

Quik-Price Builder

Users Guide

Irrisoft

Quik-Price Builder

Quik-Price Builder

Users Guide

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Support

Software updates available on-line: www.irrisoft.net

For technical support contact: support@irrisoft.net

For product information contact: sales@irrisoft.net

Irrisoft Inc.
PO Box 6266
North Logan, UT 84341.6266

Voice: 435-755-0400
Fax: 435-755-4015

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Quik-Price Builder

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estimates and also to adjust every estimated quantity. The user must make the final determination as to the completeness of the material list and associated cost, which would be required to prepare a cost estimate and to install a project.

Irrisoft, Inc. makes no guarantee to the suitability of the products used to assemble an irrigation system. The user makes every choice of the components and assemblies, therefore accepts all responsibility for those choices.

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Quik-Price Builder

1. Getting Started

Irrisoft has developed a family of software products for distributors to provide customers with product information complete with pricing. Customers can search the database to generate material lists. There are three programs.

- **Quik-Price Builder** - A database management tool used by distributors to provide a product database in a format that can be accessed using the other programs.
- **Quik-Price** – Customers can search a product database to generate a material list and open linked product information files to provide easy access to manufacturer product data.
- **Quik-Irr** – An enhanced version of Quik-Price for landscape irrigation estimators. It is used to quickly and accurately prepare material lists for sprinklers systems.

The key to the Quik-Irr family of products is Quik-Price Builder, which is used by suppliers to provide a Load file used to exchange the database.

Quik-Price Builder

Quik-Price Builder is a utility program used to import a product database. The database can then be used with Quik-Price and Quik-Irr. Customers who ask for a printed price list, can be offered a price list on disk, complete with a program that will help them generate a priced material list.

Once a database is imported various search tools can be added to the database to make it easier for customers to locate items. Each item can have up to 6 product codes. Products are grouped by categories. The database can be searched by product code, description and category. A Search Tree can be built to provide yet another way to find items.

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Orders can be sent from Quik-Price and Quik-Irr via email or the Internet and opened in Quik-Price Builder. The customer's order can be exported into the company's order management system.

Product information files, such as Adobe Acrobat® files, can be linked to each product. Build a library of files that can be given to customers. The link makes it simple for users to open the file containing more information on the selected product.

Quik-Price

Quik-Price is an application that is used to search the database created with Quik-Price Builder. A list of materials may be generated to estimate a project or generate a purchase order. Items can be found by searching the product code, product description or by product category. The Search Tree helps guide users to find items. Once an item is located it may be added to a project material list. This list may be saved, edit, printed, faxed or exported for use by other applications.

Quik-Irr

Quik-Irr has all the capabilities of Quik-Price but has additional tools to generate a material list for an irrigation system:

- The Quik-Irr Wizard is a series of screens that prompts the user to select the heads, valves, controllers and other materials that will be needed for a project.
- A template is a list of the most commonly used items or components needed for an assembly.
- The user may work from a blank project and search the database to enter the materials needed for the project.

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Earlier versions

Quickir Master, Quickir and Quickir Lite are the original software products produced by Irrisoft, LLC.

Quickir Master version 2 has been upgraded to Quik-Price Builder. All of the functionality found in Quickir Master exists in Quik-Price Builder with the exception of distributing Quickir Lite. Quickir Master data files can be converted to Quik-Price Builder.

To convert the files to Quik-Price Builder, go to File and select the Convert Version 2 database option.

Quickir version 1 has been upgraded to Quik-Irr version 2. There are many improvements and changes to the program. Quik-Price Builder supports the creation of Load files for Quickir version 1. The Product Info file link is not supported by Quickir version 1. Quickir users are encouraged to upgrade to Quik-Irr.

Quickir Lite version 1 has been replaced by Quik-Price. Quickir Lite was a free program. Use the version 1 Create Load Files option in Quik-Price Builder to furnish a product database for Quickir Lite users.

Quickir Lite will no longer be supported users are encouraged to upgrade to Quik-Price or Quik-Irr.

Computer System Requirements

Minimum 300 Mhz - Recommend 800 Mhz or higher
Minimum Memory - 64MB RAM – Recommend 256 MB +
Hard disk storage - 150 MB free space – Plus Product Info Library
Monitor – 1024 x 768 resolution 16 bit high color SVGA or higher
8x speed CD-ROM drive or higher
CD Writer when distributing Product Info Library
Windows 98, ME, NT, 2000
Printer must be supported by Windows.

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On-line Internet access recommended for technical support, software and database updates.

Software Installation

1. Insert the Quik-Price Builder CD-ROM
2. Most CD-ROM drives will automatically detect the disk and run the setup program. If not, go to “my computer” and click on the CD-ROM drive. The set-up program will self execute.
3. Carefully read the software license agreement. If you accept the conditions press OK and follow the on screen instructions.
4. Run the program from the Start menu by choosing Programs/Irisoft/Quik-Price Builder. The install process allows an option to place a shortcut on the desktop. If there launch the program from this shortcut.

Software Registration

When the program is first launched the software registration screen will prompt for company information. Fill in the registration information and either register on-line or print and mail the form to Irisoft, Inc.; the address will be shown on the print out. Or fax the form to the fax number on the form. The software authorization code will be sent within 7 days.

To register on-line, first connect to the Internet. When registering on-line the authorization code will be e-mailed back within 5 days.

When the authorization code is received it must be entered in the registration screen in the box provided.

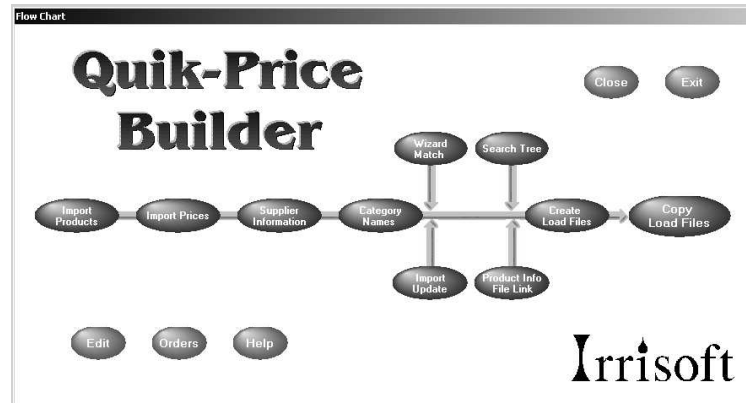
Quik-Price Builder will operate for 60 days without an authorization code. After 60 days the program will not operate.

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When moving the software to another computer or hard drive, first install the software, then contact Irrisoft for a new authorization code.

Where to Begin?

The Flow Chart is a guide, showing the steps needed to provide customers with a product database.



There are five essential steps to create a load file:

1. **Import database** – The supplier's company computer system contains product data including: descriptions, codes and customer pricing. Many systems group products by product type or manufacturer. Quik-Price Builder can import several different database formats. See chapter 2, Build the Database, for more information on export formats.
2. **Import Prices** – Product prices are stored in separate price tables, one for each price group. Price data must be exported from the company computer to be imported by Quik-Price Builder. See chapter 3, Import Prices.

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3. **Supplier Information** - Company name, address, and contact information is entered to become a part of the database given to customers.
4. **Category Names** – Products are grouped by a category code. The code can be given a descriptive name to make it easier to locate items.
5. **Create Load Files** – To provide a database to a customer, this utility must be run to create Load files. In this process all product information is combined, together with customer pricing, into a single file that can be give to a customer for use with Quik-Price or Quik-Irr. Run the Create Load files utility after any changes have been made to the database and before distributing Load files.
6. **Copy Load Files** – From here the “Load File” can be copied to a disk or another location on a computer or network. Load files may also be sent as an attachment to an email.

Additional tools are available to make it easier for customers to access information:

1. **Wizard Match** – The Quik-Irr Wizard is used to generate a material list for a sprinkler system. When the Wizard generates a material list it searches the database for each of the items. To search the database product codes are used. In most cases these codes are the standard product codes used by the manufacturers. When giving an irrigation customer a database, it should contain the product code used by the Wizard. A Wizard Match will search the imported database for the product codes used by the wizard. Items not found by the Wizard match can be found and the needed code can be added.

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2. **Search Tree** - A Search Tree can be built to provide another method to search the product database. The Search Tree is similar to Windows Explorer with folders containing folders and leading to files. Build a search tree based inventoried products.
3. **Import Update** - Products are added or changed in the company computer system on a regular basis. Generate another export file that will be used to update the database.
4. **Product Information File Link** – Many manufacturers provide CD-ROMs with product data. A common file type is a PDF file that requires use of Adobe Acrobat Reader®. With permission these files can be copied to create a library of product information. Once a library is created, items in the database are linked to files in the library. Quik-Price and Quik-Irr users will see the link and can click to open the product information file.
5. **Orders** – Quik-Price and Quik-Irr users have the tools to send a purchase order electronically, either by email, through a direct Internet connection, faxed or printed. Purchase orders received by Quik-Price Builder, via the Internet, can be opened, edited and exported to the company computer system for processing.

2. Build the Database

Database Structure

The database is divided into six sections:

- Products
- Product Prices
- Category Names
- Company information
- Search Tree
- Product Information Files

The first step is to look at the database structure, the product fields and determine the requirements to create an export file from the distributor's computer system. The next step is to import the products.

Product Data Fields

The database contains the following fields for each product:

- Product ID Number
- Descriptions (2)
- Product Codes (6)
- Wizard Code
- UPC Code
- Units Per Price
- Units per Item
- Unit type
- Package Quantity
- Size
- Category Code
- Sequence
- Search Tree Link
- Product Information File Link
- Product Prices

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Product ID Number

Each item must have a unique product identification code (product ID). This can be an alphanumeric string. The product ID must be included as part of the import. Most databases will have a computer assigned product identification code. If not, a user defined code may be used as long as it is unique and remains a constant. Descriptions, product codes, categories and pricing can be modified, but the product ID must remain the same.

When a database is updated the product ID is the key field that links the two databases to assure that product update information matches the correct item.

Product ID is also used to create the link between the customer price tables and the product file.

Descriptions

Each item has a primary and secondary description. The product description is an alphanumeric field that holds up to 60 characters. The description can be changed to meet specific needs. A search can look at character strings within the descriptions. It is easier to search for an item when there is consistency with names and abbreviations.

Product Codes

Each product must have at least one alphanumeric code product code. This field can contain no more than 30 characters. Up to 6 product codes that can be assigned to each product. A search may be performed on the exact product code, the beginning characters or specific characters in the product code.

Wizard Code

The Irrigation Wizard, found in Quik-Irr, will search the database for a specific product code. Where possible this code is the manufacturers product code. In some cases a generic code has been

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used. The Wizard Code is not imported. See chapter 8 - Wizard Match for more information.

UPC

A Universal Product Code may be included in this data. There are no search tools associated with the UPC code. It may be included in reports or exports

Units Per Price

There may be products with a price structure that may not be consistent with the Quik-Irr Wizard. For example wire may be priced per 1000 feet. If a value is entered in the units per price field, the unit price is adjusted by this value. For example if the wire price is \$40.00 per 1000 feet and a value of 1000 is entered in the units per price field then the adjusted price, exported to customers, is \$.04. (Price / Units Per Price = Adjusted Price)

Values may be imported into this field, but it will be important to review the items to assure that the information is correct. The units per item may be edited later as needed.

Units Per Item

There may be products that have unit quantities that may not be consistent with the Quik-Irr Wizard. For example a 60-foot roll of copper pipe may be sold as a single unit. In this case a value of 60 could be entered in the units per price field to assure purchase quantities are correct. This helps prevent users from ordering 60 rolls of pipe when all that was needed is one 60-foot roll.

The units per item value is exported and used by Quik-Price and Quik-Irr to alert the user to possible quantity discrepancies.

Unit Type

A unit of measure type is for reference only.

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Package Quantity

Package quantity is the number of items sold in a box or bag. Quik-Price and Quik-Irr users can use the purchase quantity to round when generating a purchase order.

Size

Item size is for reference only. In the list view items may be sorted by size.

Category Code

Products can be grouped into categories. A category may contain items from a specific manufacturer, a family of products from a manufacturer or a group of similar products from several manufacturers. Each product should be assigned to a category.

The category is used for two reasons:

1. Searches can be narrowed to categories.
2. Quik-Irr users can create a pricing structure for each category.

A distributor database may contain a numeric or a cryptic code that defines products in a category. During the import the category code is also loaded into a category table. This table includes both a category codes and the category names. The default category name is set the same as the category code. It is recommended that the category name be edited to provide a descriptive name, making it easier to search products using the category name. See chapter 5 - Categories Names for more information.

Sequence

The sequence number determines the order the items are displayed in a list. This is not a required field. The default sort in Quik-Price and Quik-Irr is first by category name then by sequence.

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Search Tree Link

Building a Search Tree is a two-part process. Once a Search Tree is created a link must be created between the Search Tree and items in the database. The Search Tree Link field holds the code that creates that link. The path on the Search Tree is displayed as part of the code. See chapter 9 for more detail.

