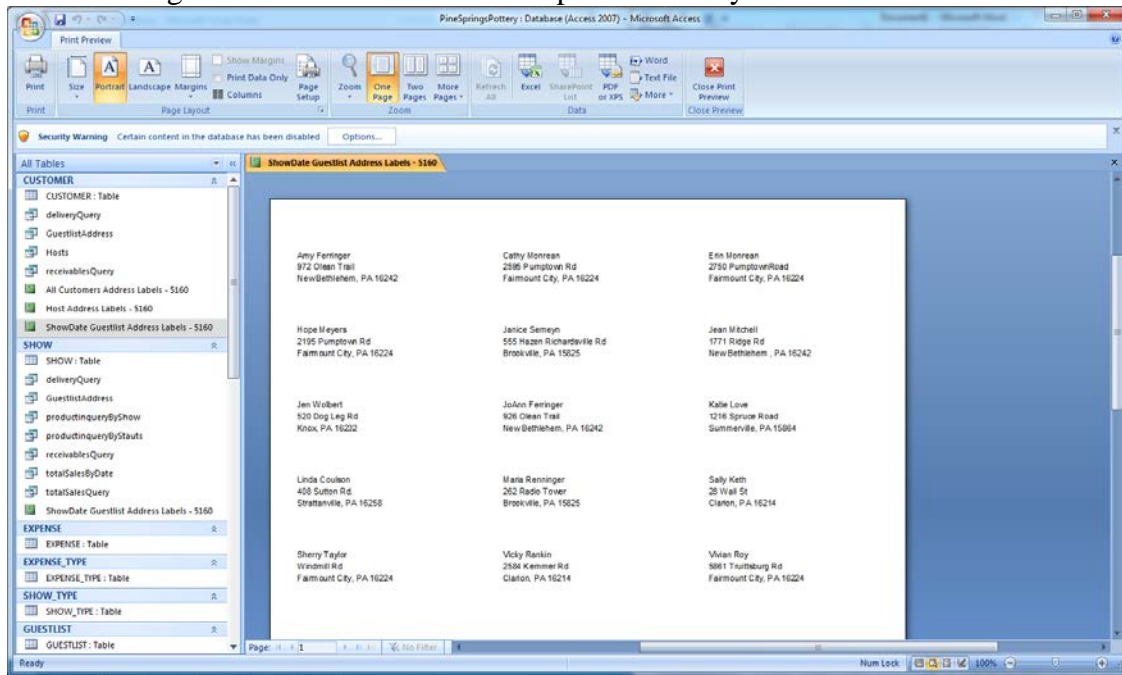




- This will bring up a list of guests and addresses associated with the show.



- Right click on the tab [“ShowDate Guestlist Address Labels – 5160”] and select “Print Preview” to get the addresses formatted to print on Avery 5160.



## All Customers

- Repeat process above with “All Customers Address Labels – 5160”.
- There will be no “Show Date” input.

## Hosts

1. Repeat process above with “Host Address Labels – 5160”.
2. There will be no “Show Date” input.

This solution will not allow for partial sheets and is only formatted for Avery 5160. To make custom address label sheets, open the correct template from

“C:\PineSpringsPottery\PineSpringsPotteryDatabaseApp\Labels”. Then copy the addresses from the Generate Reports\Mailing Labels section of the main program.

