


Order Form Importer

Imports Files into Order Form Pro

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1 Welcome and Registration

1.1 About Order Form Importer

Welcome to Order Form Importer is an enhancement program for Order Form Pro that makes it easy for you to import orders or items from the in box or from Newton Works.

Included in this archive are the following packages:

- Order Form Importer.pkg

This is the software package that you need to install on your Newton

- Order Form Importer.pdf

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


- Order Form Importer.txt

This is a text only format of the users' manual. If at all possible, use the pdf version of the manual as it has layout and graphics that cannot be included in the text version. The pdf version of the manual is viewed using Adobe® Acrobat Reader®. This can be obtained free of charge at www.adobe.com.

- SASuff.txt

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

- SA reg.pkg

If there isn't a registration option under the  button, install this package to register your software.

1.2 System Requirements

Order Form Importer requires Newton OS 2.0 or 2.1, and a Message Pad 120, Message Pad 130, Message Pad 2000, Message Pad 2100, or eMate.

1.3 Registering Order Form Importer


The Order Form Importer Demo will work for a 30 day trial period. At the end of the 30 Days, it will stop working. To avert this tragedy, you will need to get in


touch with Stand Alone to register your software. You can register with us by several different methods.

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

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

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

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

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

1.4 Contacting Stand Alone Inc.

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

1.4.1 Business Hours

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

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

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

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

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

1.5 Reporting Bugs

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

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

When reporting bugs, it is best to Email us, rather than calling, so that the programmers have a written record of the information they need to solve the problem. As soon as we receive your Email, the programmer will examine the problem, and fix it.. Because our programmers are busy creating software, it can take a while for them to reply, but they will release a new version of the software that fixes the bug as soon as they can.

1.6 Version History

Version	Date	Notes
1.0	December 15, 1997	First public release

2 Installation

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

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



on your Desktop machine.

