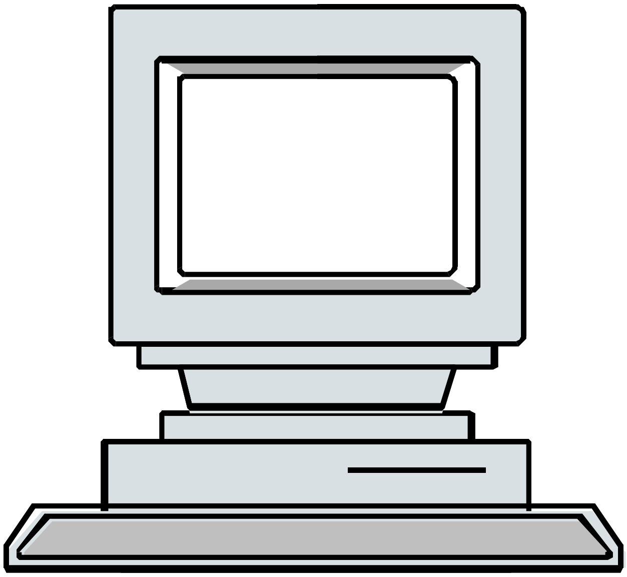
THE

AHSOMME©

Business System

25th Anniversary
Ahsomme User Guidebook



Since 1988

AHSOMME

Pronounced “Awesome”.

THE

AHSOMME©
Business System

25th Anniversary User Guidebook, Operating & Training Manual

Covering Version 18

Published 12/12/12.
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Getting Acquainted

In this section we will make introductions.

Meet the people who have contributed the most to this system.

Be officially welcomed.

First, meet Hans and Otto...

Hans & Otto

A Short Story for Very Busy People

Hans and Otto lived in a small village in the Black Forest.

Every working day they cut trees from sunup until sundown.

Every day Otto cut more trees than Hans.

This bothered Hans greatly because he was younger, stronger and (he was quite certain) much smarter than Otto.

So Hans started earlier in the morning, worked later in the evening, skipped church holidays, legal holidays, birthdays, anniversaries (including his own) – yet Otto cut more trees.

Hans stopped eating breakfast, hurried through lunch, and was far too tired for dinner. But, even on Hans' best days, Otto cut more trees. What really aggravated Hans was the many times he would look across to Otto's side of the valley and see him sitting leisurely on a fresh-cut tree stump, just resting his axe in his lap.

This continued for many years because Hans was both too proud to be beaten and too proud to ask for help - or take advice. It continued until the day Hans felt a pain in his chest - one that signaled the end of his wood cutting days.

When Otto visited him in the hospital Hans finally asked how he had cut so many more trees for so many years.

Otto laughed. "You could have watched me."

"I did! We cut trees the same way; the same swing of the axe, the same back-cut. The only difference is that you rest on the stump after you cut each tree. I assumed you were just old and tired."

"The answer was in front of you all along. Yes, I tire more easily than I did at your age, but I use my time more wisely now. Before I start each new tree, I sit on the stump of the last one ... and sharpen my axe."

Otto continued cutting trees for many years.

He retired wealthy, happy, and well respected.

Hans spent the rest of his years carving clocks - neither wealthy nor happy.

You are busy now. You rarely read operating manuals. We understand. But please read on; invest a little time, let us help you sharpen your axe.

Welcome

This Guidebook contains instructions, tips, insights, shortcuts, a little humor, lots of pictures; plus the experience of the author, the programmers, and hundreds of users worldwide.

If you are not familiar with your computer, please review the information provided by the manufacturer - it covers operations like using the mouse, selecting menus, moving, printing, etc. You must know how to perform basic operations on your computer. If you have browsed the Web, or checked your eMail, you are ready for Ahsomme.

It is not necessary to read this entire Guidebook to begin.

You can review this manual in any order but it is best to browse all of it quickly and then begin at the beginning. In each chapter we introduce some new information and build on information introduced in the preceding chapters.

The Table of Contents will help you find general topics.

Because we are always upgrading our programs, the software you are using may be a little more current than this Guidebook and some of your computer screens may be newer and look slightly different than pictures in the manual - but basic functions and techniques will be the same.

The best learning is doing! Use your Ahsomme system as you browse this Guidebook - and don't be afraid to experiment.

***

We suggest that, when you are finished with your first reading of this Guidebook, you set it aside, use the programs, and then browse the Guidebook again a couple months later. Some of the items that did not interest you at the beginning will be more important to you as you become more experienced.

Welcome aboard!

Thank You

Past and present owners and users, your support and suggestions over the years have improved this program far beyond the vision of its creator. We want to especially and particularly thank those veteran users who have been with us over two decades - and those who helped test this Version 18.

A-Rental Connection, Canoga Park, California started work on the party rental parts of Version 18 in early 2006. Their assistance will be especially noted in many of the reports created for party rental. Thank you Les, Bob, Bertha, Alex, Lynn, Julie, Juan Carlos, & Kristi.

Baytex Mfg., Mt. Maunganui, New Zealand - half a world away and always at least a day ahead of us. Spencer, Trevor, Grant, and staff have devoted countless hours to refining, testing and improving this system. For over a decade they were the lead testers for the manufacturing and purchasing elements of the system. We owe them a world of thanks.

Tom and John at Western Welding and Giffin Rentals in Goleta, California contributed to many aspects of this system – especially the early development.

***

So much of the good programming in this business system is the work of Phil Davis of Davismark in West Linn, Oregon, that it is impossible to imagine it without his contribution. We are grateful that he could find time in his very busy schedule to provide all the help he did! We would recommend his work (and his good company) to anyone.

Dedicated to Raquel

For
understanding, support, advice, patience, and humor through
all
the many hours,
days and nights,
weeks and weekends,
months and years and years
and years and years and years
and years and years and years and years
and years and years and years and years and years
and years and years and years and years and years and years
and years and years and years and years and years and years and years
of
planning, designing, constructing, programming, writing,
testing, correcting, debugging, rewriting,
enhancing, improving, rewriting,
upgrading, refining, rewriting,
proofing, editing, rewriting,
tweaking, rewriting
and rewriting;
your
contribution is priceless
these programs would not exist today without your
help.

Thanks.

PEL

Quick Start

This section begins with writing an order.

It will introduce the Navigator – the main tool for finding information in the Ahsomme Business System.

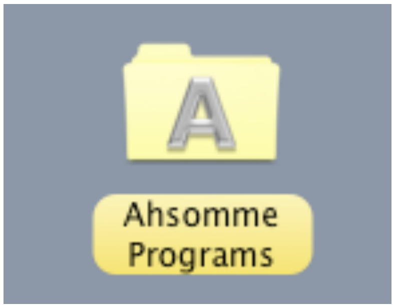
It will explain how Editors work.

It will introduce notes (both manual and automatic) to speed your work.
It will demonstrate how to find and apply dates quickly.
Finally, it will show how to access the help systems.

Create a New Order

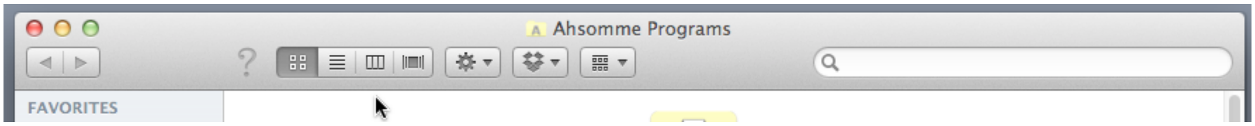
A program called "The Navigator" is the control center for the Ahsomme Business System - when in doubt; go to the Navigator.

You will find it in the Ahsomme Programs folder on the desktop:



As you open the folder you will see many things in addition to the Navigator. Ignore them for now, we will revisit them later.

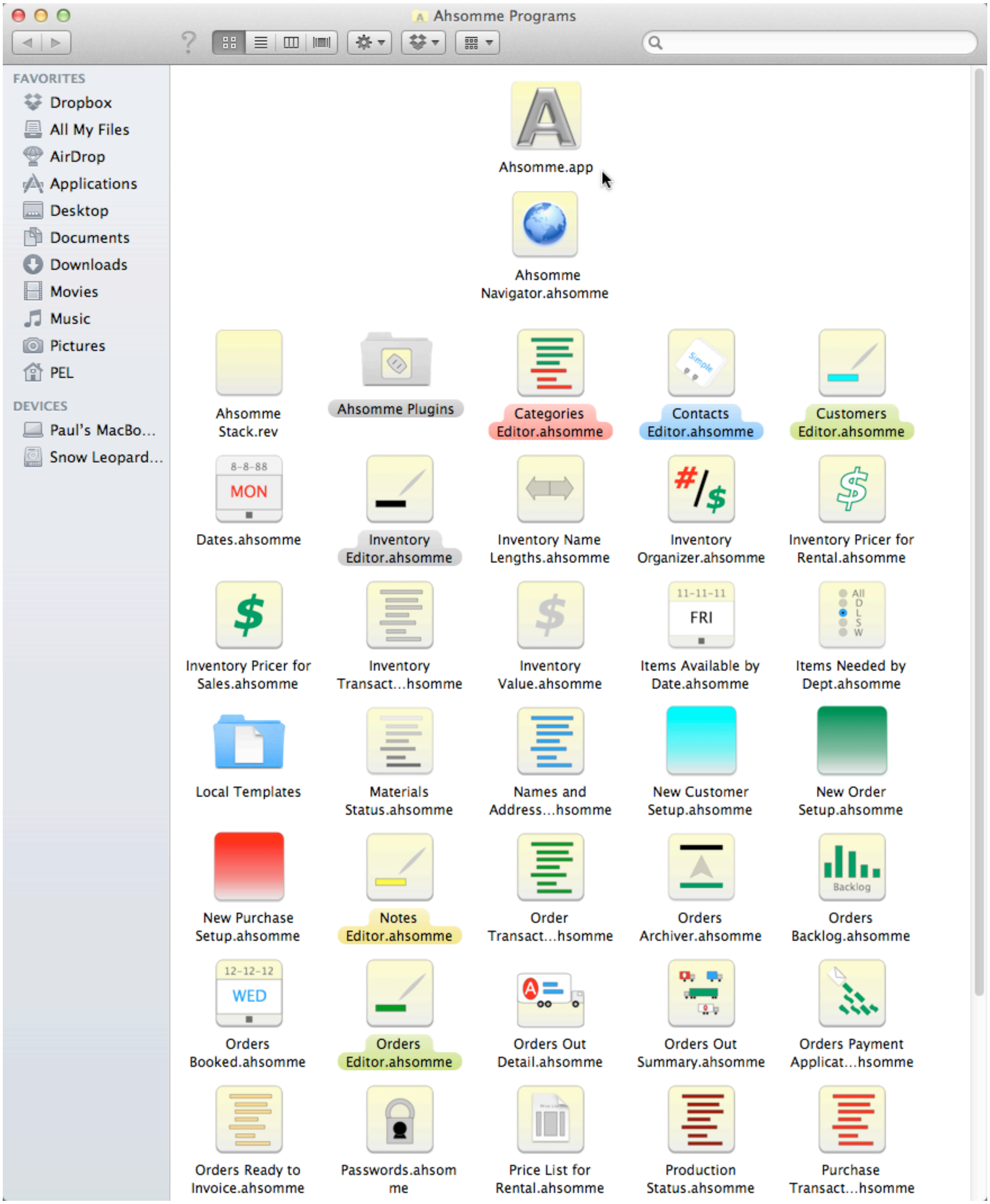
There are many different ways that files in a folder are displayed. On the next two pages we show some samples. The different views are controlled by the computer's operating system - not Ahsomme. There is usually some way to control the views from the screen, this is one example:



Note that the arrow is pointing to the list view. To the left of it is the icon for icon view. To the right of it is the icon for column view.

From whatever view you have, select Ahsomme - the icon on top of the list on the next page or fourth line down in the list on the following page.

Double click to open it.



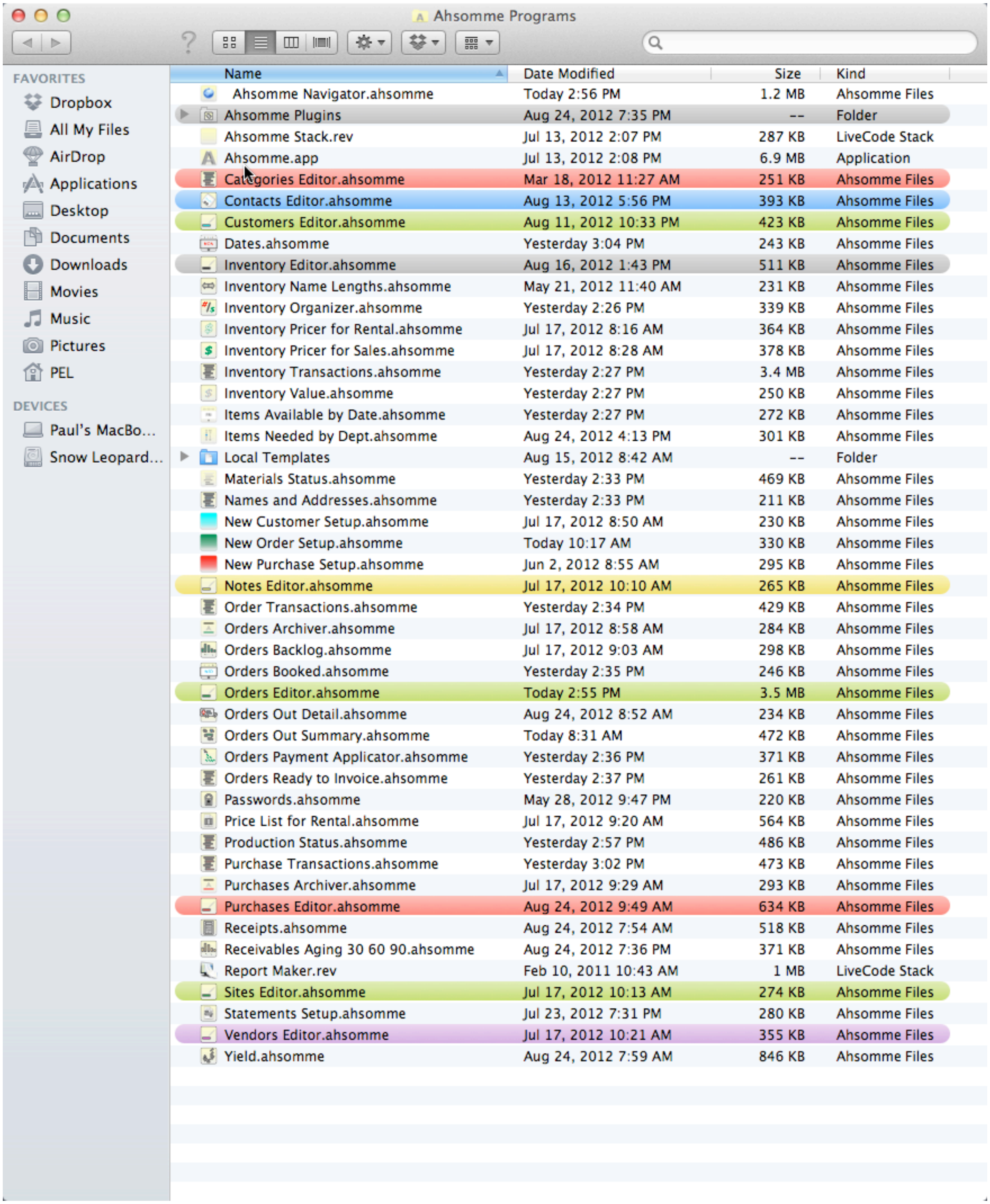
Ahsomme Programs

FAVORITES
- Dropbox
- All My Files
- AirDrop
- Applications
- Desktop
- Documents
- Downloads
- Movies
- Music
- Pictures
- PEL

DEVICES
- Paul's MacBo...
- Snow Leopard...

Ahsomme.app
Ahsomme Navigator.ahsomme

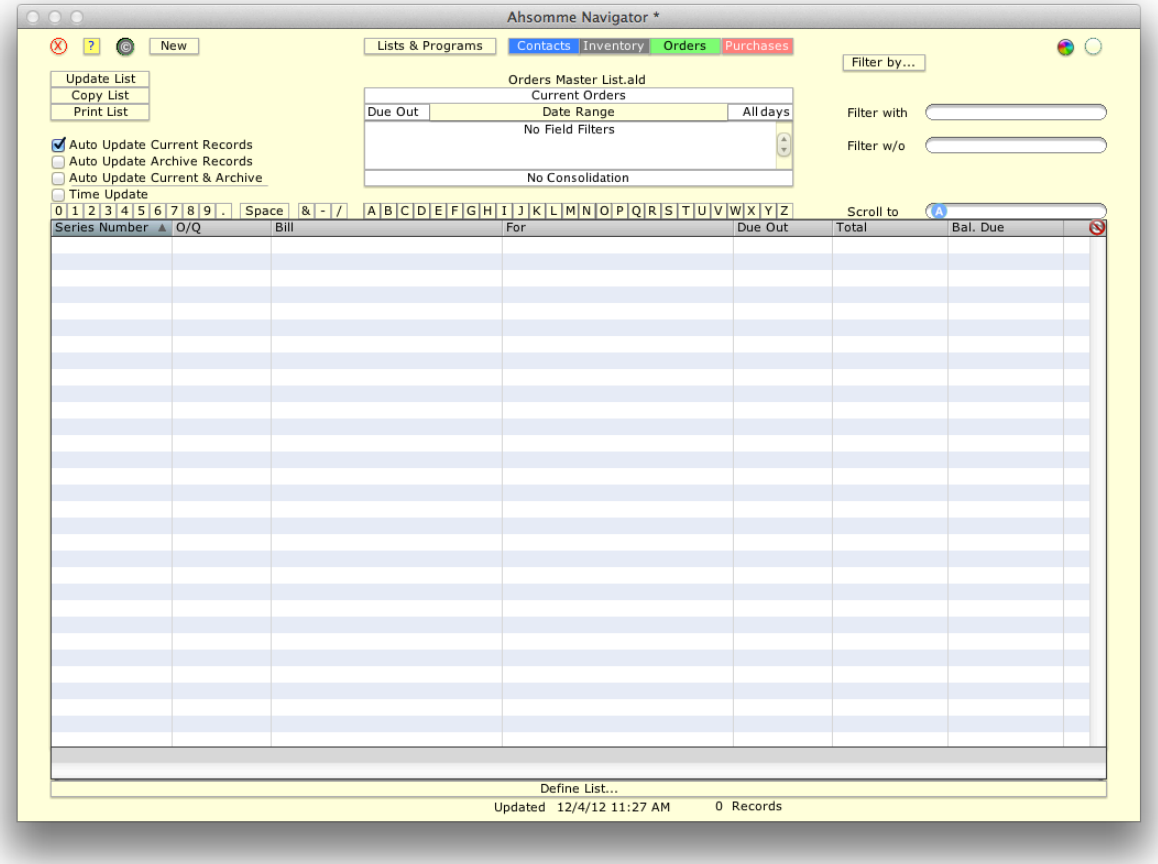
Ahsomme Stack.rev
Ahsomme Plugins
Categories Editor.ahsomme
Contacts Editor.ahsomme
Customers Editor.ahsomme
Dates.ahsomme
Inventory Editor.ahsomme
Inventory Name Lengths.ahsomme
Inventory Organizer.ahsomme
Inventory Pricer for Rental.ahsomme
Inventory Pricer for Sales.ahsomme
Inventory Transact...hsomme
Inventory Value.ahsomme
Items Available by Date.ahsomme
Items Needed by Dept.ahsomme
Local Templates
Materials Status.ahsomme
Names and Address...hsomme
New Customer Setup.ahsomme
New Order Setup.ahsomme
New Purchase Setup.ahsomme
Notes Editor.ahsomme
Order Transact...hsomme
Orders Archiver.ahsomme
Orders Backlog.ahsomme
Orders Booked.ahsomme
Orders Editor.ahsomme
Orders Out Detail.ahsomme
Orders Out Summary.ahsomme
Orders Payment Applicat...hsomme
Orders Ready to Invoice.ahsomme
Passwords.ahsomme
Price List for Rental.ahsomme
Production Status.ahsomme
Purchase Transact...hsomme



Name	Date Modified	Size	Kind
Ahsomme Navigator.ahsomme	Today 2:56 PM	1.2 MB	Ahsomme Files
Ahsomme Plugins	Aug 24, 2012 7:35 PM	--	Folder
Ahsomme Stack.rev	Jul 13, 2012 2:07 PM	287 KB	LiveCode Stack
Ahsomme.app	Jul 13, 2012 2:08 PM	6.9 MB	Application
Categories Editor.ahsomme	Mar 18, 2012 11:27 AM	251 KB	Ahsomme Files
Contacts Editor.ahsomme	Aug 13, 2012 5:56 PM	393 KB	Ahsomme Files
Customers Editor.ahsomme	Aug 11, 2012 10:33 PM	423 KB	Ahsomme Files
Dates.ahsomme	Yesterday 3:04 PM	243 KB	Ahsomme Files
Inventory Editor.ahsomme	Aug 16, 2012 1:43 PM	511 KB	Ahsomme Files
Inventory Name Lengths.ahsomme	May 21, 2012 11:40 AM	231 KB	Ahsomme Files
Inventory Organizer.ahsomme	Yesterday 2:26 PM	339 KB	Ahsomme Files
Inventory Pricer for Rental.ahsomme	Jul 17, 2012 8:16 AM	364 KB	Ahsomme Files
Inventory Pricer for Sales.ahsomme	Jul 17, 2012 8:28 AM	378 KB	Ahsomme Files
Inventory Transactions.ahsomme	Yesterday 2:27 PM	3.4 MB	Ahsomme Files
Inventory Value.ahsomme	Yesterday 2:27 PM	250 KB	Ahsomme Files
Items Available by Date.ahsomme	Yesterday 2:27 PM	272 KB	Ahsomme Files
Items Needed by Dept.ahsomme	Aug 24, 2012 4:13 PM	301 KB	Ahsomme Files
Local Templates	Aug 15, 2012 8:42 AM	--	Folder
Materials Status.ahsomme	Yesterday 2:33 PM	469 KB	Ahsomme Files
Names and Addresses.ahsomme	Yesterday 2:33 PM	211 KB	Ahsomme Files
New Customer Setup.ahsomme	Jul 17, 2012 8:50 AM	230 KB	Ahsomme Files
New Order Setup.ahsomme	Today 10:17 AM	330 KB	Ahsomme Files
New Purchase Setup.ahsomme	Jun 2, 2012 8:55 AM	295 KB	Ahsomme Files
Notes Editor.ahsomme	Jul 17, 2012 10:10 AM	265 KB	Ahsomme Files
Order Transactions.ahsomme	Yesterday 2:34 PM	429 KB	Ahsomme Files
Orders Archiver.ahsomme	Jul 17, 2012 8:58 AM	284 KB	Ahsomme Files
Orders Backlog.ahsomme	Jul 17, 2012 9:03 AM	298 KB	Ahsomme Files
Orders Booked.ahsomme	Yesterday 2:35 PM	246 KB	Ahsomme Files
Orders Editor.ahsomme	Today 2:55 PM	3.5 MB	Ahsomme Files
Orders Out Detail.ahsomme	Aug 24, 2012 8:52 AM	234 KB	Ahsomme Files
Orders Out Summary.ahsomme	Today 8:31 AM	472 KB	Ahsomme Files
Orders Payment Applicator.ahsomme	Yesterday 2:36 PM	371 KB	Ahsomme Files
Orders Ready to Invoice.ahsomme	Yesterday 2:37 PM	261 KB	Ahsomme Files
Passwords.ahsomme	May 28, 2012 9:47 PM	220 KB	Ahsomme Files
Price List for Rental.ahsomme	Jul 17, 2012 9:20 AM	564 KB	Ahsomme Files
Production Status.ahsomme	Yesterday 2:57 PM	486 KB	Ahsomme Files
Purchase Transactions.ahsomme	Yesterday 3:02 PM	473 KB	Ahsomme Files
Purchases Archiver.ahsomme	Jul 17, 2012 9:29 AM	293 KB	Ahsomme Files
Purchases Editor.ahsomme	Aug 24, 2012 9:49 AM	634 KB	Ahsomme Files
Receipts.ahsomme	Aug 24, 2012 7:54 AM	518 KB	Ahsomme Files
Receivables Aging 30 60 90.ahsomme	Aug 24, 2012 7:36 PM	371 KB	Ahsomme Files
Report Maker.rev	Feb 10, 2011 10:43 AM	1 MB	LiveCode Stack
Sites Editor.ahsomme	Jul 17, 2012 10:13 AM	274 KB	Ahsomme Files
Statements Setup.ahsomme	Jul 23, 2012 7:31 PM	280 KB	Ahsomme Files
Vendors Editor.ahsomme	Jul 17, 2012 10:21 AM	355 KB	Ahsomme Files
Yield.ahsomme	Aug 24, 2012 7:59 AM	846 KB	Ahsomme Files

In the screen shot below you see an empty Navigator.

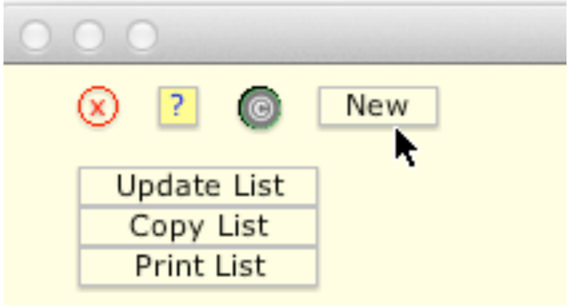
If your system has been used for a while there will be a list of orders, or some other records; ignore that for now. You can also ignore any other information that might be in your Navigator now.


Ahsomme Navigator *
New
Lists & Programs
Contacts
Inventory
Orders
Purchases
Filter by...
Update List
Copy List
Print List
Orders Master List.ald
Current Orders
Due Out
Date Range
All days
No Field Filters
No Consolidation
Filter with
Filter w/o
0 1 2 3 4 5 6 7 8 9 . Space & - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Scroll to
Series Number
O/Q
Bill
For
Due Out
Total
Bal. Due
Define List...

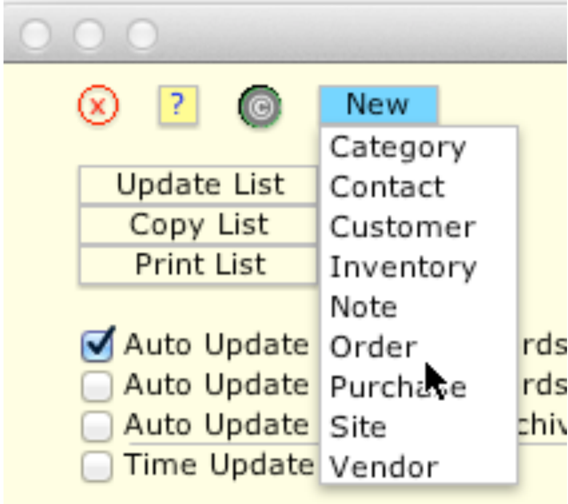
☑ Auto Update Current Records
☐ Auto Update Archive Records
☐ Auto Update Current & Archive
☐ Time Update

Updated 12/4/12 11:27 AM 0 Records

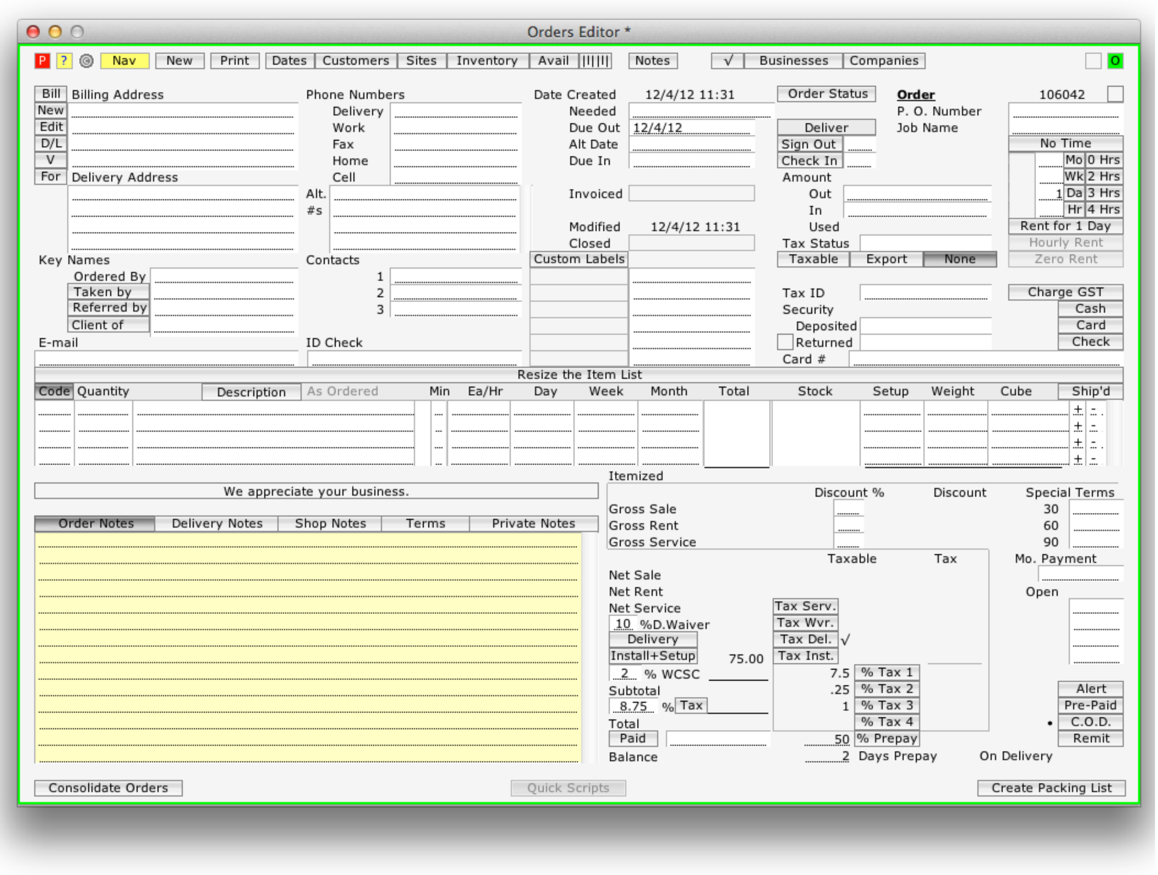
Click (once) on the “New” button at the top of the Navigator.


New
Update List
Copy List
Print List

You should see a drop down list similar to this:


New
Category
Contact
Customer
Inventory
Note
Order
Purchase
Site
Vendor
Update List
Copy List
Print List
☑ Auto Update
☐ Auto Update
☐ Auto Update
☐ Time Update

Click to select “Order”. The Orders Editor will open, ready for your first new order.


Orders Editor *

Date Created 12/4/12 11:31

Due Out 12/4/12

Modified 12/4/12 11:31

Order 106042

We appreciate your business.

Delivery 75.00

10 %D.Waiver

2 % WCSC

8.75 % Tax

7.5 % Tax 1

.25 % Tax 2

1 % Tax 3

50 % Prepay

2 Days Prepay

Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
Notes
Businesses
Companies
Bill
Edit
D/L
For
Billing Address
Delivery Address
Phone Numbers
Work
Fax
Home
Cell
Alt. #s
Needed
Alt Date
Due In
Invoiced
Closed
Order Status
Deliver
Sign Out
Check In
Amount
Out
In
Used
Tax Status
Taxable
Export
None
P. O. Number
Job Name
No Time
Rent for 1 Day
Hourly Rent
Zero Rent
Key Names
Ordered By
Taken by
Referred by
Client of
E-mail
Contacts
ID Check
Custom Labels
Tax ID
Security
Deposited
Returned
Card #
Charge GST
Cash
Card
Check
Resize the Item List
Code
Quantity
Description
As Ordered
Min
Ea/Hr
Day
Week
Month
Total
Stock
Setup
Weight
Cube
Ship'd
Itemized
Discount %
Discount
Special Terms
Gross Sale
Gross Rent
Gross Service
Taxable
Tax
Mo. Payment
Open
Net Sale
Net Rent
Net Service
Install+Setup
Subtotal
Total
Paid
Balance
Tax Serv.
Tax Wvr.
Tax Del.
Tax Inst.
% Tax 4
On Delivery
Alert
Pre-Paid
C.O.D.
Remit
Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes
Consolidate Orders
Quick Scripts
Create Packing List

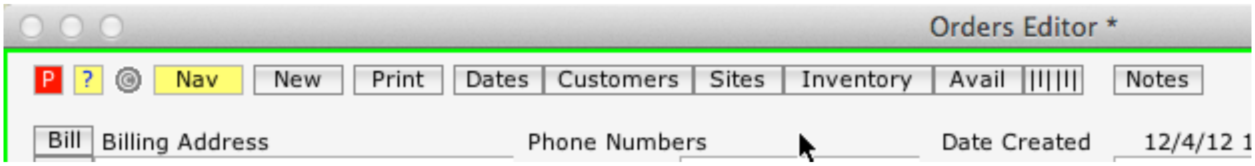
Don’t worry if the picture above looks a bit different than the Orders Editor on your screen; different businesses have different Orders Editors, and Editors’ appearance change over time.

Edit a New Order

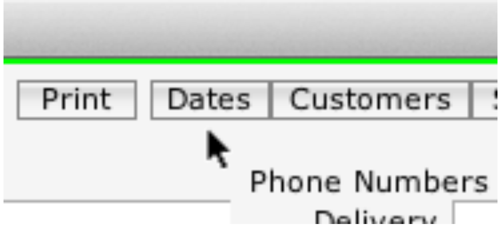
When you created the new order some of the fields were filled automatically. This will vary from business to business and company to company but there is usually a creation date for the order, a modified date, a due out date, a tax rate, and type of order (order, quote, void, etc.) All of these, except the creation date and the modified date can be changed as needed.

Additional information can be applied in any sequence. We will be adding dates, customer information, delivery/site information, inventory information and notes - but you could add things in the opposite order if you wished.

All of this information is available in lists, displayed by clicking on buttons at the top of the screen:


Orders Editor *
P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
|||||
Notes
Bill
Billing Address
Phone Numbers
Date Created
12/4/12 1

Click on the Dates button:

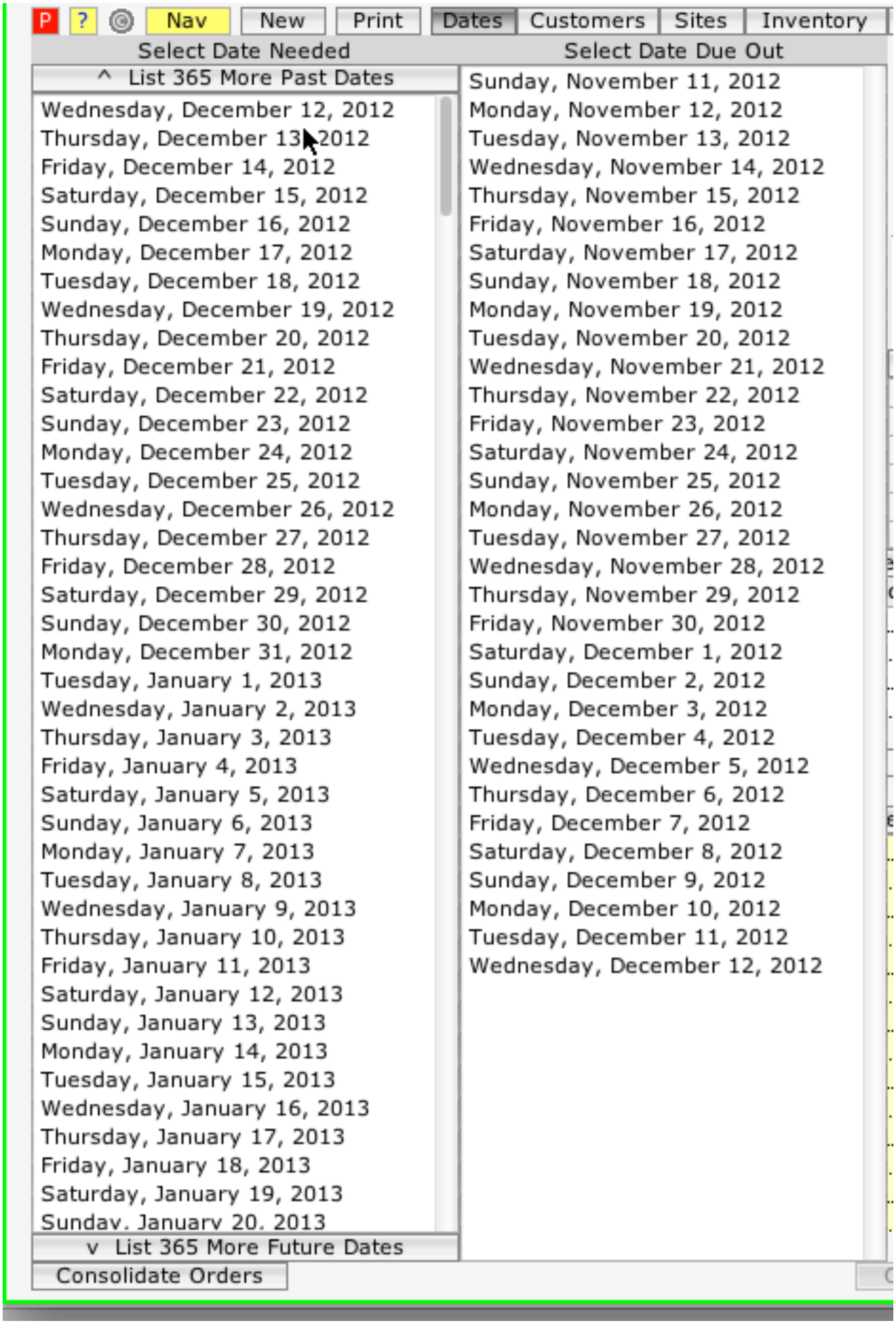

Print
Dates
Customers
Phone Numbers
Delivery

The dates listed depend on the date the order is needed, for this example we will use a needed date of 12/12/12.