## Cellica (Desktop)

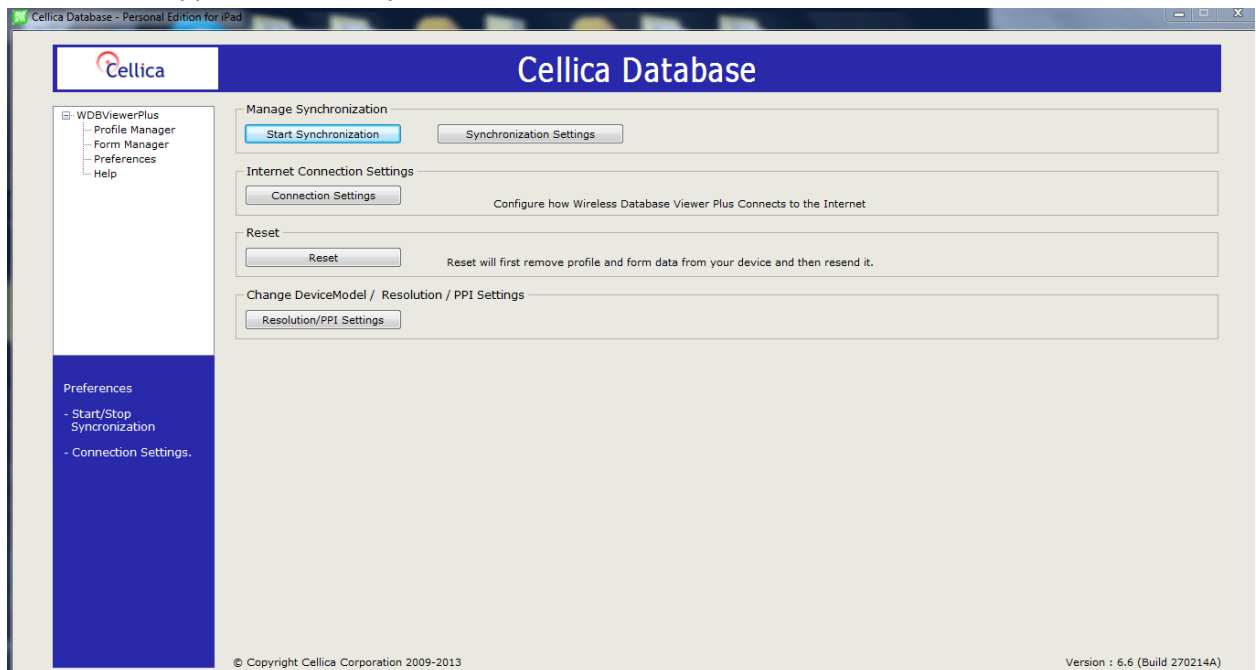
### Check Status of Syncing

To check if the forms and profiles from Cellica have successfully synced, click on the Check Status button on the forms or profiles screen and the screen will update the status next to the form or profile.

### Troubleshooting

If there is a problem with syncing between the iPad and PC:

1. Start by clicking Check status on the profiles or forms screen and then trying to sync from the iPad.
2. If step 1 does not work, navigate to the preferences screen and click stop synchronization and after it has stopped, click start synchronization.



3. If neither step 1 or 2 work, you can contact Cellica in one of three ways:
  - a. Go to <http://cellica.kayako.com/> to search for an answer
  - b. Go to <http://cellica.kayako.com/Tickets/Submit> to submit a ticket to Cellica support and they will e-mail you
  - c. Navigate to the help screen in Cellica and choose a link

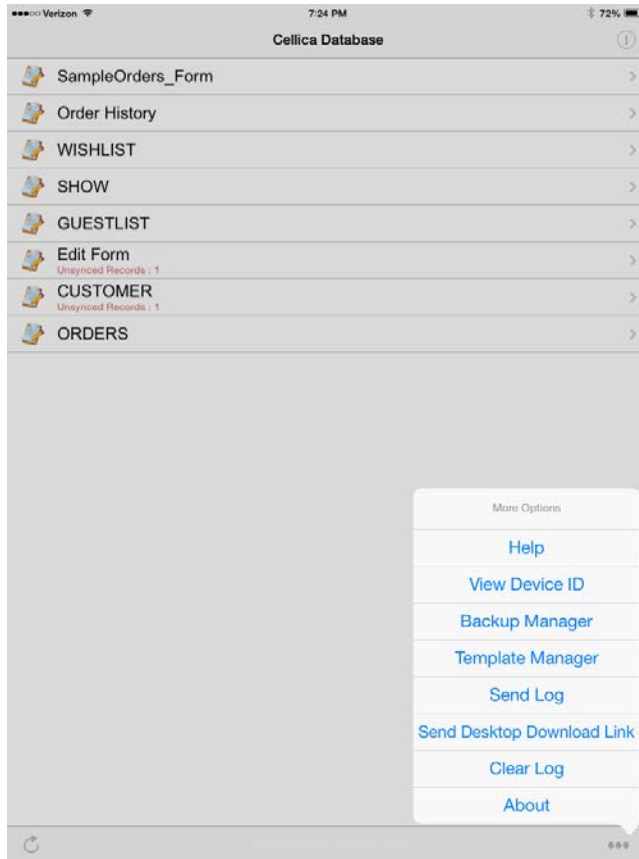


## Re-installing Cellica Desktop

### Downloading

To reinstall the Desktop end of Cellica:

1. From the iPad select Send Desktop Download Link to e-mail a download link to yourself so your iPad and PC are connected

