

ESPO Desktop Ordering System

Introduction

The ESPO Desktop Ordering System is designed for those organisations without WWW internet access to allow them to order goods from ESPO in a simple, organised manner.

Installing the ESPO Desktop Ordering System

In order to install the ESPO Desktop Ordering System, you will need to have certain software already installed on your computer system. The ESPO Desktop Ordering System has been tested with the following Operating Systems:

Microsoft Windows 95
Microsoft Windows 98
Microsoft Windows Millennium Edition
Microsoft Windows NT 4.0 (Service Pack 3)
Microsoft Windows 2000
Microsoft Windows XP

In addition, you will need to have Microsoft Internet Explorer version 4.0 or greater installed on your computer system and an A4 paper based printer. The ESPO Desktop Ordering System has not been tested on non-A4 paper based printers. If you wish to send your orders to ESPO electronically, you must either have a MAPI compliant email client installed and configured or access to the Web. Outlook and Outlook Express are both examples of MAPI compliant email clients.

If you are already using the ESPO Desktop Ordering System version 1.0, it is recommended you remove this version prior to installing version 1.4. Removing version 1.0 will NOT remove your Order History, Favourites, Delivery Addresses or any other customised data. To remove ESPO Desktop Ordering System version 1.0, complete the following steps:

1. Click on Start, Settings, Control Panel, Add or Remove Programs
2. Select ESPO Desktop Ordering System from the list and click on Change/Remove
3. Follow the on-screen instructions to remove the application.

If you are already using the ESPO Desktop Ordering System version 1.1 or above, you do not need to remove your version prior to installing this version.

To install the software, first save any work in other applications as required and close down all other programs.

For installations from the ESPO CD, insert the CD into your computer's CD-ROM drive and select Start and Run from the Windows Taskbar Menu. Type in D:\ESPODOS\setup and click OK. If your CD drive is using another drive letter instead of D:, substitute D: with the appropriate drive letter.

For installations from the ESPO website, go to <http://www.espo.org/downloads.asp> and in the 'Other Downloads' section, click on the link for 'ESPO Desktop Ordering System'. When prompted, select 'Open', rather than 'Save'.

Once the setup programme has started, and you have selected an installation folder, you will be asked what components of the system you wish to install. The following is an explanation of each of the components:

Core Files

This is the core of the Desktop Ordering System and must be installed.

Electronic Ordering Module

This module will allow you to send orders directly to ESPO via the Internet. This option should only be installed if you have the ultimate responsibility within your organisation for authorisation of orders to ESPO.

LGPL Images

These are copies of the images used in the Desktop Ordering System's buttons and tabs. It is not necessary to install these images and they are only included in the installation for copyright reasons.

Follow the remaining on-screen instructions to complete the installation.

Getting Started

To start the ESPO Desktop Ordering System, from the windows Taskbar menu select *Start, Programs, ESPO, ESPO Desktop Ordering System*.

The first task is to enter your ESPO Delivery Point Number, or DPN and your delivery details. You will be presented with a screen to allow you to enter your details. Once these details have been entered and the *Save* button clicked, you will be able to print and save orders.

Important: Your DPN will typically be 5 alpha-numeric characters, followed by a / and 3 more alpha-numeric characters, for example 77232/001. Please enter the first 5 alpha-numeric characters in the first DPN box and the 3 alpha-numeric characters after the / in the second DPN box. Please see your delivery notes for an example of your DPN.

New Order

To place a new order you will need to enter an Order reference number, select your Delivery Account or DPN, and choose some items from the 'Find Items...' button. An Order reference number cannot begin or end with a space. An Order cannot be printed or saved until you enter an Order Reference, select a DPN and select some order items. See the section on the Customise tab if you wish to change the way automatic Order Numbers are generated.

When you click on 'Find Items...', you will be presented with a search facility. Simply type in a word that describes the item you want to buy, such as **Pen**. Clicking on search will display all the items in the ESPO catalogue with the word **Pen** in their description.

To select items for your order, click on the box in the 'Stock Code' column. You will see a tick. Once you have selected all the items you want, click on 'Add To Order'. This will prompt you for a quantity for each item and add it onto your order. If you want to search again, simply type in another word and click 'Search'

If you want to refine your search further, replace **Pen** with another descriptive word, such as **Green**, click on 'Search only these results' and click on the 'Search' button. This will search the ESPO catalogue for all items with both **Pen** and **Green** in the description.

You can sort your search results by clicking on the column headers, for example, clicking on the Description column will sort alphabetically on the ESPO catalogue description. Clicking again will reverse the sort order.

If you want to modify the quantity once an item has been added to an order, you can do so by clicking once on the order line. Press enter to accept the quantity you have entered.

Once you have completed your order, you can click on Print to print the order to your selected printer. You can also transmit your order electronically by clicking on the 'Send' button. Depending on the transmission method and email client you use, you may also see warnings asking if you wish to continue to sending the email. Contact

your IT Support representatives if you are unsure as to how to proceed. Please see the Customise section below for more information on this option.