Note: while “12/12/12” is written the same way in date systems used by most countries, some other dates are not; “12/7/12” may be December 7th or July 12th - all dates in the Ahsomme system are based on the format of your local date - for this Guidebook we will be using U. S. dates for convenience and consistency.

The dates list that is displayed depends on the type of business.

The first example, on the next page, is the dates list for Sales, the second example, on the facing page, is for Rental.

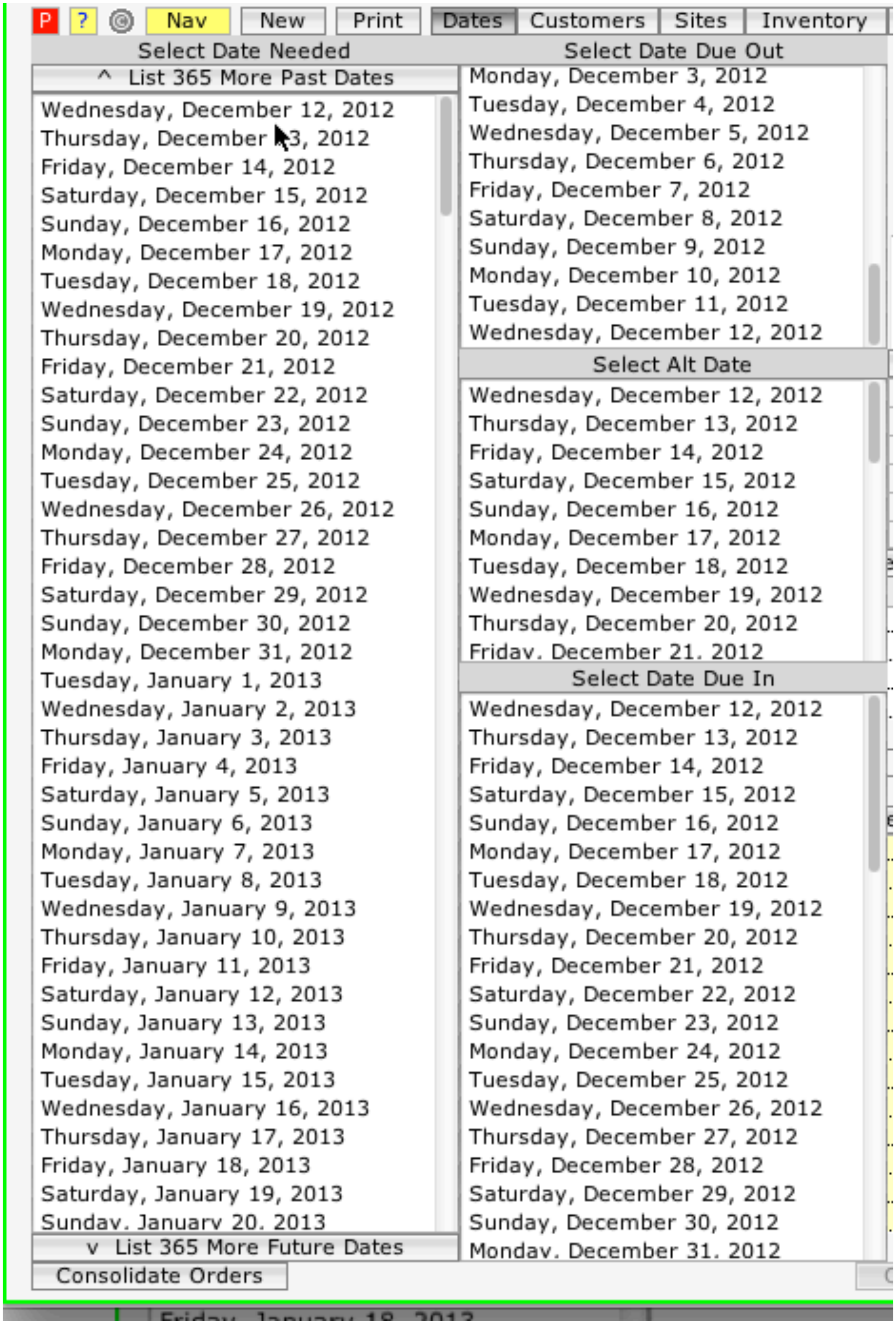


Select Date Needed

Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012
Sunday, December 16, 2012
Monday, December 17, 2012
Tuesday, December 18, 2012
Wednesday, December 19, 2012
Thursday, December 20, 2012
Friday, December 21, 2012
Saturday, December 22, 2012
Sunday, December 23, 2012
Monday, December 24, 2012
Tuesday, December 25, 2012
Wednesday, December 26, 2012
Thursday, December 27, 2012
Friday, December 28, 2012
Saturday, December 29, 2012
Sunday, December 30, 2012
Monday, December 31, 2012
Tuesday, January 1, 2013
Wednesday, January 2, 2013
Thursday, January 3, 2013
Friday, January 4, 2013
Saturday, January 5, 2013
Sunday, January 6, 2013
Monday, January 7, 2013
Tuesday, January 8, 2013
Wednesday, January 9, 2013
Thursday, January 10, 2013
Friday, January 11, 2013
Saturday, January 12, 2013
Sunday, January 13, 2013
Monday, January 14, 2013
Tuesday, January 15, 2013
Wednesday, January 16, 2013
Thursday, January 17, 2013
Friday, January 18, 2013
Saturday, January 19, 2013
Sunday, January 20, 2013

Select Date Due Out

Sunday, November 11, 2012
Monday, November 12, 2012
Tuesday, November 13, 2012
Wednesday, November 14, 2012
Thursday, November 15, 2012
Friday, November 16, 2012
Saturday, November 17, 2012
Sunday, November 18, 2012
Monday, November 19, 2012
Tuesday, November 20, 2012
Wednesday, November 21, 2012
Thursday, November 22, 2012
Friday, November 23, 2012
Saturday, November 24, 2012
Sunday, November 25, 2012
Monday, November 26, 2012
Tuesday, November 27, 2012
Wednesday, November 28, 2012
Thursday, November 29, 2012
Friday, November 30, 2012
Saturday, December 1, 2012
Sunday, December 2, 2012
Monday, December 3, 2012
Tuesday, December 4, 2012
Wednesday, December 5, 2012
Thursday, December 6, 2012
Friday, December 7, 2012
Saturday, December 8, 2012
Sunday, December 9, 2012
Monday, December 10, 2012
Tuesday, December 11, 2012
Wednesday, December 12, 2012



Select Date Needed

Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012
Sunday, December 16, 2012
Monday, December 17, 2012
Tuesday, December 18, 2012
Wednesday, December 19, 2012
Thursday, December 20, 2012
Friday, December 21, 2012
Saturday, December 22, 2012
Sunday, December 23, 2012
Monday, December 24, 2012
Tuesday, December 25, 2012
Wednesday, December 26, 2012
Thursday, December 27, 2012
Friday, December 28, 2012
Saturday, December 29, 2012
Sunday, December 30, 2012
Monday, December 31, 2012
Tuesday, January 1, 2013
Wednesday, January 2, 2013
Thursday, January 3, 2013
Friday, January 4, 2013
Saturday, January 5, 2013
Sunday, January 6, 2013
Monday, January 7, 2013
Tuesday, January 8, 2013
Wednesday, January 9, 2013
Thursday, January 10, 2013
Friday, January 11, 2013
Saturday, January 12, 2013
Sunday, January 13, 2013
Monday, January 14, 2013
Tuesday, January 15, 2013
Wednesday, January 16, 2013
Thursday, January 17, 2013
Friday, January 18, 2013
Saturday, January 19, 2013
Sunday, January 20, 2013

Select Date Due Out

Monday, December 3, 2012
Tuesday, December 4, 2012
Wednesday, December 5, 2012
Thursday, December 6, 2012
Friday, December 7, 2012
Saturday, December 8, 2012
Sunday, December 9, 2012
Monday, December 10, 2012
Tuesday, December 11, 2012
Wednesday, December 12, 2012

Select Alt Date

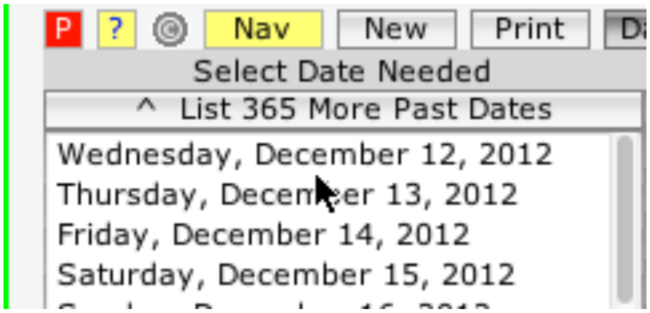
Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012
Sunday, December 16, 2012
Monday, December 17, 2012
Tuesday, December 18, 2012
Wednesday, December 19, 2012
Thursday, December 20, 2012
Friday, December 21, 2012

Select Date Due In

Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012
Sunday, December 16, 2012
Monday, December 17, 2012
Tuesday, December 18, 2012
Wednesday, December 19, 2012
Thursday, December 20, 2012
Friday, December 21, 2012
Saturday, December 22, 2012
Sunday, December 23, 2012
Monday, December 24, 2012
Tuesday, December 25, 2012
Wednesday, December 26, 2012
Thursday, December 27, 2012
Friday, December 28, 2012
Saturday, December 29, 2012
Sunday, December 30, 2012
Monday, December 31, 2012

Friday, January 18, 2013

Notice that each list started with a needed date of "12/12/12":



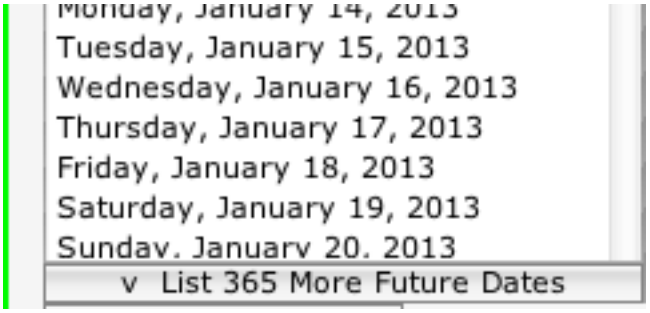
Select Date Needed

^ List 365 More Past Dates

Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012

If there was no needed date on the order, the list would have started from today.

There are buttons at the top and bottom of this list to extend it 365 days into the past or future:



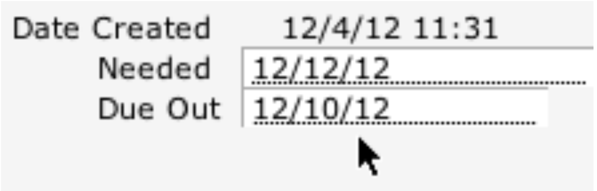
Monday, January 14, 2013
Tuesday, January 15, 2013
Wednesday, January 16, 2013
Thursday, January 17, 2013
Friday, January 18, 2013
Saturday, January 19, 2013
Sunday, January 20, 2013

v List 365 More Future Dates

If you select a different date from the list on the left it will rebuild the list(s) on the right automatically. For instance, the order must go out on or before the date it is needed.

Note: most Ahsomme date lists go to prior dates upward toward the top and go downward toward future dates at the bottom. Where appropriate, some lists open centered on today.

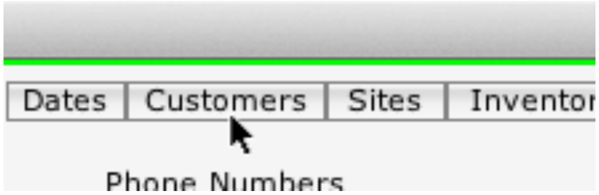
Select the date needed for your sample order, then the due out date (then the alt date, and due in date - if doing a rental). (Alt. dates are used by some companies for "rain dates" for events or alternative shipping dates.) As you select the dates, they are entered on the order:



Date Created 12/4/12 11:31
Needed 12/12/12
Due Out 12/10/12

You can enter dates directly but it is usually faster (with practice) and more accurate to enter them via the dates list.

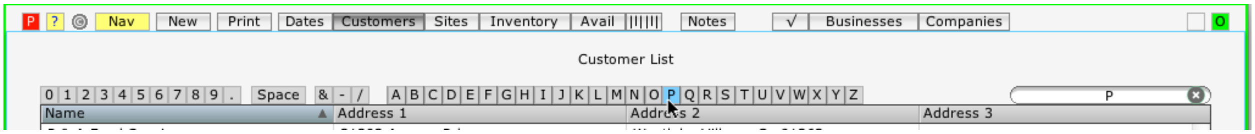
Time to add some customer information to the sample order.


Dates
Customers
Sites
Inventor
Phone Numbers

Click the next tab button to view the customers list, it is to the right of the Dates button:

The customers list shows four columns, one for each line of the customers address.

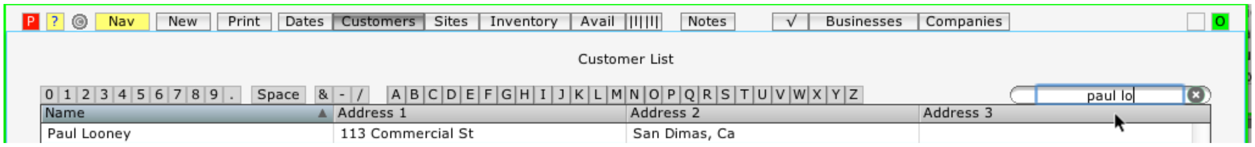
Clicking on numbers or letters in the alpha scroll bar will scroll the list to that name, here we have clicked on “P” on the alpha scroll bar and the list scrolled to the first customer name that begins with a P:


P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
|||||
Notes
√
Businesses
Companies
O
Customer List
0 1 2 3 4 5 6 7 8 9 .
Space
& - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

P

Name	Address 1	Address 2	Address 3

As we click more characters, the list continues to scroll, here we have enough characters to bring up my name in the list:

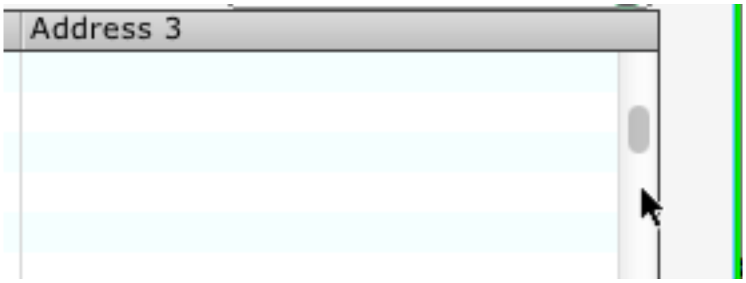

P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
|||||
Notes
√
Businesses
Companies
O
Customer List
0 1 2 3 4 5 6 7 8 9 .
Space
& - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

paul lo

Name	Address 1	Address 2	Address 3
Paul Looney	113 Commercial St	San Dimas, Ca	

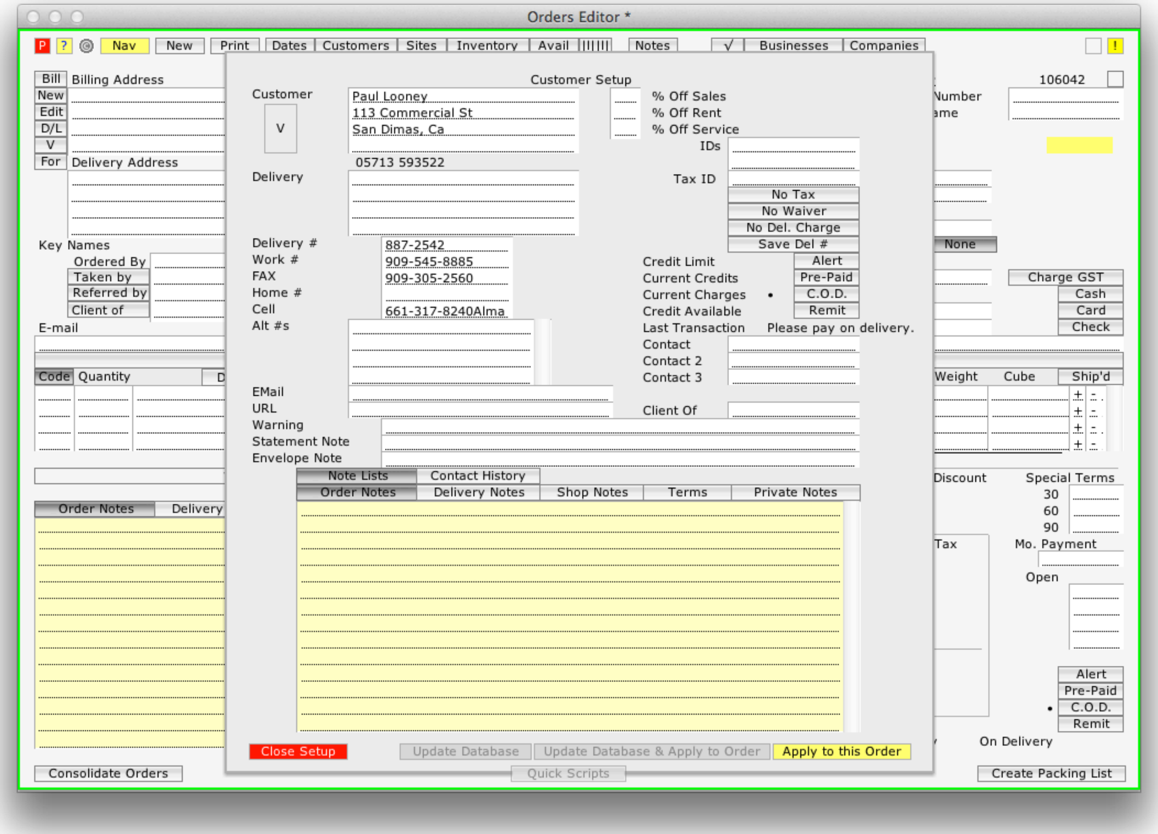
You can also type directly into the field on the right side of the alpha scroll bar. Use either capitals or lower case, it makes no difference.

You can scroll the customers list manually, by dragging the white “thumb” on the vertical scroll bar:



You can scroll with the scroll wheel on the mouse - if it has one.

Click on a name in the list to preview that customer information:


Orders Editor *
P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
Notes
Businesses
Companies
Customer Setup
Close Setup
Update Database
Update Database & Apply to Order
Apply to this Order
Quick Scripts
Consolidate Orders
Create Packing List

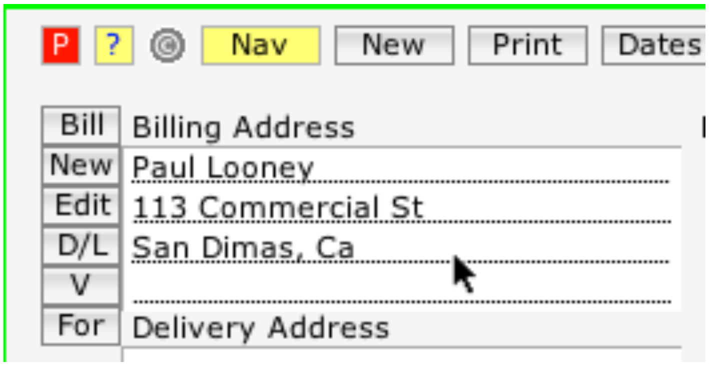
Customer
Paul Looney
113 Commercial St
San Dimas, Ca
05713 593522

Delivery # 887-2542
Work # 909-545-8885
FAX 909-305-2560
Cell 661-317-8240Alma

Last Transaction Please pay on delivery.

Number 106042

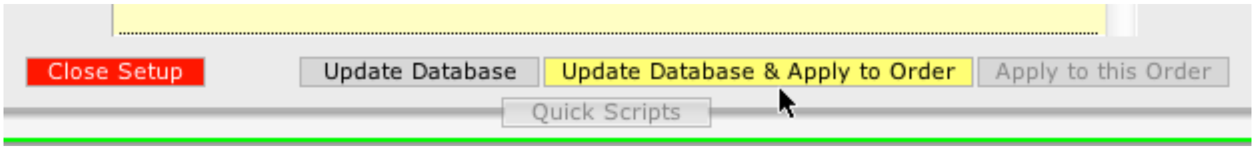
If everything is correct, you can click on the yellow Apply to this Order button at the bottom, right of the preview window, to put the customer information into the Bill field:


P
?
Nav
New
Print
Dates
Bill
New
Edit
D/L
V
For
Delivery Address

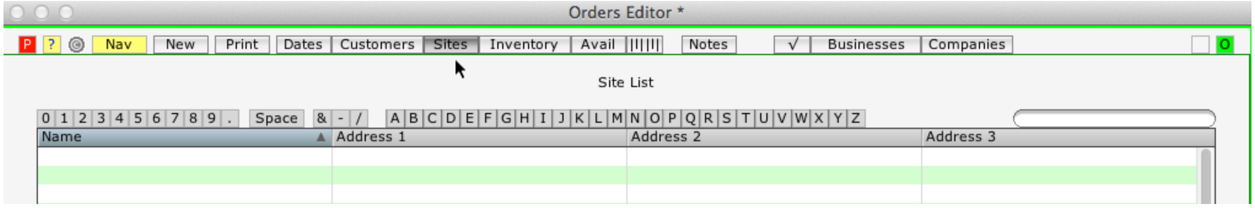
Billing Address
Paul Looney
113 Commercial St
San Dimas, Ca

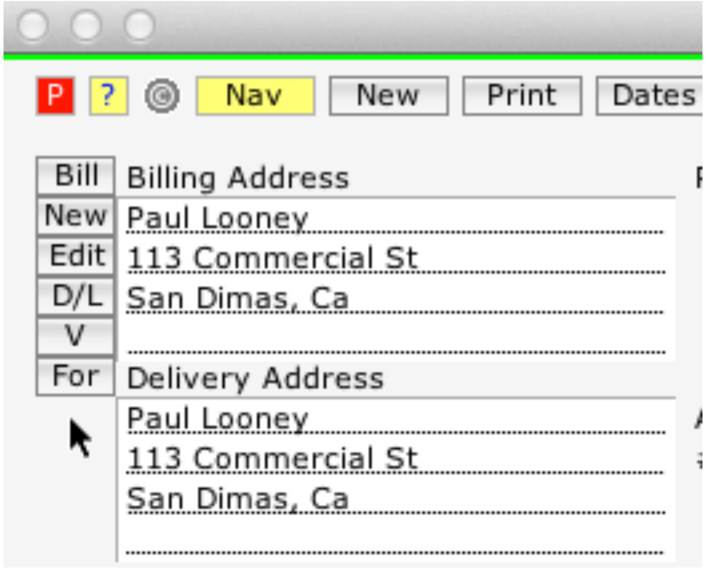
If the information was not correct (name change, address change, typo, etc.), it can be edited in the preview window.

Any changes to the information in the preview window give you the option of applying those changes to the order and updating the main customers database:


Close Setup
Update Database
Update Database & Apply to Order
Apply to this Order
Quick Scripts

The Sites tab button works the same as Customers, but it puts the site/ delivery information into the For field.


Orders Editor *
P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
Notes
√
Businesses
Companies
Site List
0 1 2 3 4 5 6 7 8 9 .
Space
& - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Name
Address 1
Address 2
Address 3


P
?
Nav
New
Print
Dates
Bill
New
Edit
D/L
V
For

Billing Address
Paul Looney
113 Commercial St
San Dimas, Ca

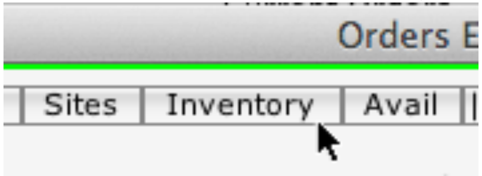
Delivery Address
Paul Looney
113 Commercial St
San Dimas, Ca

Note, if the site and the billing address are the same, just enter the billing address for the customer, as described above, then click the little "V" in this picture (it is just above the For button on the screen), that will copy the Bill information down to the For field.

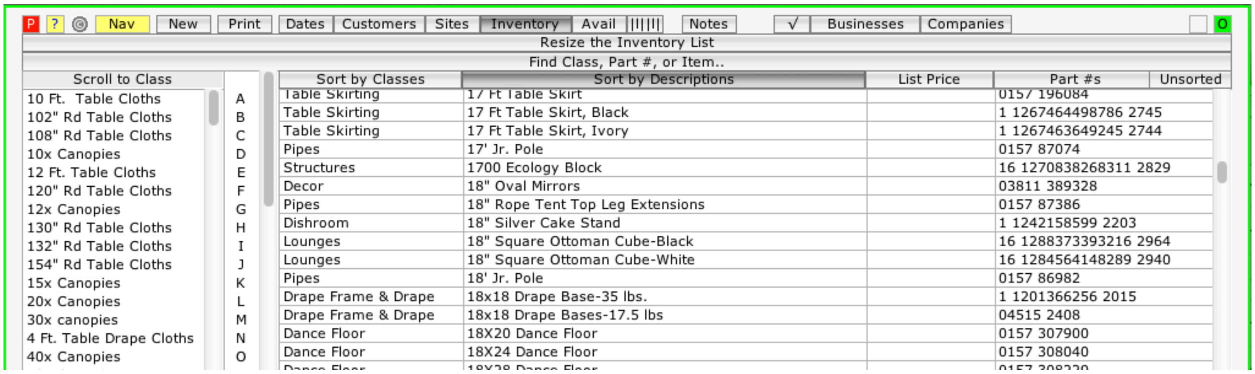
We will talk about the other buttons when we come back to this order later.

We will also talk about setting up new customers and sites a little later in this Guidebook. Meanwhile, we need to put some inventory items on our sample order.

Click on the Inventory tab:


Orders E
Sites
Inventory
Avail

This will open the inventory list:


P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
|||||||
Notes
√
Businesses
Companies
O
Resize the Inventory List
Find Class, Part #, or Item..
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O

Scroll to Class

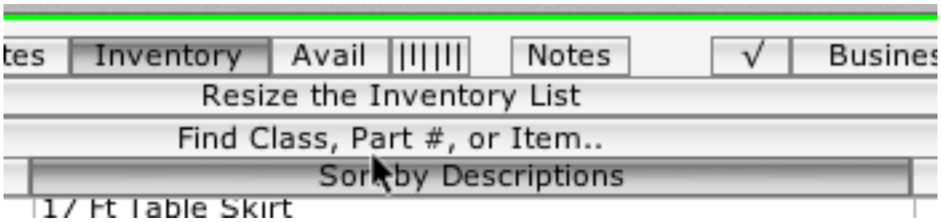
10 Ft. Table Cloths
102" Rd Table Cloths
108" Rd Table Cloths
10x Canopies
12 Ft. Table Cloths
120" Rd Table Cloths
12x Canopies
130" Rd Table Cloths
132" Rd Table Cloths
154" Rd Table Cloths
15x Canopies
20x Canopies
30x canopies
4 Ft. Table Drape Cloths
40x Canopies

Sort by Classes	Sort by Descriptions	List Price	Part #s	Unsorted
Table Skirting	17 Ft Table Skirt		0157 196084	
Table Skirting	17 Ft Table Skirt, Black		1 1267464498786 2745	
Table Skirting	17 Ft Table Skirt, Ivory		1 1267463649245 2744	
Pipes	17' Jr. Pole		0157 87074	
Structures	1700 Ecology Block		16 1270838268311 2829	
Decor	18" Oval Mirrors		03811 389328	
Pipes	18" Rope Tent Top Leg Extensions		0157 87386	
Dishroom	18" Silver Cake Stand		1 1242158599 2203	
Lounges	18" Square Ottoman Cube-Black		16 1288373393216 2964	
Lounges	18" Square Ottoman Cube-White		16 1284564148289 2940	
Pipes	18' Jr. Pole		0157 86982	
Drape Frame & Drape	18x18 Drape Base-35 lbs.		1 1201366256 2015	
Drape Frame & Drape	18x18 Drape Bases-17.5 lbs		04515 2408	
Dance Floor	18X20 Dance Floor		0157 307900	
Dance Floor	18X24 Dance Floor		0157 308040	

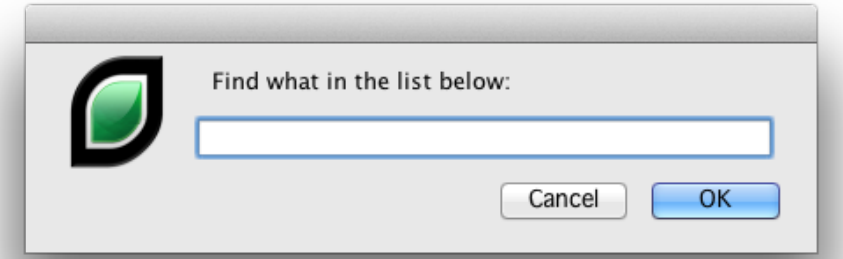
Again, don't worry if this looks different than your inventory list. In some 25 years of setting up business systems (many in the same industry), I've only twice found two companies with the same inventory in the same order (found out that one "borrowed" it from the other).

There are several ways to find inventory items to select for the order.

The least used is the Find button at the top of the list:

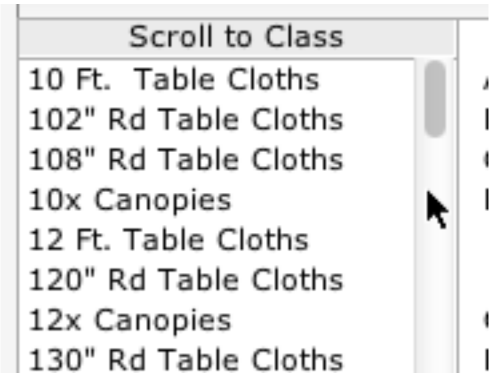

tes
Inventory
Avail
|||||||
Notes
√
Busines
Resize the Inventory List
Find Class, Part #, or Item..
Sort by Descriptions
17 Ft Table Skirt

Clicking it displays a dialog box:


Find what in the list below:

Type the name of the item and click OK. Spelling is important. Capitals and lower case letters both work. If it doesn't find the item and you know you spelled it right, it may be spelled wrong in the inventory. That is one of the reasons why it is better to find items with the list.

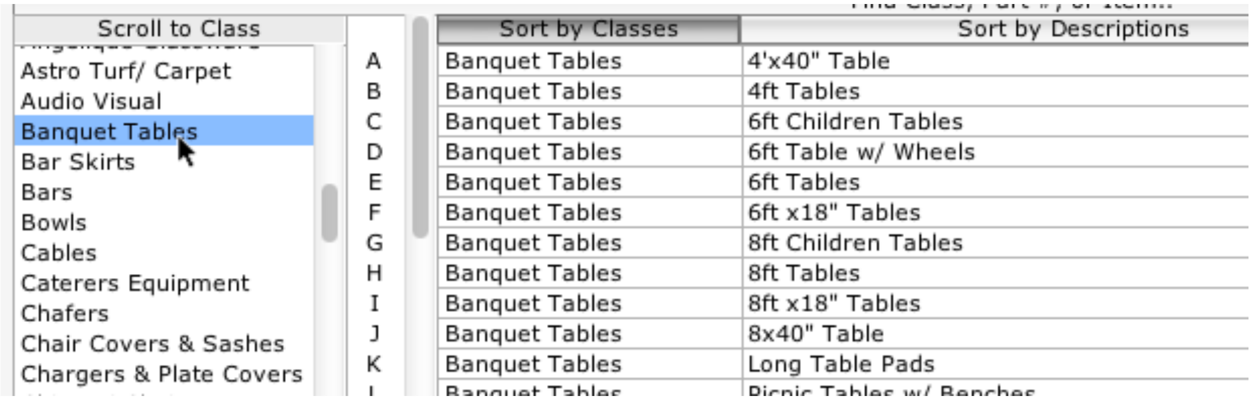
More helpful is the class list:


Scroll to Class
10 Ft. Table Cloths
102" Rd Table Cloths
108" Rd Table Cloths
10x Canopies
12 Ft. Table Cloths
120" Rd Table Cloths
12x Canopies
130" Rd Table Cloths

The easiest way to get to a class in this list is usually by dragging the “thumb” in the vertical scroll bar (just above the arrow pointer in the picture at left).

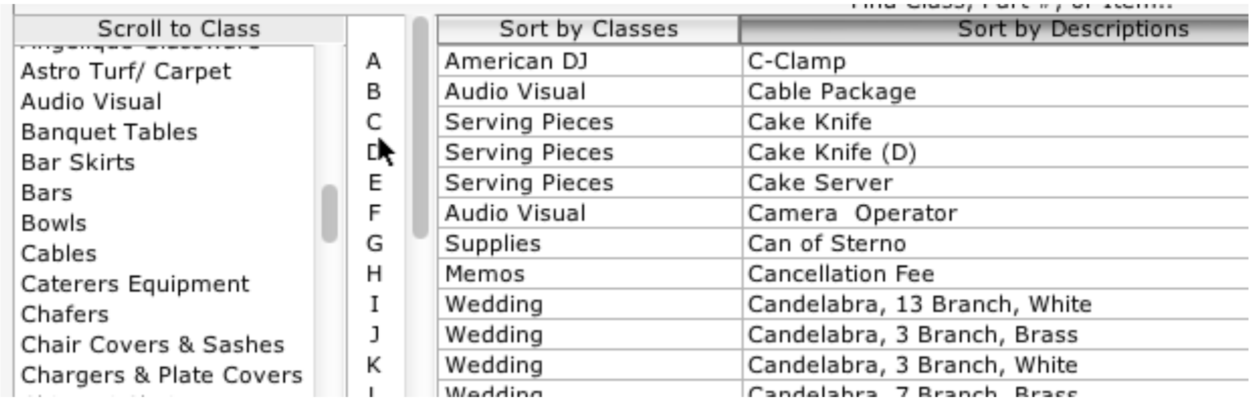
A second way of getting to a particular class is to click on the Scroll to Class button at the top of this picture and type in the name of the class.