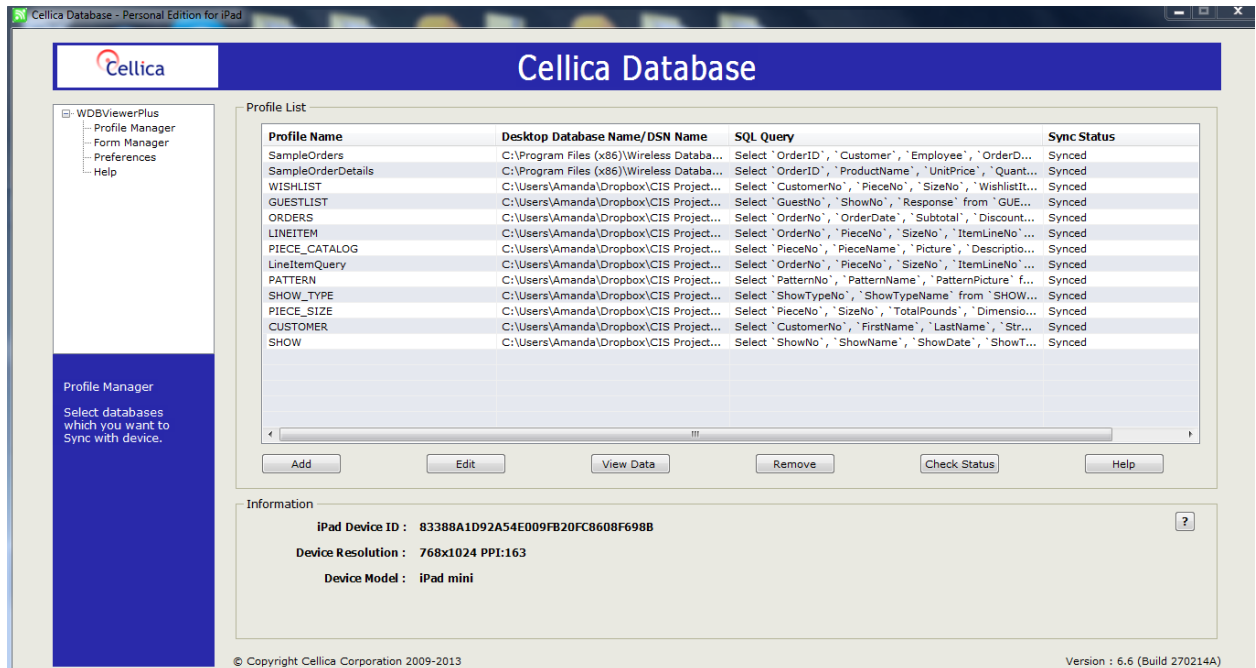


2. Click the link in the e-mail and Cellica will start to download
3. After Cellica has downloaded enter the license number you were originally given or if you do not have the number anymore contact Cellica Support (<http://cellica.kayako.com/Tickets/Submit>)