Product Information File Link

Establishing a Product Information File Link is a two-part process. A product information library must be created then a link is built between the library and items in the database. The Product Information File Link field displays the link file name. See chapter 11 for more detail.

Product Prices

Each item has a list price and at least one customer net price. The database can be associated with as many customer net price tables as needed. Price importing is handled as a separate operation. See chapter 3 - Import Prices for more information.

Prepare Export File

To import a database into Quik-Price Builder an export file from the distributor's computer system must be created. When preparing to export the database there are two things to consider:

- Data fields to be included
- Database Format

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Data fields to be included

Computer programs vary in the way data is organized and the names given to each field. Each system should have the same basic information about products. Compare the list of required data fields with the structure of the computer database. The following is a list of data fields shown with the field size and the data type:

Field Name	Size	Type
• Product ID Number *	30	Alphanumeric
• Descriptions * (2)	80	Alphanumeric
• Product Code * (6)	30	Alphanumeric
• UPC Code	16	Numeric
• Units Per Price		Numeric
• Units per Item		Numeric
• Unit type	20	Alphanumeric
• Package Quantity		Integer
• Size	30	Alphanumeric
• Category Code *	50	Alphanumeric
• Sequence		Integer

* Required field (At least one description and one Product code)

Database Format

Quik-Price Builder supports several import file formats. Select a format compatible with the distributor's system.

- Paradox (*.db)
- DBase (*.dbf)
- Character Separated Values (*.csv)
- Tab Separated Values (*.txt)
- SHIMS Product List File (*.txt)
- ODBC – SQL Import

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Paradox - Paradox is a database program and its format can be used for exchanging data. The common file extension is .db. The field type must be defined during the export when using Paradox. See the data field list on page 13.

Dbase - dBase III is a very common format and is often available as an export format. The file extension for the dBase files should be .dbf. The field type must be defined during the export when using dBase. See the data field list on page 13.

Character Separated Values – CSV is a very common file format used to exchange data between applications. It is also referred to as a character delimited file. There are several format options used in CSV.

- **Field Names** – Some programs will include the names of the data fields as the first record. There may be times when the first few lines may contain text that is not relevant to the data. There is an option to tell Quik-Price Builder if the first line contains field names and which line contains the field names, thus ignoring the irrelevant lines.
- **Field Separator** – A specific character separates each data field. The most common separator is a comma. Several export utilities allow the user to select a field separator. The following characters can be used: , . \$ # % = & ! ~ When importing using CSV and using a character other than a comma, go to Import Properties and select the field separator.
- **String Field Separator** – A text string may have a ‘single quotes’ “double quotes” or no separators.
- **Trim leading and trailing spaces** – The exported file may contain extra, unneeded spaces at either the beginning or end of each field. To eliminate those spaces select the trim option.

The recommended format for a CSV export file is:

- First line contains the field names.
- Get structure from line one.
- Field separator – comma ,
- String Field Separator - “double quotes”

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A data set may look something like the following example.

(Line 1) Product ID,Description,Product Code 1,Product Code 2,
ProductCode3,ProductCode4,ProductCode5,Package,Sequence,Categ
ory, List Price

(Line 2) 10501,"1802 2"," POP UP SPRAY BODY",1802R,1802,,,
100,100,Rain Bird Sprayheads,\$2.60

(Line 3) 10502,"1803 3"," POP UP SPRAYBODY", 1803R,
1803,,,,75, 200,Rain Bird Sprayheads,\$2.75

Etc.

Tab Separated Values – A tab-separated format is similar to the CSV format. The main difference is the field separator, instead of a specific character, such as a comma a TAB is used. This format is often more reliable than the CSV format. All the same options exist except the delimiter is always the TAB.

SHIMS Product List File - SHIMS is a Unix based software package used in wholesale distribution. The SHIMS system accepts "TCL" commands to create an export that can be read by the import utility.

To create the export file use a PC as a terminal that has a text capture option.

1. Go into TCL and use the SELECT command to create a list of records that meet specified criteria. For more information type HELP then select in TCL.

For example: to select all products with the product line smaller than 200 use the following command:

```
SELECT PRODUCT WITH LINE < 200
```

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2. Once the products have been selected, type the following command "LIST PRODUCT ID DESC ALT1 ALT2 ALT3 ALT4 ALT5 LINE SEQ PKG LIST REP-COST PRICE01.... (And other price codes as needed) HDR.SUP NOPAGE BY LINE Before pressing enter turn on the screen capture in the terminal emulation program. When prompted, enter a file name. Once the screen capture is on go back to SHIMS and press enter.

The result is a text file containing all of the above information. Each record may look something like this:

```
PRODUCT..... 26995*
ID..... 26995
DESCRIPTION..... 1804 4" POP_UP BODY
ALT..... 1804R
ALT2..... RB1804
ALT3..... 4RPU
ALT4..... 1804
ALT5..... R1804
LINE..... 181
SEQ..... 600
PKG..... 75
LIST..... 2.900
REPLACEMENT COST. 1.210
PRICE01..... 1.508
PRICE02..... 1.740
PRICE03..... 1.740
```

This process may take a long time depending on the computer speed, connection speed and the size of the database.

3. Once the file has been created, go into Quik-Price Builder Import and select the file type as SHIMS Product List File. Locate the file. Press open and the program searches for all the field names. The product ID may show up two times, once with an * and once without the *. Use the ID without the *. The file viewer displays the beginning records. To

Quik-Price Builder

display more of the records, go to Import Properties and choose the number of lines to be previewed. Be aware that the SHIMS export format has one line for each data field; one record could contain over 15 lines.

Note: The following is an example of TCL command string that works:

```
LIST PRODUCT ID DESC ALT1 ALT2 ALT3 ALT4 ALT5 LINE
SEQ LIST REP-COST PRICE01 PRICE02 PRICE06 PRICE09
PRICE10 PRICE11 PRICE12 PRICE15 PRICE16 PKG BY LINE
WITH LINE LT "999" NOPAGE HDR.SUP
```

Note: Each Shims system may be configured different. The examples here work on some systems, there may need to different commands added depending on the system configuration.

ODBC – SQL Import - ODBC is a programming interface that enables applications to access data in a database management system that uses Structured Query Language (SQL) as a data access standard. An SQL statement must be written to create a table containing the fields needed by Quik-Price Builder. Use the SQL-92 syntax conventions.

Every computer system has a different file structure. The SQL statement will need to be written based on the file structure of that system. There are several steps to the process:

1. Go to Import and select the SQL type from the Import Type pull-down list. Open the SQL editor
2. Select the database to be accessed.
3. Write the SQL statement.
4. Run the query to create the data table. The created table can then be viewed.
5. The next step is to assign the table data fields to the fields used by Quik-Price Builder.
6. Then run the import.
7. Pressing the Save Icon can save the SQL statement along with the field assignments.

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Build the Database

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Import a Database

ID	DESCRIPTION	ALT	KEY	KEY-3
16399	HUNTER PS-00-10A SHF PS-00-10A		PS0010A	16399*1
16400	HUNTER PS-00-12A SHF PS-00-12A		PS0012A	16400*1
16401	HUNTER PS-00-15A SHF PS-00-15A		PS0015A	16401*1
16402	HUNTER PS-00-17A SHF PS-00-17A		PS0017A	16402*1
16403	HUNTER PS-00-55S SHF PS-00-55S		PS0055S	16403*1

Once the export file has been created containing the required exported data, complete the following steps:

1. Go to File and select New. Enter a name for the database.
2. From the Flow Chart select Import or go to the Import pull-down menu and select Import
3. Select the file format type from the pull-down list.
4. Locate the file containing the exported data and press open.
There may need to be some options selected in the Import Properties, for more information see the detail for each format type.

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5. The file is displayed in a column format, if each field is not clearly displayed, changes may need to be made to the Import Properties or there may be problems with the export file.
6. Now associate the data column with the fields needed by Quik-Price Builder. Use the pull down list by each data field to select the name of the field that corresponds to each field.
7. Press OK. Quik-Price Builder will begin importing the data.
8. Then SAVE the import script to file. All the choices made are saved in a file. Press the Save icon and name the import script. This script can be opened later to refresh all the options when prices are imported or when running an import update.

Once a database has been imported there are several more steps to complete:

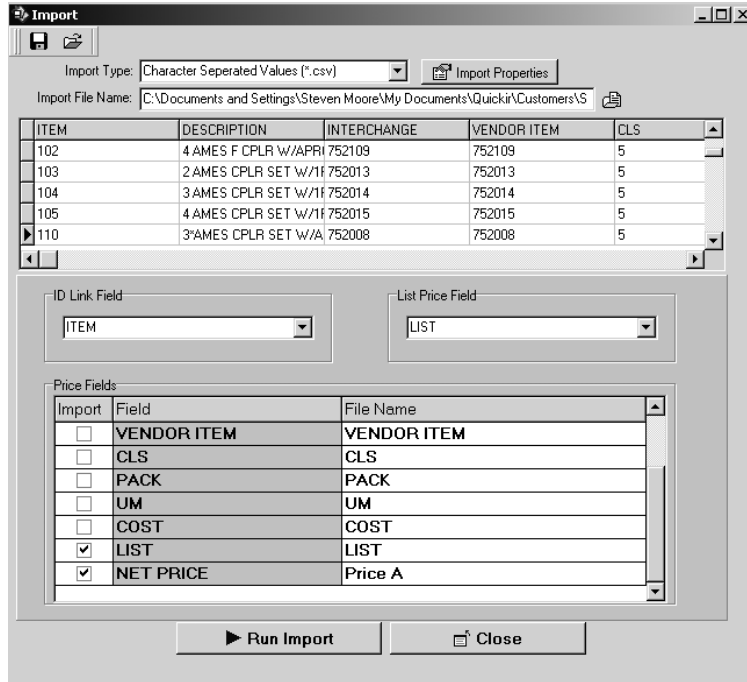
- Prices need to be imported.
- Enter the Supplier Information.
- Category names need to be defined.
- Review and edit the database as needed.
- For databases going to Quik-Irr users, the Wizard Match needs to be completed.
- Build a Search Tree and create the links.
- Assemble a Product Information Library and create the links.
- Create a Load file to distribute the database with Quik-Price and Quik-Irr users.

Import Prices

3. Import Prices

The process to import prices is very similar to importing the product data. The same initial steps are required:

- Identify the data fields to be included.
- Determine the database format.



For each product Quik-Price Builder has a “List” price and a customer net price. When a Load file is created both the list price and one customer net price is included. There is only one “List” price table but there can be an unlimited number of customer net price tables.

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Each price table is a separate file. When creating a load file, to be distributed to Quik-Price and Quik-Irr users, the product data is automatically merged with the list price and one of the net price tables. When running the create Load files process the price tables to be included are selected.

Steps to Import Price Tables

1. Create an export file from the company computer system containing the product ID and at least one price list. The format should be the same used for the product import. The export file can be the same file that contains the product information.
2. Select Import Prices from the Flow Chart or from the Import pull-down menu.
3. Identify and select the file type in the Import Type pull-down list.
4. Enter the file name or locate the file using the browser.
5. Once the file is opened the contents are displayed. If the file contents are not displayed properly select Import Properties. (Refer to chapter 2 for more information on options relative to each file type.) If, after changing the properties the data is not displayed properly the problem may be with the export file and another file type may need to be used.
6. Once the data is displayed and the fields can be identified assign the fields. The Product ID assignment must be made. The product ID in price table must match the product ID in the product database. Use the pull-down list to display the fields and select the product ID.
7. List price is typically the manufacturers suggested list price or a base price. This price is included with each database given to customers. From the List Price Field pull-down list, select the list price field. This is not a required field. If price tables are imported several times, this price table does not need to be imported each time. It is only needed when prices change.

Import Prices

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8. The Price Fields box displays all fields, using the mouse click the Import box to select the price field (or fields) to be imported.
9. Each price file is given a file name. The default file name is the name of the field. The name may be changed by entering a new name.
10. Press Run Import when ready.
11. These settings can be saved by pressing the Save icon and then entering the name of Import Script. With the Import Script saved, next time prices need to be imported open the import script and all settings made will be restored.

For more information about price options see chapter 6.

- Units per price
- Products without a price report
- Changing the list price table
- Selecting a price table
- Viewing and editing a price table

Quik-Price Builder

4. Supplier Information

The Supplier Information data can be accessed from either the Flow Chart or from the View pull-down menu.

The screenshot shows a window titled "Supplier Information Window" with a standard Windows-style title bar (minimize, maximize, close). The window contains a form for entering supplier details. The form is organized into two columns. The left column contains fields for: Company Name (Great Western Supply), Address (123 Main Street), Address (Optional), City (Anywhere), State (USA), Zip Code (12345), Web Site Address (www.gws.com), and E-Mail Address (sales@gws.com). The right column contains fields for: Phone # (800-200-1000), Fax # (800-200-1001), Mobile # (Optional), Branch ID (Optional), Region (Optional) (North West), and Sequence (Optional) (1). At the bottom of the window, there are two buttons: "Contacts" and "Order Settings".