Classes are like a Table of Contents for the inventory. You might have a class called tables, clicking on it would scroll the main list to the tables:


Scroll to Class
Astro Turf/ Carpet
Audio Visual
Banquet Tables
Bar Skirts
Bars
Bowls
Cables
Caterers Equipment
Chafers
Chair Covers & Sashes
Chargers & Plate Covers
A
B
C
D
E
F
G
H
I
J
K

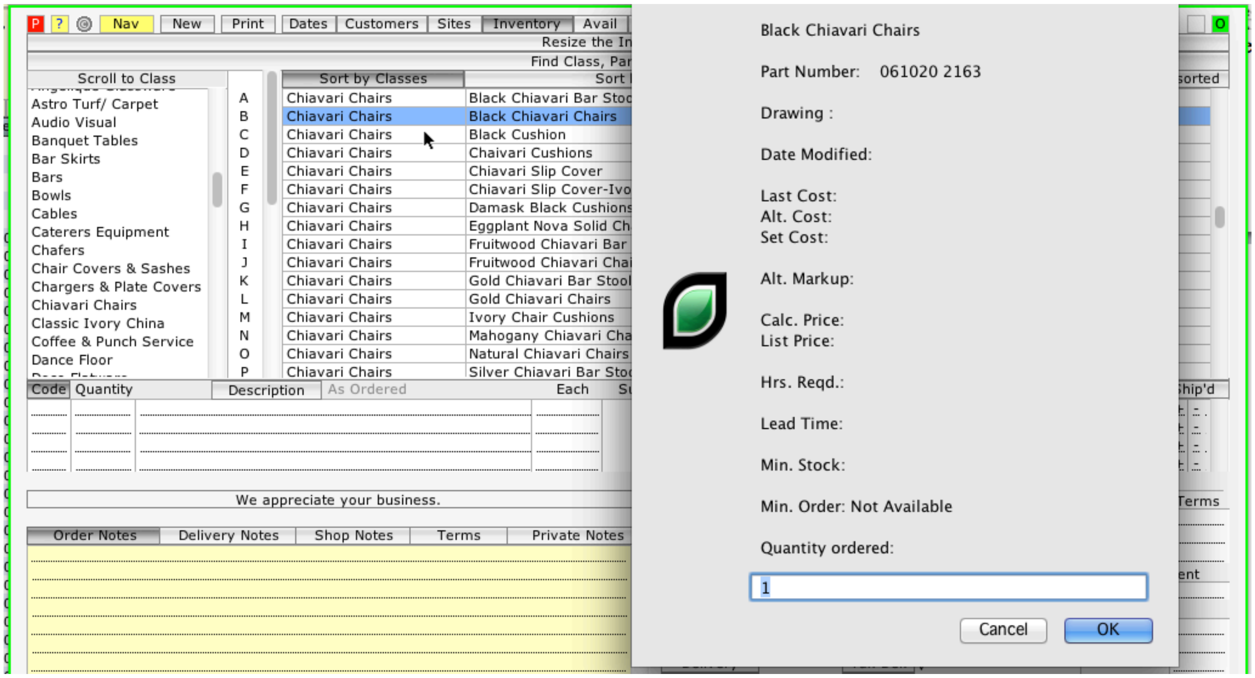
Sort by Classes	Sort by Descriptions
Banquet Tables	4'x40" Table
Banquet Tables	4ft Tables
Banquet Tables	6ft Children Tables
Banquet Tables	6ft Table w/ Wheels
Banquet Tables	6ft Tables
Banquet Tables	6ft x18" Tables
Banquet Tables	8ft Children Tables
Banquet Tables	8ft Tables
Banquet Tables	8ft x18" Tables
Banquet Tables	8x40" Table
Banquet Tables	Long Table Pads
Banquet Tables	Picnic Tables w/ Benches

Clicking on the alpha list (to the right of the class list) will sort the main list alphabetically and scroll it to the first letter that matched the letter we clicked:


Scroll to Class
Astro Turf/ Carpet
Audio Visual
Banquet Tables
Bar Skirts
Bars
Bowls
Cables
Caterers Equipment
Chafers
Chair Covers & Sashes
Chargers & Plate Covers
A
B
C
D
E
F
G
H
I
J
K

Sort by Classes	Sort by Descriptions
American DJ	C-Clamp
Audio Visual	Cable Package
Serving Pieces	Cake Knife
Serving Pieces	Cake Knife (D)
Serving Pieces	Cake Server
Audio Visual	Camera Operator
Supplies	Can of Sterno
Memos	Cancellation Fee
Wedding	Candelabra, 13 Branch, White
Wedding	Candelabra, 3 Branch, Brass
Wedding	Candelabra, 3 Branch, White
Wedding	Candelabra, 7 Branch, Brass

Clicking on an item in the main list brings up a dialog for entering the quantity to be ordered:


P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
Resize the In
Find Class, Par
Scroll to Class
Astro Turf/ Carpet
Audio Visual
Banquet Tables
Bar Skirts
Bars
Bowls
Cables
Caterers Equipment
Chafers
Chair Covers & Sashes
Chargers & Plate Covers
Chiavari Chairs
Classic Ivory China
Coffee & Punch Service
Dance Floor
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Code
Quantity
Description
As Ordered
Each
We appreciate your business.
Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes
sorted
hip'd
Terms
ent

Sort by Classes	Sort
Chiavari Chairs	Black Chiavari Bar Stoo
Chiavari Chairs	Black Chiavari Chairs
Chiavari Chairs	Black Cushion
Chiavari Chairs	Chaivari Cushions
Chiavari Chairs	Chiavari Slip Cover
Chiavari Chairs	Chiavari Slip Cover-Ivo
Chiavari Chairs	Damask Black Cushions
Chiavari Chairs	Eggplant Nova Solid Ch
Chiavari Chairs	Fruitwood Chiavari Bar
Chiavari Chairs	Fruitwood Chiavari Chai
Chiavari Chairs	Gold Chiavari Bar Stool
Chiavari Chairs	Gold Chiavari Chairs
Chiavari Chairs	Ivory Chair Cushions
Chiavari Chairs	Mahogany Chiavari Cha
Chiavari Chairs	Natural Chiavari Chairs
Chiavari Chairs	Silver Chiavari Bar Stoo

Black Chiavari Chairs

Part Number: 061020 2163

Drawing :

Date Modified:

Last Cost:
Alt. Cost:
Set Cost:

Alt. Markup:

Calc. Price:
List Price:

Hrs. Reqd.:

Lead Time:

Min. Stock:

Min. Order: Not Available

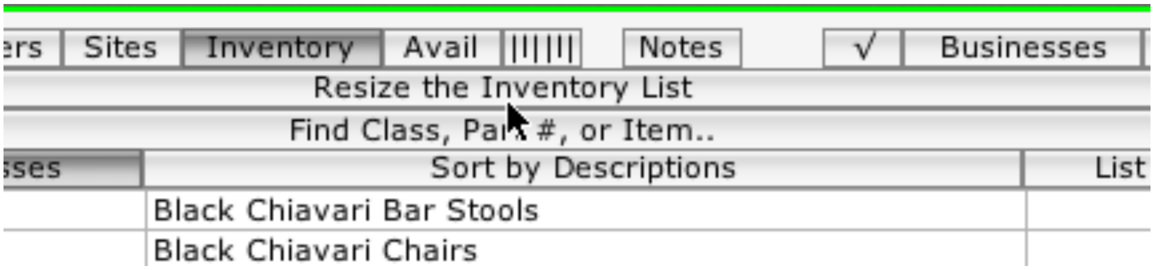
Quantity ordered:

1

We clicked Black Chiavari Chair. The dialog opened with quantity: 1.

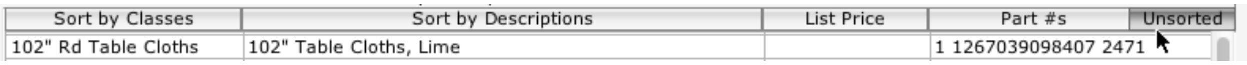
Select some items, enter some quantities.

If the inventory list is size small you can see the items go on the order as you select them. You can resize the inventory list by clicking on the Resize button:


ers
Sites
Inventory
Avail
|||||
Notes
√
Businesses
Resize the Inventory List
Find Class, Part #, or Item..
sses
Sort by Descriptions
List
Black Chiavari Bar Stools
Black Chiavari Chairs

Before leaving this inventory discussion, we need to talk about sorting a bit more. Most of the sort choices are obvious, clicking on a class in the class list sorts the main inventory by class (and hilights the Sort by Class tab), clicking one of the alphas sort the list alphabetically (and hilights the Sort by Descriptions tab).

The one that is not obvious is Unsorted:

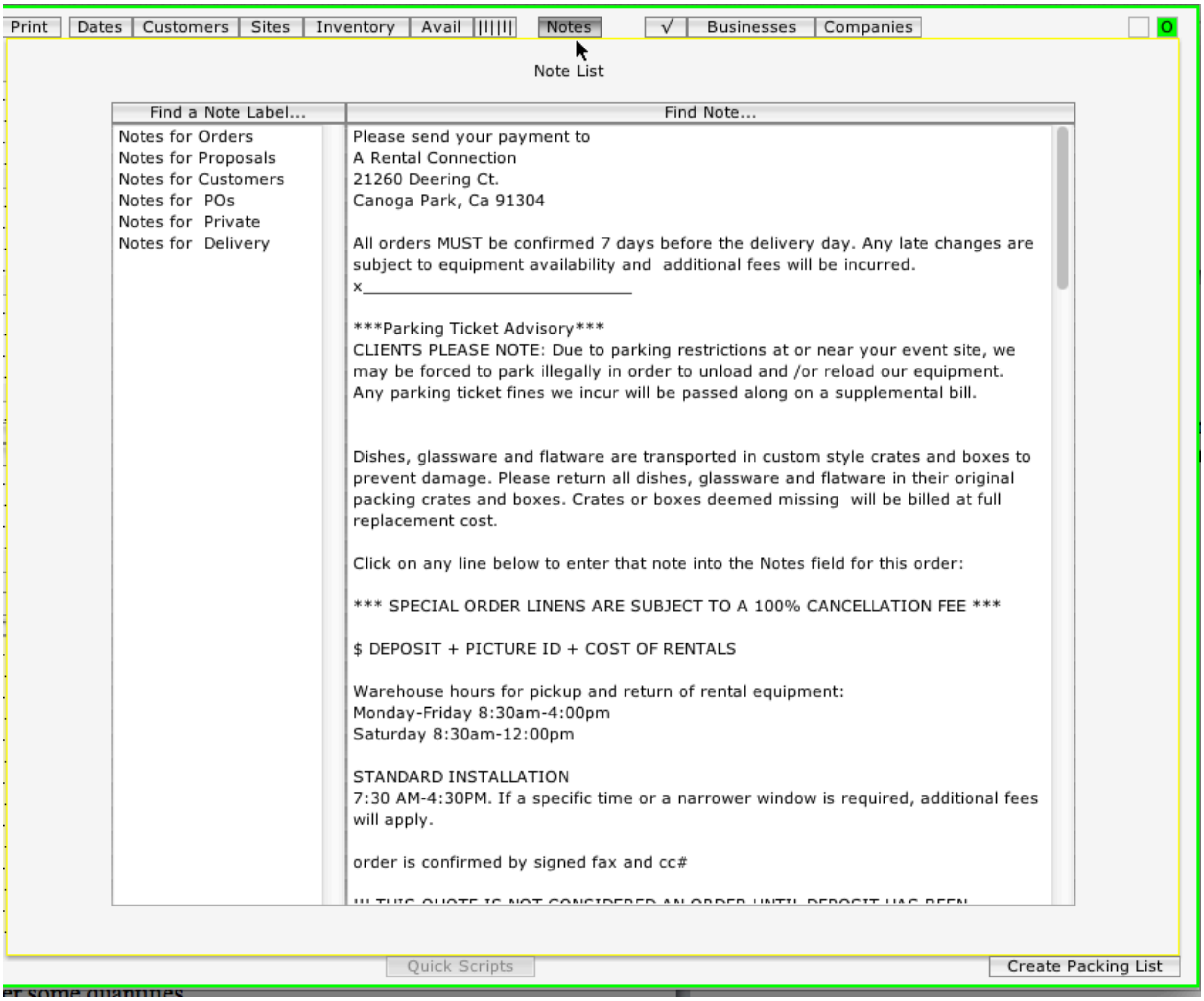


Sort by Classes	Sort by Descriptions	List Price	Part #s	Unsorted
102" Rd Table Cloths	102" Table Cloths, Lime		1 1267039098407 2471	

This will sort the list into the same order in which it is stored in the database.

An administrative program, called the Inventory Organizer, helps you sort your inventory into any order you want.

The final “Quick Start” item in this chapter is notes - and you know almost all you need to know about them already. As you might suppose, you begin by clicking on the Notes button tab which will bring up the notes list:


Print
Dates
Customers
Sites
Inventory
Avail
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Notes
√
Businesses
Companies
O
Note List
Find a Note Label...
Find Note...
Notes for Orders
Notes for Proposals
Notes for Customers
Notes for POs
Notes for Private
Notes for Delivery
Quick Scripts
Create Packing List

Please send your payment to
A Rental Connection
21260 Deering Ct.
Canoga Park, Ca 91304

All orders MUST be confirmed 7 days before the delivery day. Any late changes are subject to equipment availability and additional fees will be incurred.
x___________________________

Parking Ticket Advisory
CLIENTS PLEASE NOTE: Due to parking restrictions at or near your event site, we may be forced to park illegally in order to unload and /or reload our equipment. Any parking ticket fines we incur will be passed along on a supplemental bill.

Dishes, glassware and flatware are transported in custom style crates and boxes to prevent damage. Please return all dishes, glassware and flatware in their original packing crates and boxes. Crates or boxes deemed missing will be billed at full replacement cost.

Click on any line below to enter that note into the Notes field for this order:

*** SPECIAL ORDER LINENS ARE SUBJECT TO A 100% CANCELLATION FEE ***

$ DEPOSIT + PICTURE ID + COST OF RENTALS

Warehouse hours for pickup and return of rental equipment:
Monday-Friday 8:30am-4:00pm
Saturday 8:30am-12:00pm

STANDARD INSTALLATION
7:30 AM-4:30PM. If a specific time or a narrower window is required, additional fees will apply.

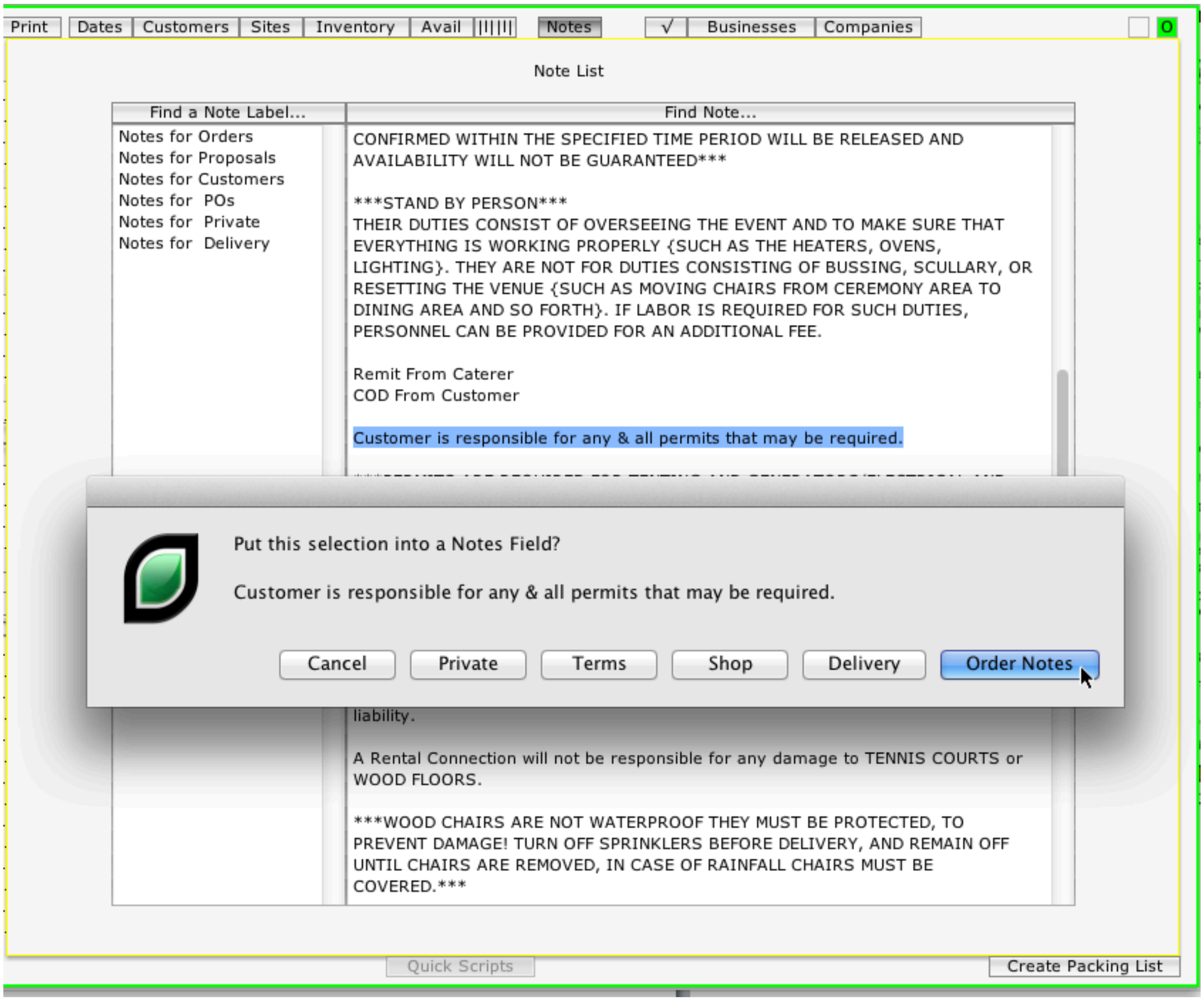
order is confirmed by signed fax and cc#

!!! THIS QUOTE IS NOT CONSIDERED AN ORDER UNTIL DEPOSIT HAS BEEN

Clicking on any paragraph will put that entire note into one of the notes field on the order. Before that you get a dialog asking which Notes field to use - see the next page.

This requires some explanation.

The default choice is the main Order Notes field, the yellow one which has been visible on all of the Orders Editors screen we’ve viewed so far:


Print
Dates
Customers
Sites
Inventory
Avail
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Notes
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Businesses
Companies
O
Note List
Find a Note Label...
Find Note...
Notes for Orders
Notes for Proposals
Notes for Customers
Notes for POs
Notes for Private
Notes for Delivery
Cancel
Private
Terms
Shop
Delivery
Order Notes
Quick Scripts
Create Packing List

CONFIRMED WITHIN THE SPECIFIED TIME PERIOD WILL BE RELEASED AND AVAILABILITY WILL NOT BE GUARANTEED***

STAND BY PERSON
THEIR DUTIES CONSIST OF OVERSEEING THE EVENT AND TO MAKE SURE THAT EVERYTHING IS WORKING PROPERLY {SUCH AS THE HEATERS, OVENS, LIGHTING}. THEY ARE NOT FOR DUTIES CONSISTING OF BUSSING, SCULLARY, OR RESETTING THE VENUE {SUCH AS MOVING CHAIRS FROM CEREMONY AREA TO DINING AREA AND SO FORTH}. IF LABOR IS REQUIRED FOR SUCH DUTIES, PERSONNEL CAN BE PROVIDED FOR AN ADDITIONAL FEE.

Remit From Caterer
COD From Customer

Customer is responsible for any & all permits that may be required.

Put this selection into a Notes Field?

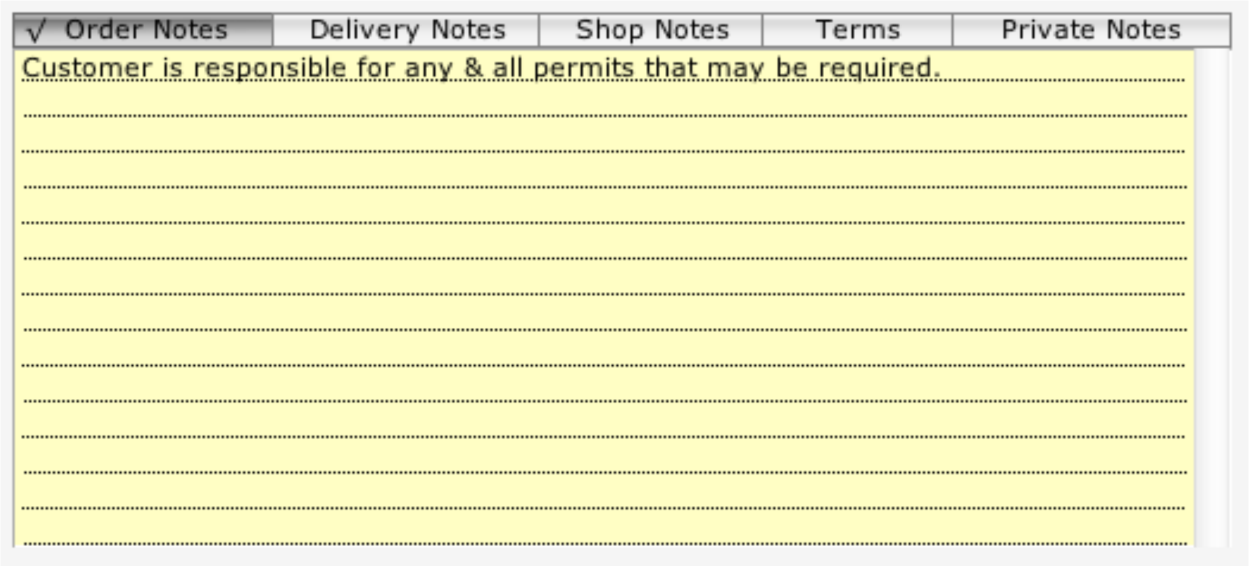
Customer is responsible for any & all permits that may be required.

liability.

A Rental Connection will not be responsible for any damage to TENNIS COURTS or WOOD FLOORS.

WOOD CHAIRS ARE NOT WATERPROOF THEY MUST BE PROTECTED, TO PREVENT DAMAGE! TURN OFF SPRINKLERS BEFORE DELIVERY, AND REMAIN OFF UNTIL CHAIRS ARE REMOVED, IN CASE OF RAINFALL CHAIRS MUST BE COVERED.

If you choose Order Notes the selected note will go into the main notes field:


√ Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes

Customer is responsible for any & all permits that may be required.

The Notes list will stay open, allowing you to select other notes without reopening the list. If you are finished, click on the Notes button tab, at the top of the screen, to close the list.

The other notes fields are:

Deliveries - these notes only go on the Delivery Detail Report for delivery drivers

Shop - used by manufacturing companies to send notes to the shop floor

Terms - “net 30”, etc.

Private - never get printed anywhere

If there are notes in a notes field, there will be a checkmark in its button tab for that note (see the checkmark in the Order Notes on the preceding page).

It is probably worth mentioning that you can also type notes directly into any of the Notes fields.

There are so many ways you can add so many kinds of notes to an order that we have an entire chapter devoted to them; it is called All About Notes. But that is beyond this “Quick Start” - it has its own chapter later in this Guidebook.

***

If you have read this far, you know enough to begin writing basic orders immediately. You may want to (need to) do that now. You may want to experiment and digest what you have learned.

There is more to learn. We have only covered a few of the features of one of the Editors. We have not (yet) discussed discounts, multiple businesses, stock checking, time payments, custom reports, queries, duplicate orders, voids, etc.

The next chapter, Get Help, is short and “helpful”. When you have finished that, you are done with all the chapters in the “Quick Start” section.

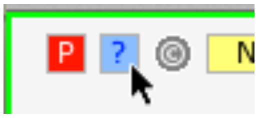
The next section, “The Basics”, will build on all that you have learned here. Proceed to that when ready.

Get Help

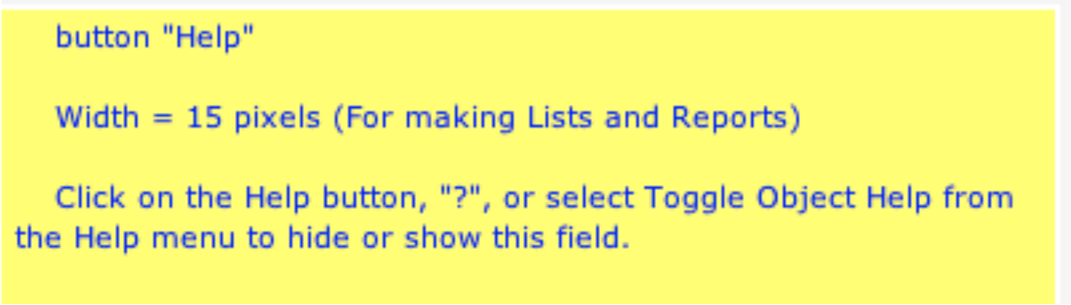
The previous chapters covered a few of the 280 buttons and 517 fields on the Orders Editor - and there are more on other Editors. Most of them have obvious functions but you might have an occasional question.

Welcome to “Object Help”.

Object Help is available for almost every object (field, button, graphic, etc.) in the Ahsomme Business System. To launch Object Help, click on the question mark in the upper left corner of most Ahsomme screens:



While help is turned on, a floating window will describe the object under the pointer. Here the pointer is on the Help button (pictured above) and the help window describes the Help (help for the Help button):



button "Help"

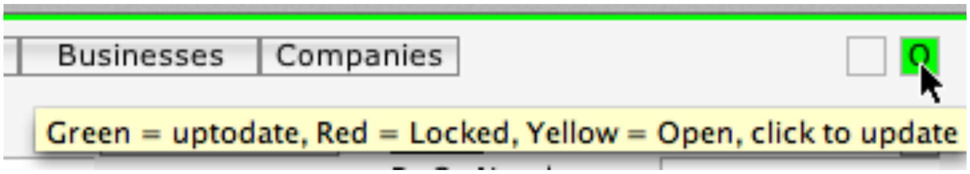
Width = 15 pixels (For making Lists and Reports)

Click on the Help button, "?", or select Toggle Object Help from the Help menu to hide or show this field.

Some of the help windows will just confirm what you already know, or suspect; others have a lot of information, like the example on the next page.

The Object Help window provides additional “helpful” information. When creating reports or lists it is necessary to know two things: the exact name of the field, and the width of the field. Both are available in the Help window. The top line shows the name of the object and the second line shows its width (in pixels, a standard unit of measure for screen objects - a printed pixel is generally 1/72nd of an inch; screen pixels used to be the same but, with higher and higher resolutions, some screens are over 200 pixels per inch. You do not need to worry about that, the ReportMaker, described in the Administrator Guidebook, and the Object Help use the same measurement.)

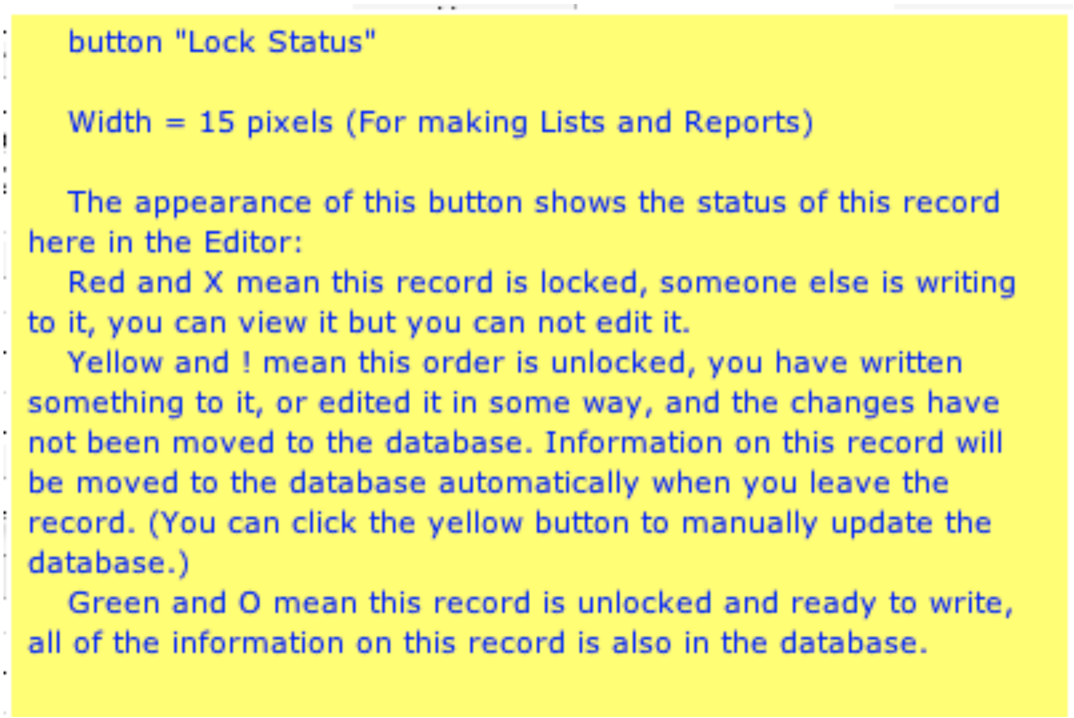
In addition to “Object Help” there are also “Quick Tips”. Here is the Quick Tip for the button “Lock Status”:



Green = uptodate, Red = Locked, Yellow = Open, click to update

Quick Tips are toggled on and off from the “Help” menu.

Quick Tips are the poor cousins of Object Help. They provide one line of information. Some people find it easier to leave Quick Tips on instead of Object Help because they take up less screen space. However you will always find our best stuff in Object Help. Here is Object Help for the Lock Status button above:



button "Lock Status"

Width = 15 pixels (For making Lists and Reports)

The appearance of this button shows the status of this record here in the Editor:

Red and X mean this record is locked, someone else is writing to it, you can view it but you can not edit it.

Yellow and ! mean this order is unlocked, you have written something to it, or edited it in some way, and the changes have not been moved to the database. Information on this record will be moved to the database automatically when you leave the record. (You can click the yellow button to manually update the database.)

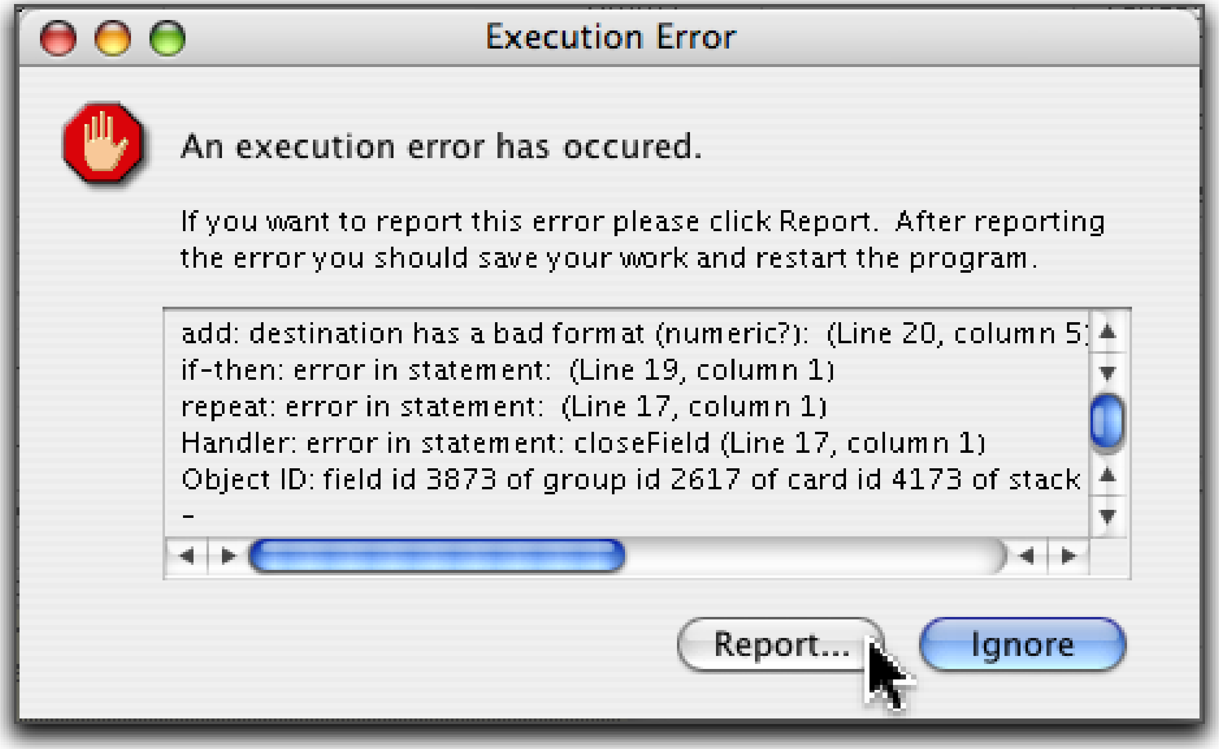
Green and O mean this record is unlocked and ready to write, all of the information on this record is also in the database.

You are reading this Guidebook for help now. May we suggest making a note to return to it again later? There are things that do not interest you now that will be important later. There are things you will forget.

Last, please help us help you.

If you receive an “Execution Error” dialog, report it (click the Report button at the bottom of the dialog), we read all of these reports. They help us know the frequency and severity of bugs our users encounter.

If you encounter an error while running one of the Ahsomme programs, the Error dialog will have a button to let you inform our Tech Support. Please use it.



An execution error has occured.

If you want to report this error please click Report. After reporting the error you should save your work and restart the program.

```
add: destination has a bad format (numeric?): (Line 20, column 5
if-then: error in statement: (Line 19, column 1)
repeat: error in statement: (Line 17, column 1)
Handler: error in statement: closeField (Line 17, column 1)
Object ID: field id 3873 of group id 2617 of card id 4173 of stack
-
```

This emails your bug report directly to us. We read every bug report and we fix bugs as fast as we can. Don’t assume we know about the one you are reporting!

The most important thing in reporting (and fixing) bugs is the “recipe”: what were you doing at the time that brought up the error message? You don’t need to be a programmer or use computer lingo (you don’t even need to understand the error message), just explain, in your own words, what action or actions cause the problem. It is also extremely helpful to know if the the error is repeatable, does the recipe always produce this error?

If you have an Always New subscription you will receive all bug fixes we do for all users during the subscription year.

The Basics

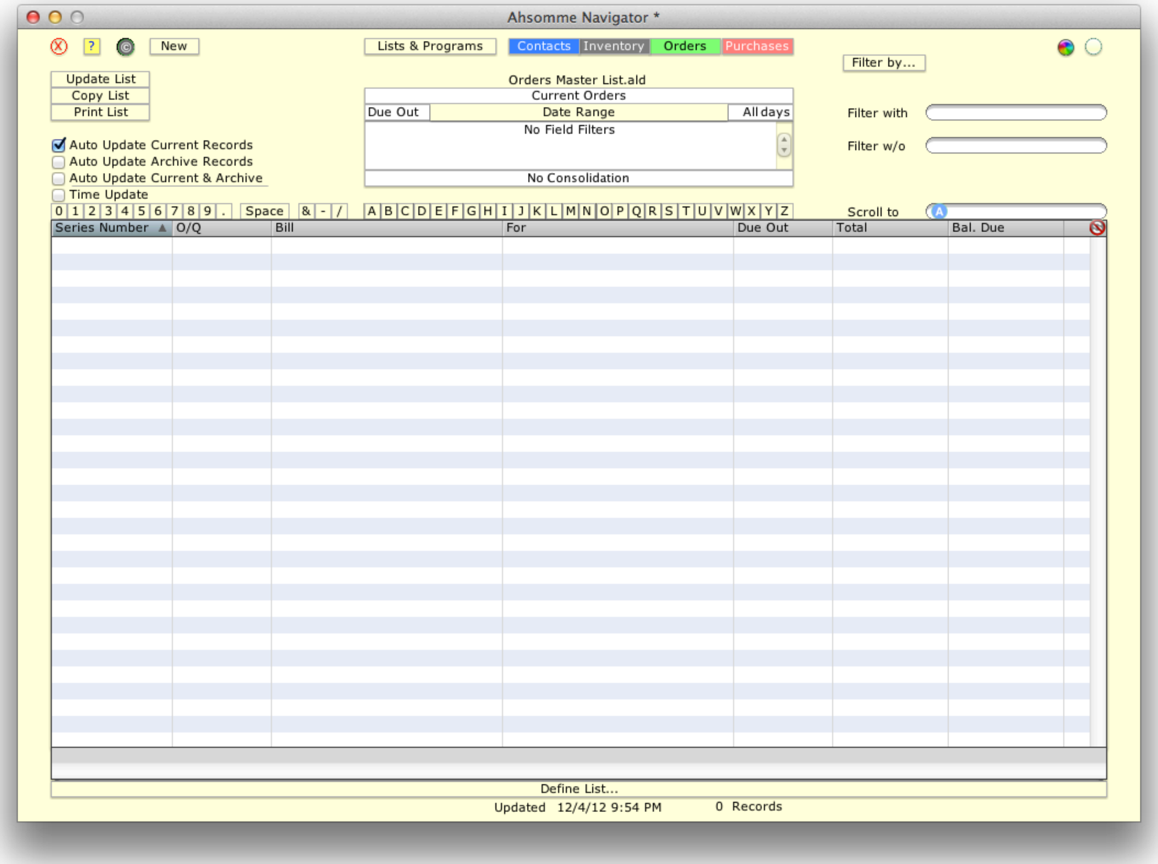
This section builds on information learned in the “Quick Start” section.