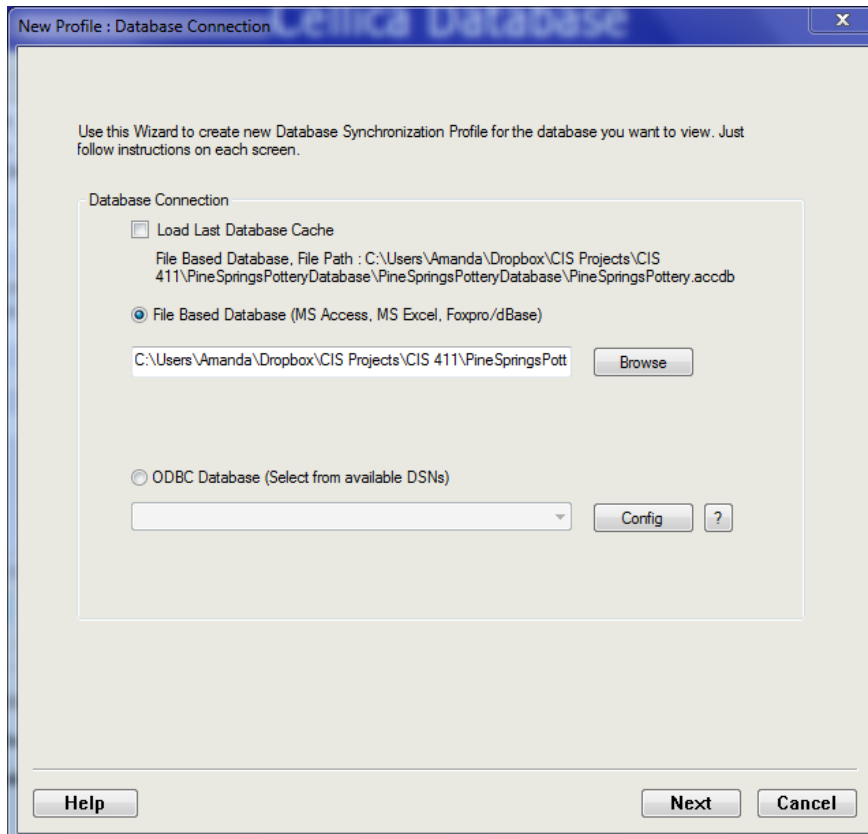
## Adding Profiles

It is necessary to add profiles before adding the forms. Start by

1. Clicking add on the profile screen

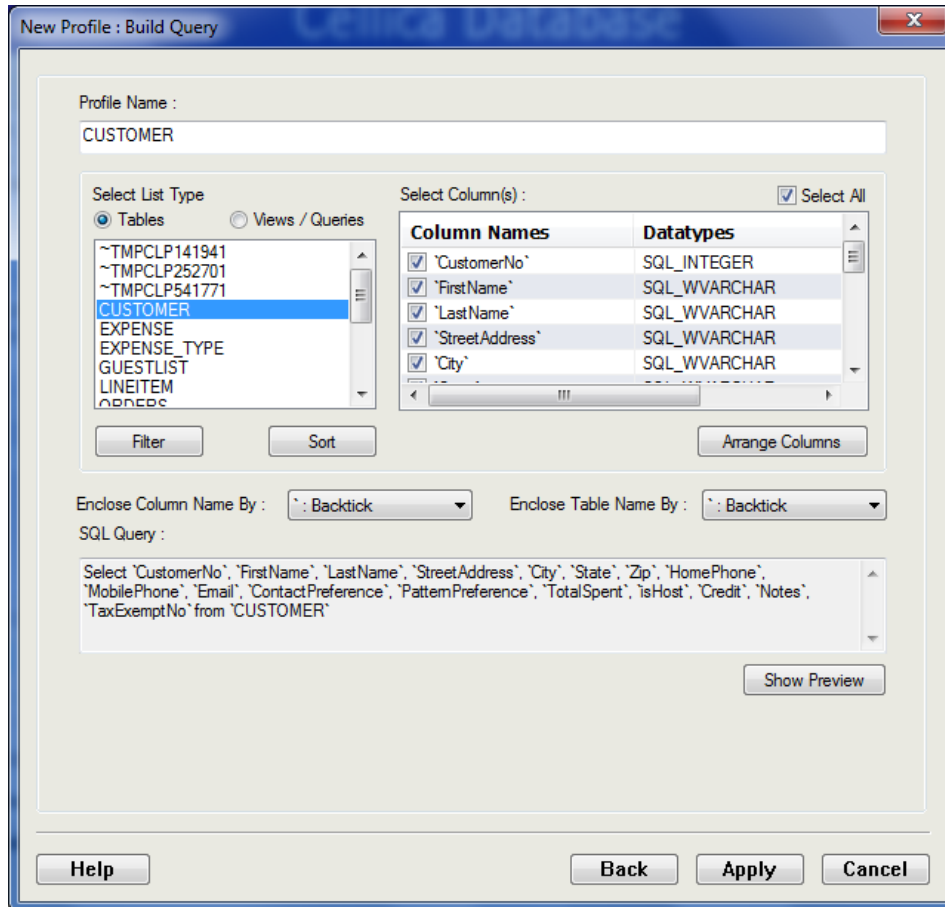


Which will open the following screen:



When the screen opens the first time there will be an option to load last database cache.

2. Click browse
3. Navigate to the database saved in the computer files (like you would to back-up the database)
4. Click Next
5. Select a table (Customer is selected in the table below) then click Apply



6. Repeat steps 1-6 with the tables GUESTLIST, WISHLIST, LINEITEM, ORDERS, SHOW, PIECE\_CATALOG, PATTERN, SHOW\_TYPE, and PIECE\_SIZE
7. Next you can move on to importing forms. Click Form Manager on the left of the screen

## Importing Forms

1. Your screen should now look like this
2. Click add
3. Click Import Form
4. Navigate to where the forms (.fm files) are saved (Same place as the database)
5. Select one of the forms (start with Wishlist)
6. Click Apply
7. Repeat steps 2-6 (recommended order is: customer (link go to orders to wishlist), show (link go to host info button to customer form by customer number), order(link to customer and show forms), and then guestlist (link to show))

Link forms (wishlist does not link to anything, also use wishlist when creating customer form and then after adding order form go back and do step i.

- a. Click Go To button (Go to customer info, go to orders, etc...)
- b. Click ... button next to form selection

| Name           | Value          |
|----------------|----------------|
| Control ID     | Button7        |
| (X, Y)         | 143, 718       |
| (Width,Height) | 70, 32         |
| Caption        | Go To Customer |
| Action         | Go To Form     |
| Form Selection | CUSTOMER ...   |
| Disabled       | FALSE          |
| BackColor      |                |
| ForeColor      |                |
| Visible        | TRUE           |
| Font Name      | Verdana        |
| Font Size      | 10             |