Fill in the company name, address, phone numbers etc. Information entered in the Supplier Information screen is exported with the databases. This company information is displayed on the opening screens of Quik-Price and Quik-Irr. Users can also access this information within the program. Supplier information is included on purchasing reports.

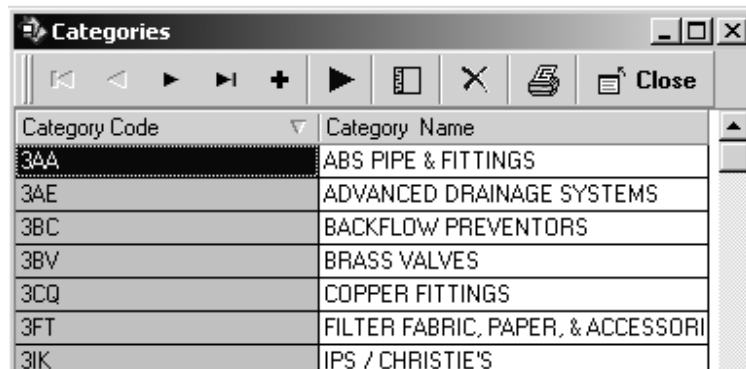
Enter the primary supplier location. Branches may be added by pressing the add button (+).

Pressing the Contacts button to Information regarding key contacts at each branch location.

The Supplier Information screen also has the location for Internet Order Settings. See chapter 13 for more information.

5. Category Names

The category code may be an alpha/numeric code used to group similar products. When products are imported a category code should be included. During the import a category table is created. Each category code is given a name. The default name is set the same as the category code. After importing the data go to the category names screen and edit the category name. Often the category code is cryptic and not helpful to those unfamiliar with the code. A logical name makes it much easier to search the database.



The screenshot shows a window titled "Categories" with a toolbar containing navigation and action icons (back, forward, add, delete, print, close). Below the toolbar is a table with two columns: "Category Code" and "Category Name". The table contains the following data:

Category Code	Category Name
3AA	ABS PIPE & FITTINGS
3AE	ADVANCED DRAINAGE SYSTEMS
3BC	BACKFLOW PREVENTORS
3BV	BRASS VALVES
3CQ	COPPER FITTINGS
3FT	FILTER FABRIC, PAPER, & ACCESSORI
3IK	IPS / CHRISTIE'S

To rename the category put the cursor in the category name field to be changed and type over the exiting name.

From the Category Name window there are several other tools.

- Move through the list
- Sort the list
- Add a category
- Run a Category Search
- Locate Items without a category
- Delete all items by category
- Print the list of categories

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Move through the list

There are several buttons to help navigate the list. Use these buttons to move the First, Last, Prior or Next record in the list. The slide bar may also be used to scroll through the list.

Sort the list

There are two columns in the Category name window. Click on the heading of the column to sort by that column. When renaming categories it is much easier to sort on the Category Code column.

Add a category

When new items are imported into the database the category code is automatically added to the category table. If additional categories are needed press the add (+) button. Enter the new category code and name. Products can be reassigned to the new category in the Form View window by selecting the category name from the pull-down list.

Run a Category Search

When the List View Window is open, press the Run Category Search to display the records in the selected category. Select a different category and the list view will be refreshed, displaying the items in the newly selected category.

Locate items without a category

There may be some records that do not have a category code. To display those records press the "Show Products without a Category" button.

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Delete all items by category

The delete button will delete both the category AND all products with that category code. This cannot be undone! Be careful, it can be a very useful tool to delete undesired records, but if not understood could remove records that should not be.

Print the list of categories

Pressing the Print icon will print the list of category names. A print preview window displays the report before printing. From this screen the printout can be:

1. Send to printer.
2. Print setup options may be selected.
3. Other pages may be previewed.
4. The Zoom in / Zoom out icons control the size of the preview.
5. The printout may be edited in Quik-Word. See chapter 12 – Reports for more detail.

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6. Database Management

Search the Database

There are many ways to search the database to quickly find a product. Most searches are executed from the Search Tool bar located toward the top of the screen.



- Product ID
- Exact Product Code
- Product Code Beginning Characters
- Partial Product Code
- Description Search
- Category Search
- Combined Search
- Search Tree

Product ID

If the product ID is known, enter the code in the exact search box and press enter or the ID button. The product will then be displayed.

Exact Product Code

If the exact product code is known, enter the code in the exact search box and press enter or the PC button. The product will then be displayed. If there are items with the same product code, a list showing the items will be displayed, select the desired record.

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Product Code Beginning Characters

Often the initial characters of a product code are known and represent a number of items. Enter at least two characters and press the PC? Button. Select the desired item from the list of items that match the beginning characters.

Partial Product Code

To search using key characters found in the product code use the search boxes to enter a string of characters that would be found in the product code. Press the Product Code button. All items matching the character string entered will be found.

Description Search

To search using the product descriptions, use the search boxes to enter a string of characters that would be found in the description. Press the Description button. All items matching the character string entered will be found.

Category Search

Products are grouped by category. There are two ways to look for items by category.

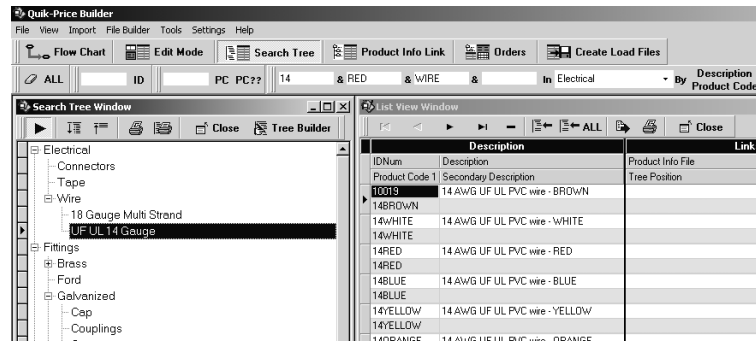
1. In the Edit Mode the Categories and List View windows are open. Press the Run Category Search button. Select a category from the list. All items in the selected category are displayed in the List View window.
2. In the Search Tool bar there is a category pull-down list. The category name is displayed in the list. Once a category is selected only those items found in that category will be displayed in the list view. When selecting a category from the list the first letter of a category name may be typed to jump to that category.

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Combined Search

A combined search uses both a category and either a product code or description search. To use the combined search, enter character strings of the product code or description in the search boxes. Then select a category from the pull-down list. Press either the Description or Product Code search button. This will narrow a search to a specific category. This method is often the fastest way to search the database.

Search Tree



Once the Search Tree has been built and products assigned, the Search Tree can be used to locate items. Press the Search Tree icon and select Run Tree.

Search Tool Bar

The Search Tool bar contains two additional buttons that will be used on a regular basis.

Clear Search Text – Press Clear Search Text button to erase entries in the search boxes.

NOTE: All searches filter out records that do not meet the search criteria. The number of active records is displayed at the bottom of the screen. Clearing the Search boxes does NOT reset the filters.

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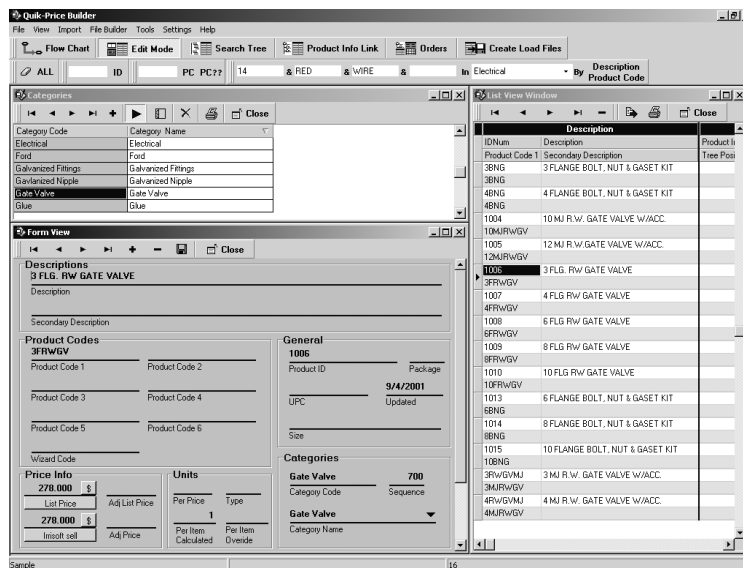
ALL – Pressing the ALL button eliminates all filters. All the records are then displayed.

Edit the Database

Once a database has been imported it good to review the results. The best way to review and edit the database is in the Edit Mode. The Edit mode can be opened any of threes ways:

1. Flow Chart
2. Edit Mode Button
3. View pull-down list

The Edit Mode opens three windows that can be viewed independently but in this mode these three widows can help to navigate, view and edit the database.



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1. The Categories window displays the list of categories by name and code. Using the Run Category Search can be used to quickly review products by category.
2. The List View window displays the database in a columnar format.
3. The Form View window displays all data associated with each record. Editing the data should be done in the Form View. When an item is selected in the List View the information for that product is immediately displayed in the form view.

List View

Description		Links		Group	Product Codes			General		Pricing
IDNum	Description	Product Info File	Category	Sequence	Wizard Co.	Product C.	Product Co.	Pat.	Unit of M.	Unit Price
Product Co.	Secondary Description	Tree Position	CategoryName		Product C.	Product C.	Product Co.	UPC	D/Updated	List
1223	ADDITIONAL CDRES OF PC208W		Software	1245		PC208W-AI				
1393	CSL REAL TIME DATA MONITOR SG	Software - Datalogger Support	Software	1405		RTDM			9/4/2001	
1395	CSL REAL TIME DATA MONITOR SG	Software - Data Graphics & A	Software	1407		RTDMEVAL			9/4/2001	
1396	CSL REAL TIME DATA MONITOR SG	Software - Data Graphics & A	Software	1408		RTDMRT			9/4/2001	
1384	CSL REAL TIME DATA MONITOR SG	Software - Data Graphics & A	Software	1406		RTDMJU			9/4/2001	
1220	DOS DATALOGGER SUPPORT SOF	Software - Datalogger Support	Software	1242		PC208			9/4/2001	
1771	PC208 IUPGRDFE	Software - Datalogger Support	Software	1243		PC208A1			9/4/2001	

The List View displays the data in a columnar format. There are two lines of data for each record. The columns are divided into major groups referred to as bands. The bands and their default contents include:

1. Description
 - a. ID Number
 - b. Product Code 1
 - c. Description
 - d. Secondary Description
2. Links
 - a. Product Info File Link
 - b. Tree Position
3. Group
 - a. Category Code
 - b. Category Name
 - c. Sequence

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4. Product codes
 - a. Product Code 2-6
 - b. Wizard Code (Needed for Quik-Irr users only)
5. General
 - a. Package Quantity
 - b. Unit of Measure
 - c. Unit
 - d. UPC
 - e. Date Updated
6. Pricing
 - a. List Price
 - b. Current selected net price

These bands and columns may be moved, resized and sorted as needed.

- **Move** – A column or band may be moved by clicking on the name in the header, holding the left mouse button while dragging the column to the new location.
- **Resize** – To resize a column, position the cursor in the header and on the line that divides a column or band. When the cursor changes to opposing arrows, click and hold the left mouse button while dragging the line to a new width.
- **Sort by Column** – records may be sorted by column. To sort, click on the column header. A sort symbol is displayed in the column indicating the column has been sorted. Sorting always occurs in an ascending order.

Selecting records – A record selected in the List View is displayed in the Form View Window. Editing can be done in the Form View window.

More than one record may be selected at a time for deleting or when creating links to those records. To select a range of records, click on the first record in the range, then press and hold the SHIFT key, then using the mouse select the last item in the range by clicking on that item. The range is highlighted and all items are selected for action.

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To randomly select multiple records press and hold the CTRL key, using the left mouse button click on the desired records. The selected items are highlighted and are ready for edit.

To unselect the items, release the shift or CTRL key and click on an item outside of the highlighted group.

Form View

All fields associated with an item can be viewed in the Form View window. Each of the fields may be edited, however there are some things to consider when making changes.

The screenshot shows a 'Form View' window for a product. The window title is 'Form View' and it has standard window controls (minimize, maximize, close). The form is organized into several sections:

- Descriptions:** Contains '1". In-line, Normally Open Hydraulic' as the main description and '210 Series VALVES' as the secondary description.
- Product Codes:** A grid of six fields for Product Code 1 through 6, with '210-21-04' entered in the first field and '210-21-04' in the Wizard Code field.
- General:** Includes '210-21-04' for Product ID, '5' for Package, '9/18/2001' for Updated, and 'UPC' for UPC.
- Price Info:** Shows '280.000' for List Price and '280.000' for List, with currency symbols and input fields for Adj List Price and Adj Price.
- Units:** Shows '1' for Per Price and '1' for Per Item Calculated, with input fields for Type and Per Item Override.
- Categories:** Shows 'Toro Valve' for Category Code and '4440' for Sequence, with a dropdown menu for Category Name.
- Links:** Includes 'PAGE_08.PDF' for Tree Position and 'Product Info file' for Product Info file.