Here you will learn how to:

- find any record in any database
- display, sort and filter lists
- find the current version of the program you are using
- customize your Navigator
- work all of the standard controls on List Programs and Editors

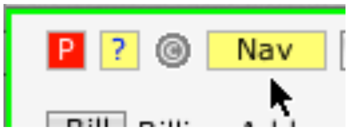
Know Your Navigator

We begin, again, with the Navigator:


Ahsomme Navigator *
New
Lists & Programs
Contacts
Inventory
Orders
Purchases
Filter by...
Update List
Copy List
Print List
Orders Master List.ald
Current Orders
Due Out
Date Range
All days
No Field Filters
No Consolidation
Filter with
Filter w/o
Scroll to
0 1 2 3 4 5 6 7 8 9 . Space & - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Series Number
O/Q
Bill
For
Due Out
Total
Bal. Due
Define List...

☑ Auto Update Current Records
☐ Auto Update Archive Records
☐ Auto Update Current & Archive
☐ Time Update

Updated 12/4/12 9:54 PM 0 Records



If you are not in the Navigator now, open it as described in the Create a New Order chapter. If you are still in the Orders Editor from the last section (or anywhere else in the Ahsomme system), click on the Nav button in the upper, left corner of that screen.

In this chapter we will use the Navigator to get back to the order we created in the last section. Along the way we will see some of the Navigator's hidden powers and multiple uses.

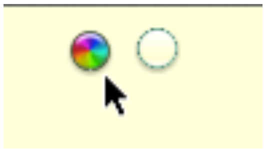
The primary use of the Navigator is to go to other programs and view records in any of the Ahsomme databases. You "get around in Ahsomme" with the Navigator - hence the name.

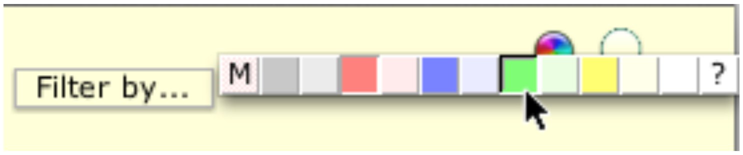
First we'll answer an age-old question:

Does the Navigator need to be yellow?

No, it doesn't.

Notice the small color circle in the upper, right corner of the Navigator screen. Click on it to open the quick color picker - shown below:

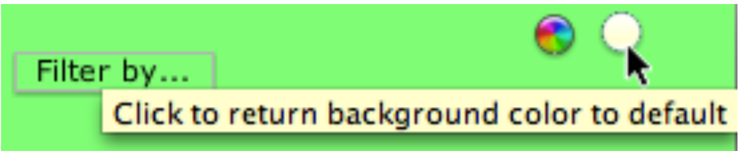




In the example above, the pointer arrow is clicking the green square - which will turn the background color of the Navigator to green (see the next picture below). All of the primary red/blue/green/yellow colors are on the quick color picker. Experiment.

Selecting the "?" at the right end of the quick color picker does not bring up help, it brings up the computer operating system's color picker, with that you can select any color modern monitors can display.

If you decide to return to the default yellow, just click the default color button to the right of the quick color picker:



Click to return background color to default

You may grow to like yellow because...

All Navigator updates will be sent in the standard Ahsomme yellow.

An Ahsomme yellow Navigator is easier to find on a desktop crowded with many overlapping windows.

We must concede that, on some monitors, a bright yellow is just too much.

The quick color picker has been part of Ahsomme installations for almost seven years as I write this and I've noticed that when some users get an Ahsomme update that reverts the Navigator to yellow, the first thing they do is return it to "their" color - exactly as we intended (but you should see some of the colors!)

Many of the much-used List Programs (described later) have quick color pickers - and they all work the same way as this one here in the Navigator.

With the color question answered, we move on.

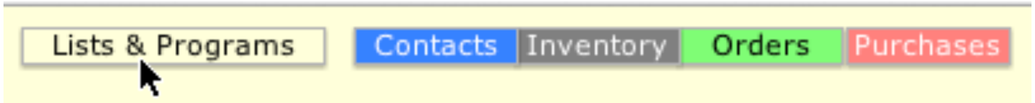
The most important part of the Navigator is "navigation", getting to programs and records. But if we start jumping around the screen haphazardly we will likely get lost. So we will show how to find existing records - by returning to the new order we created in the last section. Then we will re-visit the Navigator and systematically explore the Navigator objects.

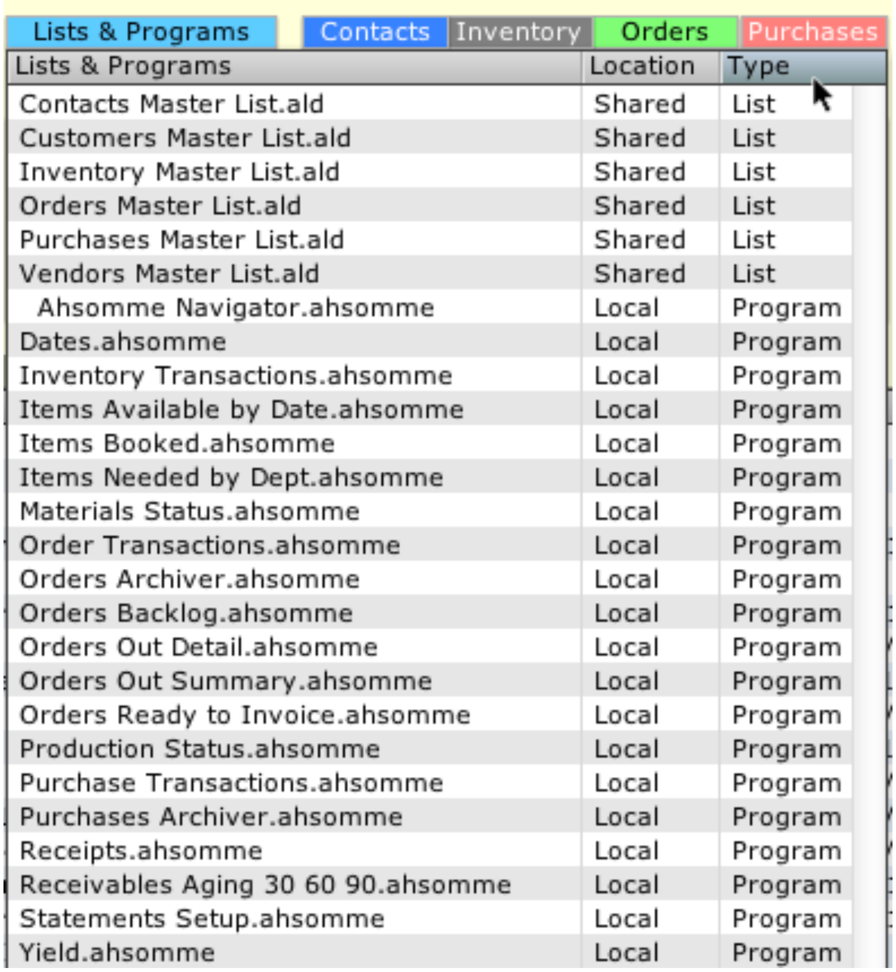
Listing Records

We are looking for a specific record - the order we wrote in the previous section. It is stored in a database with all the other order records on the server. The server has other databases, as well - for customer records, vendor records, purchases, inventory items - even notes.

The Navigator has "Master Lists" for each of the databases.

To see a list of these Master Lists, click on the Lists and Programs button:

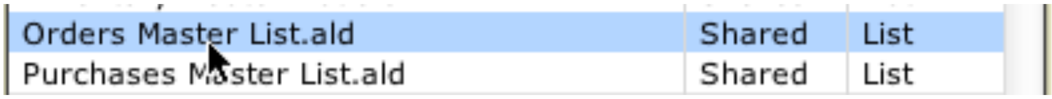




Lists & Programs	Location	Type
Contacts Master List.ald	Shared	List
Customers Master List.ald	Shared	List
Inventory Master List.ald	Shared	List
Orders Master List.ald	Shared	List
Purchases Master List.ald	Shared	List
Vendors Master List.ald	Shared	List
Ahsomme Navigator.ahsomme	Local	Program
Dates.ahsomme	Local	Program
Inventory Transactions.ahsomme	Local	Program
Items Available by Date.ahsomme	Local	Program
Items Booked.ahsomme	Local	Program
Items Needed by Dept.ahsomme	Local	Program
Materials Status.ahsomme	Local	Program
Order Transactions.ahsomme	Local	Program
Orders Archiver.ahsomme	Local	Program
Orders Backlog.ahsomme	Local	Program
Orders Out Detail.ahsomme	Local	Program
Orders Out Summary.ahsomme	Local	Program
Orders Ready to Invoice.ahsomme	Local	Program
Production Status.ahsomme	Local	Program
Purchase Transactions.ahsomme	Local	Program
Purchases Archiver.ahsomme	Local	Program
Receipts.ahsomme	Local	Program
Receivables Aging 30 60 90.ahsomme	Local	Program
Statements Setup.ahsomme	Local	Program
Yield.ahsomme	Local	Program

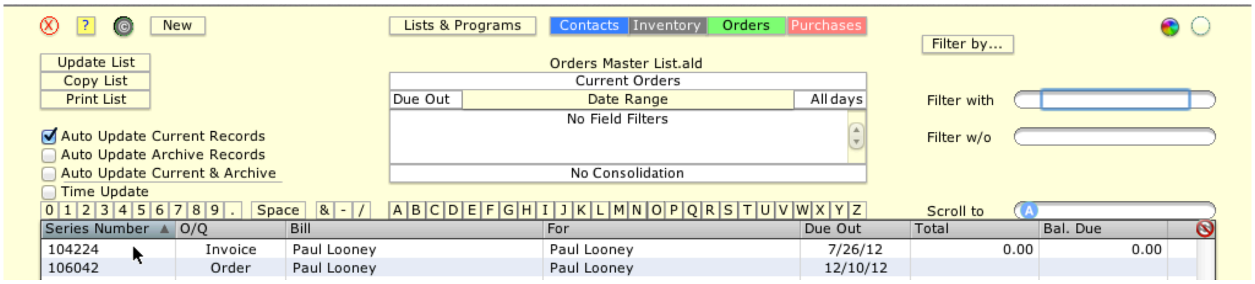
This list can be sorted by the tabs at the top of the list: Lists & Programs, Location, and Type. If it is sorted by Type, as in the example above, then all of the Master Lists will appear at the top. Since they are most often used, this is probably the best way to sort the list - but it is your choice.

Click on the Orders Master List:



Orders Master List.ald	Shared	List
Purchases Master List.ald	Shared	List

A typical Orders Master List looks like this:


New
Lists & Programs
Contacts
Inventory
Orders
Purchases
Filter by...
Update List
Copy List
Print List
Filter with
Filter w/o
0 1 2 3 4 5 6 7 8 9 . Space & - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Scroll to

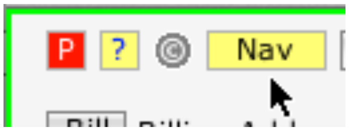
Orders Master List.ald
Current Orders
Due Out | Date Range | All days
No Field Filters
No Consolidation

☑ Auto Update Current Records
☐ Auto Update Archive Records
☐ Auto Update Current & Archive
☐ Time Update

Series Number	O/Q	Bill	For	Due Out	Total	Bal. Due
104224	Invoice	Paul Looney	Paul Looney	7/26/12	0.00	0.00
106042	Order	Paul Looney	Paul Looney	12/10/12		

Your list should include the sample order you wrote when studying the last chapter. If your list is sorted by Series Number (the first column), your order should appear at either the bottom or the top, depending on how the column is sorted (click on any column to use it for sorting, click a second time to sort in the reverse order).

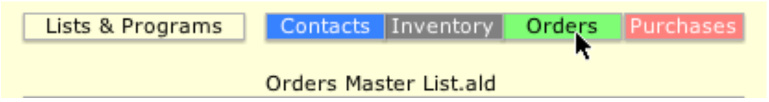
When you have found your order, click that line to display it in the Editor.



Click on the Nav button in the Orders Editor to return to the Navigator:

Congratulations, you can now find any record in any Ahsomme database. Since you now know the “long” way (which will find any record) we can discuss the quick way (which works for the most used databases).

The Master Lists for the main databases can be viewed quickly by clicking on one of the colored buttons at the top of the Nav screen:

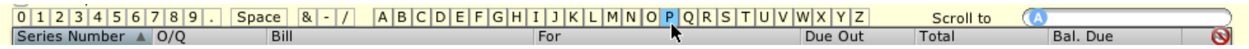

Lists & Programs
Contacts
Inventory
Orders
Purchases
Orders Master List.ald

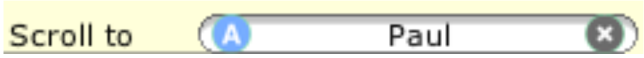
Clicking the green Orders button brings up the Orders Master List directly

The Alpha Scrollbar

Finding the sample order was easy because it was just written and at, or near, the top or bottom of the list. What if you didn’t know where it was? You could use the vertical scrollbar, but that might take awhile - especially if the list is long.

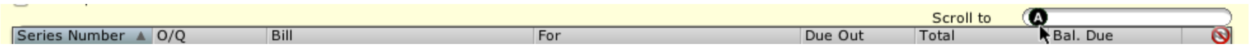
In the previous section we introduced the Alpha Scrollbar. We used it to find a customer record to put on the order. It works the same way in the Navigator BUT - the list will scroll to the text in the SORT COLUMN. The customer list in the Orders Editor opened sorted by the first column, which was the customer name - which is what we wanted to use for scrolling. The Orders Master list in the Navigator opens sorted by the first column which is the Series (order, invoice, etc.) number and if you want to scroll to “Paul”, it won’t be found in that column. So click on the Bill column, if “Paul” is there the Alpha scroll will find it.

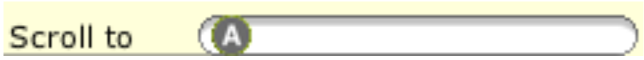

0 1 2 3 4 5 6 7 8 9 .
Space
& - /
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Scroll to
Series Number ▲
O/Q
Bill
For
Due Out
Total
Bal. Due


Scroll to: Paul

This is true of all the Master Lists (and many of the other lists that we have not yet discussed). Note also, some of the lists do not appear sorted by the first column. If you have entered something in the Scroll to field and the computer just beeps at you, chances are you need to click a different column for sorting.

By the way, if the Alpha Scrollbar is not visible, click on the “A” with the black background in the Scroll to field:


Scroll to
Series Number ▲
O/Q
Bill
For
Due Out
Total
Bal. Due



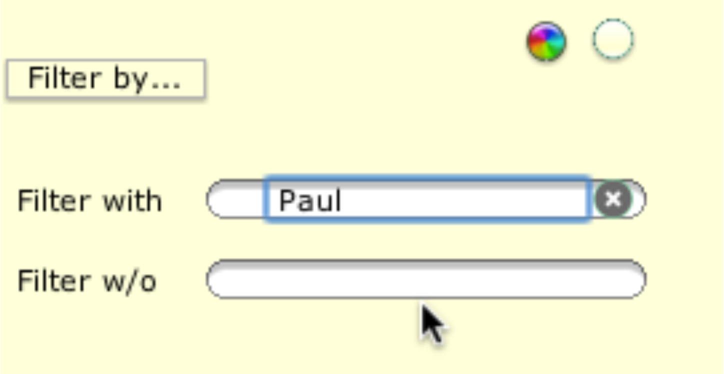
The Alpha Scrollbar helps when trying to find something in a long list. But there is also a way to make the lists shorter.

Introducing “Filters”:

Filtering Lists

What if you want to list all of the orders for a single customer? Perhaps you are not sure which one you want. or maybe you want to total the amount of those orders, or you would like to see just orders, or just quotes; how difficult is that?

The ability to easily make and filter lists is one of the most powerful parts of the Ahsomme system

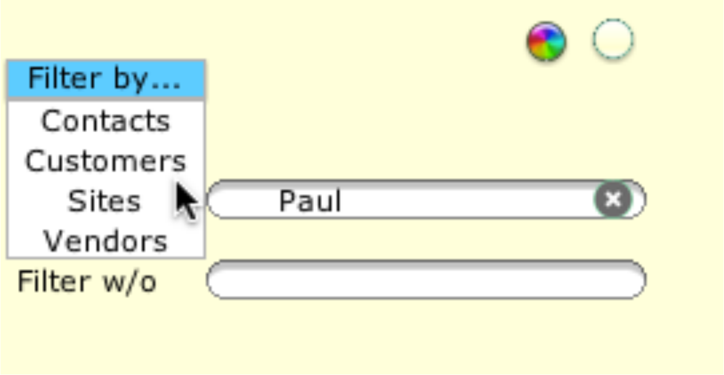


Filter with Paul

Capitals and lower case make no difference. You can use spaces and numbers.

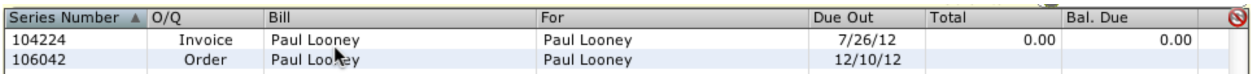
Enter the text or numbers and hit the Return or Enter key. Every record in the selected database that has the Filter with text will be listed below. You can click on any line in that list to go to that record in an Editor.
Use Filter without to list everything except the Filter w/o text. If you put the same text in both the Filter with field and the Filter w/o field, you will get nothing.

Sometimes you will want to filter one list with a record in another list, for example, orders for one customer; purchases from one vendor, etc.



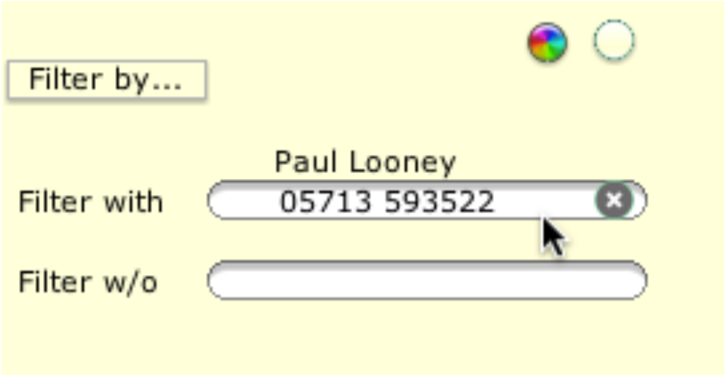
Paul

To get a list of the records in another database while still displaying the Master List for the original database, click on the Filter by button. Here we are selecting the Customers list. And from that list we select the record for “Paul”. There may be many - and, although we are looking for a name, the filter might include “Paul” in addresses, notes, inventory items, etc. Shortly we’ll see how to filter on one field.



Series Number ▲	O/Q	Bill	For	Due Out	Total	Bal. Due
104224	Invoice	Paul Looney	Paul Looney	7/26/12	0.00	0.00
106042	Order	Paul Looney	Paul Looney	12/10/12		

Notice, when we choose a filter from the list, instead of typing it into the Filter with field, the actual filter is the Record ID for that name in the database (the 05713 593522 in our example). This lets the computer find the name more rapidly and more precisely. The text that was selected is also displayed, for reference, but the actual filtering is done from the Record ID.



Paul Looney

Filter with: 05713 593522

Filter w/o:

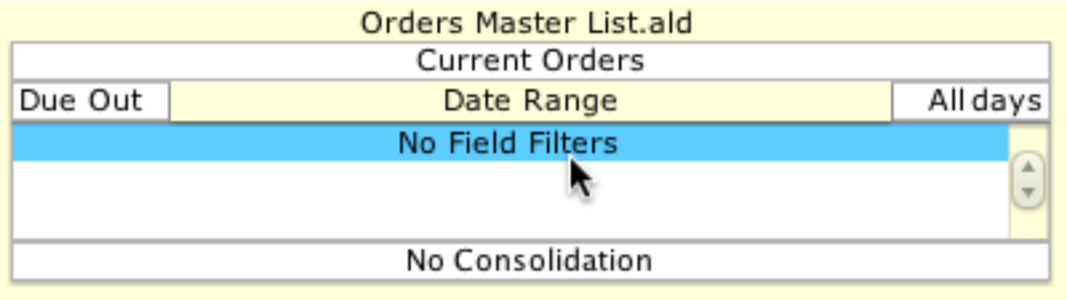
Filtering Fields

In the sample above we used what is called a “global” filter, it filters everything everywhere.

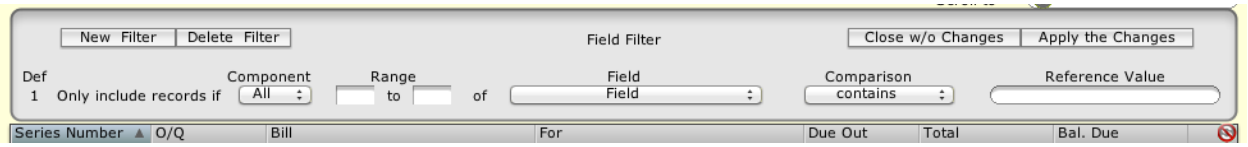
When we type “Green”, the global filter will display records with:

1. Dr. & Mrs. Green, Greene & Greene, Green Produce
2. Green St., Green Blvd., Green Ave.
3. Greenville, Greenburg, Green Valley
4. Hunter Green Table Cloths, Kelly Green Napkins, Lime Green Sherbert

You can filter on a specific field:

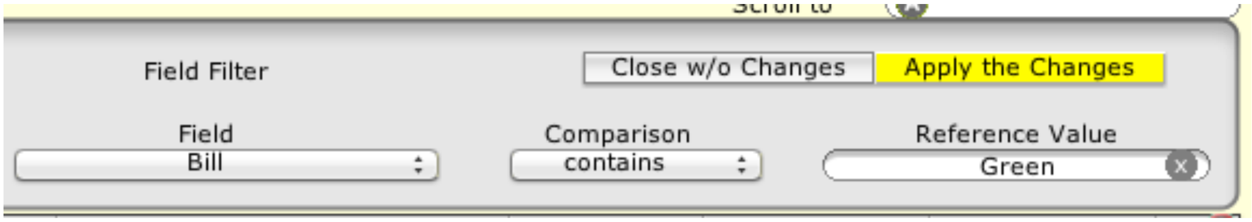

Orders Master List.ald
Current Orders
Due Out
Date Range
All days
No Field Filters
No Consolidation

Click on the “No Field Filters” to bring up the Field Filter:


New Filter
Delete Filter
Field Filter
Close w/o Changes
Apply the Changes
Series Number
O/Q
Bill
For
Due Out
Total
Bal. Due

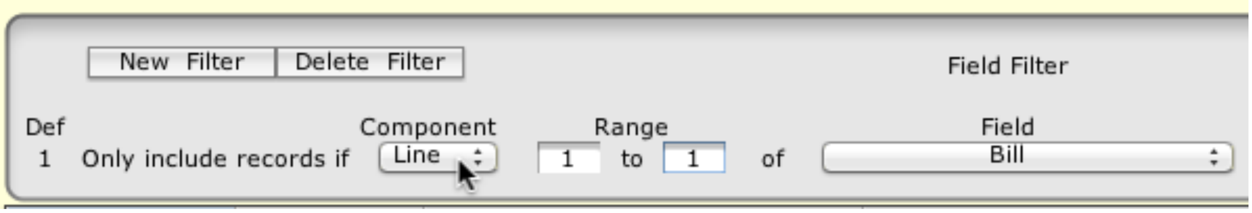
Def 1 Only include records if Component All Range to of Field Field Comparison contains Reference Value

The last part of the Field Filter is the most important:


Field Filter
Close w/o Changes
Apply the Changes

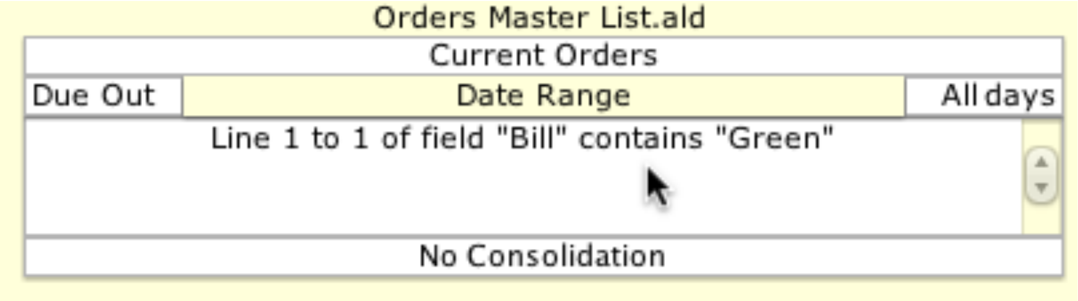
Field: Bill
Comparison: contains
Reference Value: Green

You will seldom need the first part (the components):


New Filter
Delete Filter
Field Filter

Def 1 Only include records if Component Line Range 1 to 1 of Field Bill

When finished building your filter, click Apply the Changes. You will see the details of your new field filter spelled out:



Orders Master List.ald

Current Orders

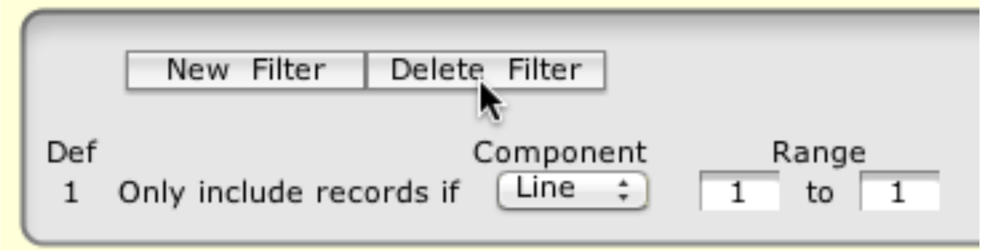
Due Out | Date Range | All days

Line 1 to 1 of field "Bill" contains "Green"

No Consolidation

To remove a field filter:

If the Field Filter window is not open, click again on the Field Filter (which says: Line 1 to 1 of field "Bill" contains "Green" - in our sample above. Click on the Delete Filter button:



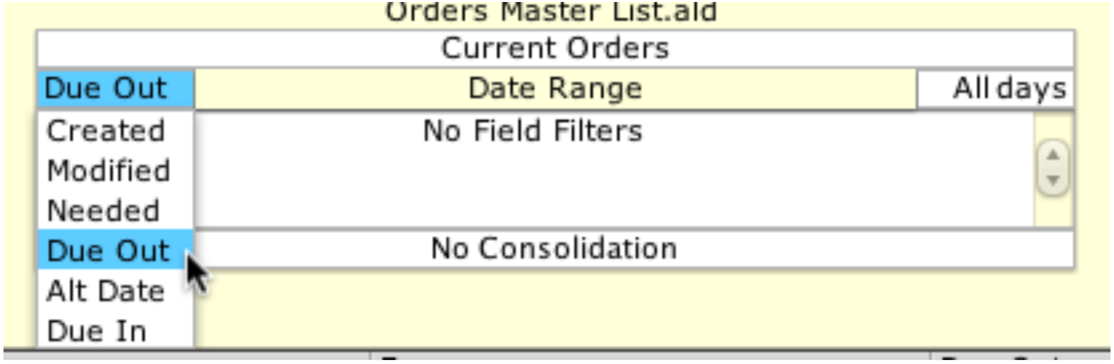
Def 1 Only include records if Component: Line Range: 1 to 1

In our sample, only records with “Green” on the first line of the Bill field will be listed.

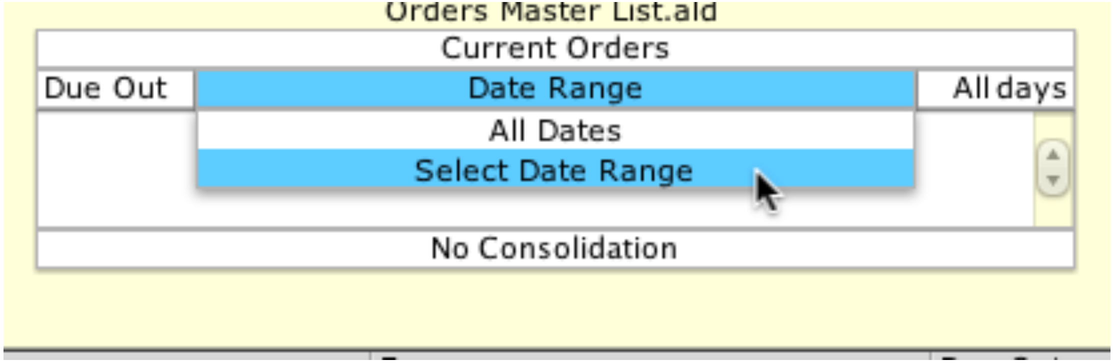
Note: if you are not sure whether you are looking for “Green” or “Greene”, choose the first. It will find “Green” in “Green e”. Filtering for “Greene” will not list “Green”. The same logic applies when uncertain about whether the word has an “s” on the end of it: filter with “linen” instead of “linens” to get both.

Filtering with a Date Range

Select the type of date you want from the popup list:


Orders Master List.ald
Current Orders
Due Out
Date Range
All days
Created
Modified
Needed
Due Out
Alt Date
Due In
No Field Filters
No Consolidation

Then click the Select Date Range button to open the Dates window.


Orders Master List.ald
Current Orders
Due Out
Date Range
All days
All Dates
Select Date Range
No Consolidation

The Dates Window

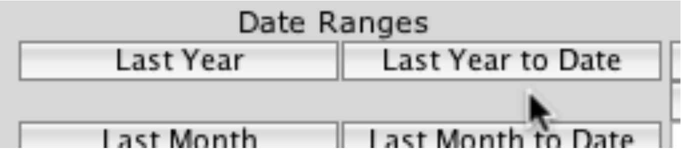
There are three sections in the Dates window. Each is helpful in different situations and it is worthwhile to become familiar with all three.

The first section contains the two columns on the left, labeled “Date Ranges”. These are listed from the middle of the screen, which is “Today”. The list reads up into the past, and down into the future - thus, “Yesterday” is above “Today” and “Tomorrow” is below “Today”.

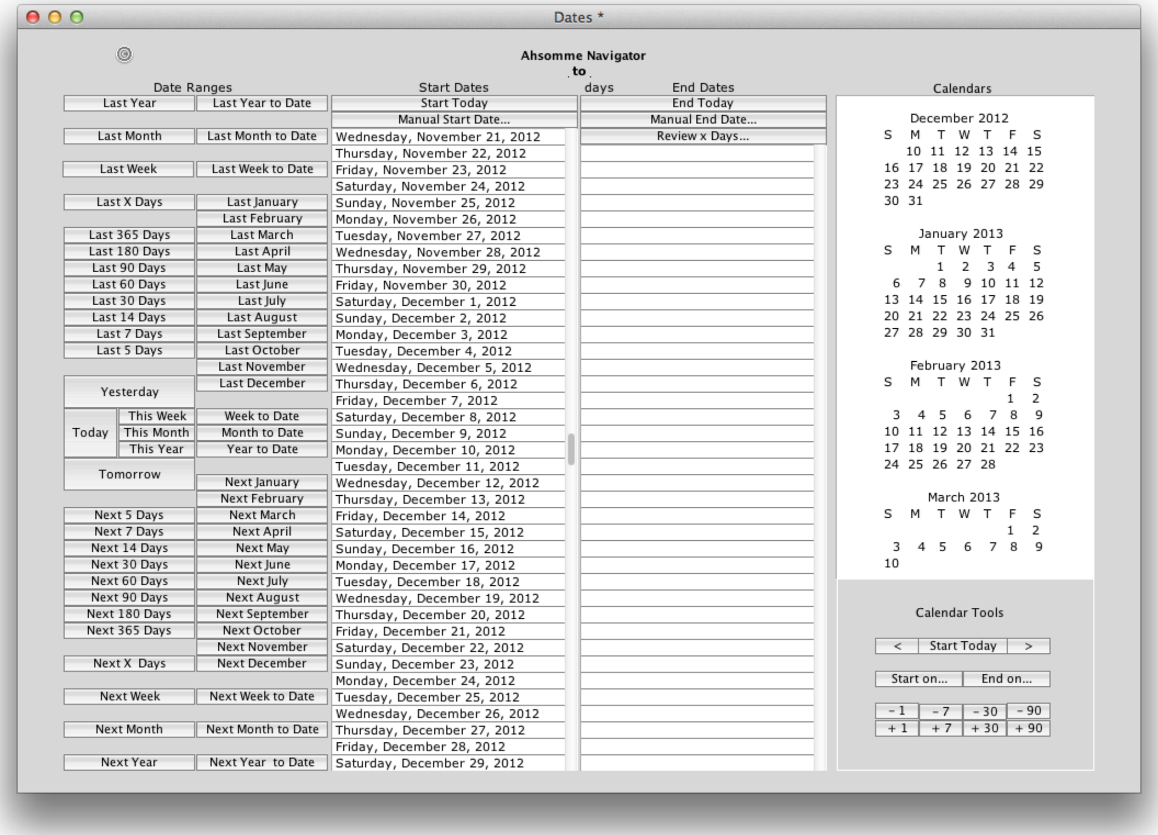
Some less than obvious options:

The buttons that say “X days/weeks/etc” let you choose the days/weeks/etc. you want.

Using the future dates is helpful for checking deliveries or booked receipts.


Date Ranges
Last Year
Last Year to Date
Last Month
Last Month to Date

The “Week/Month/Year to Date” buttons let you compare partial weeks/months/years. Suppose it is July and you want to see the previous year, but just to July, click the button at the top of the second column.


Dates *
Ahsomme Navigator
to
Date Ranges
Last Year
Last Year to Date
Last Month
Last Month to Date
Last Week
Last Week to Date
Last X Days
Last January
Last February
Last 365 Days
Last March
Last 180 Days
Last April
Last 90 Days
Last May
Last 60 Days
Last June
Last 30 Days
Last July
Last 14 Days
Last August
Last 7 Days
Last September
Last 5 Days
Last October
Last November
Yesterday
Last December
Today
This Week
Week to Date
This Month
Month to Date
This Year
Year to Date
Tomorrow
Next January
Next February
Next 5 Days
Next March
Next 7 Days
Next April
Next 14 Days
Next May
Next 30 Days
Next June
Next 60 Days
Next July
Next 90 Days
Next August
Next 180 Days
Next September
Next 365 Days
Next October
Next November
Next X Days
Next December
Next Week
Next Week to Date
Next Month
Next Month to Date
Next Year
Next Year to Date
Start Dates
Start Today
Manual Start Date...
days
End Dates
End Today
Manual End Date...
Review x Days...
Calendars
Calendar Tools
<
Start Today
>
Start on...
End on...
- 1
- 7
- 30
- 90
+ 1
+ 7
+ 30
+ 90

Wednesday, November 21, 2012
Thursday, November 22, 2012
Friday, November 23, 2012
Saturday, November 24, 2012
Sunday, November 25, 2012
Monday, November 26, 2012
Tuesday, November 27, 2012
Wednesday, November 28, 2012
Thursday, November 29, 2012
Friday, November 30, 2012
Saturday, December 1, 2012
Sunday, December 2, 2012
Monday, December 3, 2012
Tuesday, December 4, 2012
Wednesday, December 5, 2012
Thursday, December 6, 2012
Friday, December 7, 2012
Saturday, December 8, 2012
Sunday, December 9, 2012
Monday, December 10, 2012
Tuesday, December 11, 2012
Wednesday, December 12, 2012
Thursday, December 13, 2012
Friday, December 14, 2012
Saturday, December 15, 2012
Sunday, December 16, 2012
Monday, December 17, 2012
Tuesday, December 18, 2012
Wednesday, December 19, 2012
Thursday, December 20, 2012
Friday, December 21, 2012
Saturday, December 22, 2012
Sunday, December 23, 2012
Monday, December 24, 2012
Tuesday, December 25, 2012
Wednesday, December 26, 2012
Thursday, December 27, 2012
Friday, December 28, 2012
Saturday, December 29, 2012

December 2012

S	M	T	W	T	F	S
	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

January 2013

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

February 2013

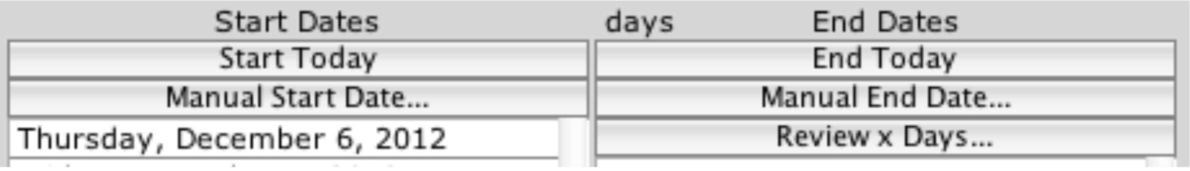
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

March 2013

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10						

The first column in the middle section is labeled "Start Dates". It opens with a list of dates, centered on today. Again, dates go backward to the top and forward to the bottom - 365 days in each direction. Clicking on a start date creates a list of possible end dates. Clicking on an end date closes the Dates window, enters the selected dates in the Navigator, and updates the list in the Navigator.