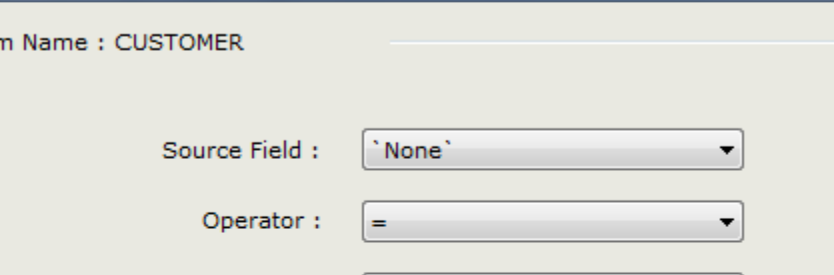
- c. Click desired form in the drop down menu
  - i. For Customer form select ORDERS, click add, click add, change first drop down to customerNo and third drop down to customerNo. Click ok until you are back to the form (three ok buttons). Click Apply.
  - ii. For Show form select CUSTOMERS, click add, click add, change first drop down to hostNo and third drop down to customerNo. Click ok until you are back to the form (three ok buttons). Click Apply.
  - iii. For Guestlist form select SHOWS (Go To Show Info) and CUSTOMERS (Go To Customer Info, click add, click add, change first drop down to ShowNo(GuestNo) and third drop down to ShowNo(customerNo). Click ok until you are back to the form (three ok buttons). Click Apply after doing this for both buttons.
  - iv. For Orders form select SHOWS (and CUSTOMERS), click add, click add, change first drop down to ShowNo(CustomerNo) and third drop down to ShowNo(customerNo). Click ok until you are back to the form (three ok buttons). Click Apply after doing this for both buttons.



## First Click Add

The screenshot shows a dialog box titled "Go To Form Information Dialog". It has a light blue header bar. Below the title bar, there's a label "Form Name :" followed by a dropdown menu showing "`None`". The main area contains a table with two columns: "Destination Form" and "Form Field Details". The table is currently empty. At the bottom of the dialog, there are four buttons: "Add", "Modify", "Remove", and "Help". On the far right, there are "OK" and "Cancel" buttons.

## Second Click Add



Go To Form Fields Details Dialog

Form Name : CUSTOMER

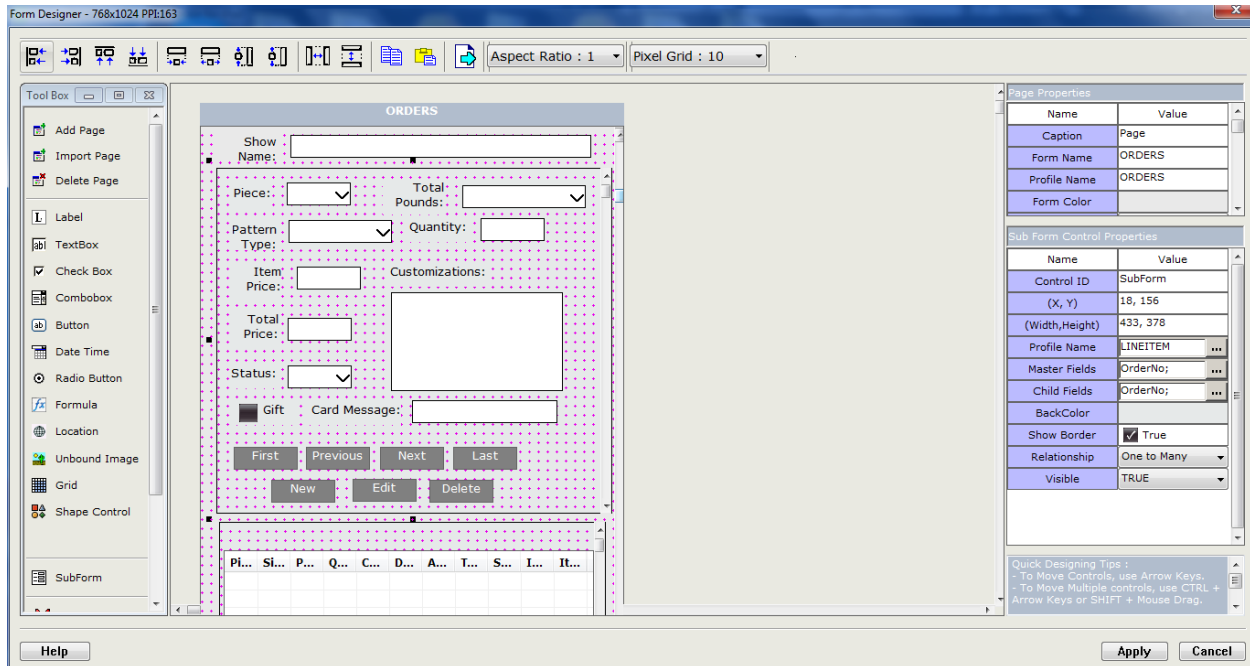
Source Field :

Operator :

Destination Field :