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Editing Fields - After making a change press the enter key to record the change and update the record.

Product ID – Care should be taken when editing this field. The price tables use this field to establish a link between the product database and the price tables. This field is also used to form a link when updating the database.

Updated – This field is automatically updated by the import and update process.

Wizard Code – Quickir and Quik-Irr users need this code for the irrigation Wizard to work properly. Non-irrigation suppliers should ignore this field. This field is best edited using the Wizard Match utility. See chapter 8 for more detail.

Price Options – See Price Options later in this chapter for more detail.

Categories – The best way to change a category assignment is to use the pull-down list at the Category Name.

Links – To edit the link fields, see the chapter 9 on the Search Tree and Product Info File Link. If an item has been linked to a Product Info File clicking on the Product Info File button can open that file.

Database Tools

There are several tools that should be run to check the database for possible problems.

Duplicate Product Codes Report

There are two concerns about duplicate product codes.

1. Duplicates could confuse the end users.
2. Quickir Version 1.7 and earlier does not support duplicate product codes.

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From the Tools pull-down menu, select Duplicate Product Codes Report. Run the report by pressing the Run button.

Duplicate Product Codes				
Duplicated	Product 1		Product 2	
Product Code	Description	ID Number	Description	ID Number
FC-050	1/2" Coupling	FC-050	1/2" Coupling	FC-050
FCV-BB	Valve (Barb x Barb)	FCV-BB	1/4" Barb x Barb Flow Control Valve	FCV-BB
FE-025	Elbow (Barb x Barb)	FE-025	1/4" Barb x Barb Elbow	FE-025
FE-050	1/2" Elbow	FE-050	1/2" Elbow	FE-050
FHA-050	3/4" to 1/2" Poly Hose Adapter	FHA-050	3/4" to 1/2" Poly Hose Adapter	FHA-050
FMA-050	1/2" Male Adapter	FMA-050	1/2" Male Adapter	FMA-050
FT-025	Tee (Barb x Barb)	FT-025	1/4" Barb x Barb Tee	FT-025
FT-050	1/2" Tee	FT-050	1/2" Tee	FT-050
FTA-050	1/2" Slip Adapter Tee	FTA-050	1/2" Slip Adapter Tee	FTA-050
GA 100-85	Shaft For 1" Grip	GA 100-85	Shaft For 1-1/4" Grip	GA 100-85
GA 100-85	Shaft For 1" Grip	GA 100-85	Shaft For 1-1/2" Grip	GA 100-85
GA 200-104	Shaft For 2" 4" Grip	GA 200-104	Shaft For 2" 4" Grip	GA 200-104

There are two types of duplicate product codes.

1. The same code used for the same item. For example product code 1 and product 2 might be exactly the same for the same item. This does not pose a problem to any version of Quickir, Quik-Irr or Quik-Price; it may be a nuisance so duplicates could be edited out.

Once the report is completed, if there are duplicate product codes for the same item, those duplicates pointing to the same item can be deleted from the list. Press the Remove Duplicates from Display button. This does NOT remove the duplicates from the database but only from the report.

2. If the same product code exists for separate items, it could create confusion for users. If duplicate product codes are found in Quik-Price or Quik-Irr a list of duplicates is displayed and the user must choose from the list.

WARNING: Quickir version 1.7 and earlier users will not see the duplicates. If duplicates exist the first record found will be displayed. It is important to eliminate duplicate product codes for these users.

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After the report is run, review the list. The Find Product 1 and 2 buttons bring up the records containing the duplicate items. Edit the database as needed. The report may need to be re-run after the editing is complete.

Duplicate ID Number Report

It is vital that there not be duplicate ID numbers. Price tables are linked to the product database. If duplicate ID numbers exist price data could be wrong. Run the duplicate ID number report from the Tools pull-down menu. Company computer system ID should not be generating duplicate ID numbers, but it is important to verify. If duplicate ID numbers are found identify the cause and correct the problem and edit the database as needed.

The Duplicate ID report displays the ID number and duplicate product one and two. If additional duplicates are found they will be listed consecutively. Review the list, use the Find Product 1 or 2 buttons to open the record and either delete or edit as needed. After the editing the database, re-run the duplicate report.

Delete Products without a Category

Some databases have items that do not have a category and need to be deleted. From the Tools pull-down menu select to Delete Products without a Category. Before running this utility, it may be wise to review the items that would be deleted by this action. In the Edit Mode there is an option on the Categories window to Show Products without a Category.

Delete Products without a Product ID

There are times when items are imported that do not have an ID number. No price data can be linked to these items. To delete these items run the Delete Products without a Product ID from the Tools pull-down menu.

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To identify these potential records before running this delete utility those items can be found by opening the List View. Press the ALL button to display all records. Click on the ID number column to sort on the column. Items without an ID number will be displayed first. Review this list before running the delete. It may be there is an error with the ID number on some records.

Import Product Info Links

The Quik-Price Builder CD comes with product information files that have been provided by several of the irrigation manufacturers. These files can form the beginning for your own library. Links to this database can automatically be added to the database. This utility will only link items that have been found using the Wizard Match. Not all items will have a link.

The Wizard Match must be completed for this to work. This utility will overwrite existing links. This utility is provided as a convenience and a beginning of a product information library. Not all the manufacturers have contributed to the library. Add to the library and create links items in the database.

Pack Database

After deleting many items from the database it may become necessary to Pack the Database. This is a utility to cleanup the database internally.

Price Options

There are several options associated with product prices. In many cases these options will not be needed, but have been provided to meet specific situations.

Selecting a Price Table

Quik-Price Builder supports as many price tables as needed. Only one net price table is viewed at a time. To select a price table go to the

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Form View window. In the Price Info box both the list price and a net price are shown. Click on the button under the price field to open a list to select a price table. It is this selected price that is shown in the List View window.

Changing the List Price Table

The list price table is assigned when the list price is imported. There are two ways to change the list price table.

1. From the Settings pull-down menu select List Price Table. Select the new list price table from the displayed list.

Or

2. In the Form View window the Price Info box shows both the list price and a net price. Click on the button under the list price field to open a list, and then select the price table. The selected list price is shown in the List View window.

Viewing and Editing a Price Table

To view the price table, click on the \$ button next to the price fields in the Form View window. This will open a window displaying a table containing the Product ID and the price. This table may be edited as needed. When the table is opened the entire contents of the table can be viewed but when the window is opened the top item is the current item being viewed in the Form View.

If the current product does not have a price, open the price table and edit the price. Remember only one table is being edited, if a price is missing for an item and a price needs to be added, the other price tables may need to be opened and edited.

Units Per Price

The imported price of an item may create a conflict when using the Quik-Irr Wizard. If this is the case the unit price can automatically be

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adjusted by entering the number of Units per Price. When a value is entered an adjusted price is displayed. The adjusted price is the value included in the Load file.

For example wire may be priced per 1000 feet. If a value is entered in the Units Per Price field, the unit price is adjusted by this value. For example if the wire price is \$40.00 per 1000 feet and a value of 1000 is entered in the units per price field then the adjusted price exported to customers is \$.04. (Price / Units Per Price = Adjusted Price)

Values may be imported into this field, but it will be important to review the items to assure that the information is correct. The units per item may be edited as needed.

There may be times when both the Units Per Price and the Units Per Item must be used. Taking the above example the roll size may be 250'. A value of 250 would need to be entered in the Units Per Item field.

Units Per Item

When a value is entered in the Units Per Price field, this same value automatically is entered in the Units Per Item field. Some customers may not know how many units are included when purchasing an item. The description may indicate a 10' 2"x4" piece of wood. In this case there would be 10 units of 10 feet per item.

If the "units per item" is not the same as the units per price, enter the correct number of units in the Units Per Item Override field.

There may be products that have unit quantities that may not be consistent with the Quik-Irr Wizard. For example a 60-foot roll of copper pipe may be sold as a single unit. In this case a value of 60 could be entered in the units per price field to assure purchase quantities are correct. This should prevent users from ordering 60 rolls of pipe when all that was needed is one 60-foot roll.

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The units per item value is exported and used by Quik-Price and Quik-Irr to alert the user to possible quantity discrepancies.

Unit Type

A unit of measure type is for reference only.

Show Products without a Price

In reviewing the database before distributing it to users it is important to check the database for correct pricing and possible blank or zero price items. Go to Show Products without a Price from the Tools pull-down menu. Selected records are filtered to display only those products without a price. It is often easiest to view in the List View window.

Note: This is NOT searching all price tables it is only searching the current selected net price table.

Settings

Folder Locations

There are two folders that can be assigned. All other folders should be left in the default location set when the program was installed.

1. The location of the Product Information Files
2. Backup file location.

From the Settings pull-down list open the folder locations window to view and edit the folder assignments.

Backup and Restore Database

Periodically make a backup of the database files. A backup should also be done before making major changes to the database.

Quik-Price Builder

Create Backup

To create a backup file, follow these steps:

1. Go to the File pull-down menu and select Create Backup.
2. Enter the file name for the backup file and press Save.
3. The option is then given to include the price tables. If there are many price tables this can become a very large backup file.

Restore

To restore a backup Quik-Price Builder must first be installed on the computer.

1. Go to the File pull-down menu and select Restore Backup
2. Locate the file that contains the backup and press open.
3. The entire contents of the backup file are restored. Any existing files with the same names will be overwritten.

A backup is a single file that can also be used to transfer the database to another computer.

Export

The entire database or selected items may be exported for use with other applications. There is an Export button in the List View window. Enter a file name and select the file type. There are three options available:

- Microsoft® Excel
- Comma Separated Values
- HTML

Microsoft® Excel spreadsheet format - Once the file has been saved it may be opened in Excel. There are times when it may be desirable to export to Excel to make changes to the database and then run an

Database Management

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import update. The edited file exported from Excel should be saved as a Tab delimited text file.

Comma Separated Values – CSV is a very common format that can be opened by many applications.

HTML – web based file structure.

Quik-Price Builder

7. File Builder

The File Builder has the tools to provide Quik-Price and Quik-Irr users with a product database. There are several tools that are part of this process.

- Create Load Files
- Copy Load Files
- Exchange Quik-Irr settings
- Print disk labels

Create Load Files

Once a database is ready to be given to Quik-Price and Quik-Irr users, a utility must be run to prepare and compress the data files to create a Load File. A Load file is a single and contains the following data:

- Product Descriptions
- Product Codes
- Units and general product data
- Categories and Category Names
- The Search Tree
- Supplier Information
- Product Information File Links
- A one net price and a list price for each item

NOTE: The Product Information Library files are NOT included in the Load File. The library should be copied to a CD and distributed separately.

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Before creating load files check to see that the following work has been completed:

- Product database imported
- Prices imported
- Supplier information entered
- Purchase order settings
- Category names assigned
- Search Tree (not required but encouraged)
- Wizard Match (required for Quik-Irr users)
- Product Info File Links assigned
- Check for duplicate codes
- Price check

Steps to Create Load Files

Create Load Files

List Price Table
List

Date of Price Update: 11/26/2001
Expiration Date (Version 2 Only):

Price Files To Prepare

Price File	Create	Load File Name
Field1	<input checked="" type="checkbox"/>	Field1
Field5	<input checked="" type="checkbox"/>	Field5
Field7	<input checked="" type="checkbox"/>	Field7
Field8	<input checked="" type="checkbox"/>	Field8
List	<input checked="" type="checkbox"/>	List
Net	<input checked="" type="checkbox"/>	Net

Load File Settings Create Load Files Close

Quik-Price Builder

When Load files are created they are place in the load files folder. The typical path is c:\Program Files \ Quik Price Builder \ Load Files. The file extension for a load file is *.qz2. (Quickir version 1 load files have a *.qzp extension). The size of the file will vary depending on the number of products. It takes approximately 50-60KB per 1000 items.

There are three ways to open the Create Load Files screen.

1. The Flow Chart
2. Create Load Files button
3. From the Disk Builder pull-down list

Open the Create Load Files screen. Notice the current selected List Price table is shown on the right for reference. This price table will be included in the process and will be displayed as the list price in Quik-Price and Quik-Irr. There are several options to be set. Review the options before running the Create Load files utility:

- Load files settings
- Date of price update
- List of files to create

Load files settings

The load files settings include three options. Check the box if to include the option.

Create Quickir version 1 files – Quik-Price and Quik-Irr load files are automatically prepared. If version 1 load files are also needed check the box. Version 1 load files have the file extension *.qzp. These files are saved in the same folder.

Include Search Tree – If the Search Tree is not complete or is not to be included with the database, uncheck this option.

Enable Direct Orders – Orders may be sent electronically via the Internet by mail or through a direct Internet connection using TCP/IP. If direct order support has not been setup disable this option. For more information, go to chapter 13.

File Builder

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Date of price update

Today's date is the default date; it can be changed from the pull-down calendar. This date is included as part of the database and is shown on the opening screen of Quik-Price and Quik-Irr to inform the user when the prices were last updated.