Some less than obvious options (they are all at the top of this section of the Dates window):


Start Dates
days
End Dates
Start Today
End Today
Manual Start Date...
Manual End Date...
Review x Days...

Thursday, December 6, 2012

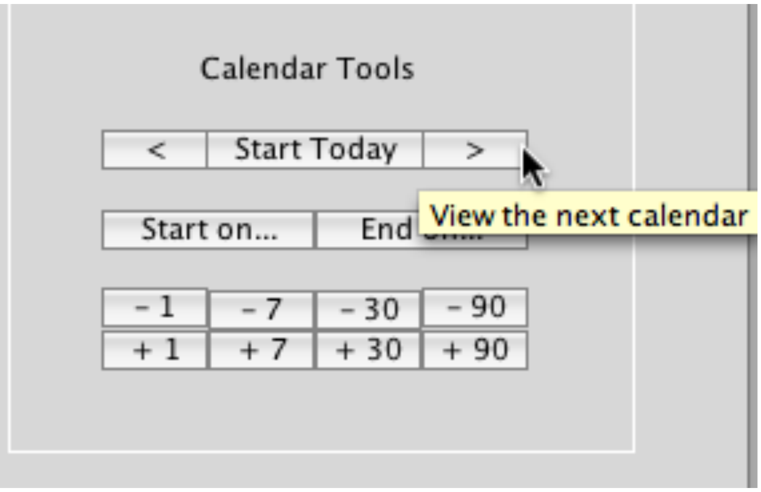
Although these buttons may not be obvious to see, they self-explanatory.

The third section is a classic calendar. It opens with today as the first date.The first date clicked in the calendar will be the start date. The second date clicked will be the end date.

Let's look at the buttons at the bottom of the calendar:

There are Quick Tips, as you can see:

Note: if the Quick Tips are not working (that is, you hold the arrow pointer over an object and no tips appear), select Toggle Quick Tips from the Help menu.


Calendar Tools
<
Start Today
>
View the next calendar
Start on...
End
- 1
- 7
- 30
- 90
+ 1
+ 7
+ 30
+ 90

Clicking the previous, "<", and next, ">", buttons subtract or add 90 days to the current calendar.

The "-1", "+1", ... "-90", "+90" buttons add or subtract that many days from start of the current calendar.

You can specify a starting OR ending date - not both.

The calendar will end 90 days after any start date selected OR begin 90 days before any end date selected.

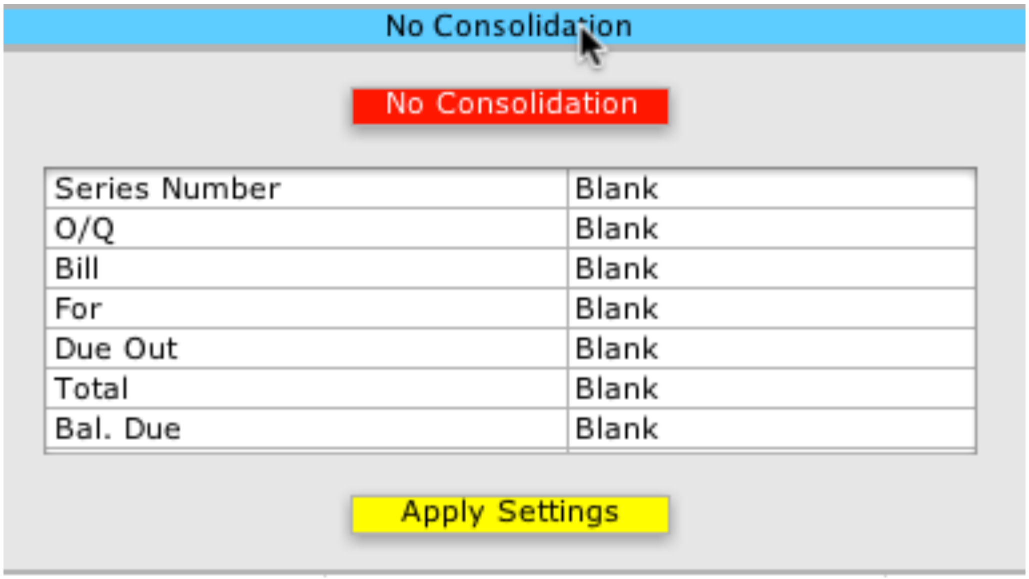
Consolidations

There is a lot of information in a typical Master List. Consolidation is a means of summarizing it in a meaningful way.

We will use the Orders Master List for our sample, obviously you can consolidate any list - not just Master Lists.

Begin by clicking on the No Consolidation button:

The selection lists will appear:

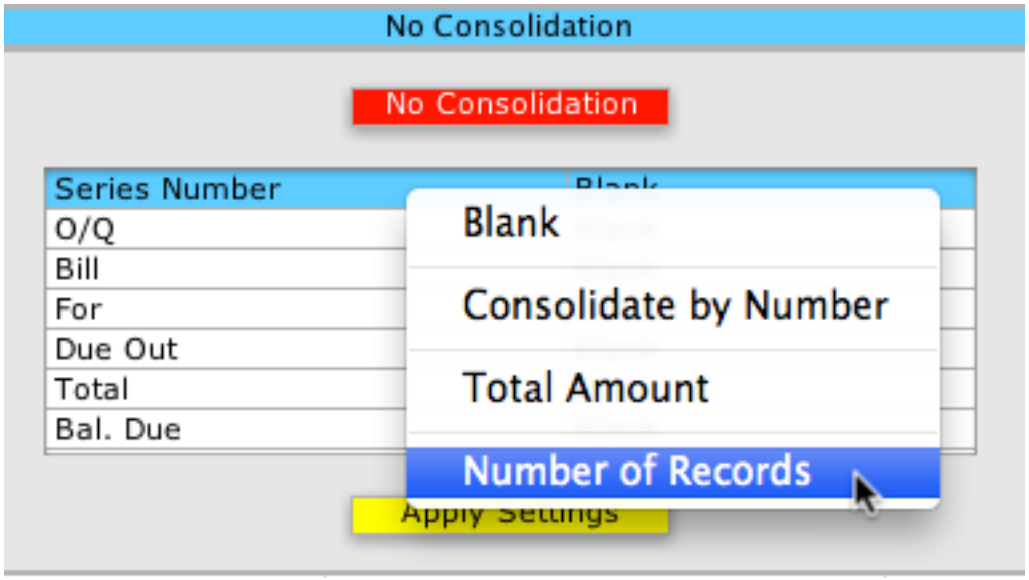


Series Number	Blank
O/Q	Blank
Bill	Blank
For	Blank
Due Out	Blank
Total	Blank
Bal. Due	Blank

These are the fields/columns in the current list, listed top to bottom, instead of left to right as they appear on the screen.

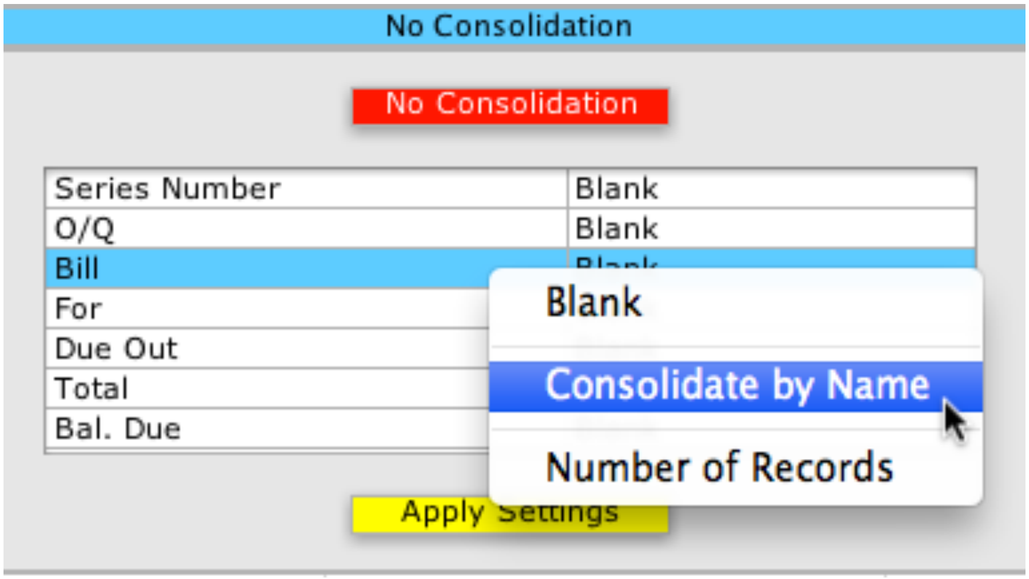
There are different options for each field in the list, based on whether they are text, number, or date - and whether they are totaled.

Click on the Series Number. This is a field for numbers - and the popup list reflects that. Choose Number of Records.


No Consolidation
No Consolidation
Blank
Consolidate by Number
Total Amount
Number of Records
Apply Settings

Series Number	Blank
O/Q	
Bill	
For	
Due Out	
Total	
Bal. Due	

Click on Bill


No Consolidation
No Consolidation
Blank
Consolidate by Name
Number of Records
Apply Settings

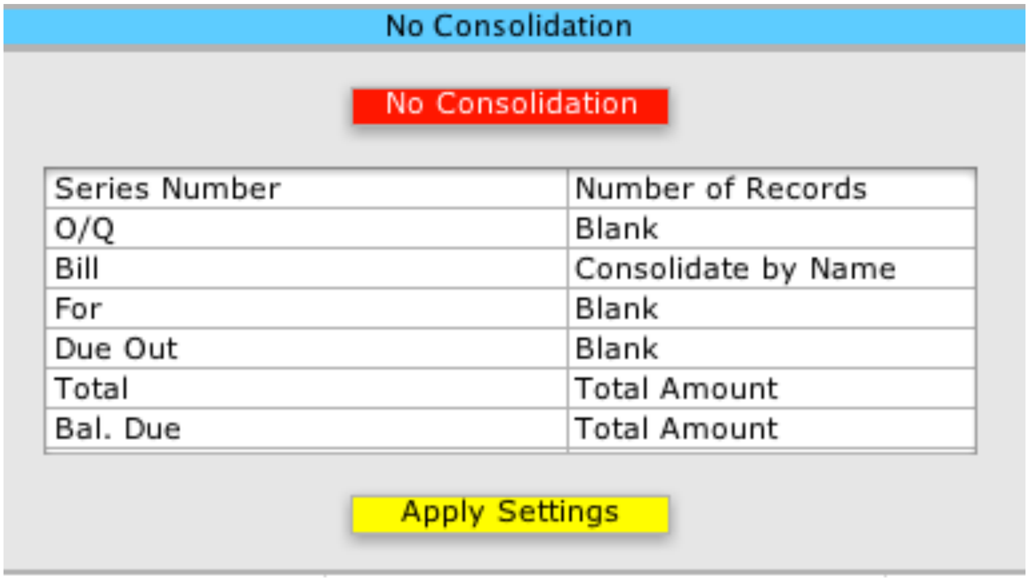
Series Number	Blank
O/Q	Blank
Bill	Blank
For	
Due Out	
Total	
Bal. Due	

Select Consolidate by Name.

Note there can only be one consolidation field, if you choose a second one you will be warned.

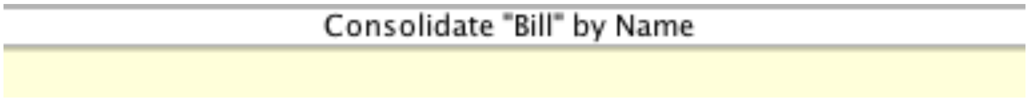
Choose Total Amount for the last two fields/columns.

When finished, your consolidation should look like this:


No Consolidation
No Consolidation
Apply Settings

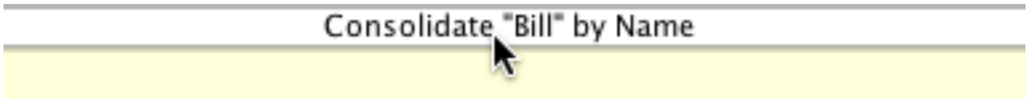
Series Number	Number of Records
O/Q	Blank
Bill	Consolidate by Name
For	Blank
Due Out	Blank
Total	Total Amount
Bal. Due	Total Amount

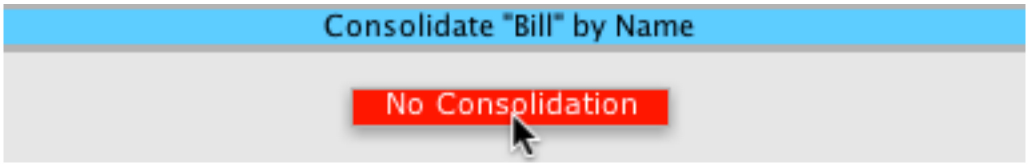
Click Apply Settings to see the consolidation. The Consolidation field will describe the consolidation currently used:


Consolidate "Bill" by Name

In our sample the list has been consolidated with one line per Bill name. The first column, Series Number, shows the number of records for that name. The last two columns show the totals for all records for that name.

Click again on the Consolidation to remove it.


Consolidate "Bill" by Name

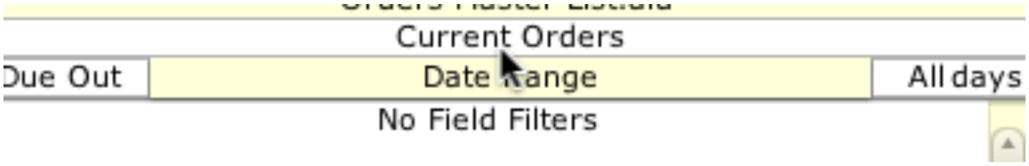

Consolidate "Bill" by Name
No Consolidation

Other List Programs have consolidations, and they work the same way as they do in the Navigator.

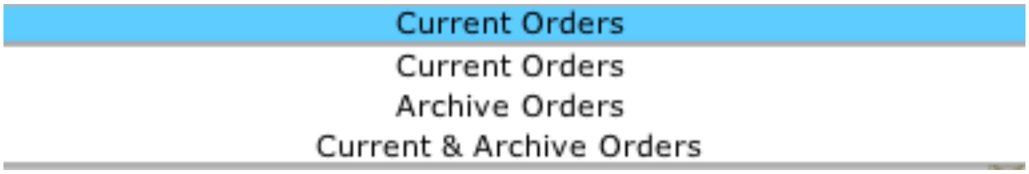
Current vs Archive Lists

Usually you will want to see Current records in a database. Some databases, like Notes, have no practical archives. Orders and Purchases will have far more retired or “archived” records than active ones.

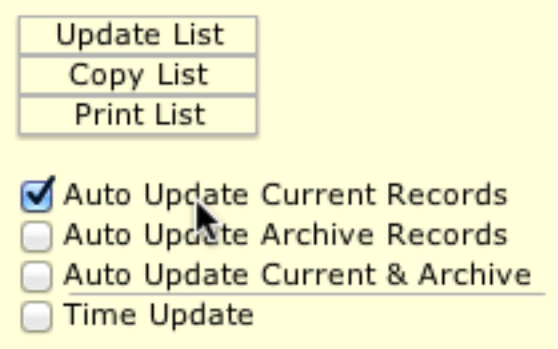
You can view archived records alone or with current ones. The list changes to reflect the database , in our example we are searching the Orders database:


Current Orders
Due Out
Date Range
All days
No Field Filters

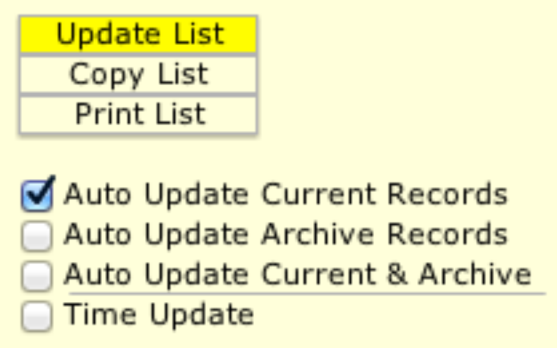
so we see “Current ORDERS”, “Archive ORDERS”, etc.


Current Orders
Current Orders
Archive Orders
Current & Archive Orders

The immediate response depends on the buttons on the left side of the screen:


Update List
Copy List
Print List

☑ Auto Update Current Records
☐ Auto Update Archive Records
☐ Auto Update Current & Archive
☐ Time Update


Update List
Copy List
Print List

☑ Auto Update Current Records
☐ Auto Update Archive Records
☐ Auto Update Current & Archive
☐ Time Update

These are the default settings.

With these, only the Current Records will update automatically, any combination that includes Archived Records will require clicking the Update List button manually.

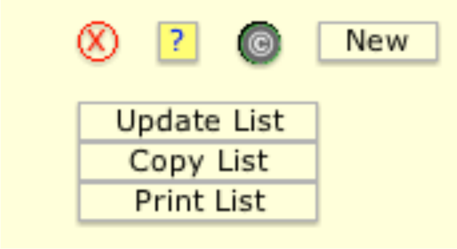
If the Update List button needs clicking, it will be this bright yellow.

Since the archived records don’t change frequently, and since they take more time to list, most users do not have them update automatically.

Note: the Time Update is used by programers to see how much faster new code runs, and by users to see how much faster a new computer runs. This becomes annoying quickly if left checked.

Copying or Printing a List

Any list that can be displayed in the Navigator can be copied or printed.



Use the Copy List or Print List buttons at the top, left corner of the Navigator screen.

Copying is useful for moving information from one of the Ahsomme databases to a spreadsheet - getting information on the monthly sales to your accountant, for instance.

To copy a list to a spreadsheet:

1. Create, filter, and sort the list you want to copy
2. Click the Copy List button
3. Open or create an empty spreadsheet
4. Click in the first cell of the spreadsheet (row 1, column 1)
5. Paste (either from the Edit menu or by typing V with the Command key - see Command keys later in this Guidebook.)

Printing will print the list with all of the filter information - dates, field filters, etc. The printing command is especially useful when combined with consolidations - described earlier.

Master the Editors

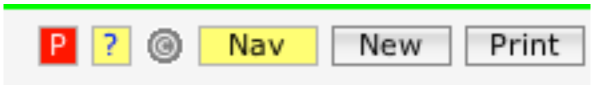
In the Ahsomme System there is one Editor for every two databases, the current records and the archived records share an Editor. So far we have visited the Orders Editor a couple times. It is a good sample Editor because it does almost everything an Editor can do, and it is used by almost everyone who uses an Ahsomme System.

One of the features of the Editors is note handling.

There is a complete chapter on Notes following this one.

Button Basics

We begin with some of the buttons at the top of the screen that we passed over on previous visits:



The red button on the left will "Park" the Editor. When not in use, it is good for an Editor to be closed or parked - that way it can not lock out a record that some other user may need.

"?" brings up Object Help, as we've seen previously.

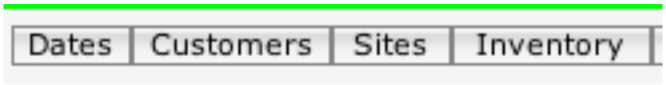
"©" tells the version of the Editor - as well as showing the copyright.

"Nav" returns to the Navigator. Note: it does not park or close the Editor (which will remain open in the background - there is no need to close or Park it if you plan to return to it shortly).

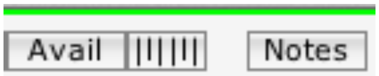
"New" creates a new record - same as we did from the Navigator previously - but without a trip to the Navigator.

"Print" shows all the print templates - in an Orders Editor, this would show the report templates for Orders, Quotes, Invoices, etc.

We have already visited most of the middle buttons:



Also in the middle are:


Avail
|||||
Notes

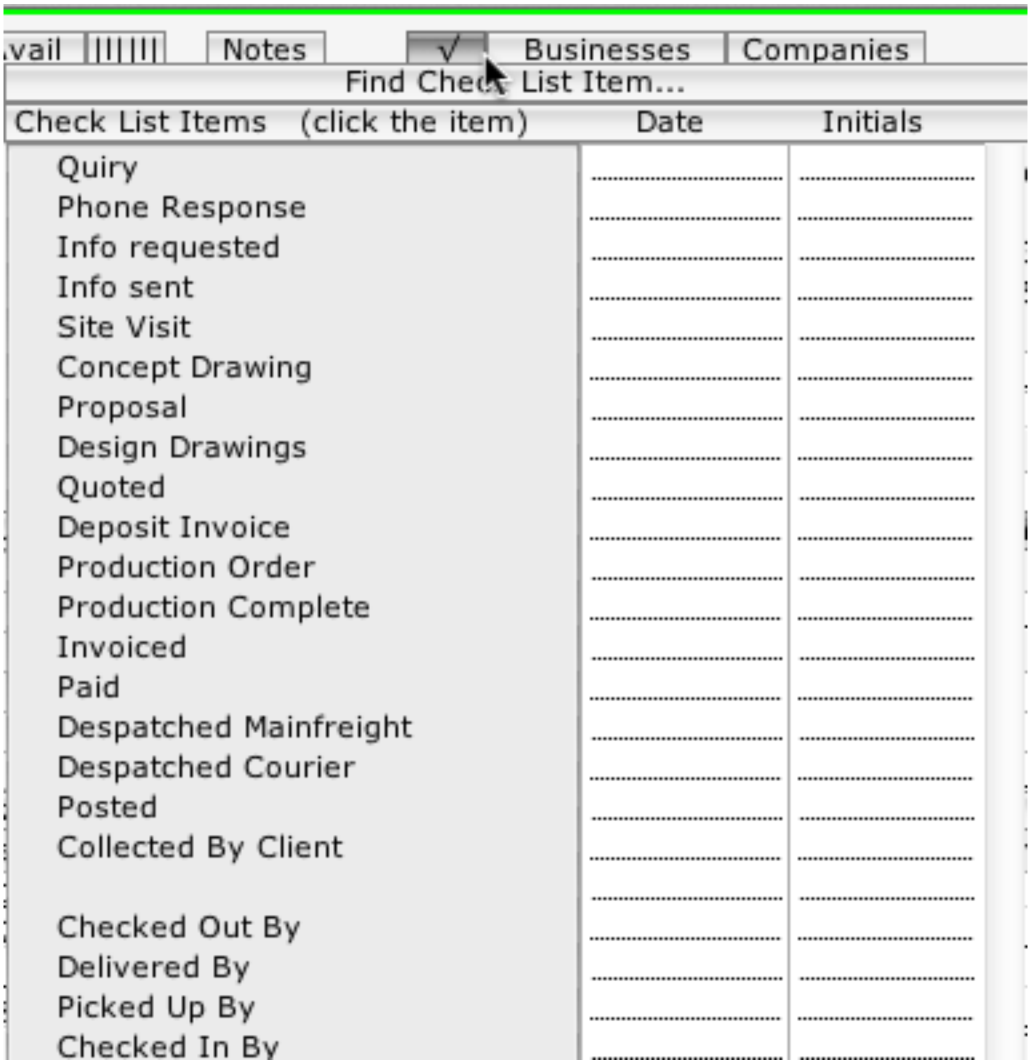
“Avail” displays a list showing the amount of stock available to cover this order - and/or all orders out.

“|||||” is for reading barcoded part number and entering them onto an order - think supermarket checkout.

“Notes”, and more notes, get covered in the next chapter.

A Hidden Checklist

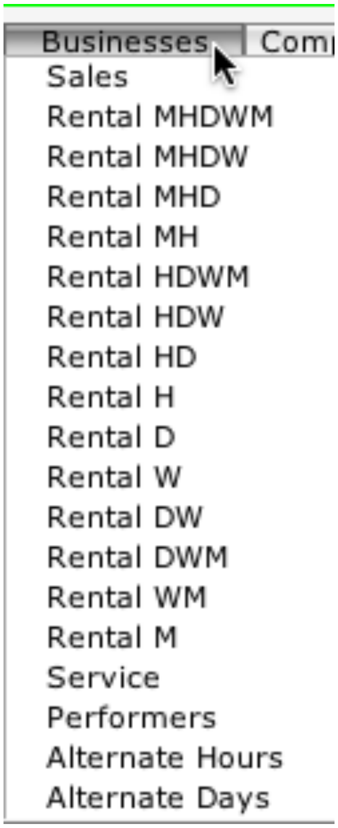
“√” displays a count-down event checklist - used primarily by Party rental companies:


vail
|||||
Notes
√
Businesses
Companies
Find Check List Item...
Check List Items (click the item)
Date
Initials

Quiry
Phone Response
Info requested
Info sent
Site Visit
Concept Drawing
Proposal
Design Drawings
Quoted
Deposit Invoice
Production Order
Production Complete
Invoiced
Paid
Despatched Mainfreight
Despatched Courier
Posted
Collected By Client

Checked Out By
Delivered By
Picked Up By
Checked In By

Business Screens

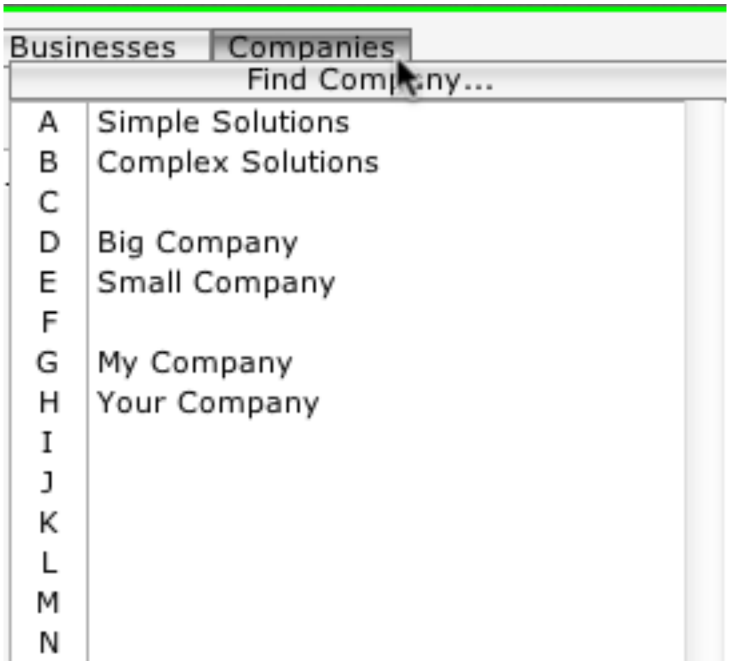

Businesses
Com
Sales
Rental MHDWM
Rental MHDW
Rental MHD
Rental MH
Rental HDWM
Rental HDW
Rental HD
Rental H
Rental D
Rental W
Rental DW
Rental DWM
Rental WM
Rental M
Service
Performers
Alternate Hours
Alternate Days

The options listed here will reset the screen for that type of business. For instance, the Sales screen has line item discounts, the Rental screens have due in dates, the Performers screen has start and stop times for each line item (the times scheduled for performers).

The "MHDWM" on the first Rental line stand for "Minimum, Hourly, Daily, Weekly, and Monthly" prices. This is the most popular screen for both Party and Equipment Rental and Hire companies.

There is seldom any need to change these screens once the system is setup for your company - but, if someone has accidentally selected another screen, now you know why it looks strange - and how to fix it.

Running Multiple Companies

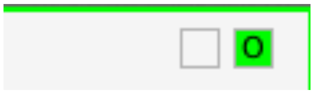

Businesses
Companies
Find Company...
A
Simple Solutions
B
Complex Solutions
C
D
Big Company
E
Small Company
F
G
My Company
H
Your Company
I
J
K
L
M
N

The price of an Ahsomme Business System is so "reasonable" today, that there is little need for running multiple companies on an single server - but it can be done; and, if the companies share an inventory, it is well to do it.

The companies would have been setup at the time your system was installed. Here you can select from those choices.

The name of the selected company will go at the top of the screen (and on the Order/Quote/Invoice if the printing template is setup for it).

Locking & Getting Locked Out

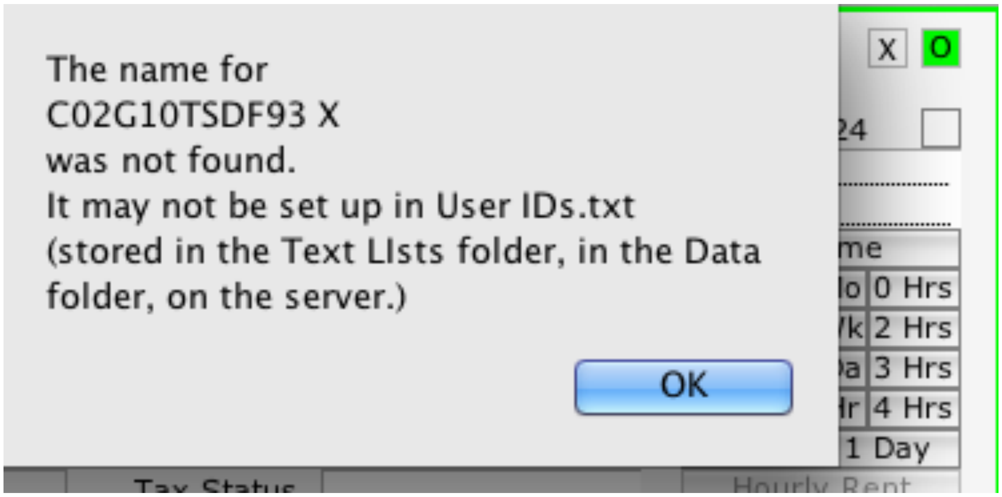


The button on the far right was covered previously; it shows the status of the current record in the database: if green all of the information on the screen is in the database, if yellow there is information on the screen that is not in the database (clicking the yellow button will update the database, as will printing, parking, leaving the record, etc.), if red, the record is locked (because someone else is on it or it is an archived record).

The field to the left of the button will have a red "X" if the current record is locked (in use) on another computer.

If the administrator of your system has setup the User IDs, clicking on that red X will show the name of the user locking the record.

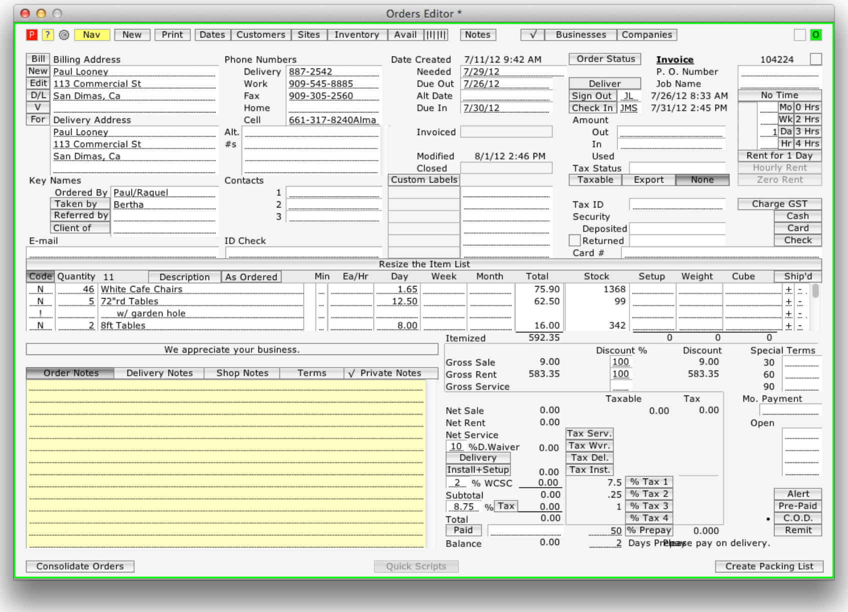
If the User IDs are not setup, clicking on the X will show the serial number of the computer which is locking the record.



The name for
C02G10TSDF93 X
was not found.
It may not be set up in User IDs.txt
(stored in the Text LIsts folder, in the Data
folder, on the server.)

If you are locked out because the record is archived, the screen will be greyed-out:

A current order:


Orders Editor *
P
?
Nav
New
Print
Dates
Customers
Sites
Inventory
Avail
|||||
Notes
√
Businesses
Companies
O
Bill
New
Edit
D/L
V
For
Order Status
Deliver
Sign Out
Check In
Custom Labels
Taxable
Export
None
No Time
Mo
Wk
Da
Hr
Rent for 1 Day
Hourly Rent
Zero Rent
Charge GST
Cash
Card
Check
Resize the Item List
Order Notes
Delivery Notes
Shop Notes
Terms
√ Private Notes
Delivery
Install+Setup
Tax
Paid
Tax Serv.
Tax Wvr.
Tax Del.
Tax Inst.
% Tax 1
% Tax 2
% Tax 3
% Tax 4
% Prepay
Alert
Pre-Paid
C.O.D.
Remit
Consolidate Orders
Quick Scripts
Create Packing List

Billing Address
Paul Looney
113 Commercial St
San Dimas, Ca

Delivery Address
Paul Looney
113 Commercial St
San Dimas, Ca

Phone Numbers
Delivery 887-2542
Work 909-545-8885
Fax 909-305-2560
Home
Cell 661-317-8240Alma

Key Names
Ordered By Paul/Raquel
Taken by Bertha
Referred by
Client of

E-mail

ID Check

Date Created 7/11/12 9:42 AM
Needed 7/29/12
Due Out 7/26/12
Alt Date
Due In 7/30/12
Invoiced
Modified 8/1/12 2:46 PM
Closed

Invoice 104224
P. O. Number
Job Name
Sign Out JL 7/26/12 8:33 AM
Check In JMS 7/31/12 2:45 PM
Amount Out
In
Used
Tax Status
Tax ID
Security Deposited
☐ Returned
Card #

Mo 0 Hrs
Wk 2 Hrs
1 Da 3 Hrs
Hr 4 Hrs

Code	Quantity 11	Description	Min	Ea/Hr	Day	Week	Month	Total	Stock	Setup	Weight	Cube
N	46	White Cafe Chairs			1.65			75.90	1368			
N	5	72"rd Tables			12.50			62.50	99			
!		w/ garden hole										
N	2	8ft Tables			8.00			16.00	342			
		Itemized						592.35		0	0	0

We appreciate your business.

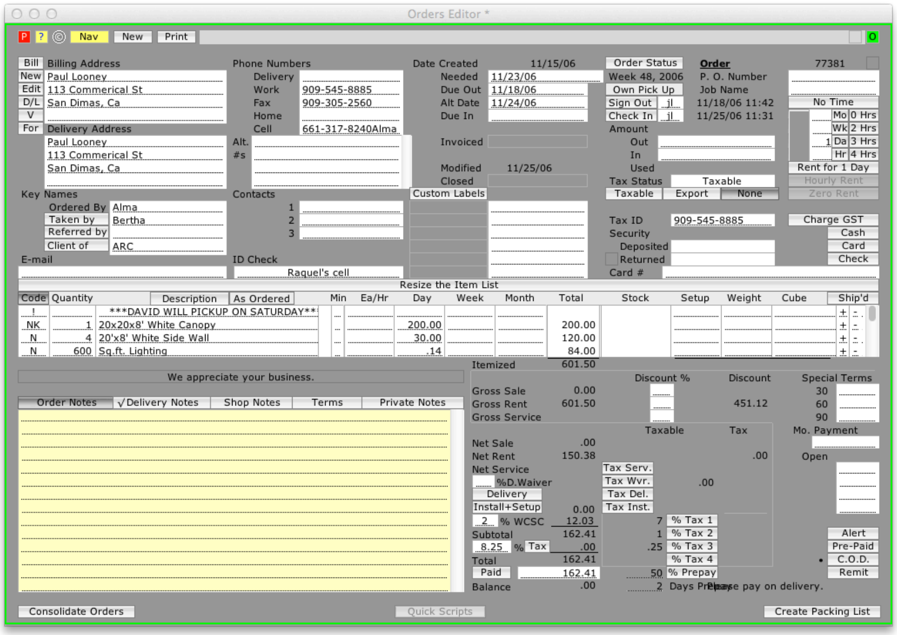
		Discount %	Discount
Gross Sale	9.00	100	9.00
Gross Rent	583.35	100	583.35
Gross Service			

Special Terms 30 / 60 / 90
Mo. Payment
Open

		Taxable	Tax
Net Sale	0.00	0.00	0.00
Net Rent	0.00		
Net Service			
10 %D.Waiver	0.00		
Delivery			
Install+Setup	0.00		
2 % WCSC	0.00		
Subtotal	0.00		
8.75 % Tax	0.00		
Total	0.00		
Paid			
Balance	0.00		

7.5 % Tax 1
.25 % Tax 2
1 % Tax 3
% Tax 4
50 % Prepay 0.000
2 Days Prepay
Please pay on delivery.