Help Ok Cancel

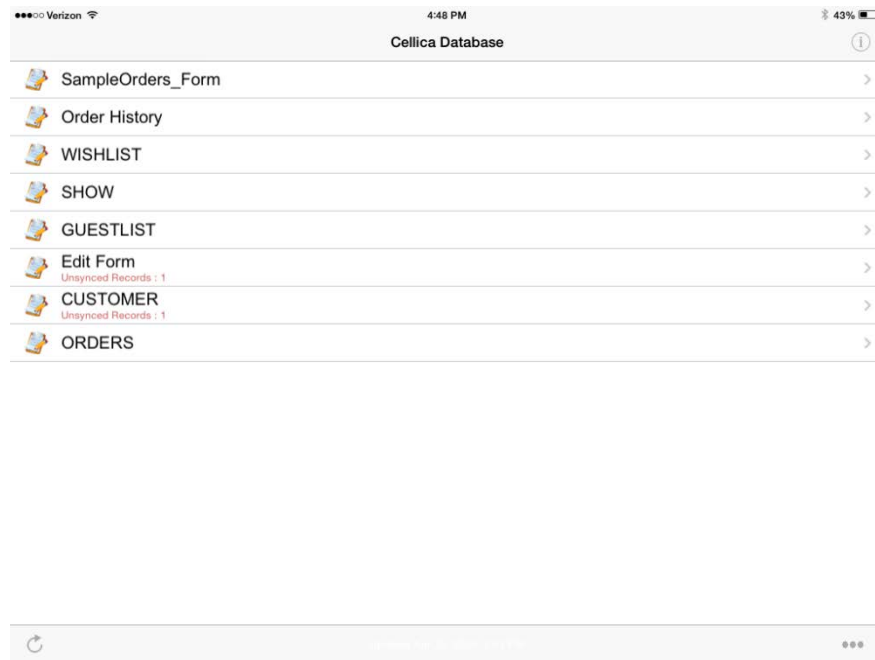
8. Some forms have subforms so they require a few extra steps
  - a. Open ORDERS form (this has 2 subforms both will follow the same steps)
  - b. Click on the subform (the scrollbar)



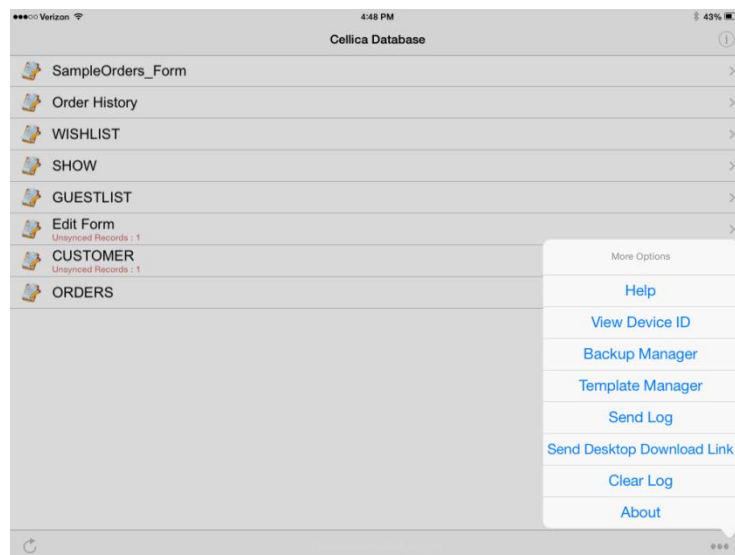
- c. Click on the ... button next to the profile name
- d. Select LINEITEM
- e. Click ok
- f. Click ... button next to Master Field and change the drop downs (both) to OrderNo
- g. Click ok
- h. Click Apply
- i. Open Guestlist form
- j. Click on the subform
- k. Click profile name
- l. Select guestlist
- m. Click ok
- n. Click master field and change the drop downs to showNo
- o. Click Apply
- p. Open Wishlist
- q. Click the subform
- r. Click profile name
- s. Select Wishlist
- t. Click ok
- u. Click Master Field and change drop downs to customerNo
- v. Click ok
- w. Click Apply

## Cellica (iPad)

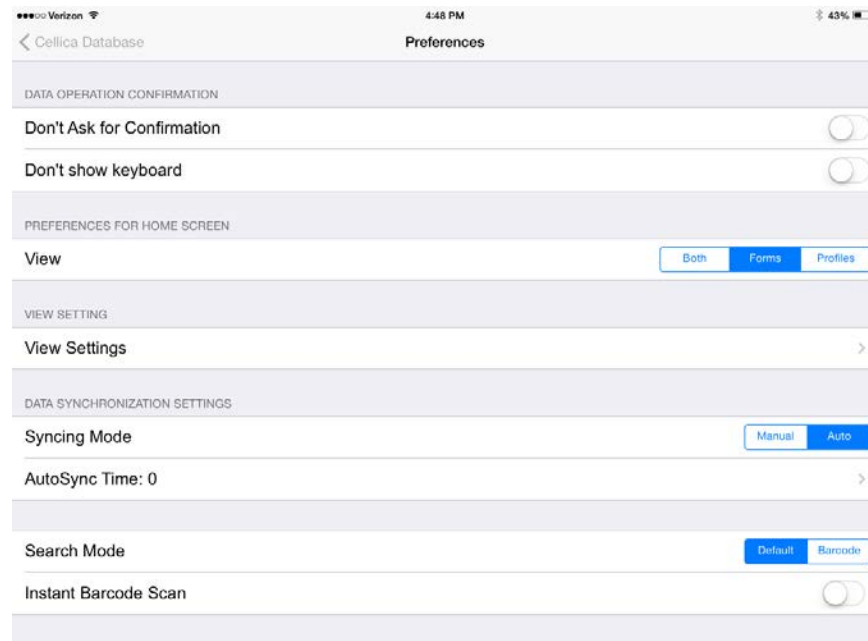
After opening Cellica for the first time on your iPad, your screen will open up to a menu screen with a list of the forms available (as shown below).