Select Price Files

Select the price fields to be used in creating a Load file by checking the box next to the file name. There are two buttons that help to either un-check or check all price tables. The default Load file name is the same as the price table name. The name for the file may be changed. Enter the new file name as needed.

Run Create Load Files

Press the Create Load Files button. This utility will take several minutes. Upon completion the files can be given to Quik-Price and Quik-Irr users.

NOTE: Remember each time changes are made to the database this utility needs to be run before distributing the files to customers.

Copy Load Files

To distribute a Load file go to the File Builder and select Copy Load Files. This option is also available on the Flow Chart.

1. Once the screen is open select either the format either
 - a. Version 1 is for all Quickir Users 1.7 or earlier and Quickir Lite users.
 - b. Version 2 is for Quik-Price and Quik-Irr users.
2. Select the copy location, insert a blank disk if needed and press the copy button.

A data disk can be used with only Irrisoft products. The contractor must first install an Irrisoft program and then Load the data disk.

Quik-Price Builder

NOTE: The Create Load file utility must be run prior to distributing the files.

Print disk labels

Labels for the data disks can be printed. The data disk label includes the supplier name as entered in the supplier setup screen. The sheets are formatted for use with the Avery 5196 or equivalent.

Exchange Quik-Irr Settings

Quik-Irr has many customizable settings that make it easier to use. Often these setting have regional similarity. These settings in include:

- Custom Wizards
- Templates
- System Preferences

A supplier can customize Quik-Irr to meet the needs of the market. These settings can be retrieved by Quik-Price Builder to be shared with other Quik-Irr users. This is a four-step process:

1. The PC that is running Quik-Price Builder must also have Quik-Irr. Use this same computer to build the Templates and Wizards and also set system preferences.
2. Run the Build Quik-Irr Settings File found in the File Builder pull-down menu. A settings file must be given then press save. All the settings are saved in the file.
3. When the file has been created it can be distributed to Quik-Irr users. Use the Copy Quik-Irr Settings File command to open the copy screen. The saved settings files are listed and can be copied to the desired location
4. There is utility in Quik-Irr that is used to import these settings.

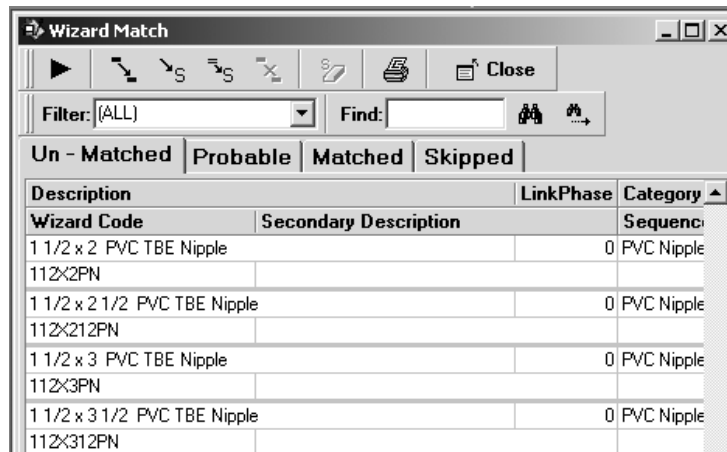
Refer to the Quik-Irr help files for more information on customizing and importing the preferences.

Quik-Price Builder

8. Quik-Irr Wizard Match

The Quik-Irr Wizard uses product codes to search the database when building a material list for a project. A Wizard Code is used to correctly link products in the database with products that can be selected when using the Wizard. Quik-Irr users will need to have a database that contains the Wizard codes. The Wizard Match process searches the database for all possible codes and provides the tools to find the products to properly set the Wizard Code.

Whenever possible the Wizard Code is the manufacturer's part number as listed in published price lists. For some generic items the Wizard Code has selected by Irrisoft.



A four-step process:

1. Run the Wizard Match
2. Review "Probable Matches"
3. Skip non-stock items
4. Find and match all "un-matched items"

Quik-Price Builder

1. Run the Wizard Match

Open the Wizard Match Mode from the Flow chart or from the View Pull-down menu. Press the Run button to start the Wizard Match. The database will be searched for possible matches. This automatic follows three phases. Each phase is attempting locate a match for each item. The result will be two lists, a matched and an un-matched list. The text color for each items displayed in the matched list indicates which phase found the match.

The phase I search is searching for the Wizard Code in the Wizard Code field. The first time the Wizard Match is run there will be no match in this phase. The text color for items found in the phase one search is black. When the Wizard Match is run a second time all items will be displayed in black. This color-coding will only be of value the on the first run.

Phase II of the search looks for the Wizard code in all other product code fields. The text color for items found in this phase is blue. Items found in this phase have a high probability of being correct matches.

Phase III of the search uses other possible codes to search. Some of the part numbers may contain dashes or other less significant characters. Product codes in the database may use these codes. The text for these items is dark red. The probability of a match is not as high but still very probable.

When an item is manually matched the text is displayed in green.

The color code can be of value to determine the probability of a correct match.

2. Review “Probable” Matches

Review the list of items that are "Probable" matches to make sure the correct item is found. When an item is selected in the Probable list on the left, the corresponding item found in the database is highlighted in the List View on the right.

Quik-Irr Wizard Match

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Once the match is confirmed, set it as a "Matched" item by pressing the Matched button.

If the item is linked to the wrong item the Wizard Code needs to be deleted from the list and the correct item should be found. Use the un-match button to move the item from the probable list to the un-matched list. The corresponding Wizard code is also cleared from the incorrect item in the product database.

3. Skip non-stock items

There will be items used in the Wizard that are not included in the database. The next step is to review the Un-matched list and determine if the items would be found in the database. Those items can be moved to the Skipped list by pressing the Skip button.

4. Find and match all "Un-matched" items

The next step is to locate the remaining un-matched products in the database. There are three ways to go about locating items:

- If the product code is known, enter it in the code to locate the item.
- When an item is selected a set of possible search codes is automatically put in the search tool bar. Narrow the search by selecting the category the item is in. Press the search by Product Code or by Description button to find possible matches.
- Enter a different set of search criteria to locate the item.

Once the product is found press the Match Icon. The Wizard code is entered and the item is moved from the un-matched list to the matched list.

Wizard Match Window Tools

There are several tools in the Wizard Match Window that need to be understood.

Quik-Price Builder

Run – This initiates the Wizard Match Search

Match – Once a Probable match or Un-Matched item is found, use this button to set the Wizard Code to the item. When the code is set the item moves from the Probable or Un-Matched list to the Matched list.

Skip – Press the Shipped button if the item is not a part of the database it will be sent to the Skipped list.

Delete – Items can be cleared from the skipped list by pressing the delete button.

Print – The selected list can be printed for review.

Close – This will close the Wizard Match window.

Un-Matched – Those items not matched after running the Wizard Match are listed in here.

Probable – When the Wizard Match is run items automatically found are put in this list. Items need to be verified and set as Matched items using the Match button.

Matched – Those items matched after running the Wizard Match are listed in here.

Skipped – Those items moved to a Skipped list are shown here.

Columns – The columns may be moved, resized and sorted.

- **Move** – A column may be moved by clicking on the name in the header, holding the left mouse button while dragging the column to the new location.
- **Resize** – To resize a column, position the cursor in the header and on the line that divides a column or band. When the cursor changes to opposing arrows. Click and hold the left mouse button while dragging the line to a new width.

Quik-Irr Wizard Match

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- **Sort by Column** – records may be sorted by column. To sort click, on the column header. A sort symbol is displayed in the column indicating the column has been sorted. Sorting always occurs in an ascending order.

To reset the list to the default sequence, press the Sequence column header.

Filter - Items in the Wizard database have been grouped by Category. Select a Category from the Filter pull-down list to narrow the view of items listed in the Matched, Probable, Un-matched or Skipped tabs. Choose (ALL) to display the complete list of items.

Find -To find a specific item in the Wizard database enter characters that would be found in either the Description or the Product code. Press the Find button. To locate the next item with the selected characters press the Find Next button.

Quik-Price Builder

9. Search Tree

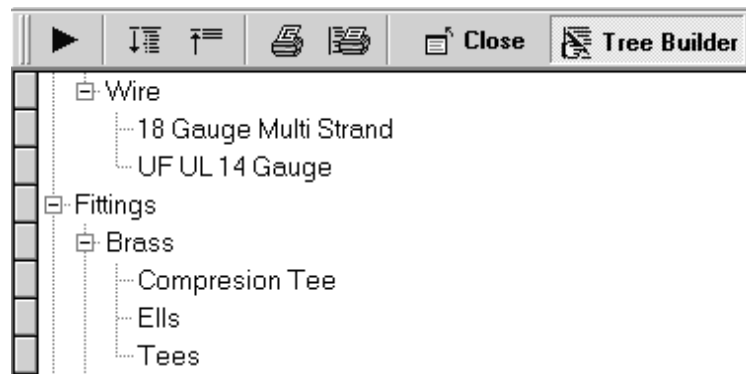
A Search Tree can be built to provide another method to search the product database. The Search Tree is similar to Windows Explorer that uses folders containing folders that lead to files. Build a Search Tree based on the products in the database. The tree structure consists of a root, or beginning point for the search. From each root are branches. Products in the database are linked to branches on the tree.

There are two steps to setting up a Search Tree:

- Building the Search Tree
- Link products to the Search Tree

Tree Builder

Quik-Price Builder has tools to build and edit the Search Tree. Start by opening the search tree. This can be done from the Flow Chart or the Search Tree icon or from the View pull down menu. The Search Tree is displayed on the left and the List View of the database is displayed on the right.



Quik-Price Builder

Search Tree

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To Begin press the Tree Builder button, this displays the Search Tree work area. There are tools to build and control the tree:

New Root (Ctrl-R) - A root is the starting point for branches to be built. Pressing this icon adds a "root" to the tree. Type the name for the root point and press enter. Add as many roots as needed, but they should be kept to a minimum. It is faster to view a short list of choices rather than a long list.

New Sub Branch (Ctrl-S) - A sub branch comes off a root or a branch, it is the step further into the tree. Position the cursor on the root or branch that an additional branch should be added. Press the New Sub Branch icon. A branch is added at the bottom of the list. Type the name of the branch and press enter.

+ / - Symbols - When branches are added to a root or other branches a - sign appears by the existing position. Pressing the minus sign hides the added branches. The - sign then changes to a + sign, indicating there are additional branches located under a branch. Pressing the + sign expands the tree to show the next level of branches.

The Search Tree can extend out 15 branches deep; it is easier for customers to look at a short list that opens as a branch is selected, rather than at long lists.

New Branch (Ctrl-B) - This will add an additional branch under the same branch or root. It is not necessary to reposition the cursor; the New Branch will be added under the current branch. Type the name of the branch and press enter

Delete branch - To delete a branch or root, first use the mouse to highlight the position to be deleted, and then press the delete icon. All branches under the deleted branch or root will be deleted. Also, if any product has been assigned to the branch, the link will also be deleted.

Expand All Branches – To view the entire tree, press the Expand All Branches icon.

Quik-Price Builder

Collapse All Branches - To reduce the tree to display only the Root nodes of the Search Tree, press the collapse all button.

Sort – Branches and roots are added to the Search Tree in the order they are entered. Press the sort button to order the items in an alphanumeric sequence.

Save Tree – When working on the Search Tree press the Save button to write changes to the disk. When exiting the Search Tree Builder the work is saved.

Close - When finished, close the Search Tree using this icon.

Print - Print the Search Tree to review and allow others to review the structure before assigning products to the tree.

Print Selected Branches including products – This print option can be used to create a list grouping items as they are in the Search Tree, Search Tree headings are also included in the report.

Renaming roots and branches - Two left mouse clicks over the text changes the text to an edit mode. The rename option can also be executed with a right mouse click.

Import Sample Tree – Irrisoft has created a Search Tree as part of the Sample database. This Search Tree can be imported as a beginning point. It is recommended that the Wizard Match be completed first. When the Sample Search Tree is imported items found in the Wizard Match will automatically be linked to the imported Search Tree.

The Search Tree must be empty for this option to work.

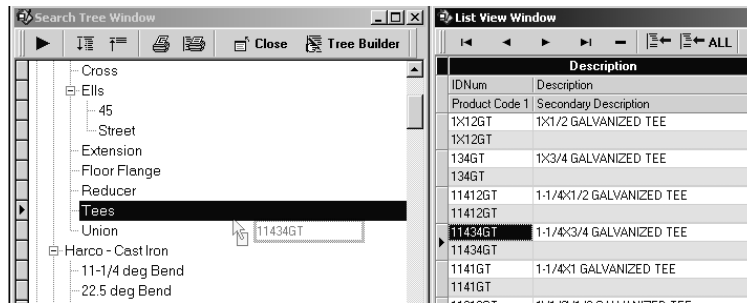
Search Tree

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Link Products to the Search Tree

Once the Search Tree structure is complete products can be linked to the tree. Products can only be linked to the furthest branch on the tree. An item can be assigned to only one position on the tree. Linking items is a two-step process:

- Locate the item in the List View
- Use the link tools to create the link



Locate the item in the List View

Use the available search tools to locate the items to be linked to the Search Tree. The items must be displayed in the List View.