An archived order:


Orders Editor *
P
?
Nav
New
Print
O
Bill
New
Edit
D/L
V
For
Order Status
Own Pick Up
Sign Out
Check In
Custom Labels
Taxable
Export
None
No Time
Mo
Wk
Da
Hr
Rent for 1 Day
Hourly Rent
Zero Rent
Charge GST
Cash
Card
Check
Resize the Item List
Order Notes
√ Delivery Notes
Shop Notes
Terms
Private Notes
Delivery
Install+Setup
Tax
Paid
Tax Serv.
Tax Wvr.
Tax Del.
Tax Inst.
% Tax 1
% Tax 2
% Tax 3
% Tax 4
% Prepay
Alert
Pre-Paid
C.O.D.
Remit
Consolidate Orders
Quick Scripts
Create Packing List

Billing Address
Paul Looney
113 Commerical St
San Dimas, Ca

Delivery Address
Paul Looney
113 Commerical St
San Dimas, Ca

Phone Numbers
Delivery
Work 909-545-8885
Fax 909-305-2560
Home
Cell 661-317-8240Alma

Key Names
Ordered By Alma
Taken by Bertha
Referred by
Client of ARC

E-mail

ID Check Raquel's cell

Date Created 11/15/06
Needed 11/23/06
Due Out 11/18/06
Alt Date 11/24/06
Due In
Invoiced
Modified 11/25/06
Closed

Week 48, 2006
Order 77381
P. O. Number
Job Name
Sign Out jl 11/18/06 11:42
Check In jl 11/25/06 11:31
Amount Out
In
Used
Tax Status Taxable
Tax ID 909-545-8885
Security Deposited
☐ Returned
Card #

Mo 0 Hrs
Wk 2 Hrs
1 Da 3 Hrs
Hr 4 Hrs

Code	Quantity	Description	Min	Ea/Hr	Day	Week	Month	Total	Stock	Setup	Weight	Cube
!		***DAVID WILL PICKUP ON SATURDAY**										
NK	1	20x20x8' White Canopy			200.00			200.00				
N	4	20'x8' White Side Wall			30.00			120.00				
N	600	Sq.ft. Lighting			.14			84.00				
		Itemized						601.50				

We appreciate your business.

		Discount %	Discount
Gross Sale	0.00		
Gross Rent	601.50		451.12
Gross Service			

Special Terms 30 / 60 / 90
Mo. Payment
Open

		Taxable	Tax
Net Sale	.00		
Net Rent	150.38		.00
Net Service			
%D.Waiver		.00	
Delivery			
Install+Setup	0.00		
2 % WCSC	12.03		
Subtotal	162.41		
8.25 % Tax	.00		
Total	162.41		
Paid	162.41		
Balance	.00		

7 % Tax 1
1 % Tax 2
.25 % Tax 3
% Tax 4
50 % Prepay
2 Days Prepay
Please pay on delivery.

Most of the topics covered in this chapter apply to all of the Editors. You will find the Purchases Editor to be very similar to the Orders Editor we have been using as a sample. Much of what you will learn about notes, in the next chapter, will also apply to all of the Editors.

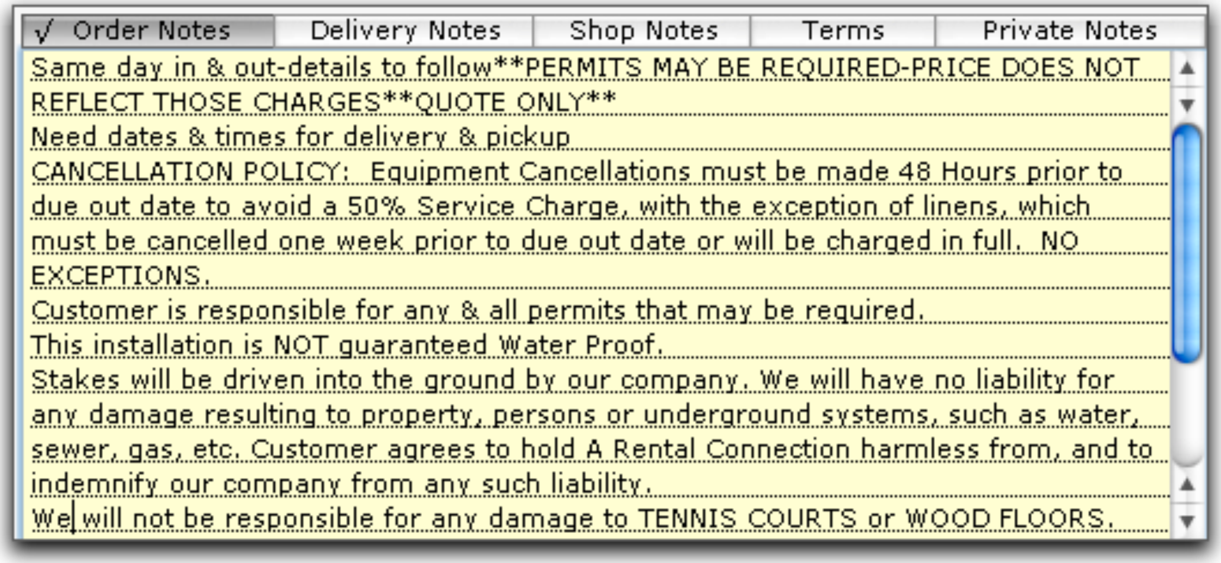
All About Notes

Notes Overview

The Ahsomme system has over a dozen ways to apply notes to orders, quotes, invoices, customer records, purchases, accounts, vendors and contact records. In this chapter we will quickly discuss all of them.

The most common, and obvious, notes are the tabbed note fields shown below. These appear in orders, purchases, customers, vendors, contacts – and in inventory. If one of the notes fields has a note then there is a check-mark ,"√", in front of the label for that note – as in the sample below. You can type directly into any of the note fields or you can enter pre-written notes – we'll show how to do that later in this chapter. There is enough room in each of the note fields to type a large novel, so do not be concerned if you have notes that span more than a page or two. The first tab in all of these programs is Order Notes.

Order Notes



Same day in & out-details to follow**PERMITS MAY BE REQUIRED-PRICE DOES NOT
REFLECT THOSE CHARGES**QUOTE ONLY**
Need dates & times for delivery & pickup
CANCELLATION POLICY: Equipment Cancellations must be made 48 Hours prior to
due out date to avoid a 50% Service Charge, with the exception of linens, which
must be cancelled one week prior to due out date or will be charged in full. NO
EXCEPTIONS.
Customer is responsible for any & all permits that may be required.
This installation is NOT guaranteed Water Proof.
Stakes will be driven into the ground by our company. We will have no liability for
any damage resulting to property, persons or underground systems, such as water,
sewer, gas, etc. Customer agrees to hold A Rental Connection harmless from, and to
indemnify our company from any such liability.
We will not be responsible for any damage to TENNIS COURTS or WOOD FLOORS.

The Order Notes will print on Invoices, Orders, Quotes and Purchase Orders. Do not put anything here that you do not wish a customer to see! You can use Delivery Notes and Private Notes, described below for that.

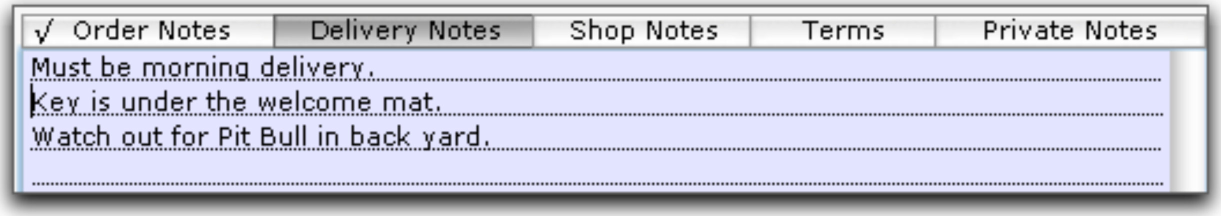
The Order Notes entered on a customer record in the Customers Editor get transferred to Orders when that customer is selected. Likewise, Order Notes entered on a vendor record in the Vendors Editor get transferred to purchases from that vendor.

Delivery Notes

The delivery notes are intended for providing messages to the delivery drivers. They do not go on any of the original orders, quotes, or purchases.

At present, the only place where they appear is on the Orders Out Detail report – which also has a copy of the order notes.

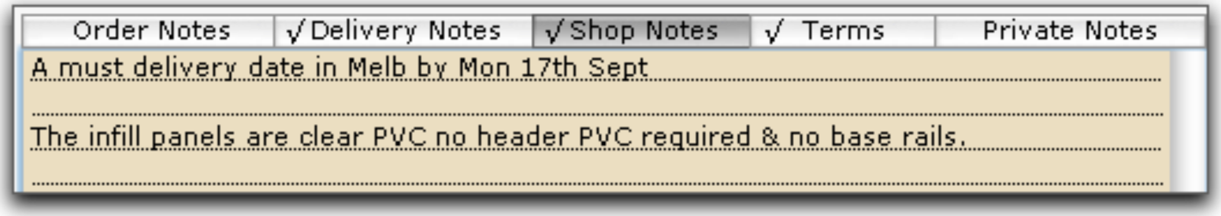
Some companies prefer to put driver notes in the Order Notes so that the customer *will* see them.


√ Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes

Must be morning delivery.
Key is under the welcome mat.
Watch out for Pit Bull in back yard.

Shop Notes

These notes go on work orders for manufacturing the products on the sales on rental order. They can also be used by service businesses to provide shop, work order, or dispatch information.


Order Notes
√Delivery Notes
√Shop Notes
√ Terms
Private Notes

A must delivery date in Melb by Mon 17th Sept

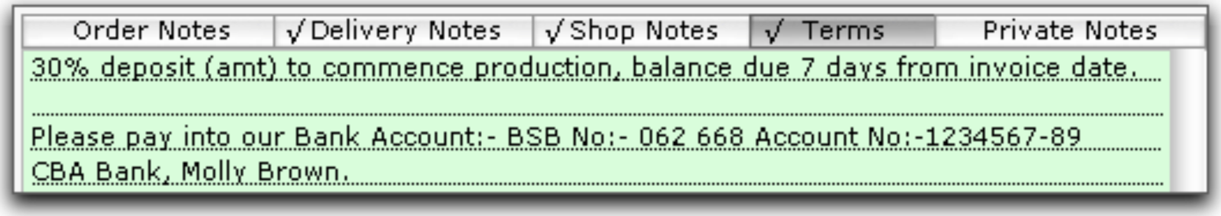
The infill panels are clear PVC no header PVC required & no base rails.

Terms

These notes are used for customer terms or for transit documents.

The standard invoices, orders, etc. do not pick up this information but the forms can be customized and special reports can be created to capture this information if needed.

Note: if you use the same “terms” on all orders, it is best to pre-print them on the order form.


Order Notes
√Delivery Notes
√Shop Notes
√ Terms
Private Notes

30% deposit (amt) to commence production, balance due 7 days from invoice date.

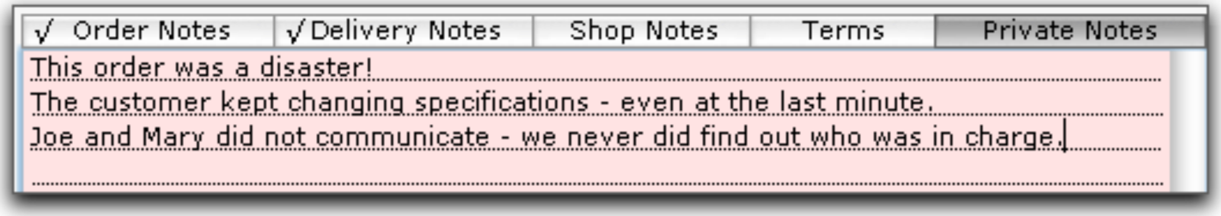
Please pay into our Bank Account:- BSB No:- 062 668 Account No:-1234567-89
CBA Bank, Molly Brown.

Private Notes

These obscure notes may be the most valuable notes of all – despite the fact that they go nowhere.

The are good for “legal” notes (“On the 21st of some month, someone did something, etc.”), explanations of why a customer was dissatisfied, changes to make on future orders, a list of the people who worked on this order, your reasons for sending this purchase order to this vendor – instead of the usual one, etc.

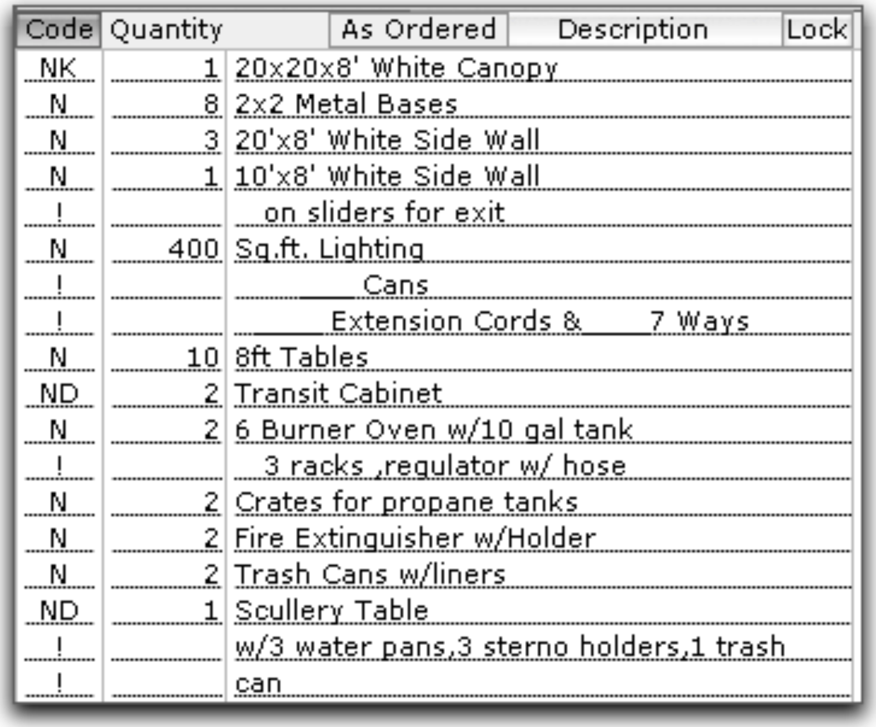
Unlike the other notes, when these are written in the Customers Editor or Vendors Editor they do not transfer to orders or purchases. They are available in the Inventory Editor but, again, don't go anywhere – we have yet to find a reason why one would use private notes on inventory items.



This order was a disaster!
The customer kept changing specifications - even at the last minute.
Joe and Mary did not communicate - we never did find out who was in charge.

Item Notes

Order Notes on inventory items are a bit different. Instead of transferring to the large yellow notes field on orders or purchases (pictured on the first page of this chapter) they follow the inventory line item. In our sample order here there are four sets of inventory item notes – they have exclamation marks, “!”, in the Code column.



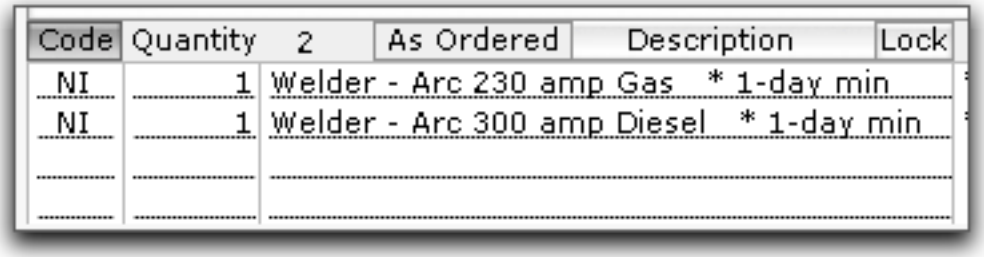
Code	Quantity	As Ordered	Description	Lock
NK	1		20x20x8' White Canopy	
N	8		2x2 Metal Bases	
N	3		20'x8' White Side Wall	
N	1		10'x8' White Side Wall	
!			on sliders for exit	
N	400		Sq.ft. Lighting	
!			____Cans	
!			_____Extension Cords & ____7 Ways	
N	10		8ft Tables	
ND	2		Transit Cabinet	
N	2		6 Burner Oven w/10 gal tank	
!			3 racks ,regulator w/ hose	
N	2		Crates for propane tanks	
N	2		Fire Extinguisher w/Holder	
N	2		Trash Cans w/liners	
ND	1		Scullery Table	
!			w/3 water pans,3 sterno holders,1 trash	
!			can	

You add this kind of note to inventory items with the Inventory Editor pictured in a later chapter.

These notes can be edited on orders or purchases without changing the original note on the inventory item.

You can add notes above or below item descriptions manually.

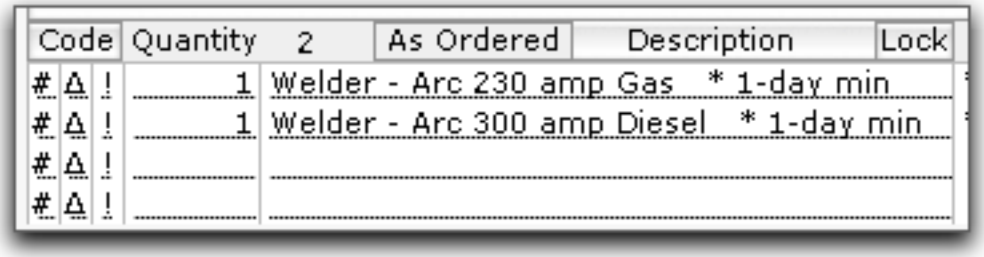
In our sample we will add some notes above and below the 230 amp Gas welder on the first line.



Code	Quantity 2	As Ordered	Description	Lock
NI	1		Welder - Arc 230 amp Gas * 1-day min	
NI	1		Welder - Arc 300 amp Diesel * 1-day min	

First, make sure the Code field is showing the "#, Δ, !" columns instead of actual codes for line items, like "N, P, or S". In the sample above it is showing the codes so we click on the Code button.

Explained another way: if the Codes button is hilighted (like the sample above) then click and unhighlight it (like the sample below).

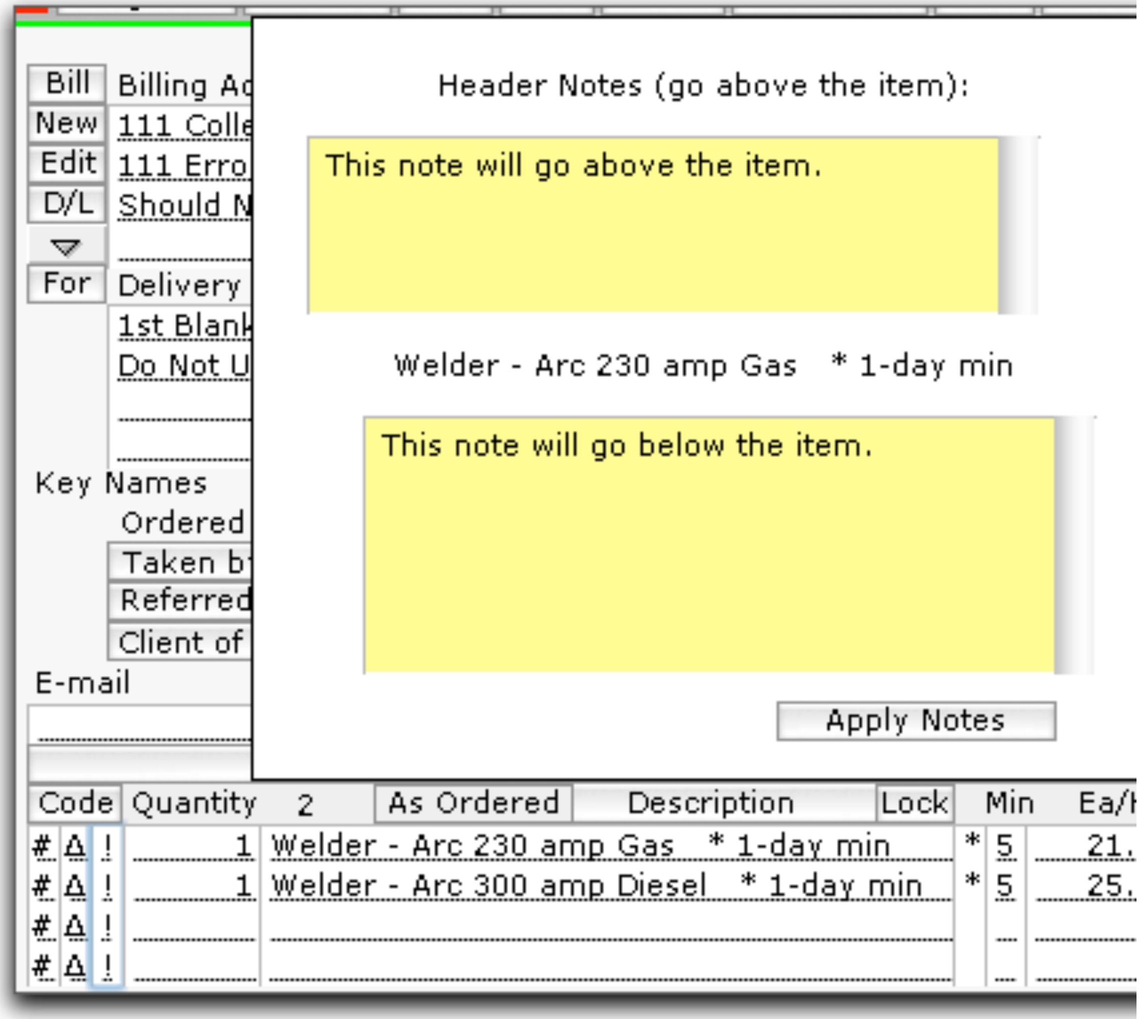


Code	Quantity 2	As Ordered	Description	Lock
# Δ !	1		Welder - Arc 230 amp Gas * 1-day min	
# Δ !	1		Welder - Arc 300 amp Diesel * 1-day min	
# Δ !				
# Δ !				

Next, click on the "!" on the line where you want to add the notes. In this sample we want to click on the "!" on line one. That will bring up the edit fields for item notes.

See the edit fields on the next page.

Click into either yellow field to add your note. Click on the Apply Notes button to transfer the note to the item on the order or purchase.


Bill
Billing Ad
New
111 Colle
Edit
111 Erro
D/L
Should N
For
Delivery
1st Blank
Do Not U
Key Names
Ordered
Taken b
Referred
Client of
E-mail
Apply Notes

Header Notes (go above the item):

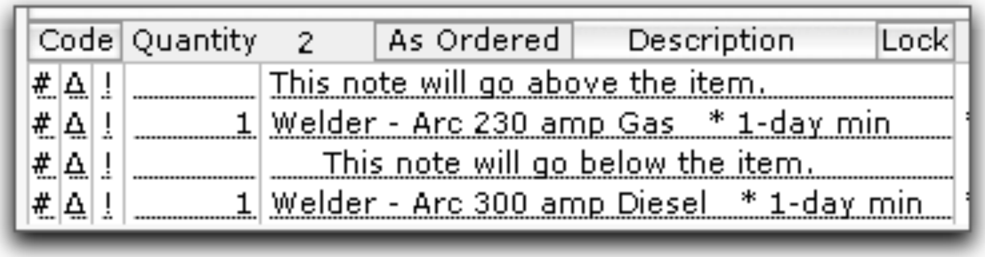
This note will go above the item.

Welder - Arc 230 amp Gas * 1-day min

This note will go below the item.

Code	Quantity 2	As Ordered	Description	Lock	Min	Ea/
# Δ !	1	Welder - Arc 230 amp Gas * 1-day min		*	5	21.
# Δ !	1	Welder - Arc 300 amp Diesel * 1-day min		*	5	25.
# Δ !						
# Δ !						

The lines on the order or purchase will be adjusted automatically to make room for the note.

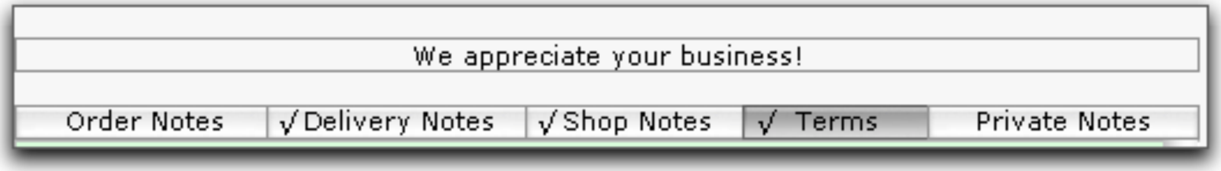


Code	Quantity 2	As Ordered	Description	Lock
# Δ !		This note will go above the item.		
# Δ !	1	Welder - Arc 230 amp Gas * 1-day min		
# Δ !		This note will go below the item.		
# Δ !	1	Welder - Arc 300 amp Diesel * 1-day min		

In our sample the notes were only one line. You can have multi-line notes, paragraphs – even paragraphs separated by blank lines.

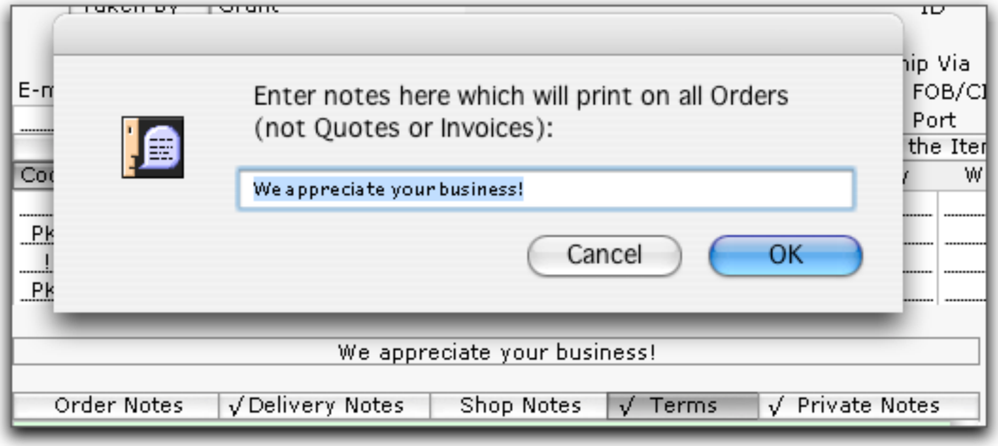
General Notes

There is a general note field located above the tabbed notes. You might not have even noticed that this is a note.



We appreciate your business!

Because it is designed to appear on all orders or purchases it is a little harder to edit than the notes described above. To edit it, hold down the Option key (on most keyboards the Option key is located at the bottom of the keys near the Space Bar) and click on this field.



Enter notes here which will print on all Orders (not Quotes or Invoices):

We appreciate your business!

We appreciate your business!

Type whatever short sentence you want into the box and click OK. Also click OK to keep the original text, clicking Cancel will empty this field on the Editor. Our customers use this general note field to apply the name of the person writing orders on this computer, and to announce special sales, services, or events. For example:

I appreciate your businesses, Mary
Try our new Super Spray Turbo Mistimizer
Remember to order your New Years favors early
Vote for Paul (just joking)

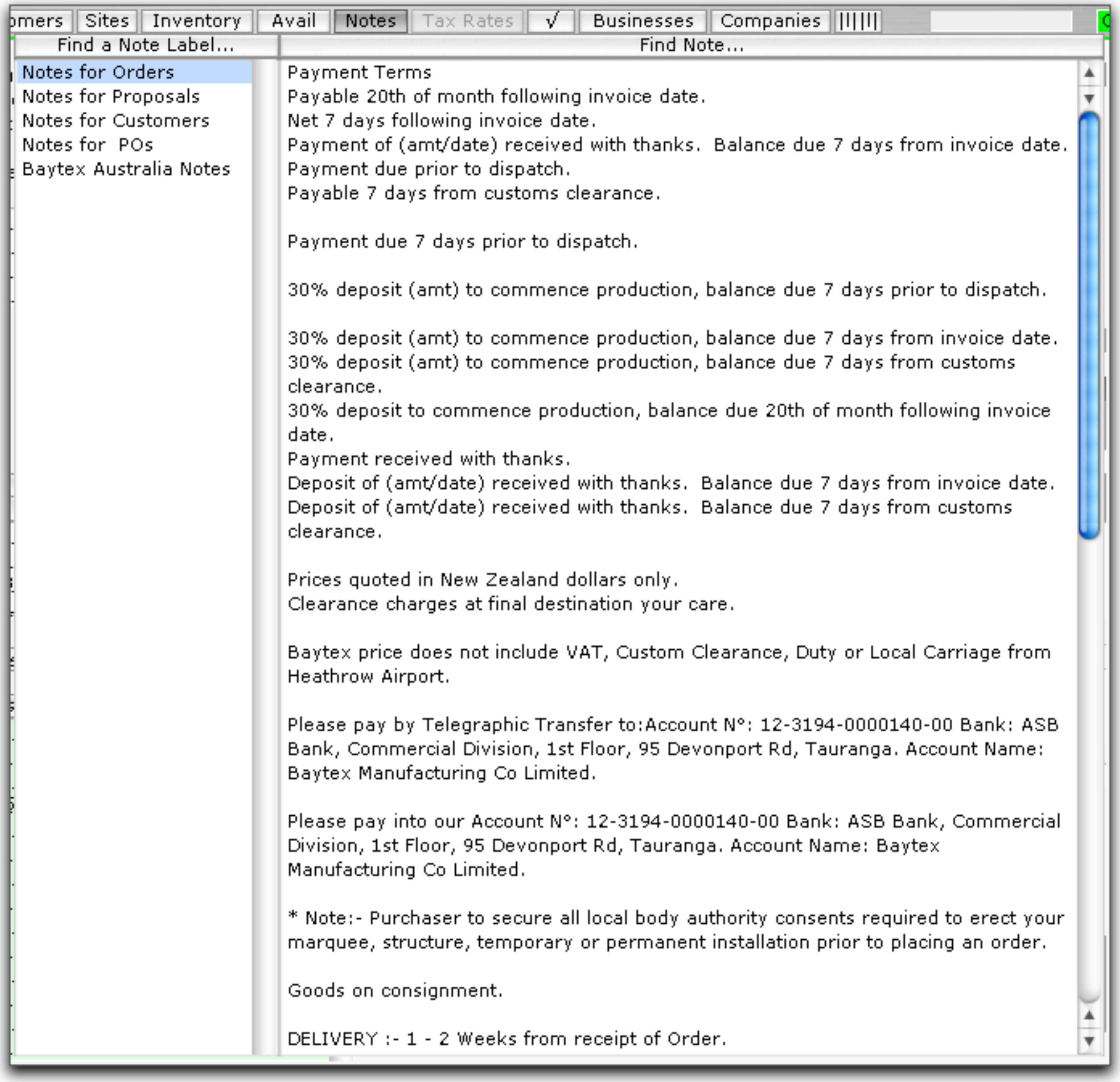
The bad news: When we send you a new Orders Editor this field will again say “We appreciate your businesses”. So, it must be updated with each new edition.

The good news/bad news: This note gets its flexibility by being unique to each computer. Thus, there is no way to change all general notes fields for a company at once.

The Notes List

In addition to notes created in other programs and notes added manually as needed, you can enter notes from the notes list. This list is displayed by clicking on the Notes tab at the top of the screen.

First example:



Notes for Orders
Notes for Proposals
Notes for Customers
Notes for POs
Baytex Australia Notes

Payment Terms
Payable 20th of month following invoice date.
Net 7 days following invoice date.
Payment of (amt/date) received with thanks. Balance due 7 days from invoice date.
Payment due prior to dispatch.
Payable 7 days from customs clearance.

Payment due 7 days prior to dispatch.

30% deposit (amt) to commence production, balance due 7 days prior to dispatch.

30% deposit (amt) to commence production, balance due 7 days from invoice date.
30% deposit (amt) to commence production, balance due 7 days from customs clearance.
30% deposit to commence production, balance due 20th of month following invoice date.
Payment received with thanks.
Deposit of (amt/date) received with thanks. Balance due 7 days from invoice date.
Deposit of (amt/date) received with thanks. Balance due 7 days from customs clearance.

Prices quoted in New Zealand dollars only.
Clearance charges at final destination your care.

Baytex price does not include VAT, Custom Clearance, Duty or Local Carriage from Heathrow Airport.

Please pay by Telegraphic Transfer to:Account N°: 12-3194-0000140-00 Bank: ASB Bank, Commercial Division, 1st Floor, 95 Devonport Rd, Tauranga. Account Name: Baytex Manufacturing Co Limited.

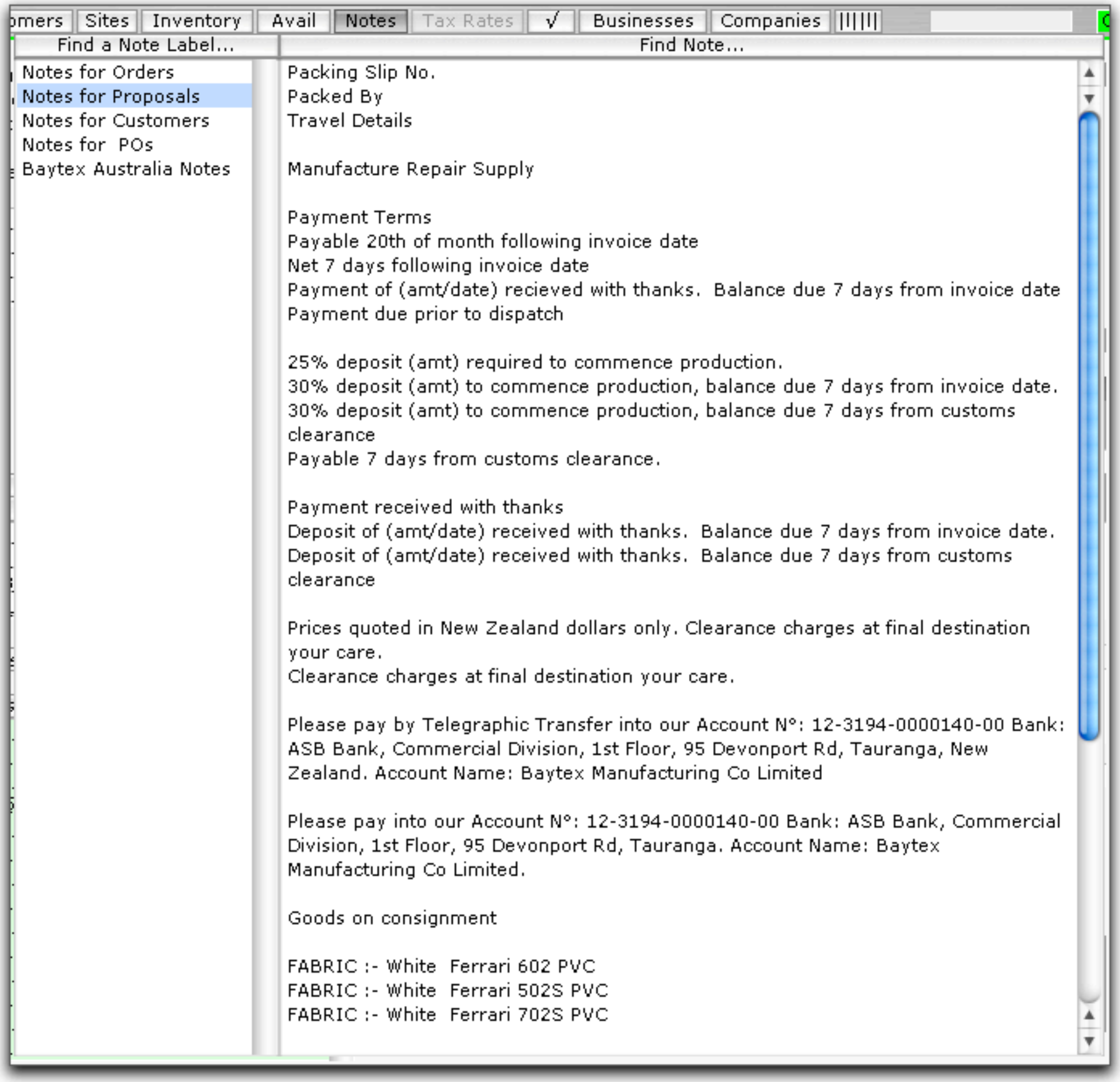
Please pay into our Account N°: 12-3194-0000140-00 Bank: ASB Bank, Commercial Division, 1st Floor, 95 Devonport Rd, Tauranga. Account Name: Baytex Manufacturing Co Limited.