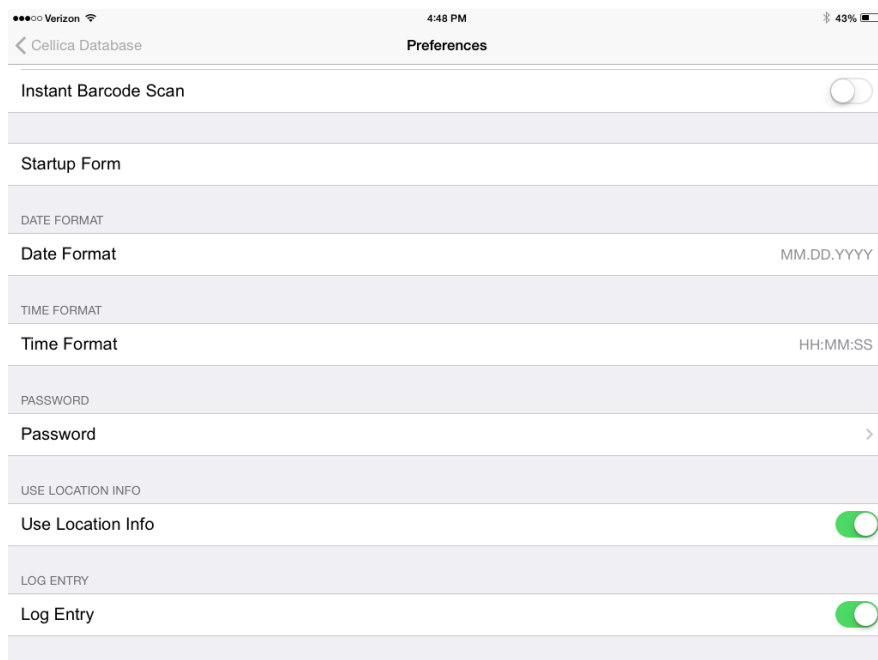
On this screen, you can view options in the lower right corner. These options are important if you need to contact Cellica for help with a problem. Cellica may ask for your Device ID (View Device ID) or Logs (Send Log). If you need to re-download Cellica on your desktop, you can send a link to your email by clicking “Send Desktop Download Link”.



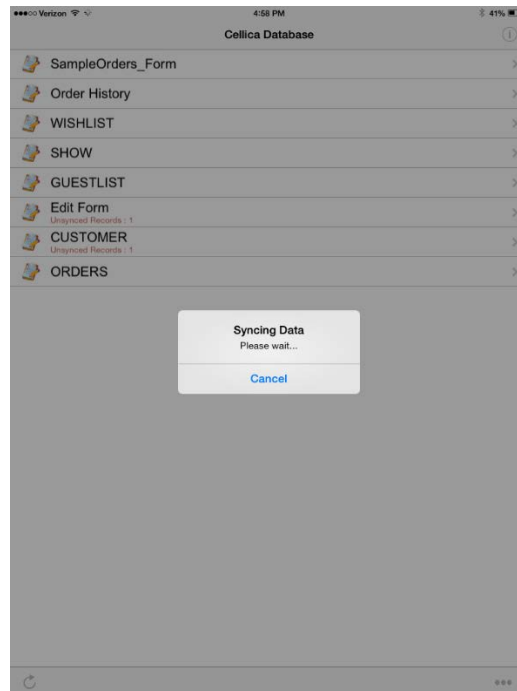
In the top right corner of the menu screen, there is an information button if you click on that you will see a Preferences screen (shown below). Make sure that the “View” is set to “Forms” and “Syncing Mode” is set to “Auto”.



If you would like to set a password for Cellica, “Preferences” “Password” is where you would be able to set it up.



On the Menu Screen, on the lower left corner is the sync button, once you click that it will send any updated information to your desktop and receive any new information from the desktop. This does not always work.



The CUSTOMER form allows you to enter/view customer information. You can navigate using the “First”, “Previous”, “Next”, and “Last” buttons, add a new customer (“New”), edit a customer (“Edit”), find a customer (“Search”), go to the orders form, or sync.