You can also save your order for future reference. When you click on Save, the New Order tab will be cleared and your order will be available for amending under the Order Enquiry tab.

Once you order an item more than once, it will be available under the 'Favourites' button.

Order Enquiry

All your previous orders will be listed on the *Order Enquiry* screen. The top part of the screen lists all your orders, with the bottom part displaying the order itself. The top half of the screen can be sorted by clicking on the columns headings, such as *Order Number*, *Order Date* or *Line Items*. Clicking in the column heading again reverses the sort order.

To reprint an order, simply select the order from the top half of the screen and click on the *Print* button. To delete an order, select the order from the top half of the screen and click on the *Delete* button.

Previous orders can be amended by selecting them from the top part of the screen, making your changes and clicking on the *Save* button.

Customer Delivery Details

This screen allows you to enter your delivery details. Enter your ESPO Delivery Point Number (DPN) and other details and click *Save*. If you have multiple DPNs set up, after clicking on *Save*, click on the *Clear* button to clear the form and enter the next DPN. All the DPNs you set up here will be available on the *New Order* screen.

If you wish to change the details of a previously set up DPN, simply click on it in the bottom half of the screen, make your changes and click *Save*. If you wish to delete a DPN, simply click on it in the bottom half of the screen and click *Delete*.

Customise

The Customise tab allows you to change the standard functionality of the ESPO Desktop Ordering System. The *Saved Orders Location* entry details which folder orders are saved to. For example, you may wish to save orders to a folder on your network to allow them to be backed up overnight. The *Catalogue Location* entry details where the current ESPO catalogue file is held. If you had many computers on a network using this application, you may wish to point them to a common catalogue file in order to simplify updating changes to the catalogue. Note that the price breaks file 'PriceBreaks.xml' must be in the same location as the catalogue file, so if you do intend on changing the location of the catalogue file, you will need to move the Price Breaks file to the same location.

The *Order Reference* section determines whether an order reference is generated for you for each new order, or whether you need to provide an order reference.

The *EDI* section is used to configure how the ESPO Desktop Ordering System electronically transmits orders to ESPO. The default option is to 'Send Orders via Email'. This requires a MAPI compliant email client as well as internet email access. If you use a Web based email system, you may want to try using the 'Send Orders via the Web' option instead. This doesn't require a MAPI compliant email client and order confirmation emails will be sent to the email address specified in the Customer Delivery Details section above.

The *ESPO Email Address* entry details where an emailed order will be sent to. This should not need to be modified unless asked to do so by an ESPO IT Support representative.

The *ESPO Web Address* entry details where orders sent via the Web will go. Again, this should not need to be modified unless asked to do so by an ESPO IT Support representative.

Clicking on the *Save* button or exiting the application will make these changes permanent. Catalogue Location and Saved Orders Location will not have any effect until you restart the application.

About

The About screen simply displays contact information and version details.

Help

The Help screen simply displays this file.

Exit

The Exit screen will exit the application. Make sure you have saved any orders before exiting the application.

Technical Help

File Archiving

Order files are saved into the folder specified in the registry key detailed below. All Orders are loaded at when the application starts to enable the 'Order Enquiry' screen. As orders are saved in the use of the application, the time taken to load all the orders will increase. You may find the application starts faster if you move older orders to a different folder, such as an 'Archive 2003' folder underneath the main SavedOrders folder.

File Locations

Orders are saved in a folder off the main installation directory called 'SavedOrders'. These orders are saved as simple XML files in order to facilitate import of these orders into other computer systems. The filename for each order file is displayed on the Order Enquiry screen.

The Customer Delivery Details are saved into a file called locations.xml in the root of the installation directory.

Favourite items are saved into a file called favourites.xml in the root of the installation directory.

EDI Issues

Orders are sent to ESPO via a MAPI compliant email client. If you are using Outlook Express version 4, you will need to tick the box labelled "Make Outlook Express my default Simple MAPI Client" under the Tools | Options menu option. Outlook Express 5 onwards does not require any special settings.

Registry Entries

All Registry settings are held under the key 'HKEY_CURRENT_USER\Software\VB and VBA Program Settings\ESPODOS\Settings'. The following keys are created in the Registry when the application is first used:

UseOrderAutoNumber

This key dictates whether Order References are created automatically, or if they have to be created by the user.

NextOrderReference

If the above key is set to "True", this key will hold the next order reference to be used.

PosState

Records the application window state, whether Minimised, Maximised or Normal

PosX

Records the X position of the application window

PosY

Records the Y position of the application window

PosHeight

Records the height of the application window

PosWidth

Records the width of the application window

QuickExit

Dictates if the application will prompt before exiting

SavedOrderFolder

Dictates where orders will be saved to and retrieved from.

CatalogueFilename

Dictates the location of the ESPO Catalogue file. The price breaks file is expected to be in the same folder as the catalogue file.

EDIEmailAddress

A semi-colon delimited list of email addresses an order will be sent to when the 'Email' button is clicked.