2. On your Newton, go to the Extras Drawer  and tap the Connection icon



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

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

- Tap the Install Package button in the Newton Backup

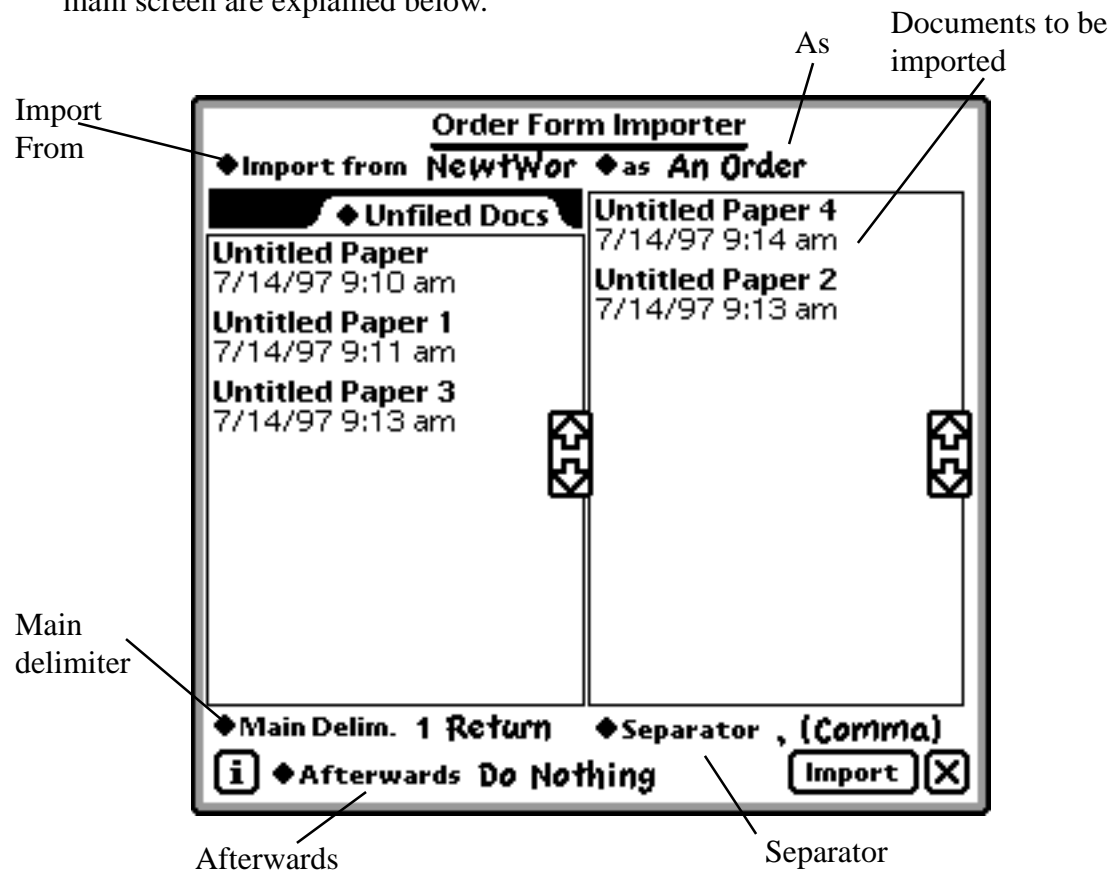
Utility



- Go to the folder where your packages are, and select the desired package.
- Click on the “Install” button

3 Using Order Form Importer

When you open Order Form Importer, the main import screen appears. From this screen you control how imported files are interpreted. The various sections of the main screen are explained below.



3.1 Import From

Order Form Importer can import data from two places. You can set it to import Emails from the In Box, or NewtWorks documents from Newtworks from stored .

Current location for importing



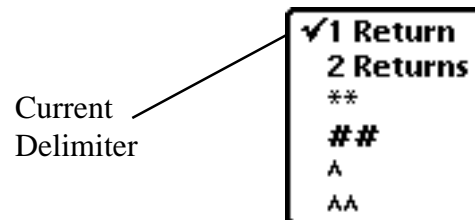
3.2 As

You can import documents as either Items, or as an Order. Items are items for sale and go into Order Form Pro's inventory. An Order imports the information as an standard order.



3.3 Main Delimiter

The Main Delimiter sets what character or series of characters separate orders or items in the imported data. Choose one of the character choices to separate the items or orders.



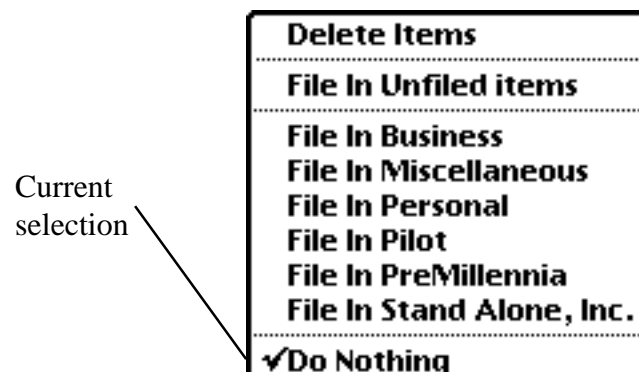
3.4 Separator

You can choose to separate the fields of an order with either commas or tabs.




3.5 Afterwards

You use the Afterwards section to set what happens to the data you are importing after it is imported. You can choose to delete the data, do nothing with the data, or file the data into one of the Newton's folders.