 A screenshot of the 'CUSTOMER' form in the Celica Database app. The form is titled 'CUSTOMER' and shows 'Record 1/43'. It contains several input fields: First Name (Marie), Last Name (Lewis), Street Address (1650 Stony Road), City (Bethlehe), State (PA), Zip (16242), Home Phone ((814)764-5626), Mobile Phone, E-mail, Contact Preference, and Pattern Preference. There are also checkboxes for 'Host' (checked), 'Credits' (0), and 'Total Spent' (0). A 'Custom Picture' section shows a 'No photo Available' icon. A 'Notes' text area is also present. At the bottom, there are navigation buttons: First, Previous, Next, Last, New, Edit, Delete, Find, Go To Orders, and Sync. The status bar at the top shows 'Verizon', signal strength, time '4:56 PM', and battery level '42%'.

The WISHLIST form allows you to view a customer's wish list, edit the wish list, or navigate the wish lists.

The screenshot shows a mobile application interface for a 'WISHLIST'. At the top, there's a status bar with 'Verizon', '4:58 PM', and '41%' battery. The app header has 'Done' on the left, 'WISHLIST' in the center, and 'Record 0/0' on the right. The form contains several input fields: 'Customer Name' (two separate boxes), 'Wish Date' (with a right arrow), 'Piece' (with a right arrow), 'Pattern' (with a right arrow), 'Quantity' (with a right arrow), 'Total Pounds' (with a right arrow), and a large 'Customizations' text area. Below the form is a table with three visible columns: 'PieceNo', 'SizeNo', and 'PatternNo'. The table body is currently empty. At the bottom, there are seven buttons: 'First', 'Previous', 'Next', 'Last', 'New', 'Edit', and 'Delete'.

The SHOW form allows you to navigate the shows, enter a new show or edit a show, go to the host's customer information form, or take a picture ("Capture") of the screen and email the screen shoot.

Verizon 4:56 PM 41%

Done SHOW Record 1/3

Show Name: Sheila's Studio Show

Show Type: 1 Location: My Studio

Show Date: 03.07.2013 Show Time:

Non-Order Sales Total: 0

Total Sales: 326.5

Notes:

First Previous Next Last

New Edit Delete

Go To Host Info Capture

The GUESTLIST allows you to navigate between the show guest list, add a new guest list, edit a guest list, or view customer or show information.

Verizon 4:57 PM 41%

Done GUESTLIST Record 1/14

Show Name: Sheila's Studio Show

Guest Name: Dawn

Response: YES

First Previous Next Last

New Edit Delete

| GuestNo | Response |
|---------|----------|
| 20      | YES      |
| 21      | YES      |
| 22      | YES      |
| 23      | YES      |
| 24      | YES      |

Go To Customer Info Go To Show Info

The ORDERS form is long so you have to be careful when scrolling the screen. On the orders screen, you can navigate the orders and pieces in the order. You can also view the customer information or show information that is connected to the order.

Done ORDERS Record 1/20

First Previous Next Last

New Edit Delete

Customer Name: Terri

Show Name:

Piece: Win...rock Total Pounds: 1

Pattern Type: Sunflower Quantity: 1

Item Price: 27 Customizations: green, not black top edge speckle

Total Price: 27

Status: ORDERED

☐ Gift Card Message:

First Previous Next Last

New Edit Delete



Done      4:57 PM      41%      ORDERS      Record 1/20

New      Edit      Delete

| PieceNo | SizeNo | PatternType |
|---------|--------|-------------|
| 24      | 1      | 9           |

Go To Customer      Go To Show

Subtotal: 27      Discount: 0

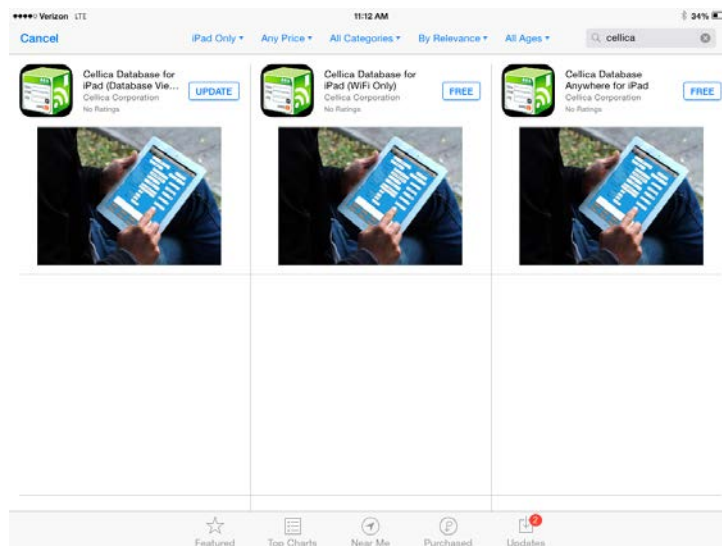
Tax: 1.62      Total: 28.62

Payment Type: CASH      Amount Paid: 28.62

Notes:

## Downloading the Cellica App for the iPad

In the App Store, search for “Cellica Database for iPad”. Select Cellica Database for iPad (Database Viewer Plus).



Click [Install] to install Cellica on to your iPad.