* Note:- Purchaser to secure all local body authority consents required to erect your marquee, structure, temporary or permanent installation prior to placing an order.

Goods on consignment.

DELIVERY :- 1 - 2 Weeks from receipt of Order.

Here is a second example:



Notes for Orders
Notes for Proposals
Notes for Customers
Notes for POs
Baytex Australia Notes

Packing Slip No.
Packed By
Travel Details

Manufacture Repair Supply

Payment Terms
Payable 20th of month following invoice date
Net 7 days following invoice date
Payment of (amt/date) recieved with thanks. Balance due 7 days from invoice date
Payment due prior to dispatch

25% deposit (amt) required to commence production.
30% deposit (amt) to commence production, balance due 7 days from invoice date.
30% deposit (amt) to commence production, balance due 7 days from customs clearance
Payable 7 days from customs clearance.

Payment received with thanks
Deposit of (amt/date) received with thanks. Balance due 7 days from invoice date.
Deposit of (amt/date) received with thanks. Balance due 7 days from customs clearance

Prices quoted in New Zealand dollars only. Clearance charges at final destination your care.
Clearance charges at final destination your care.

Please pay by Telegraphic Transfer into our Account N°: 12-3194-0000140-00 Bank: ASB Bank, Commercial Division, 1st Floor, 95 Devonport Rd, Tauranga, New Zealand. Account Name: Baytex Manufacturing Co Limited

Please pay into our Account N°: 12-3194-0000140-00 Bank: ASB Bank, Commercial Division, 1st Floor, 95 Devonport Rd, Tauranga. Account Name: Baytex Manufacturing Co Limited.

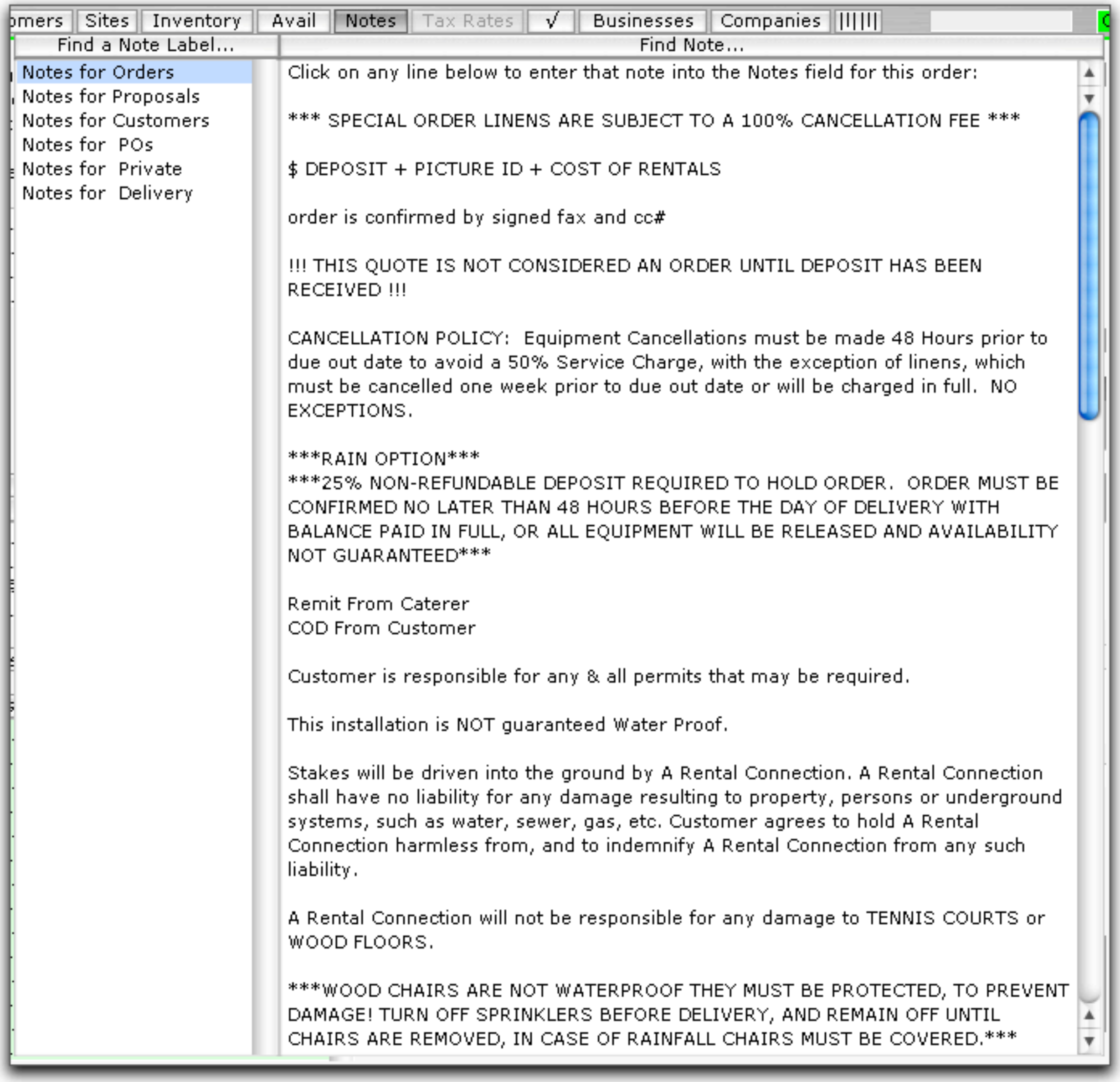
Goods on consignment

FABRIC :- White Ferrari 602 PVC
FABRIC :- White Ferrari 502S PVC
FABRIC :- White Ferrari 702S PVC

As you can see, diverse companies have diverse notes.

Not only can you change the notes themselves, (in the Notes Editor described below), you can add new note labels (different classes of notes, like the “Notes for Orders” or the “Notes for Purchases”) - in the left panel on the pictures above and below.

Here is a third example:



Notes for Orders
Notes for Proposals
Notes for Customers
Notes for POs
Notes for Private
Notes for Delivery

Click on any line below to enter that note into the Notes field for this order:

*** SPECIAL ORDER LINENS ARE SUBJECT TO A 100% CANCELLATION FEE ***

$ DEPOSIT + PICTURE ID + COST OF RENTALS

order is confirmed by signed fax and cc#

!!! THIS QUOTE IS NOT CONSIDERED AN ORDER UNTIL DEPOSIT HAS BEEN RECEIVED !!!

CANCELLATION POLICY: Equipment Cancellations must be made 48 Hours prior to due out date to avoid a 50% Service Charge, with the exception of linens, which must be cancelled one week prior to due out date or will be charged in full. NO EXCEPTIONS.

RAIN OPTION
25% NON-REFUNDABLE DEPOSIT REQUIRED TO HOLD ORDER. ORDER MUST BE CONFIRMED NO LATER THAN 48 HOURS BEFORE THE DAY OF DELIVERY WITH BALANCE PAID IN FULL, OR ALL EQUIPMENT WILL BE RELEASED AND AVAILABILITY NOT GUARANTEED

Remit From Caterer
COD From Customer

Customer is responsible for any & all permits that may be required.

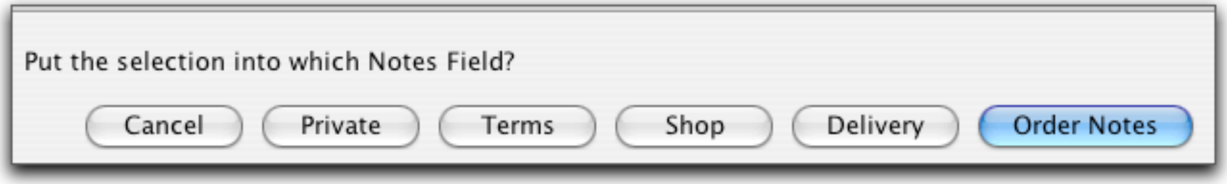
This installation is NOT guaranteed Water Proof.

Stakes will be driven into the ground by A Rental Connection. A Rental Connection shall have no liability for any damage resulting to property, persons or underground systems, such as water, sewer, gas, etc. Customer agrees to hold A Rental Connection harmless from, and to indemnify A Rental Connection from any such liability.

A Rental Connection will not be responsible for any damage to TENNIS COURTS or WOOD FLOORS.

WOOD CHAIRS ARE NOT WATERPROOF THEY MUST BE PROTECTED, TO PREVENT DAMAGE! TURN OFF SPRINKLERS BEFORE DELIVERY, AND REMAIN OFF UNTIL CHAIRS ARE REMOVED, IN CASE OF RAINFALL CHAIRS MUST BE COVERED.

The notes are added to orders (and purchases) by clicking on them. An entire paragraph is transferred with each click. They can go into any of these note fields:



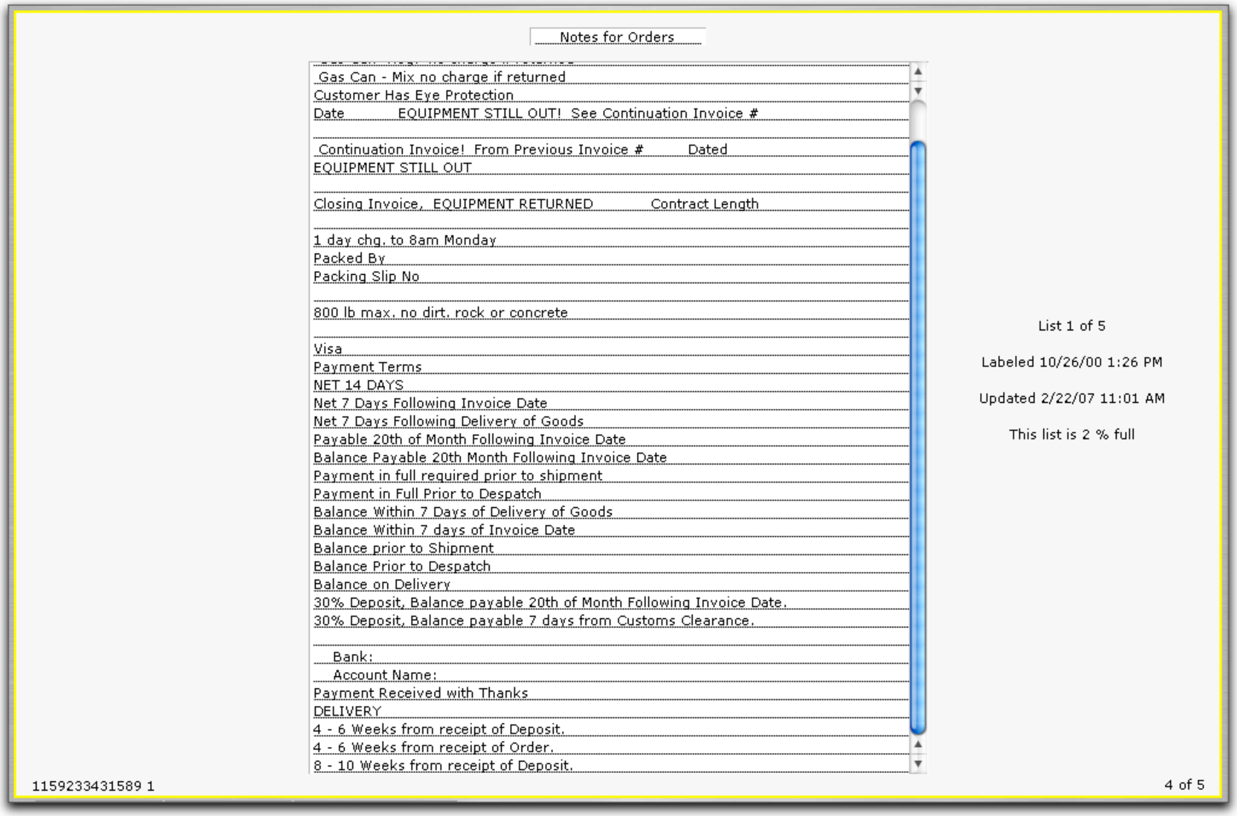
Put the selection into which Notes Field?

Using the Notes Editor

Set up a notes list with the Notes Editor. Go to it with the Navigator.

Make new notes lists with any of the usual new records commands, or select "New Record" from the Edit menu.

Type a name for the new list at the top of the screen:



Notes for Orders

Gas Can - Mix no charge if returned
Customer Has Eye Protection
Date EQUIPMENT STILL OUT! See Continuation Invoice #

Continuation Invoice! From Previous Invoice # Dated
EQUIPMENT STILL OUT

Closing Invoice, EQUIPMENT RETURNED Contract Length

1 day chg. to 8am Monday
Packed By
Packing Slip No

800 lb max. no dirt. rock or concrete

Visa
Payment Terms
NET 14 DAYS
Net 7 Days Following Invoice Date
Net 7 Days Following Delivery of Goods
Payable 20th of Month Following Invoice Date
Balance Payable 20th Month Following Invoice Date
Payment in full required prior to shipment
Payment in Full Prior to Despatch
Balance Within 7 Days of Delivery of Goods
Balance Within 7 days of Invoice Date
Balance prior to Shipment
Balance Prior to Despatch
Balance on Delivery
30% Deposit, Balance payable 20th of Month Following Invoice Date.
30% Deposit, Balance payable 7 days from Customs Clearance.

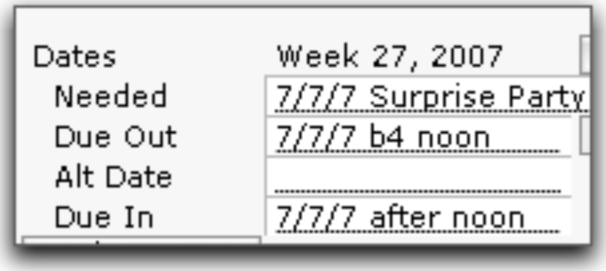
Bank:
Account Name:
Payment Received with Thanks
DELIVERY
4 - 6 Weeks from receipt of Deposit.
4 - 6 Weeks from receipt of Order.
8 - 10 Weeks from receipt of Deposit.

Write some notes.

Let the computer wrap the text, rather than using returns. Returns separate paragraphs and separate paragraphs must be clicked separately to go onto the notes fields in the order or purchase. You can have paragraphs which contain pages of text – it will all be applied to the order/purchase with a single click.

The width of the notes list in the Notes Editor is the same as the width of the notes fields on orders and purchases – so lines will almost always wrap at the same place on each of the Editors.

Notes after Dates

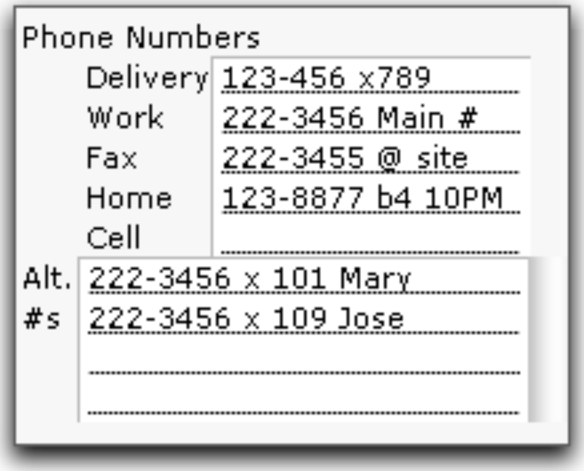

Dates Week 27, 2007
Needed 7/7/7 Surprise Party
Due Out 7/7/7 b4 noon
Alt Date
Due In 7/7/7 after noon

Most other business systems that use dates require you keep the dates separate from numbers and text.

Not Ahsomme.

For many years our customers have been adding brief notes to event, pickup and delivery dates. Just remember to put the note *after* the date – and be sure to leave a space between the date and the note.

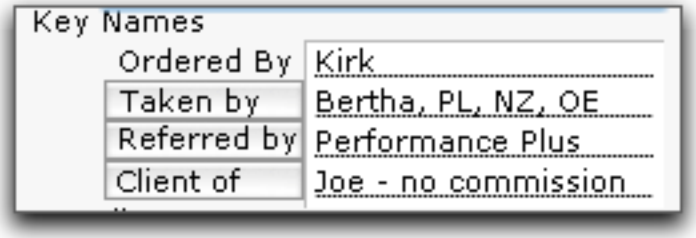
Notes after Numbers


Phone Numbers
Delivery 123-456 x789
Work 222-3456 Main #
Fax 222-3455 @ site
Home 123-8877 b4 10PM
Cell
Alt. #s 222-3456 x 101 Mary
222-3456 x 109 Jose

All of the numbers in the Phone Numbers and Alt. #s fields can have brief notes attached – for example, extension numbers.

Again, as with dates, put the number first, then note - also, leave a space between the number and the beginning of the note.

Notes after Names


Key Names
Ordered By Kirk
Taken by Bertha, PL, NZ, OE
Referred by Performance Plus
Client of Joe - no commission

After putting a name in the Ordered by, Referred by, Taken by, or Client of fields, you can add a note manually. In the sample you notice Bertha took the order. Then PL, NZ, and OE also talked with the customer regarding the order.

There is room for at least five sets of initials. Some companies set up the Taken by popup list to also list people with just their initials.

Notes as Inventory Items

Some companies put “header” notes into the inventory – as inventory items:
*** Cook tent ***
*** Reception tent ***
*** Ceremony tent ***
*** Banquet tent ***
**** Crew tent ****

*** Estimate Only, Confirmed after Deposit ***
*** Not guaranteed waterproof or rain proof ***
-- Special “no refund” pricing --
!!!! One time only, special offer, will not be repeated !!!!

1. This is the first thing
2. This is the second thing
3. This is the third thing

Note: the following are special order/custom-made items:
Alert: the following equipment runs on diesel, not gasoline:

These are used to label sections of an order.

They are put into the inventory so that they will go into the item section of the order, instead of the notes area of the order.

The asterisks (“*”) shown in notes above are optional. They help separate inventory “notes” from inventory items. They make it easier for you to read your inventory and they make it easier for customers to read your orders. If you are using asterisks, we recommend separating them from the note, for easier reading:
Important Note
*** Important Note ***

Delivery Charges as Inventory Items

While not exactly “notes”, this is probably the best place to discuss this. Some of our customers enter the delivery and installation charges as inventory items. Doing so puts the charge into the main order list – instead of in the Delivery or Installation fields and it allows the Yield program to calculate how much revenue you have received from each delivery area. If this is important to you, feel free to use it. For most companies it is not necessary. Note: setup your delivery or installation charges one way or the other, don't try to mix delivery charges in the Delivery Charges with delivery charges in the inventory.

Intermediate Topics

Review the Quick Lists to personalize your system for your business.
Locate some valuable Long Lists.
Discover “Duplicate”, “Reproduce” and other powerful commands.

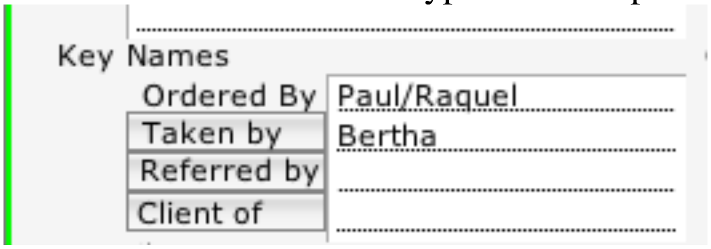
See other Editors and other Lists.

More Editor Tricks

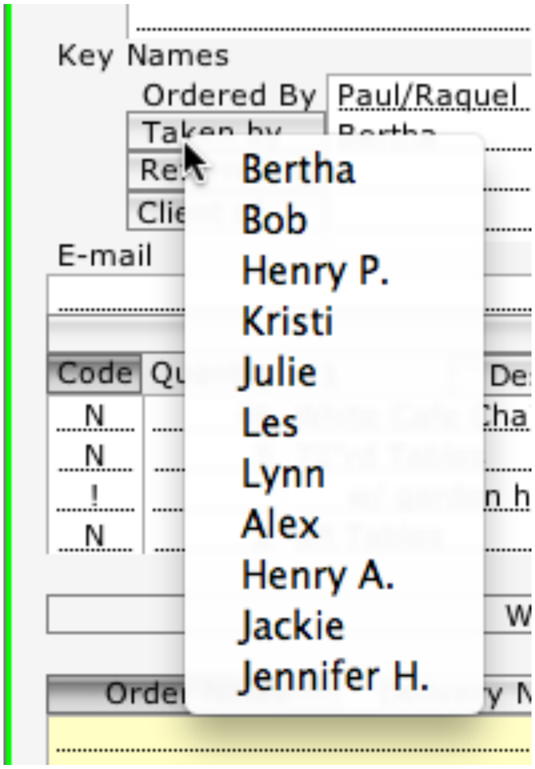
After so many visits to the Orders Editor in this Guidebook, you might wonder if there is anything more to know. Yes, there is. While you can write orders with the knowledge gained from the previous chapters, there are still a few things to help write them more easily. And, as always, what you learn about the Orders Editor applies to the other Editors, as well.

Quick Lists

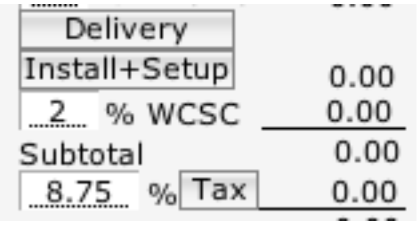
Scattered over the Orders Editor are some popup fields that we call "Quick Lists". These usually provide some simple choices so you can "point and click" rather than "remember and type. An example is the Key Names Quick LIst:



Key Names
Ordered By Paul/Raquel
Taken by Bertha
Referred by
Client of


Key Names
Ordered By
Paul/Raquel
Bertha
Bob
Henry P.
Kristi
Julie
Les
Lynn
Alex
Henry A.
Jackie
Jennifer H.
E-mail
Code
N
N
!
N

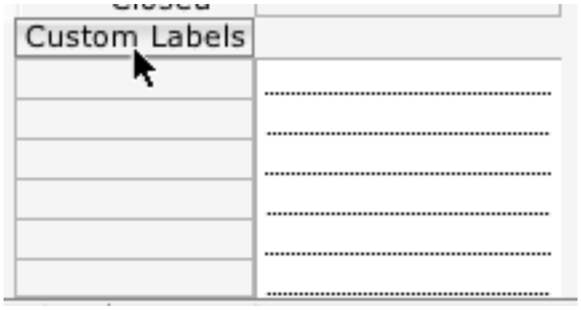
Don't miss the Quick Lists for Delivery, Installation, and Tax:



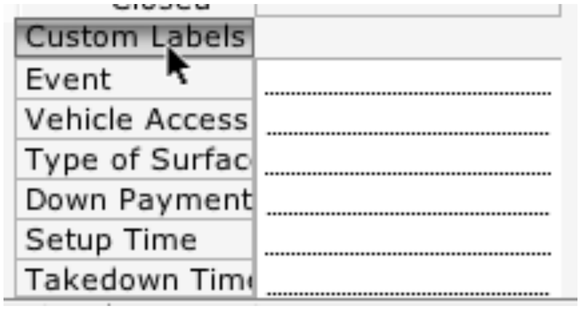
Delivery
Install+Setup 0.00
2 % WCSC 0.00
Subtotal 0.00
8.75 % Tax 0.00

Custom "Quick List"

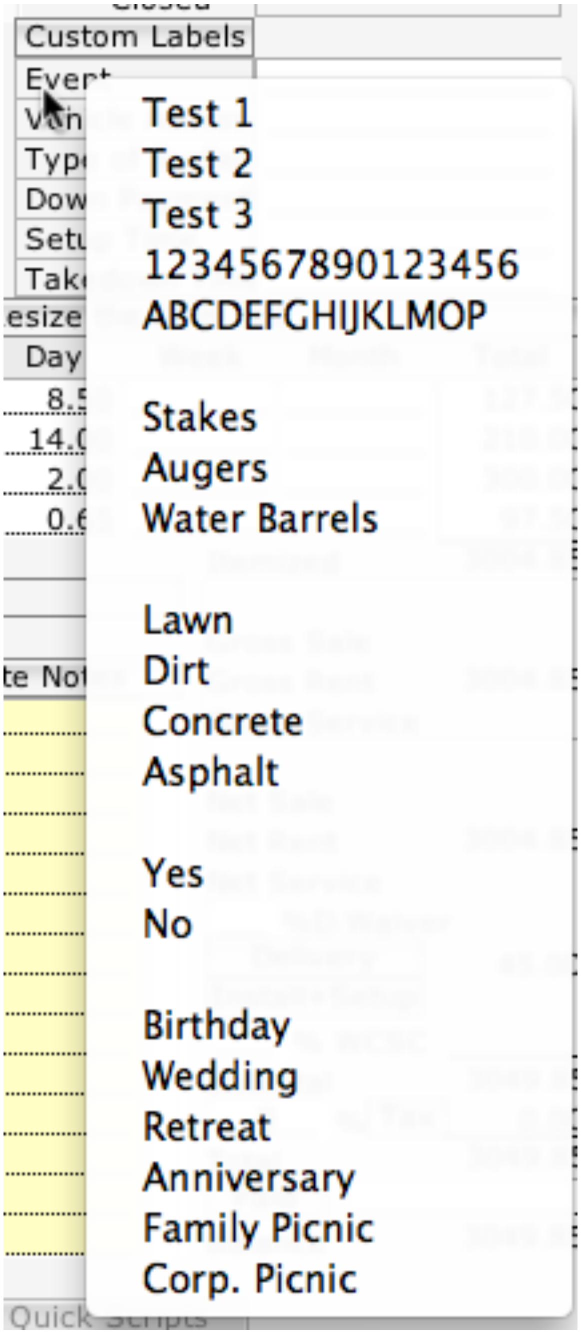
A special "Quick List" helps you use custom labels and custom popup menus. These are located in the center of the screen:


Custom Labels

The master Orders Editor screen has no custom labels (it is shipped empty). Clicking on the Custom Labels button will enter any custom labels setup for your company, if none have been setup, clicking will enter the default custom labels:


Custom Labels
Event
Vehicle Access
Type of Surfac
Down Payment
Setup Time
Takedown Tim

Clicking on any line in the labels like (clicking on "Event" in our sample above, for instance) will show a list of all choices, for all labels - see the next page:

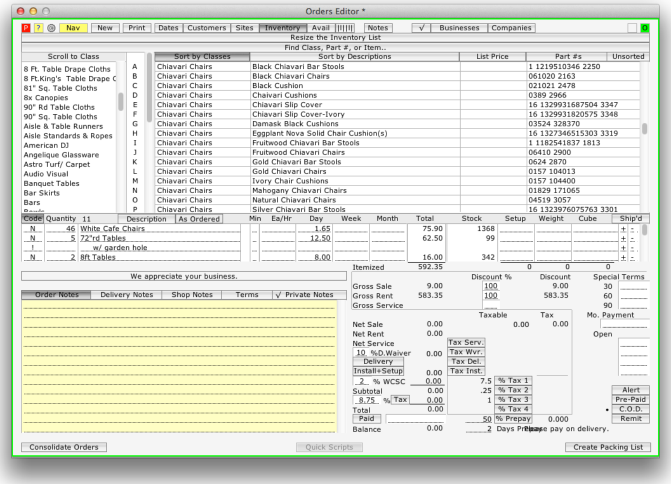

Custom Labels
Event
Test 1
Test 2
Test 3
1234567890123456
ABCDEFGHIJKLMOP
Stakes
Augers
Water Barrels
Lawn
Dirt
Concrete
Asphalt
Yes
No
Birthday
Wedding
Retreat
Anniversary
Family Picnic
Corp. Picnic
Quick Scripts

Whichever choice you make will go next to the label you clicked. For example, we clicked on “Event”; if you choose “Wedding” (or even “Concrete”) it will go to the right of “Event”.

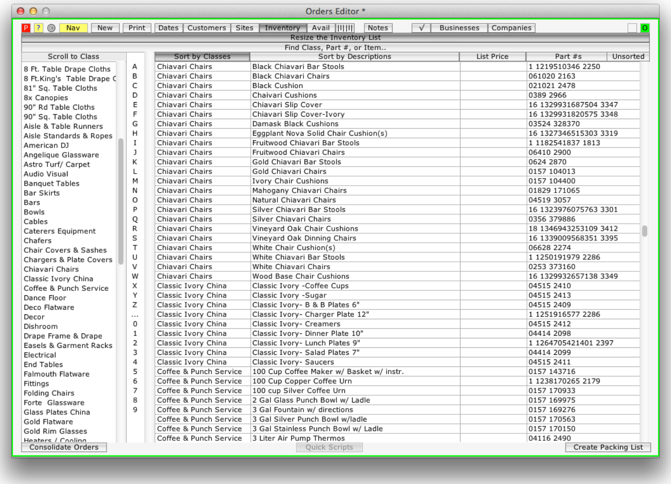
Long Lists

Like the Quick Lists, these hide in plain sight. They are lists that come in two sizes. The Inventory Window we worked with previously is a good example.

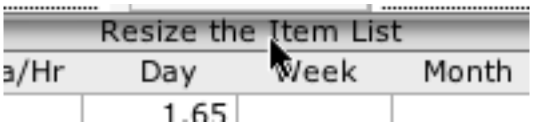
Compact Inventory Window:



Tall Inventory Window:



Another Long List is toggled with the Resize Item List button, in the middle of the screen on Orders and Purchases Editors:

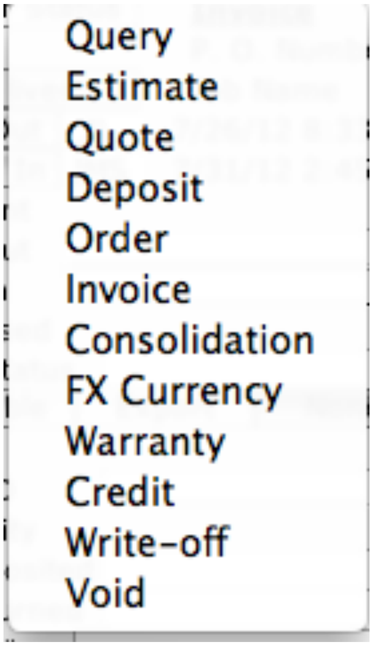

Resize the Item List
a/Hr
Day
Week
Month
1.65

Order, Quote, Void, etc.

You have probably already seen the button for selecting order status,

Order Status
Invoice

but what do all of the choices mean?



Here is a quick explanation:

Queries are “mini quotes”, they are written but incomplete, no customer, no phone number, etc.

Estimates are “informal quotes”, there is no commitment to furnish the goods as estimated.

A formal quote is a commitment to furnish specific goods or services at a specific time, for a specific amount. Quotes have a Valid Until date - after which they are void.

Deposits are memos. They are for the benefit of the customer who wants a record of his/her deposit.

Orders are confirmed deliveries or pickups.

Invoices are completed Orders. They have been shipped (or, in the case of rental, picked-up) - there will be no more changes. Accounting can close the order.

FX Currency are memo orders in a different currency. The order may be written in the seller’s currency, the FX Currency would be written in the buyer’s.

Warranties are service records - usually no charge.

Credits are for money returned - a reduction in the amount of the order.

Write-offs are for open orders that will never be collected.

Voids are orders that were canceled - never delivered.

Note: most delivery and financial programs in the system only pickup information on Orders and Invoices.

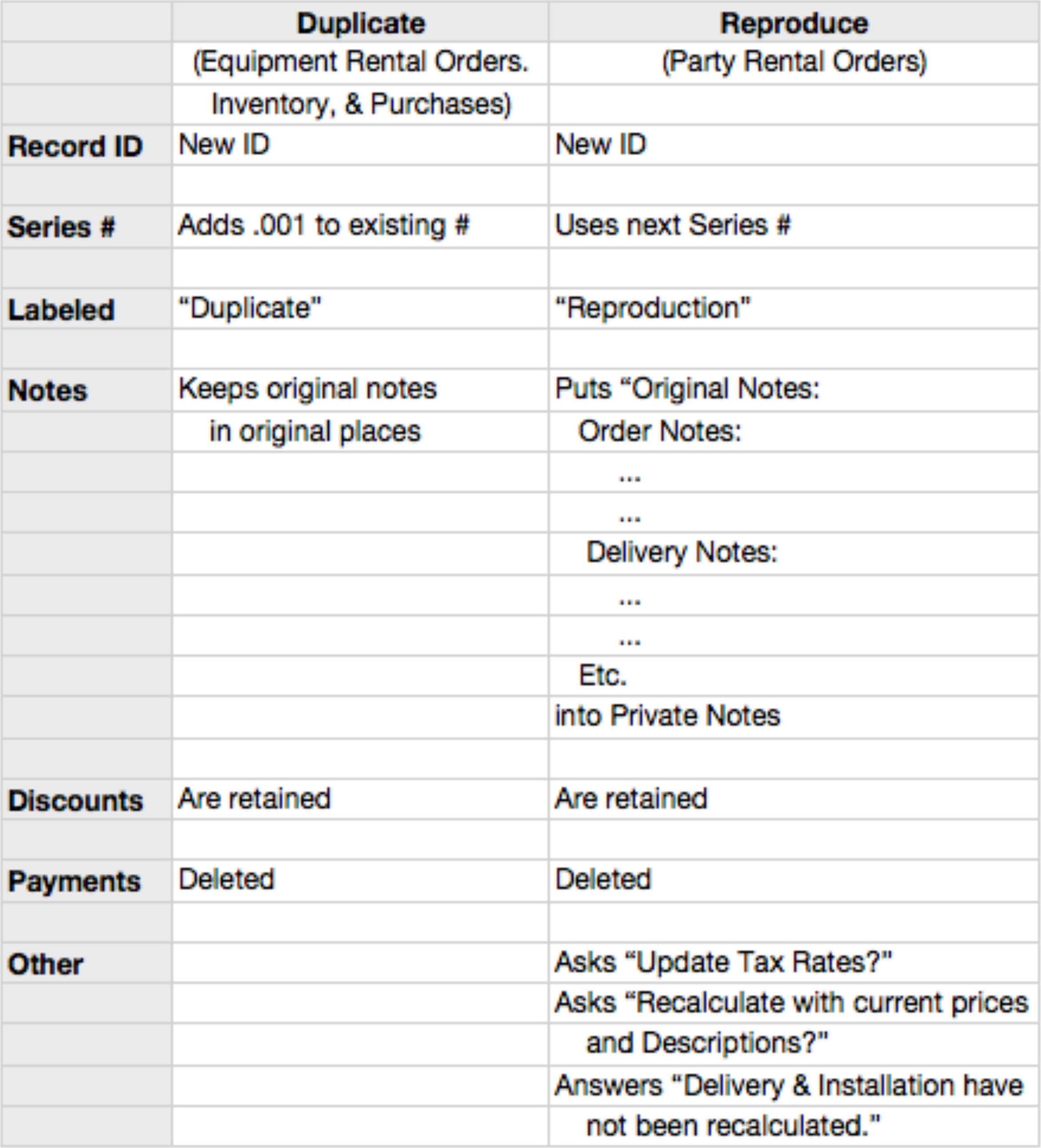
Also note: these order status labels do not affect printing, You can print a Quote as an Order; an Order as an Invoice, an Estimate as a Quote, etc.

Duplicate & Reproduce

Sometimes you want to copy an old record (inventory item, purchase, sale, rental, or customer). Seldom will you want an exact copy; inventory items need a different name, payments must be dropped from orders and purchases. The Ahsomme system has two ways of making these kinds of copies. The Duplicate and Reproduce commands are located in the Edit menu on the main menubar.

Duplicate is used for making an “almost” exact copy (all vendors at a fair).

Reproduce makes an “almost” new record (wedding from two years ago).