Use the link tools to create the link

There are several ways to create the link between the Search Tree and items in the database.

- Drag and Drop
- Link to Tree button
- Right Mouse
- Function key F-12
- Link All to Tree button

Quik-Price Builder

Drag and Drop – Once products are found, select either individual items or multiple items.

Select a single item by clicking on the item; the selected record is then highlighted.

To select a range of records, click on the first record in the range, then press and hold the SHIFT key, then using the mouse select the last item in the range by clicking on that item. The range is highlighted and all items are selected for action.

To randomly select multiple records press and hold the CTRL key, using the mouse click on the desired records. The selected items are highlighted and are ready for edit.

To unselect the items, release the shift or CTRL key and click on an item outside of the highlighted group.

Once items are selected locate the node on the Search Tree that items are to be linked. From the List View, click any selected record with the left mouse button, hold the mouse button and drag and drop the records to the desired node on the tree.

Link to Tree Button – First select a node on the Search Tree, when selected it will be highlighted. Then find and select the desired items in the List View window. Press the Link to Tree button.

The Right Mouse and the function key F-12 do the same as pressing the Link to Tree button.

Link All to Tree Button - First select a node on the Search Tree, when selected it will be highlighted. Then search for items in the database, if the all items found in the search are to be linked to the selected node on the Search Tree press the Link ALL to Tree button.

Search Tree

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Run Search Tree

To verify the product assignments press the Run Tree button. This will shift the search control to the Search Tree. The Search Tree will now locate items that were linked to the tree. When a branch is selected all items associated with that branch are displayed, when branches are opened to follow the search is narrowed. The view and functionality of the Search Tree in Quik-Price Builder is the same for Quik-Price and Quik-Irr.

Search Tree Editing

Changes can be made anytime to the Search Tree. Editing can either involve:

- Change the Search Tree Structure
- Change Links

Edit the Search Tree Structure

Go to the Tree Builder. Once items have been linked to the Search Tree the editing will run slower. Changes made to the Search Tree structure are automatically changed in the product database

Move a Branch - To move a branch, position the cursor over the branch to be moved. With the left mouse button click, hold and drag to another position. To move a branch to the Root position, drag it to the bottom of the list. Release the left mouse button; you will then be prompted to confirm the move. The branch and all sub-branches will be moved together. Products already linked to the branch will be re-linked to the new position.

Quik-Price Builder

Add - New Root positions and branches can be added by using the icons or the options found using the right mouse button. (For more information refer to the Tree Builder)

Delete - When deleting branches from the tree, select the branch and use the delete icon. All sub-branches are also deleted. The program also searches and deletes tree assignments, so a delete can take several minutes.

Change Links

Reassign Products - Once an item is assigned to the tree the same item can be reassigned to any new position. Follow the same process when items were originally linked, the original link is overwritten.

Remove Product From Tree - To unlink a product press F-11 or use the Remove from tree option found when clicking the Right mouse button.

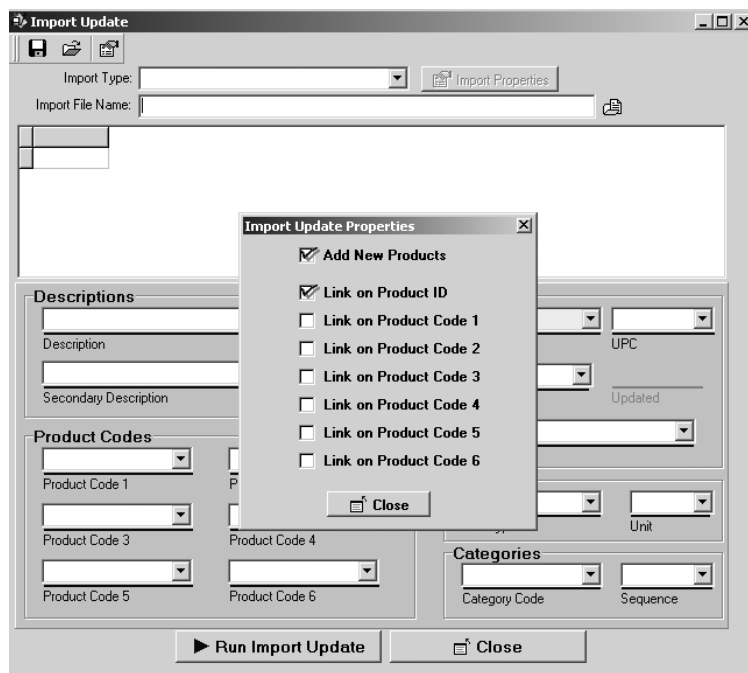
10. Import Update

Update Database

There are constant changes in pricing and products. Price updates are separate from product updates. To update prices simply re-import the price fields. A product update is used to:

- Add items
- Import to all or selected fields

The process to update the database is very similar to the original data import. Follow the same procedure to create an export file from the system computer. For more information refer to chapter 2.



Quik-Price Builder

There is one key element to a successful update. There must be a link between the existing database and the database to be imported. This field is used to identify the same item so it is updated with the correct corresponding data. The product ID is the recommended link field. This field should have been a part of the original import.

The import update process involves several steps:

1. To begin, go to Import / Import Update or choose Import Update from the Flow Chart.
2. The Import Update Properties screens with two options:
 - a. Add New Products – by checking this box items not linked to the existing database will be treated as new items and will be added. By not checking the box no new items will be added. After running the update a list of items that would be added will be displayed.
 - b. Link on – select the field that will be used to link the database between the existing database and the file containing the updated information.

Enter the choices and press close.

If an Import Script was saved when doing the initial import, open the import script. The file must have the same name and have the same structure. The Open Import Settings button can be used to locate this file. By opening this file all the setup options will automatically be loaded. Skip to step 7 and press the Run Import Update button.

3. Select the file type from the pull-down menu. The file type must match the format of the file exported from the system computer.
4. Locate the file containing updated data and press open.
5. Once the file is opened the contents of the file are displayed. If the data is not clearly displayed in columns some of the options may need to be changed in the Import Properties. For more detail see chapter 2.
6. Now associate the data column with the fields needed by Quik-Price Builder. Use the pull down list by each data field to select the name of the field that corresponds to each field.

Import Update

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7. Press Run Import Update. Quik-Price Builder will begin importing the data and updating the selected fields.
8. After the update has been run a New Products Added screen opens displaying the new products that were either added or would have been added had the add option been selected. If the Add option was not selected and there are some items that need to be added, those items may be selected and the Add button may be pushed. The other option is to add all the items in the list.
9. Now SAVE the import update script to file all the choices made. Press the Save icon and name the import script. This script can be opened later to refresh all the options when you need to import prices or run an import update.

There may need to be additional editing, categories may have been added, new products may need to be linked to the Search Tree and/or Product Information files.

NOTE: After updating the database, re-run the Create Load files utility.

Quik-Price Builder

11. Product Info File Link

Many manufacturers provide product information in an electronic format. One very common format is Adobe Acrobat files that can be viewed and printed using Adobe Acrobat Reader®. Quik-Price Builder can be used to create a link to these files. When Quik-Price and Quik-Irr users pull up an item in the database a Product Info Link icon will be displayed indicating a link. Pressing that icon will launch the viewer and open the file.

There are three main steps to this process:

- Build a Product Information Library
- Links Products to the library
- Distribute the library to users

Build a Product Information Library

A Product Library is made up of files containing graphic and or text information. The program is not limited to PDF files. Windows associates file types with specific programs. For example a PDF file is associated with Adobe Acrobat®. When a PDF file is opened, Windows knows to first open the Adobe Reader®. There are other file types that are very common as well:

- HTM / HTML – web files that can be opened in a web browser such as Internet Explorer® or Netscape®
- BMP – bitmap images opened by many graphics programs
- A link can also be established to a website, if a website address is entered that includes HTTP://www.

Start by creating a folder (directory) location on the computer hard drive that will contain these files. Create as many sub-folders (sub-directories) as needed to organize the files. Obtain copies of the desired files or create files using a scanner and graphics-editing program.

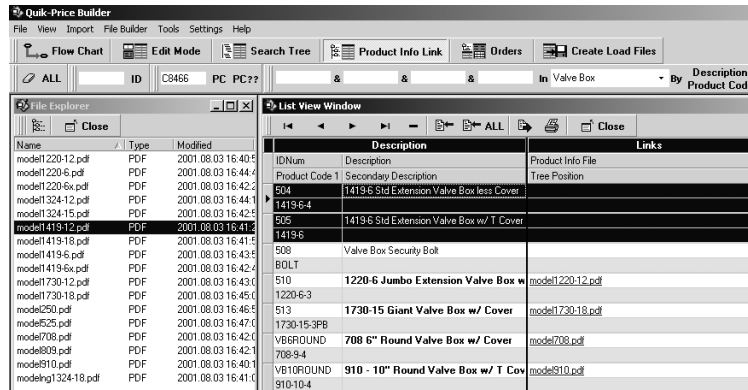
Quik-Price Builder

Product Info File Link

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Included on the Quik-Price Builder CD is a sample library containing PDF files from several manufacturers in the irrigation industry. Permission has been received to freely copy and distribute these files. Move them to the hard drive and these files can be used as a beginning point for a library. Add or delete as needed based on the needs of your market.

Link Products to the Library



Once library has been built, products in the database can be linked to the library. There are several steps to follow:

1. Go to the Settings pull-down menu and select Folder Locations. The location of the library must be set. Enter the path or use the browser button to locate the folder that contains the library. Press OK
2. Now open the Product Info Link mode, this can be done from the button at the top of the screen, the Flow Chart or the View pull-down menu. This mode opens the List View and a file explorer.
3. First locate and select the Product Information file that is to be linked. At the top of the File Explorer there is a browse button that can be used to open the folders that contain the files that are to be linked. A list of files is displayed.

Quik-Price Builder

4. Next use the search tools to locate and select items in the database to be linked to the selected file. Selected items are highlighted, more than one item may be selected using the CTRL key or the SHIFT key.
5. With the file selected on the left and products selected on the right press either the Link to Product Data Sheet button or the Link ALL to Product Data Sheet button.

To test the link, selected an item that has been linked and double click on the item to open the Form View. The link file name can be seen at the bottom of the form view. Press the Product Info File button. This will launch the associated program and open the file.

Import Product Info Links

Some of the files on the Quik-Price Builder CD have been linked to items in the Wizard Links to this database can automatically be added to the database. This utility will only link items that have been found using the Wizard Match. Not all items will have a link. This utility will overwrite existing links. This utility is provided as a convenience and a beginning of a product information library. Not all the manufacturers have contributed to the library. Add to the library and create links items in the database.

Distribute the library with users

A Load file given to Quik-Price and Quik-Irr users will contain the file link but NOT the file itself. The library will contain many files. The best way to distribute these files is to copy them to a CD using a CD burner. Users will be able to access these files from the CD or they can be copied to the hard drive of their computer. Access to these files is NOT limited to just Quik-Price and Quik-Irr users. These files may be opened and used in other applications.

The library files should be updated to provide current information and the links managed as new products are added. New copies of the library should be distributed as changes are made.

Quik-Price Builder

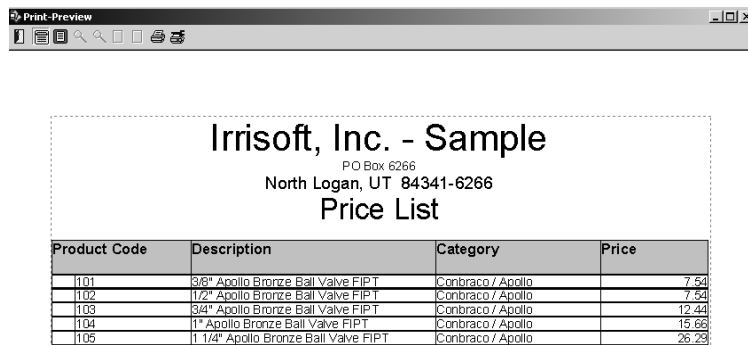
12. Reports

There are several predefined reports that can be printed. In addition reports can be modified or created using Quik-Word. The print button can be activated from the following screens:

- List View – ALL items currently filtered will be printed. In most cases a list view report should only include a filtered list of selected items. Be careful a report of 10,000 items will take a long time.
- Categories – Includes both the category name and code.
- Search Tree – Complete tree structure for review.
- Selected Branch – This report included both the tree structure and the items linked to the Search Tree. This printout will include selected branches.
- Orders – Customer orders.