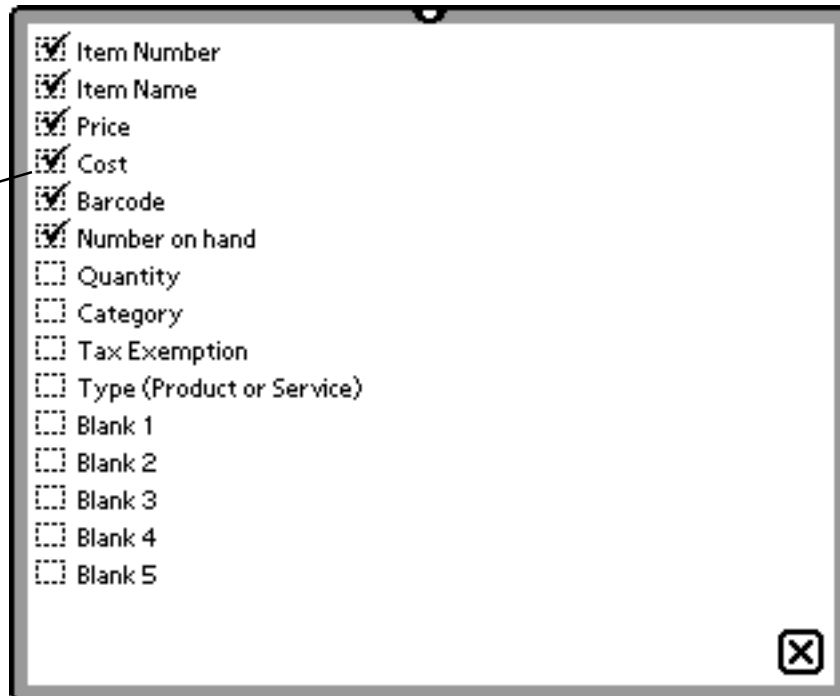
3.6 The Button

The  button lets you set up how the information will be imported. You have the choice between setting the import settings for either Items or Orders.

3.6.1 Item Import Settings

Tap on Item Import Settings to bring up a list of fields for the item. Order Form Importer imports data into any of the fields that are checked off, and in the order that they are listed. In the screen below, Price is the first field, Item Number the second, etc. To reorder the list of fields, tap and hold on a field, and then drag it to where you want it on the list. If there are more fields selected with the item Import settings than there are fields in the imported data, all excess fields are left blank.

Current
fields



<input checked="" type="checkbox"/>	Item Number
<input checked="" type="checkbox"/>	Item Name
<input checked="" type="checkbox"/>	Price
<input checked="" type="checkbox"/>	Cost
<input checked="" type="checkbox"/>	Barcode
<input checked="" type="checkbox"/>	Number on hand
<input type="checkbox"/>	Quantity
<input type="checkbox"/>	Category
<input type="checkbox"/>	Tax Exemption
<input type="checkbox"/>	Type (Product or Service)
<input type="checkbox"/>	Blank 1
<input type="checkbox"/>	Blank 2
<input type="checkbox"/>	Blank 3
<input type="checkbox"/>	Blank 4
<input type="checkbox"/>	Blank 5