When the print button is pushed a list of available forms is displayed. Quik-Price Builder comes with several predefined forms that can be selected. Additional forms may be added to generate customized reports. Select from a form and press either:

- Preview
- Print
- Edit
- New Printout



Irrisoft, Inc. - Sample
PO Box 6266
North Logan, UT 84341-6266
Price List

Product Code	Description	Category	Price
1101	3/8" Apollo Bronze Ball Valve FIPT	Conbraco / Apollo	7.54
1102	1/2" Apollo Bronze Ball Valve FIPT	Conbraco / Apollo	7.54
1103	3/4" Apollo Bronze Ball Valve FIPT	Conbraco / Apollo	12.44
1104	1" Apollo Bronze Ball Valve FIPT	Conbraco / Apollo	15.66
1105	1 1/4" Apollo Bronze Ball Valve FIPT	Conbraco / Apollo	26.29

Quik-Price Builder

Print Preview

A print preview provides a view of the document before sending it to the printer. Once the preview screen is open there are several options:

- Close – Press to close preview screen.
- Zoom in / out – Use these two buttons to control the size of the document as it appear on the screen, either larger or smaller. It does not affect the actual size of the printout.
- Back / Next – Use to advance the view to subsequent of previous pages.
- Edit – Opens the document for editing in Quik-Word. The basic word processing functions are there to make changes to the report before sending it to the printer.
- Print – Send the document to the printer.
- Print Setup - Select a Windows printer, paper size and pager orientation, either portrait or Landscape.

Print

This print button sends the report immediately to the printer.

Edit

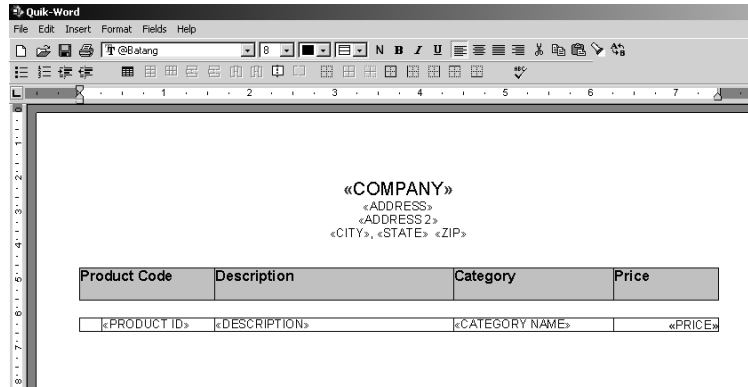
There are two levels of editing. From the preview screen the report may be opened for editing using Quik-Word. The edit option from the printout screen allows the report format to be changed.

New Printout

A new report format may be created using Quik-Word. This form may be saved for reuse.

Quik-Word

Quik-Word may be used to edit a report after it has been previewed or to edit, customize or define reports. Quik-Word is a word processor with the tools needed for Quik-Price Builder reports but may also be used for other word processing functions.



The following tools are available in Quik- Word.

File

New – Start a new blank document

Open – Open an existing file. A file browser opens to assist in locating the file.

Save – Save the current document. Files are saved as Rich Text (RTF) and can be opened by most word processors

Save As – Save the current document with a different name. The file type may also be changed to HTML or a text file.

Quik-Price Builder

Insert File - Insert document into an open document.

1. Click where you want to insert the second document.
2. On the file menu, click Insert File.
3. In the File name box, enter the name of the file to be inserted.

Print Preview – View the document as it will be printed.

Print - Sends the document to the printer

Print Setup – In the Print Setup dialog box, do any of the following:

- To select a different printer, click the pull-down menu.
- To change the paper source, click a tray name or a feeder in Source.
- To print the document vertically, click Portrait; to print the document horizontally, click Landscape.
- To change printer settings, click Properties.

Close – Exit Quik-Print and return to Quik-Price Builder

Edit

Undo - To undo the last action, click Undo

Redo - To repeat the last action, click Redo

Cut / Copy / Paste - Use to cut, copy, or paste text.

- To cut text to move it to another location, select the text, and then on the Edit menu, click Cut.
- To copy text to paste it in another location, select the text, and then on the Edit menu, click Copy.
- To paste text that was cut or copied, place the insertion point where the text is to be pasted, and then on the Edit menu, click Paste.

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Find / Replace - To find or replace specific characters or words, search for words or characters in the document. Search for and replace words or characters with text as needed.

Select All - Select all text at once by clicking Edit, and then clicking Select All.

Insert

Symbol - Click where the symbol is to be inserted.

1. On the Insert menu, click Symbol, and then click the Symbols tab.
2. In the Font box, click the desired font.
3. To get a close-up view of a symbol, move the mouse over it.
4. Double-click the symbol to be inserted.

Graphic on Disk - Click where the graphic is to be inserted.

1. On the Insert menu, click Graphic on Disk.
2. Type or browse to the path and file name in File.
3. Press open to insert the file.

Table - A table is made up of rows and columns of cells that can be filled with text. Tables are often used to organize and present information, but they have a variety of other uses as well. Use tables to align numbers in columns.

There are two ways to add a table.

1. From the Insert Menu select Table.
 - a. Enter the number of columns and rows.
 - b. Alignment selects the position of the table on the page, left, right or centered.
 - c. The borders option adds a single line around each cell in the table. Lines can be edited later.
 - d. Table width defaults at 100% of the margin width.
2. The Table button can be used to quickly add a table,
 - a. Use the mouse to drag to control the number of columns and rows.
 - b. Turn borders on or off with the border button.
 - c. When ready, click the check to insert the table.

Quik-Price Builder

Table Options

Table Control Buttons - There are several buttons that can be used to control the look of a table:

Select Row or Column –

1. Place the cursor in a cell.
2. Press the Select Row or Column button.
3. Make any changes needed to the row or column.
 - a. Add borders
 - b. Modify the text position
 - c. Add Color
 - d. Change font or text size

Insert Row or Column

1. Place the cursor in the cell where a new column or row needs to be added.
2. Press the Insert Row or Column button.

Delete Row or Column

1. Place the cursor in the cell of the column or row to be deleted.
2. Press the Delete Row or Column button.

Split Cell

1. Place the cursor in the cell to be divided into two cells.
2. Press the Split Cell button.

Join Cell

1. Select the cell or cells to be combined into one cell.
2. Press the Join Cell button.

Resize Columns

1. Position the cursor on the line dividing two columns; the cursor will change to opposing arrows.
2. Press and hold the left mouse and drag the column line to a new position.

Color and Borders - Enhance the table by adding borders and filling cells with colors.

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1. Select the cell or cells to add color or borders.
2. Press any of the border line option buttons or the cell color button.

Note: When building a report that contains lists of items that will come from the database, a table must be used as the location to insert a field that contains multiple items. The length of the field automatically adjusted when the report is generated.

Format

Font - To change a font type, style, or size

1. Select the text to be changed.
2. On the Format menu, click Font.
3. Click the desired options.

Note: Before typing, specify the font for new text by changing the font settings. Or select all text at once by clicking Edit, and then clicking Select All.

Paragraph – Change paragraph format options include:

- Alignment - left, right or centered
- Indentation - dimensions from the left or right. The first line indentation may be separate.
- Line Spacing

Borders – There are two ways to format lines and colors in a table.

1. From the Format pull-down select Borders and Lines screen to define the borders.
 - a. The line style and width may be selected.
 - b. Spacing around the text can be set.
 - c. Fill shading.
 - d. There is control over each line of the border.
 - e. The preview button displays the borders for review.
2. There are several border buttons positioned on the tool bar to quickly modify the table borders.

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Tab Stops - In the Tabs dialog box, do the following:

- To set a tab stop, set the measurement for a new tab stop in Tab stop position, and then click Insert.
- Select the tab alignment, left, right centered or on the decimal position
- To delete a tab stop, click it in the list, and then click Delete.
- To delete all tab stops in the selected paragraph, click Delete All.

Bullets - Click where the bulleted list is to start.

1. On the Format menu, click Bullet Style,
2. Then type the text.
3. Press ENTER and, another bullet appears on the next line.
4. To end the bulleted list, on the Format menu, click Bullet Style again.

Page Layout - In the Page Setup dialog box, do any of the following:

- To change the paper or envelope size, click a size in Size.
- To change the paper source, click a tray name or a feeder in Source.
- To print the document vertically, click Portrait; to print the document horizontally, click Landscape.
- To change the margins, type a width in any of the Margins boxes.
- To change printer settings, click Printer.

Fields

To access the information in the database fields must be selected and inserted into the document. There are several tables in Quik-Price Builder that can be accessed:

1. Products – All the product data that can be seen in the form view.
2. System \ Supplier
 - a. Date, time and page numbers
 - b. Supplier Information

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Go to the Fields pull-down menu and select a table. A new toolbar displays the tables. To add fields to a report:

Note: Any data that is in a list format can only be put in a table. Products and PO products are list type data tables. All other table data can be inserted at any location in the document, including tables.

1. Begin by deciding where the data is to be displayed. Create a table if needed. Position the cursor at the insertion point.
2. Using the table pull-down list select the field to be inserted
3. Press the Insert button to add the field to the document

Only the field name is displayed in the document. When the report is run from a print command the selected data will be included in the report.

Note: Care must be taken when building forms. A document CANNOT access data from both the PO tables and the product tables.

Purchase Order Forms

Form Builder is a report generator is used to create or modify a form used to generate a printout. A form is used to control the look and content of the report. Select the fields that will be included, the position and font of the text. Grid lines, boxes, color and other text may be added to customize the report. Once a form has been defined it may be selected from the Project printout screen to be used to build the report.

Due to the complexity of the using the form builder it is recommended that you select a form that is closest to meeting your needs, open it, press Save As and edit the newly saved form.

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Fields

When building a project there are product lines, headers subtotals etc. There are also many columns that may or may not need to be included in the printout. In addition there is general information about the project, the company and supplier. The Form builder in Quik-Word lets you select the fields, set the layout, font, grid lines and colors, to make a report look the way you want. To accomplish this there are several steps to understand:

- Headers and Footers
- Using Tables
- Frames in the Body of the Document
- Fields from Orders

Header and Footer

Text, tables, fields or graphics included in the header and footer are displayed on every page of the document. Keep use of this area to a minimum to save room for the body of the document.

Note: Footer text etc. should be positioned at the top of this page, the report builder will see that it gets to the bottom of the page.

Using Tables

Tables are a key part of adding items to a form. Some fields must be assigned within a table other fields can be either in or out of a table. Any field from the Project Table list must be put in a table. The table is the key to having the form act dynamically. The contents of a table can cause the table to grow as needed to include all the text.

The appearance of a table can be controlled to customize the look.

- Borders can be turned on or off.
- Text position within each cell can be set.
- Color can be added to a cell or group of cells
- Font style, size and color can be changed

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See Format options on how to use these options.

There are two ways to add a table:

- Table button
- Table from the Insert pull-down menu

See Table options for more information.

Frames in the Body of the Document

There are several frames in the body of a form. These frames will look to specific parts of a project for data and specific parts of the document to place data.

First Page Only – Text, graphics, tables, or fields that only need to be on the first page. The contents of this frame are put AFTER the page header; the page header shows up on the top of every page. Its contents are displayed before the contents of the “Top of every page” frame.

Top of every page – This frame is primarily intended to for column headings. Fields cannot be put in this frame. It is positioned below the header and first page frame.

Standard Item - Every project contains products or items that make up the material list. Put the fields that need to be included from the project in this frame. The Fields’ window includes all the fields associated with a Project. For this frame only select items under the “Project Table” fields. Do not use text, unless the text is to be repeated for every line in the project.

Header – If headers were used in the Project, that type of data will be looked for. Typically all you will need to include is the “Description” field from the Project Table fields. The font, position or background color can be changed to give variety to the report. Do not use text, unless you want the text repeated every time a header is used in a project.

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Header Subtotal - If header subtotals were used in the Project, that type of data will be looked for. Typically all you will need to include is the “Description” field and one of the Total fields found in the Project Table fields (Note: do not use the “Project Totals” fields, use the project Table totals). The font, position or background color can be changed to give variety to the report. Do not use text, unless you want the text repeated every time a header is used in a project.

Subtotal - If subtotals were used in the Project, that type of data will be looked for. Typically all you will need to include is the “Description” field and one of the Total fields found in the Project Table fields (Note: do not use the “Project Totals” fields, use the project Table totals). The font, position or background color can be changed to give variety to the report. Do not use text, unless you want the text repeated every time a header is used in a project.

Comment Line - If comment lines were used in the Project, that type of data will be looked for. Typically all you will need to include is the “Description” from the Project Table fields. The font, position or background color can be changed to give variety to the report. Do not use text, unless you want the text repeated every time a header is used in a project.

Summary – At the end of the document add the “Project Totals” fields. This will be positioned on the last page of the document and above the Page Footer. This frame can include text and graphics in addition to the totals fields.

Fields from Orders

There are many data fields available to be included in a form. To access the information in the project, fields must be selected and inserted into the document. There are several database tables in Quik-Irr that can be accessed. Go to the Fields option found in the Insert pull-down menu. A new window displays the fields. To add fields to a report:

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1. Begin by deciding where the data is to be displayed. Create a table if needed. Position the cursor at the insertion point.
2. From the Fields window select the field to be inserted.
3. Press the Insert Field button to add the field to the document.

Note: Any data that is in a list format can only be put in a table. Products are list type data tables. All other table data can be inserted at any location in the document, including tables.

Only the field name is displayed in the document. When the report is run from a print command the selected data will be included in the report.

When changing the font or text size the field name appearance does NOT change. When the cursor is at the field the text font settings are shown in the font settings control.

The following is a list of available fields with some notes explaining the data contained in the field.

1. System

- a. Date – These dates come from the computers calendar. There are several different formats.
 - i. Date (mm-dd-yyyy)
 - ii. Date (mmm dd yyyy)
 - iii. Date (mmmm dd, yyyy)
 - iv. Date (mm/dd/yy)
 - v. Date (mm/dd/yyyy)
 - vi. Date (mm-dd-yy)
- b. Time – The time come from the computers clock. There are several different formats.
 - i. Time (hh:mm am/pm)
 - ii. Time (hh:mm)

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2. **Project** – These fields hold information about the project, job information, products, prices and quantities.
 - a. Project Information
 - i. Title
 - ii. Bid Number
 - iii. Project Number
 - iv. Date
 - v. Prepared For
 - vi. Contact
 - vii. Address
 - viii. Address 2
 - ix. City
 - x. State
 - xi. Zip
 - xii. Phone
 - xiii. Mobile
 - xiv. Fax
 - xv. Email
 - xvi. Notes
 - b. Project Tables – These fields hold all items in the material list. Much of this data comes from the supplier database as items are added to the project.
 - i. # (Line number)
 - ii. Quantity
 - iii. Item Code
 - iv. Product Codes
 1. Product Code 1
 2. Product Code 2
 3. Product Code 3
 4. Product Code 4
 5. Product Code 5
 6. Product Code 6
 7. Wizard Code
 - v. Description – **Note:** This field is also used to hold the description for each product AND text used in the Headers, Subtotals and Comment lines.
 - vi. Secondary Description
 - vii. Package
 - viii. Category Code

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- ix. Category Name
 - x. Sequence
 - xi. Size
 - xii. UPC
 - xiii. Product ID
 - xiv. Units Per Item
 - xv. Cost Fields – These are line item values.
See Project Totals for the grand total fields.
 - 1. Cost
 - 2. Total = Cost x Qty
Note: This field is used for a line item extended total AND for the Subtotals.
 - 3. Tax = Total x Tax
 - 4. Cost+Tax = Cost + (Cost x Tax)
 - 5. Total w/Tax = Cost+Tax x Qty
Note: This field is used for a line item extended total AND for the Subtotals.
 - 6. Taxable
 - xvi. Sell Fields – These are line item values.
See Project Totals for the grand total fields.
 - 1. Sell
 - 2. Total = Sell x Qty
Note: This field is used for a line item extended total AND for the Subtotals.
 - 3. Tax = Total x Tax
 - 4. Taxable
 - xvii. Gross Profit
 - 1. Percent
 - 2. Amount
- c. Project Totals – These are used as the summary totals for the project. Do not use these for line item totals.
- i. Cost
 - 1. Total
 - 2. Tax
 - 3. Total + Tax

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- ii. PO
 - 1. Total
 - 2. Tax
 - 3. Total + Tax
- iii. Gross Profit
 - 1. Percent
 - 2. Amount
- d. PO Information
 - i. PO Number
 - ii. Order Type
 - iii. Ship To
 - 1. Contact
 - 2. Address
 - 3. Address 2
 - 4. City
 - 5. State
 - 6. Zip
 - 7. Phone
 - 8. Mobile
- iv. Notes

3. Supplier Information

- a. Company Name
- b. Address
- c. Address 2
- d. City / State / Zip
- e. Web Site
- f. Phone
- g. Fax
- h. Mobile
- i. Branch ID
- j. Region
- k. Contact 1-5
 - i. Name
 - ii. Position
 - iii. Phone
 - iv. Mobile

- 4. Company Information**
 - a. Contact
 - b. Company Name
 - c. Address
 - d. Address 2
 - e. City
 - f. State
 - g. Zip
 - h. Phone #
 - i. Fax #
 - j. Email Address

13. Orders

Quik-Price Builder can receive, open and process files that contain orders generated using Quik-Price or Quik-Irr. These files can be reviewed and exported to other computer programs. The orders may also be printed.

To use the Quik-Price Builder order system it is important to understand how order files can be received and processed.

Order files are received several different ways.

- Quik-Order
- E-mail file attachment
- Files exchanged on a disk or across a network.

Whatever method a file is received it should be saved in the Pending Order folder in Quik-Price Builder. An order file will have a file extension *.QPO.

Quik-Order

Quik-Orders is a separate program that receives both direct Internet orders and e-mail orders from Quik-Price and Quik-Irr users. It is included on the Quik-Price Builder CD. To automatically receive orders this program must be running at all times. It is a small program that runs in the background. Include the program in the automatic Start menu in Windows. Once the program is running it can be accessed from the Windows System Tray. There are some general settings associated with the program and settings for both e-mail and direct Internet orders.

General Options Settings

There are two settings in general options; new order sound and file save location.

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New Order Sound – When the program receives an order a New Order alert message is displayed on the screen, click new order to acknowledge the order. Use Quik-Price Builder to view the order. The program can also activate a Windows wave or Midi sound file. The new order alert sound runs until the new order is acknowledged. Use the file browser to locate and select a wave file. The sound can be tested using the run, pause and stop buttons.

Save Location – An order is received as a file. The program needs to know where the file is to be saved. The default location used by Quik-Price builder is c:\Program Files\Quik-Price Builder\Pending Orders. Use the file browser to select the location. Quik-Price Builder is used to open these files. Files may be saved to a network location or another folder.

Direct Orders Settings – Orders can be sent directly to this program via the Internet (the customer is not going to a website nor is a web browser is not used). The computer must be on an Internet server that has a static IP address. In most cases if a system is using a firewall Quik-Order will need to operate outside the firewall. There is a check box on this screen that can used to disable the direct order monitoring. To re-enable the program must be restarted.

The program looks at the computer's current IP address. This must be a static IP address. A port setting of 6711 is the recommended default value. These same settings are entered in the Supplier Information screen under, Order Settings. If enabled these settings are included with the Load file given to Quik-Price and Quik-Irr customers. These embedded settings make it easy for customers to send an order via the Internet. When an order is sent via the Internet the program looks for an Internet connection and sends the order directly to Quik-Order. The order is received by Quik-Order and an immediate confirmation is sent to the remote computer verifying that the order was received.

E-mail Orders – Orders may be received via e-mail. When using the direct Internet order system it is recommended that the e-mail system be configured. Some customers may choose to send the order via the email system in Quik-Price or Quik-Irr.

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If there is not a computer setup as a server on the Internet the email order system may be used. E-mail may not be as fast or reliable as a direct Internet connection, but provides a system that will work. Also there is no automatic confirmation to the user when an order is received.

To receive orders via email the mail server settings must be entered.

E-mail address / User ID – this is typically the e-mail address but does not typically include the @xxxxx.xxx. It is recommended that a separate e-mail account be established for orders only. This e-mail address is included with the load files when entered in the Supplier Information order settings.

Password – When an email account is established there is typically a password.

Host – Enter the name of the POP 3 e-mail server that hosts the e-mail account

Port – The incoming e-mail port setting is typically 110

Check E-mail every – Enter how often the e-mail account is to be checked for orders.

To use the e-mail order process customers should use the e-mail order system in Quik-Price or Quik-Irr to send orders. They do not need to use a separate e-mail program. If customers prefer to send the order as a file attachment, Quik-Order will receive the order.

If the Quik-Price e-mail order system is not used, customers can still send an order via e-mail to the address included in the order setting. An e-mail program such as Microsoft Outlook can be used to access the account and open the e-mail. An e-mail order sent with Quik-Price or Quik-Irr includes both text that displays the order and a file that can be opened with Quik-Price Builder. An e-mail program may be used to view the order. The attached file can be saved to the Pending Orders folder.

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Orders Received

Quik-Order will display the received files. A file name is given that includes the company name and a sequence number. The counter is used to advance the sequence used in the file name.

The error log and last packet received screens are for diagnostics. If errors occur the log should provide sufficient detail to understand and correct the problem. If the problem persists, contact Irrisoft customer support.

Order Processing

Order processing involves four steps:

- Open
- Review and edit
- Export or print
- Complete the order

1. Open a Pending Order

The file explorer, on the upper left, can be used to select and open an order.

2. Review

The order file contains information about the company sending the order, specific purchase order information in addition to the items needed in the order.

Customer Company Information – Company information in the Quik-Price or Quik-Irr is included with the information contained in the file. The name of the supplier database used to create the order is also included.

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Purchase Order information – Information on this screen can provide details such as PO number, shipping information and any notes from the customer.

Order – In the order tab are all the items included in the purchase order.

Check order for Non-stock items - Before processing the order it should be checked. In theory items on the order should have the same part numbers as in the companies' computer system. To verify the order press the "Check order for non-stock items" button (the check mark button). This utility will compare the part numbers in the order to the part numbers in the current database. Items NOT found in the database will be highlighted in yellow. These items should be reviewed and edited if needed,

Edit order – Items may be added or edited. Enter the product code or use the available search tools at the top of the screen to locate an item. The list view on the right displays the search results and an item may be added to the order by using the drag and drop method.

The same Project tools in Quik-Price are available. Headers, comments may be added, but generally are not needed.

When the order is edited the cost is not added. The program does not know which price level is used. The primary intent of this program is to receive an order that can be entered into the supplier's order entry system. The fastest way to do this is to create and run an export script.

3. Export Orders

An export script offers control to select fields and commands to export the data in an order for use in other programs. A script must first be written then it can be run.

Export Method

There are three export methods or format options.

Copy to Clipboard – This method uses the Windows Clipboard as the target to receive the data sent when the script is run. Data sent to the Clipboard can be pasted to other applications.

Save to Text File – The data may also be sent to a text file. The file name must be entered. If the data is saved as ASCII text. The data format is defined in the export script.

Send to Window – The data sent to the targeted window. The script sends the selected data as keystrokes to the target window. The window name (this name must be exact) and the pause between characters must be set. The target window must be running before running the script.

Writing an Export Script

Use a script to select data from an order and add output controls. On the right of the screen are the fields that can be selected. The fields are organized in a tree structure. Click on the + to open and display the available fields. For a complete list and an explanation of each field go to chapter 12 in the section on using the Form builder.

To add a field to the script, position the cursor in the script at the desired location. Select the field and press the Insert Field button. The name of the field is inserted in the script.

Control characters such as ¶ (Enter) or → (Tab) can added. In addition text may be entered if needed in the script.

There are three parts to an export script.

1. Initialize – Fields and control characters entered here are sent at the beginning of the script. This could be used to initiate a series of commands and/or send project information. Project, Company or Supplier Information can be included here. Do NOT select fields

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from the Project Table (the number of records in a table field can vary and this screen does not work with that type of data).

2. Products – The script can distinguish between three different types of data from the Project Table

Standard Products – Product codes, quantities, or other fields from the Project Table, together with control codes can be entered here.

Comments and Headers – The text for these lines in the project is in the “Description” field. To include this text as part of the script add that field from the Project Table and include any needed controls.

Products without a Product Code (non-stock Products) – To understand this type of product, recognize there is a difference between the Item Code and the Product Code. The Item Code is the code entered to find a product in the database. When an item is found in the database the all of its Product Codes are carried with it and are included in the Project. If the customer manually entered an item there is no “Product Code”, just an Item Code. The order check process will identify items that are not in the database. The script can be programmed to respond differently if this type of product is found.

Page options – If the target program needs specific controls added to advance a page based on the number of products on a page, set a value in the Product per Page pull-down list. Also add the needed controls.

Note: Hidden items and subtotals are not exported.

3. Finalize – This field is the same as “Initialize” only it is used to add fields or controls at the end of the script.

Save – The script is saved to a file.

Run - Selecting the file and pressing the Run button runs the script.

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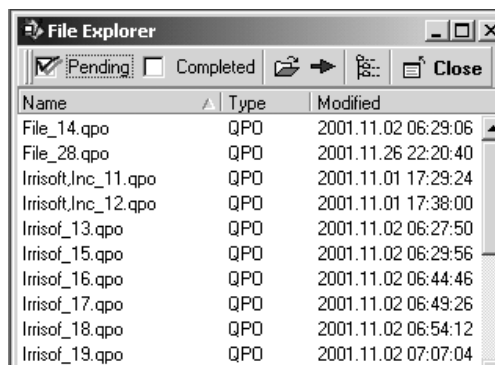
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Print – An order may also be printed. Press the Print icon. Choose from the pre-defined purchase order forms. The order may be previewed or edited. A custom form may be created. See chapter 12 on creating purchasing forms in Quik-Word.

4. Complete the order

Once the order is processed it may be saved to a “completed” folder location. Press the “Move to completed folder” button (red arrow). The file is saved in the Completed folder. Selecting the “Completed” box to view and open files in the completed folder.



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