3.6.2 Orders Import Settings

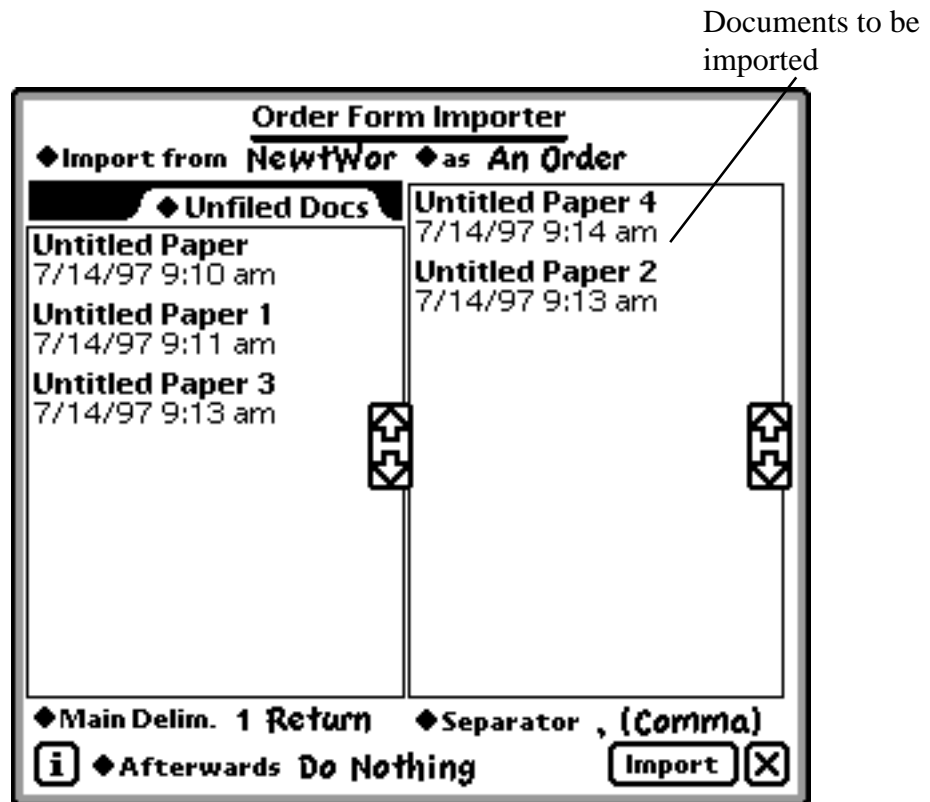
This sets the fields of data to be included for imported orders. It works identically to the Item Import settings.

Current
fields

☒ Status
☒ Order Type
☒ Client Name
☒ Client Phone
☒ Date/Time of Order
☒ Time of Assoc. Appt.
☒ Order Number
☒ PO Number
☒ Salesperson
☒ Salesperson ID
☒ Bill To (Company)
☒ Bill To (Attn)
☒ Bill To (Address)
☒ Bill To (Address 2nd Line)
☒ Bill To (City)
☒ Bill To (State)
☒ Bill To (Zip)
☒ Bill To (Phone)
☒ Bill To (Fax)

3.7 Selecting Files to Import

All you need to do to select files to import is to drag them from the left screen to the right screen. All of the files shown in the right hand window will be imported.



3.8 Setting up Items for Importing

Order Form Importer looks for specific keys in the text when importing Items or Orders. The first thing it looks for in any item are five pound signs. (#####) This tells it to start importing after the pound signs.

3.8.1 Importing Items

This example shows you one way to set up data before importing it as items with the Order Form Importer. The Main Delimiter is set to One Return, and the Separator is set to Comma. When importing, import the order as Items.

```
#####Item 1 Number, Item 1 Name, Item 1 Price, Item 1 Cost, Item 1 Barcode
Item 2 Number, Item 2 Name, Item 2 Price, Item 2 Cost
```

This would import two separate items. The first would have five fields of information, and the second would have four. Any additional fields that were chosen through the Import Settings are left blank.

3.8.2 Importing as an Order and Items

This example shows you one way to set up data before importing it as items with

the Order Form Importer. The Main Delimiter is set to One Return, and the Separator is set to Comma. When importing, import the data as An Order.

```
#####Info 1, Info 2, Info 3, Info 4, Info 5  
Data 1, Data 2, Data 3, Data 4
```

This Imports the first set of data as an Order, and the second set an Item. Any additional fields that were chosen through the Import Settings are left blank.

3.8.3 Importing as Several Orders

This example shows you one way to set up data before importing it as items with the Order Form Importer. The Main Delimiter is set to One Return, and the Separator is set to Comma. When importing, import the data as An Order.

```
#####Info 1, Info 2, Info 3, Info 4, Info 5  
#####Data 1, Data 2, Data 3, Data 4
```

This option imports both sets of data as Orders. Any additional fields that were chosen through the Import Settings are left blank.

3.9 The Import Button

The last step of the Importation process is to tap the Import button.