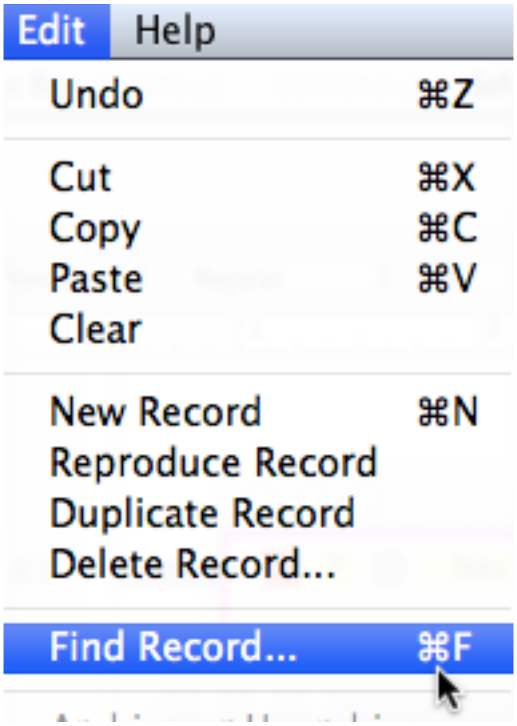


	Duplicate	**Reproduce**
	(Equipment Rental Orders. Inventory, & Purchases)	(Party Rental Orders)
Record ID	New ID	New ID
Series #	Adds .001 to existing #	Uses next Series #
Labeled	“Duplicate"	“Reproduction"
Notes	Keeps original notes in original places	Puts “Original Notes: Order Notes: ... ... Delivery Notes: ... ... Etc. into Private Notes
Discounts	Are retained	Are retained
Payments	Deleted	Deleted
Other		Asks “Update Tax Rates?" Asks “Recalculate with current prices and Descriptions?" Answers “Delivery & Installation have not been recalculated."

Command Keys

In addition to Duplicate and Reproduce, there are other helpful commands on the menubar. These include: Cut, Copy, Paste, New, and Find. They are all on the Edit menu. All of these have Command keys, that's the symbol in front of the letter, for example, for New, hold down the Command key while typing N: ⌘N

Note: on most keyboards the Command key is located next to the Space bar and the bottom of the keyboard and is labeled with the "propeller" shown above, on some keyboards the word "Command" is spelled out, on others you need to use the Control key.



Undo

Undo will generally undo small things, like reversing the most recent changes in a field. It will not un-print, or un-calculate.

Cut, Copy, Paste

Cut removes the selection and copies it to the clipboard.

Copy leaves the selection and copies it to the clipboard.

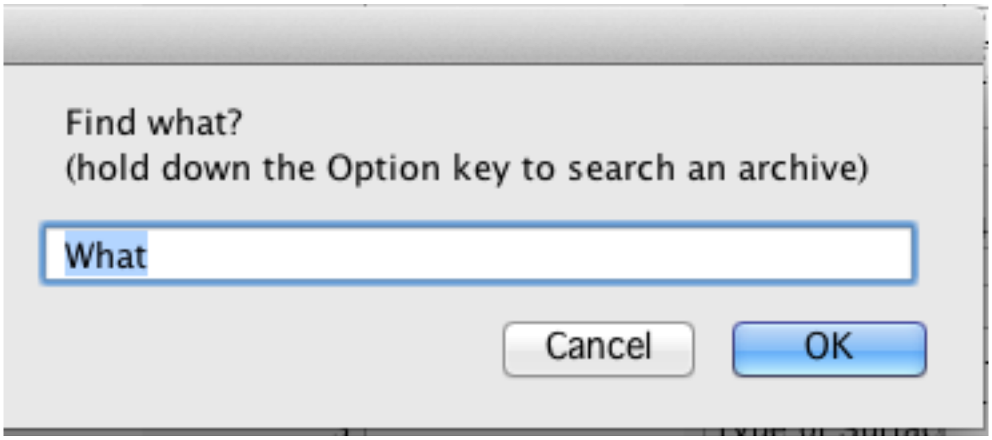
Paste puts cut or copied items into the selected area (usually a field).

New Record

New Record creates a new record in the current Editor - same as selecting New from the Navigator or clicking the New button at the top left of an Editor.

Find

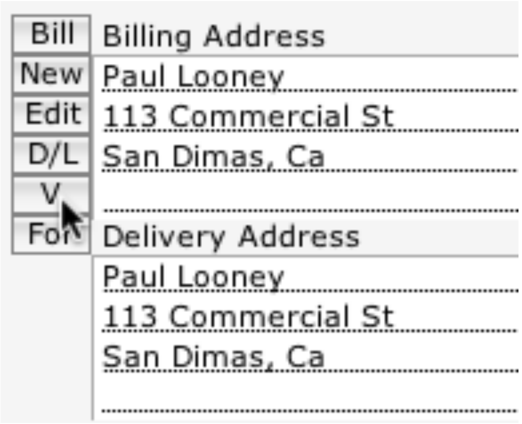
Find will search for a record that has the text you have entered.


Find what?
(hold down the Option key to search an archive)

What

Find is not as helpful as filtering in the Navigator - because Find will only show one record at a time and the record can have any text that even remotely matches the search text. It is especially bad at finding names if there is more than one match in the database. One situation where it “is” helpful is finding an Order or Purchase where you know the order number.

Copy Bill to For and Pay to From

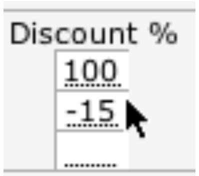

Billing Address
Paul Looney
113 Commercial St
San Dimas, Ca

Delivery Address
Paul Looney
113 Commercial St
San Dimas, Ca

Don’t forget the little “V” that copies information to the field below.

There is one on the Orders Editor and the Purchases Editor - using it is much handier than copying and pasting the addresses.

Discounts


Discount %
100
-15

There are two tricks with discounts:

1. 100% discounts (for employees, for instance)
2. Negative discounts (can be used to put a surcharge on an order - for late payments, for instance)

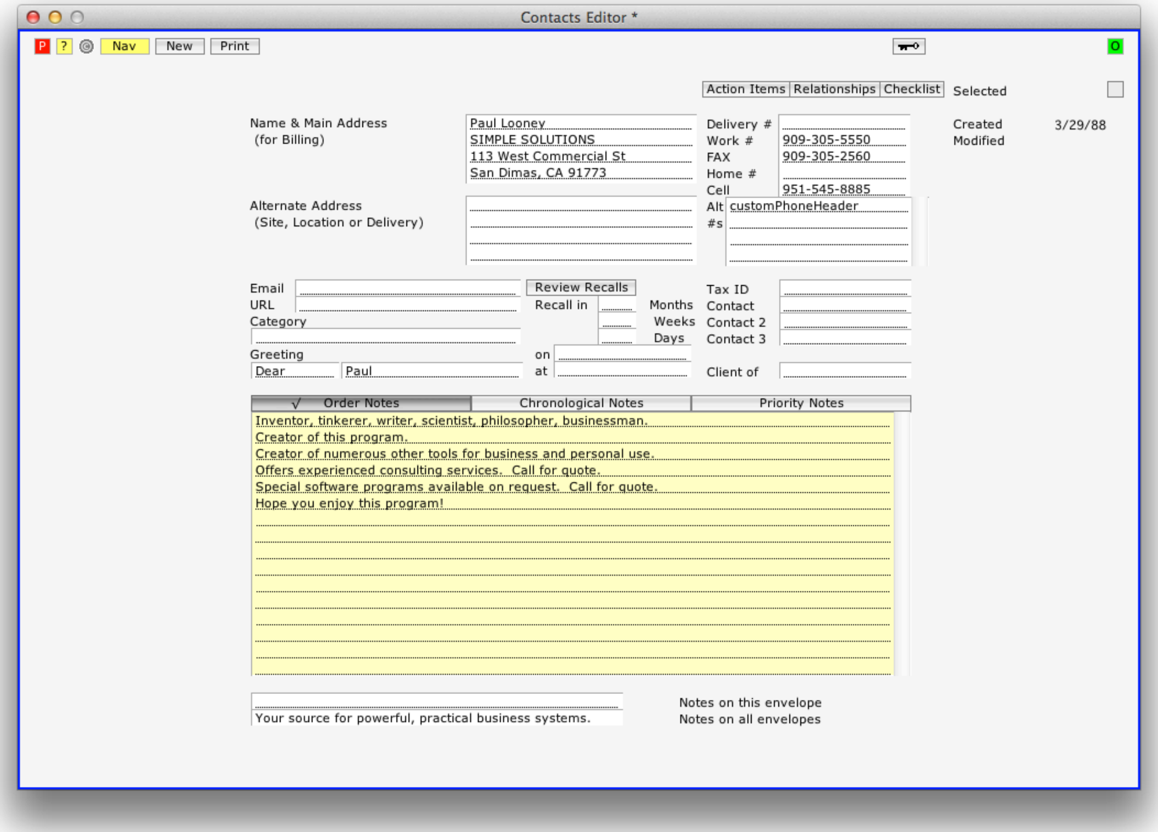
Both of these can be setup on any customer record, as well as being entered directly on an order.

The Other Editors

We have used the Orders Editor for our samples because it is used most frequently by most Ahsomme Users. There are other Editors for other databases. They each make a cameo appearance below.

Note: some of these Editors may be stored in the Admin folder and not available to all users. If the user's computer does not have an Admin folder then those Editors will not appear in the Navigator's Lists & Programs list.

Contacts Editor


Contacts Editor *
P
?
Nav
New
Print
O
Action Items
Relationships
Checklist
Selected
Review Recalls
Recall in
Months
Weeks
Days
on
at
Email
URL
Category
Tax ID
Contact
Contact 2
Contact 3
Client of
Delivery #
Home #
Chronological Notes
Priority Notes
Notes on this envelope
Notes on all envelopes

Name & Main Address (for Billing)
Paul Looney
SIMPLE SOLUTIONS
113 West Commercial St
San Dimas, CA 91773

Alternate Address (Site, Location or Delivery)

Work # 909-305-5550
FAX 909-305-2560
Cell 951-545-8885
Alt #s customPhoneHeader

Created 3/29/88
Modified

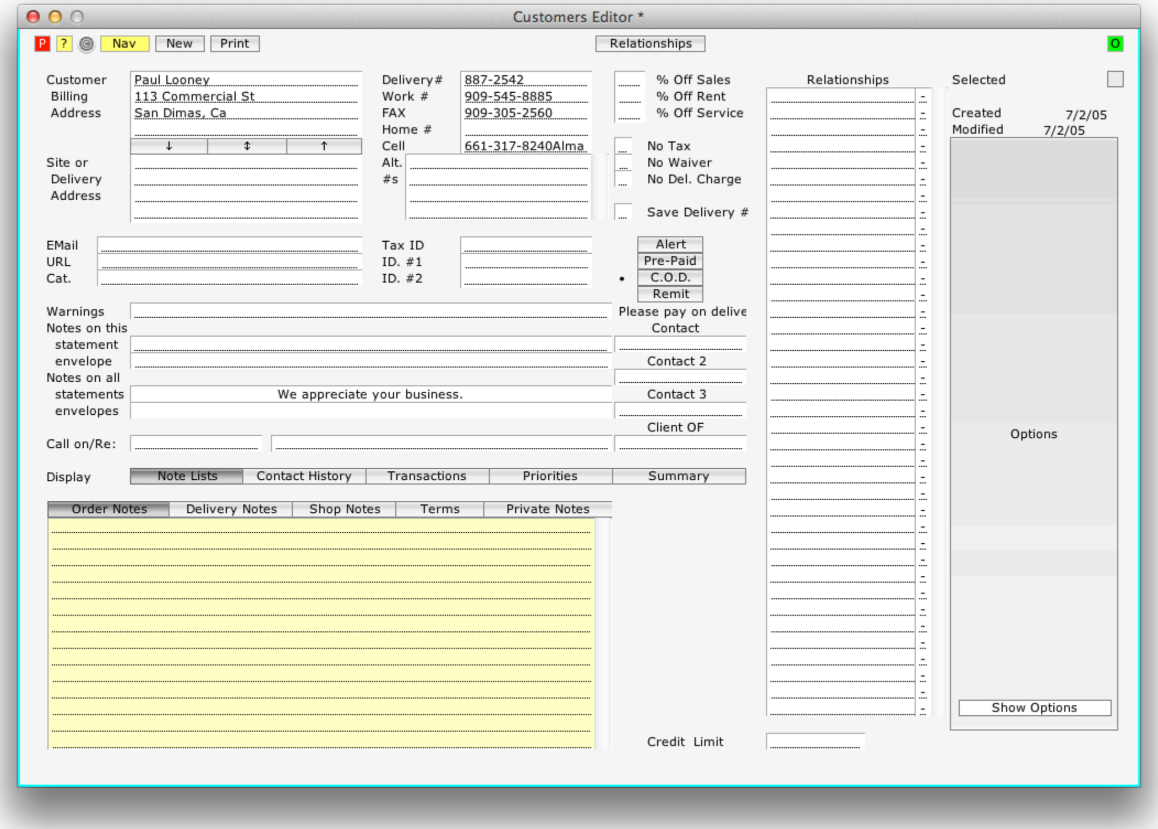
Greeting: Dear Paul

√ Order Notes
Inventor, tinkerer, writer, scientist, philosopher, businessman.
Creator of this program.
Creator of numerous other tools for business and personal use.
Offers experienced consulting services. Call for quote.
Special software programs available on request. Call for quote.
Hope you enjoy this program!

Your source for powerful, practical business systems.

The Customers database is for customer records - used with Orders. The Vendors database is for vendor records - used with Purchases. Contacts database is used for everything else; employees, prospects, family, friends, suppliers that don't need a Vendor record, etc.

Customers Editor


Customers Editor *
P
?
Nav
New
Print
Relationships
O
% Off Sales
% Off Rent
% Off Service
No Tax
No Waiver
No Del. Charge
Save Delivery #
Alert
Pre-Paid
C.O.D.
Remit
Contact
Contact 2
Contact 3
Client OF
Relationships
Selected
Options
Show Options
Display
Note Lists
Contact History
Transactions
Priorities
Summary
Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes
Site or Delivery Address
EMail
URL
Cat.
Tax ID
ID. #1
ID. #2
Home #
Alt. #s
Warnings
Notes on this statement envelope
Call on/Re:
Credit Limit

Customer Billing Address: Paul Looney
113 Commercial St
San Dimas, Ca

Delivery#: 887-2542
Work #: 909-545-8885
FAX: 909-305-2560
Cell: 661-317-8240Alma

Notes on all statements envelopes: We appreciate your business.

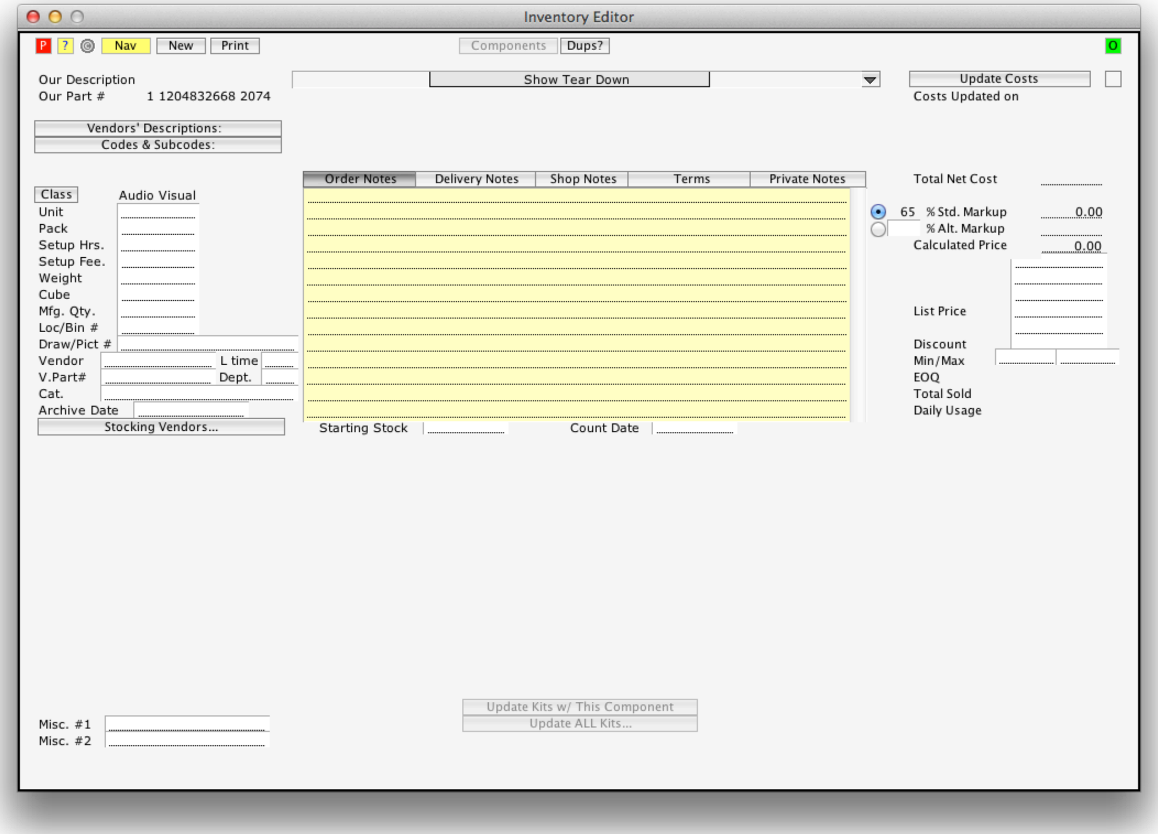
Please pay on delive

Created: 7/2/05
Modified: 7/2/05

The Customers Editor is almost identical to the Contacts (you can even move records for prospects, created in Contacts to Customers.) The main difference is on the right side of the Customers Editor screen where there are some locked setup settings for running statements.

The Customers Editor is the only place where you can set a credit limit for a customer. Thus only users with a Customers Editor can set credit limits. All other functions of the Customers Editor can be accessed from the Customers window on the Orders Editor, described previously.

Inventory Editor


Inventory Editor
P
?
Nav
New
Print
Components
Dups?
O
Our Description
Show Tear Down
Update Costs
Costs Updated on
Vendors' Descriptions:
Codes & Subcodes:
Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes
Total Net Cost
Unit
Pack
Setup Hrs.
Setup Fee.
Weight
Cube
Mfg. Qty.
Loc/Bin #
Draw/Pict #
Vendor
L time
V.Part#
Dept.
Cat.
Archive Date
Stocking Vendors...
% Alt. Markup
List Price
Discount
Min/Max
EOQ
Total Sold
Daily Usage
Starting Stock
Count Date
Update Kits w/ This Component
Update ALL Kits...
Misc. #1
Misc. #2

Our Part # 1 1204832668 2074

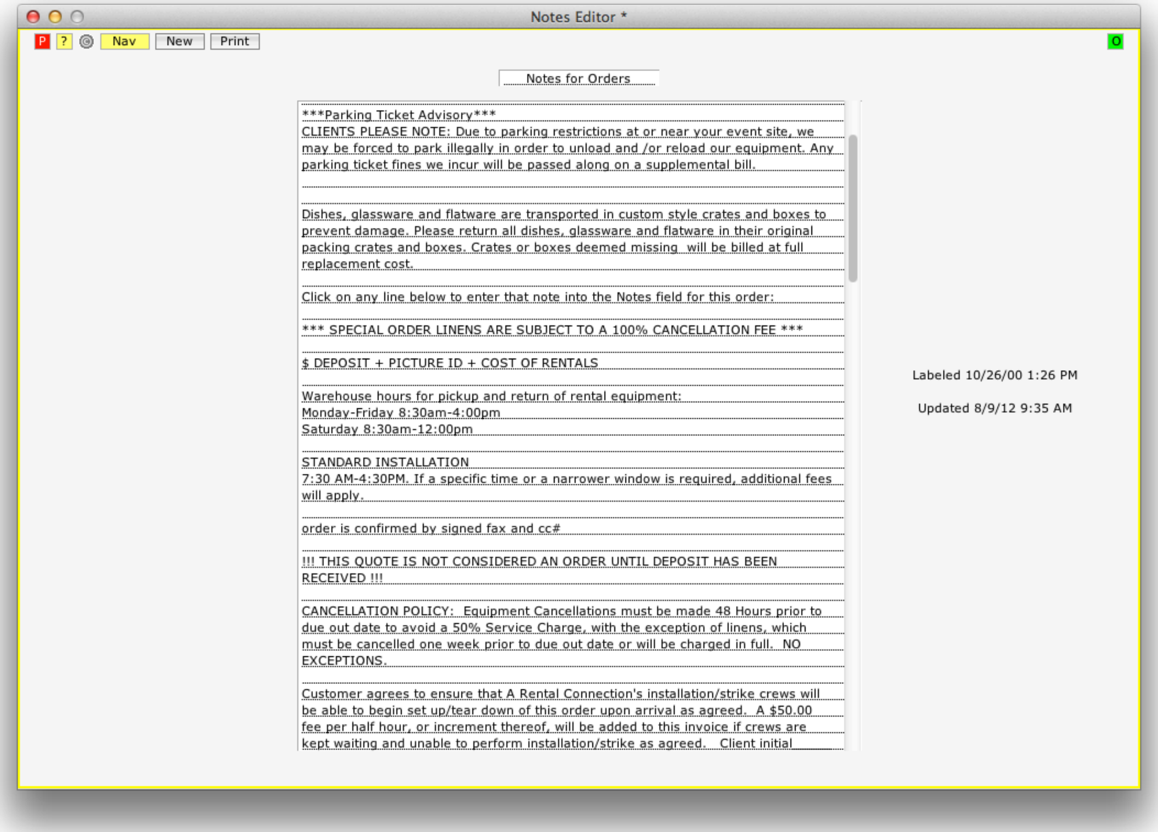
Class Audio Visual

● 65 % Std. Markup 0.00

Calculated Price 0.00

The Inventory Editor and its companion, the Inventory Organizer, are covered in the Administrator Guidebook.

Notes Editor



Notes for Orders

Parking Ticket Advisory
CLIENTS PLEASE NOTE: Due to parking restrictions at or near your event site, we may be forced to park illegally in order to unload and /or reload our equipment. Any parking ticket fines we incur will be passed along on a supplemental bill.

Dishes, glassware and flatware are transported in custom style crates and boxes to prevent damage. Please return all dishes, glassware and flatware in their original packing crates and boxes. Crates or boxes deemed missing will be billed at full replacement cost.

Click on any line below to enter that note into the Notes field for this order:

*** SPECIAL ORDER LINENS ARE SUBJECT TO A 100% CANCELLATION FEE ***

$ DEPOSIT + PICTURE ID + COST OF RENTALS

Warehouse hours for pickup and return of rental equipment:
Monday-Friday 8:30am-4:00pm
Saturday 8:30am-12:00pm

STANDARD INSTALLATION
7:30 AM-4:30PM. If a specific time or a narrower window is required, additional fees will apply.

order is confirmed by signed fax and cc#

!!! THIS QUOTE IS NOT CONSIDERED AN ORDER UNTIL DEPOSIT HAS BEEN RECEIVED !!!

CANCELLATION POLICY: Equipment Cancellations must be made 48 Hours prior to due out date to avoid a 50% Service Charge, with the exception of linens, which must be cancelled one week prior to due out date or will be charged in full. NO EXCEPTIONS.

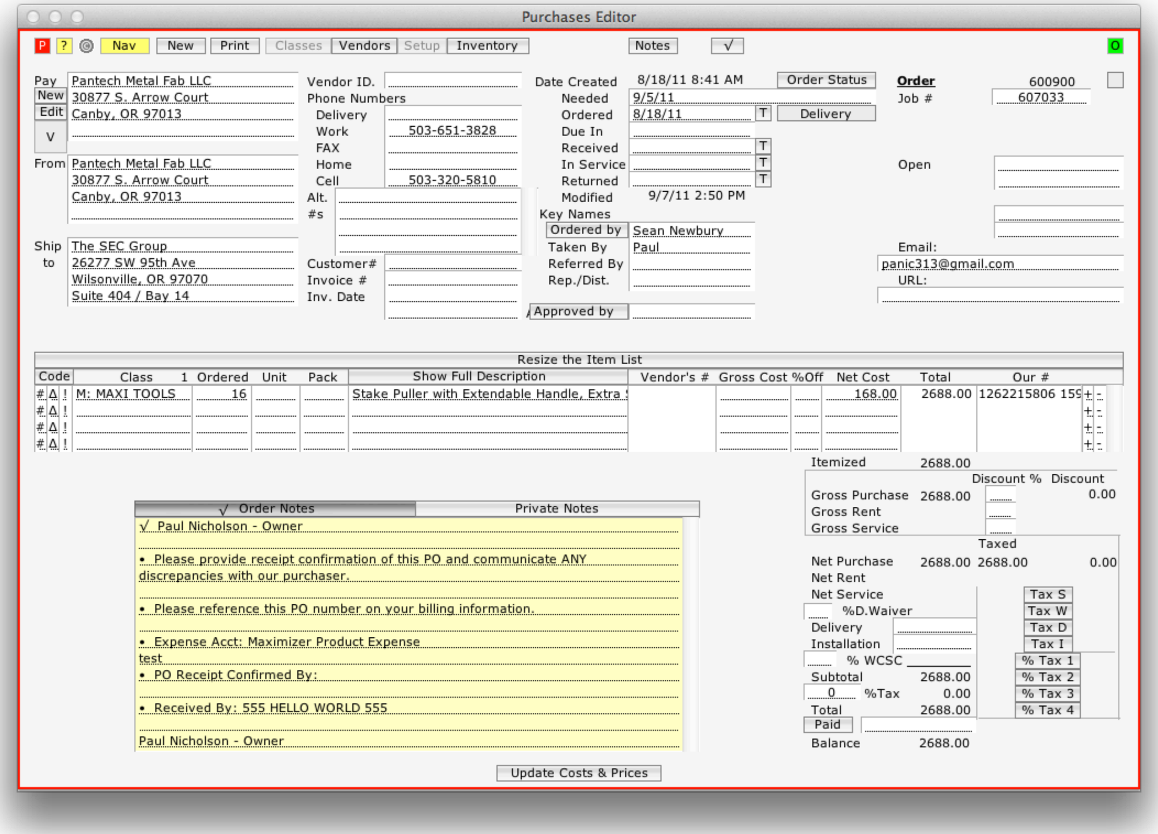
Customer agrees to ensure that A Rental Connection's installation/strike crews will be able to begin set up/tear down of this order upon arrival as agreed. A $50.00 fee per half hour, or increment thereof, will be added to this invoice if crews are kept waiting and unable to perform installation/strike as agreed. Client initial______

Labeled 10/26/00 1:26 PM

Updated 8/9/12 9:35 AM

The Notes database has pre-written notes for Orders and Purchases.

Purchases Editor


Purchases Editor
P
?
Nav
New
Print
Classes
Vendors
Setup
Inventory
Notes
√
O
New
Edit
V
Order Status
Delivery
T
Ordered by
Approved by
Resize the Item List
Show Full Description
Order Notes
Private Notes
Tax S
Tax W
Tax D
Tax I
% Tax 1
% Tax 2
% Tax 3
% Tax 4
Paid
Update Costs & Prices

Pay
Pantech Metal Fab LLC
30877 S. Arrow Court
Canby, OR 97013

From
Pantech Metal Fab LLC
30877 S. Arrow Court
Canby, OR 97013

Ship to
The SEC Group
26277 SW 95th Ave
Wilsonville, OR 97070
Suite 404 / Bay 14

Vendor ID.
Phone Numbers
Delivery
Work 503-651-3828
FAX
Home
Cell 503-320-5810
Alt. #s
Customer#
Invoice #
Inv. Date

Date Created 8/18/11 8:41 AM
Needed 9/5/11
Ordered 8/18/11
Due In
Received
In Service
Returned
Modified 9/7/11 2:50 PM

Key Names
Ordered by Sean Newbury
Taken By Paul
Referred By
Rep./Dist.
Approved by

Order 600900
Job # 607033
Open
Email:
panic313@gmail.com
URL:

Code	Class	1 Ordered	Unit	Pack	Show Full Description	Vendor's #	Gross Cost	%Off	Net Cost	Total	Our #
# Δ !	M: MAXI TOOLS	16			Stake Puller with Extendable Handle, Extra				168.00	2688.00	1262215806 15
# Δ !											
# Δ !											
# Δ !											

√ Order Notes

√ Paul Nicholson - Owner

- Please provide receipt confirmation of this PO and communicate ANY discrepancies with our purchaser.
- Please reference this PO number on your billing information.
- Expense Acct: Maximizer Product Expense

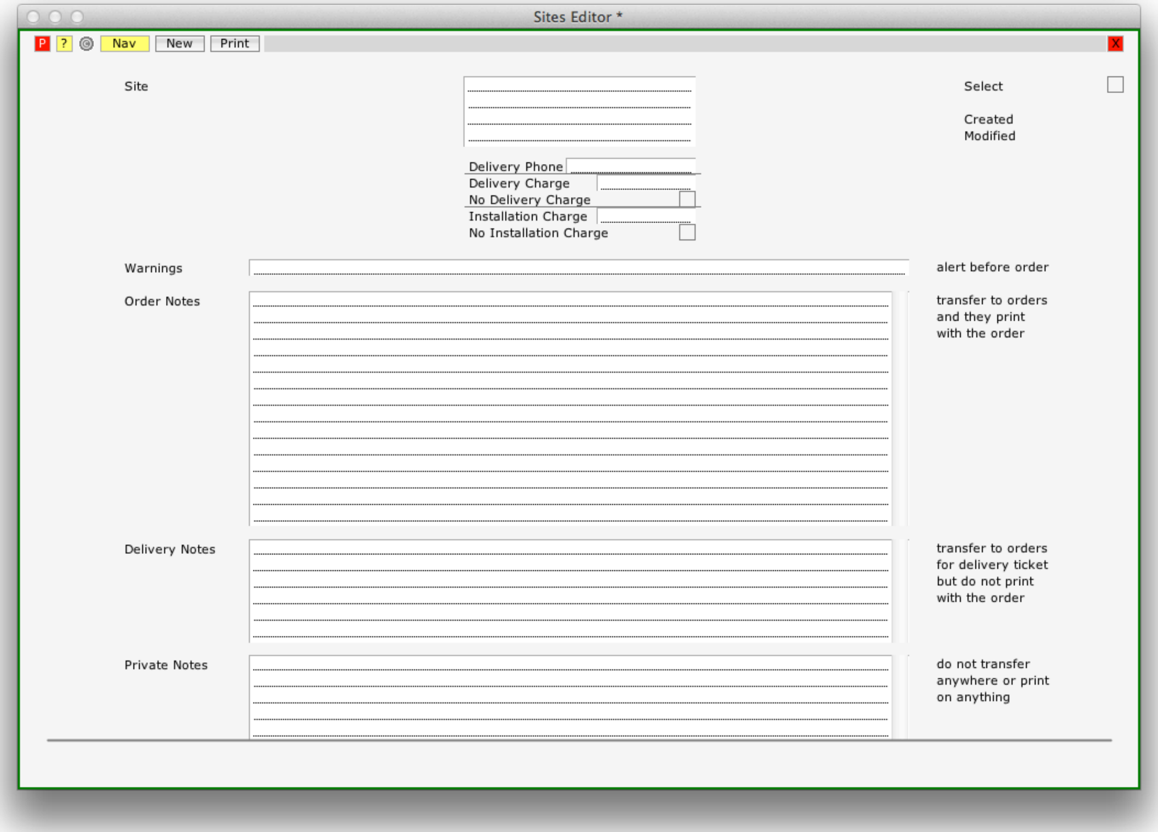
test
- PO Receipt Confirmed By:
- Received By: 555 HELLO WORLD 555

Paul Nicholson - Owner

			Discount %	Discount
Itemized	2688.00			
Gross Purchase	2688.00			0.00
Gross Rent				
Gross Service				
		Taxed		
Net Purchase	2688.00	2688.00		0.00
Net Rent				
Net Service				
%D.Waiver				
Delivery				
Installation				
% WCSC				
Subtotal	2688.00			
0 %Tax	0.00			
Total	2688.00			
Paid				
Balance	2688.00			

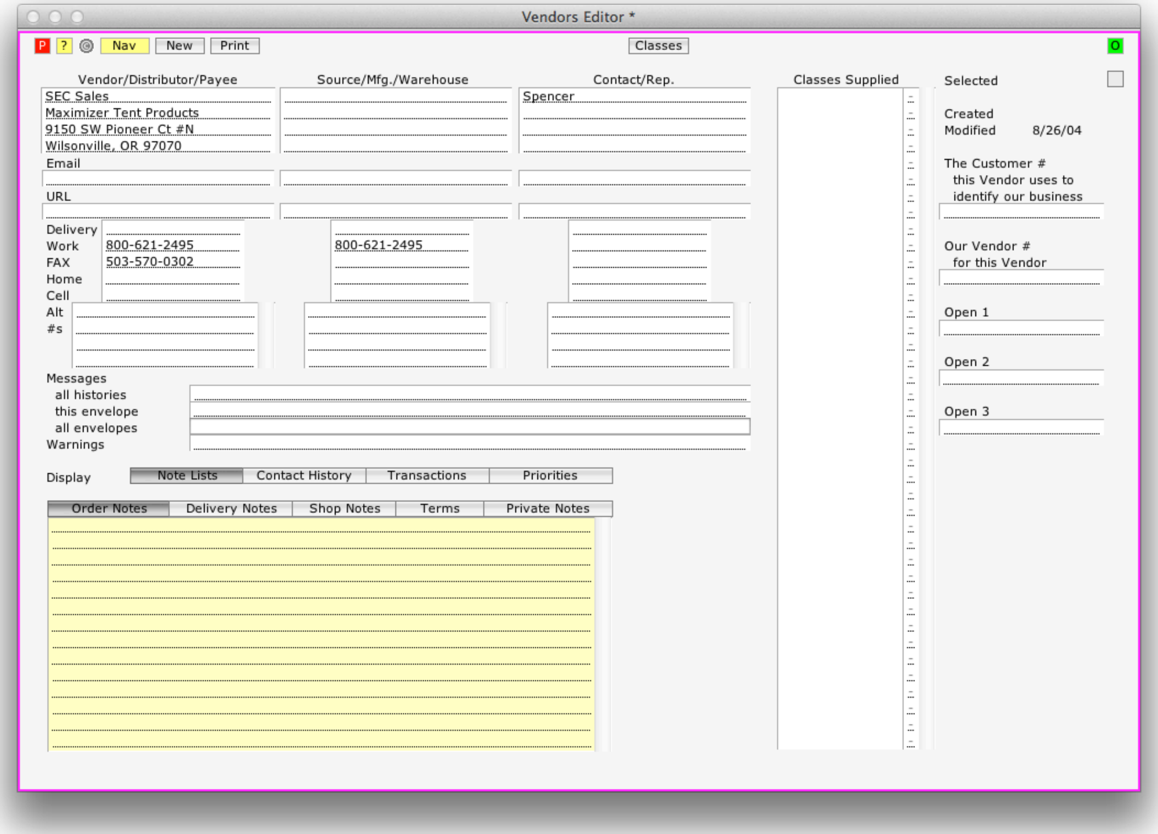
The Purchases Editor is the opposite of the Orders Editor. The OE is for receivables, the PE is for payables. They work almost identically.

Sites Editor


Sites Editor *
P
?
Nav
New
Print
X
Site
Select
Created
Modified
Delivery Phone
Delivery Charge
No Delivery Charge
Installation Charge
No Installation Charge
Warnings
alert before order
Order Notes
transfer to orders and they print with the order
Delivery Notes
transfer to orders for delivery ticket but do not print with the order
Private Notes
do not transfer anywhere or print on anything

The Sites Editor is used with the Orders Editor. Sites information goes into the For field on orders.

Vendors Editor


Vendors Editor *
P
?
Nav
New
Print
Classes
Vendor/Distributor/Payee
Source/Mfg./Warehouse
Contact/Rep.
Classes Supplied
Selected
Email
URL
Delivery
Work
FAX
Home
Cell
Alt
#s
Messages
all histories
this envelope
all envelopes
Warnings
Display
Note Lists
Contact History
Transactions
Priorities
Order Notes
Delivery Notes
Shop Notes
Terms
Private Notes
Created
The Customer #
this Vendor uses to
identify our business
Our Vendor #
for this Vendor
Open 1
Open 2
Open 3

Vendor/Distributor/Payee:
SEC Sales
Maximizer Tent Products
9150 SW Pioneer Ct #N
Wilsonville, OR 97070

Contact/Rep.: Spencer

Work: 800-621-2495
FAX: 503-570-0302

Source/Mfg./Warehouse Work: 800-621-2495

Modified 8/26/04

The Vendors Editor is almost identical to the Customers Editor. It is used with Purchases.

The Other Lists

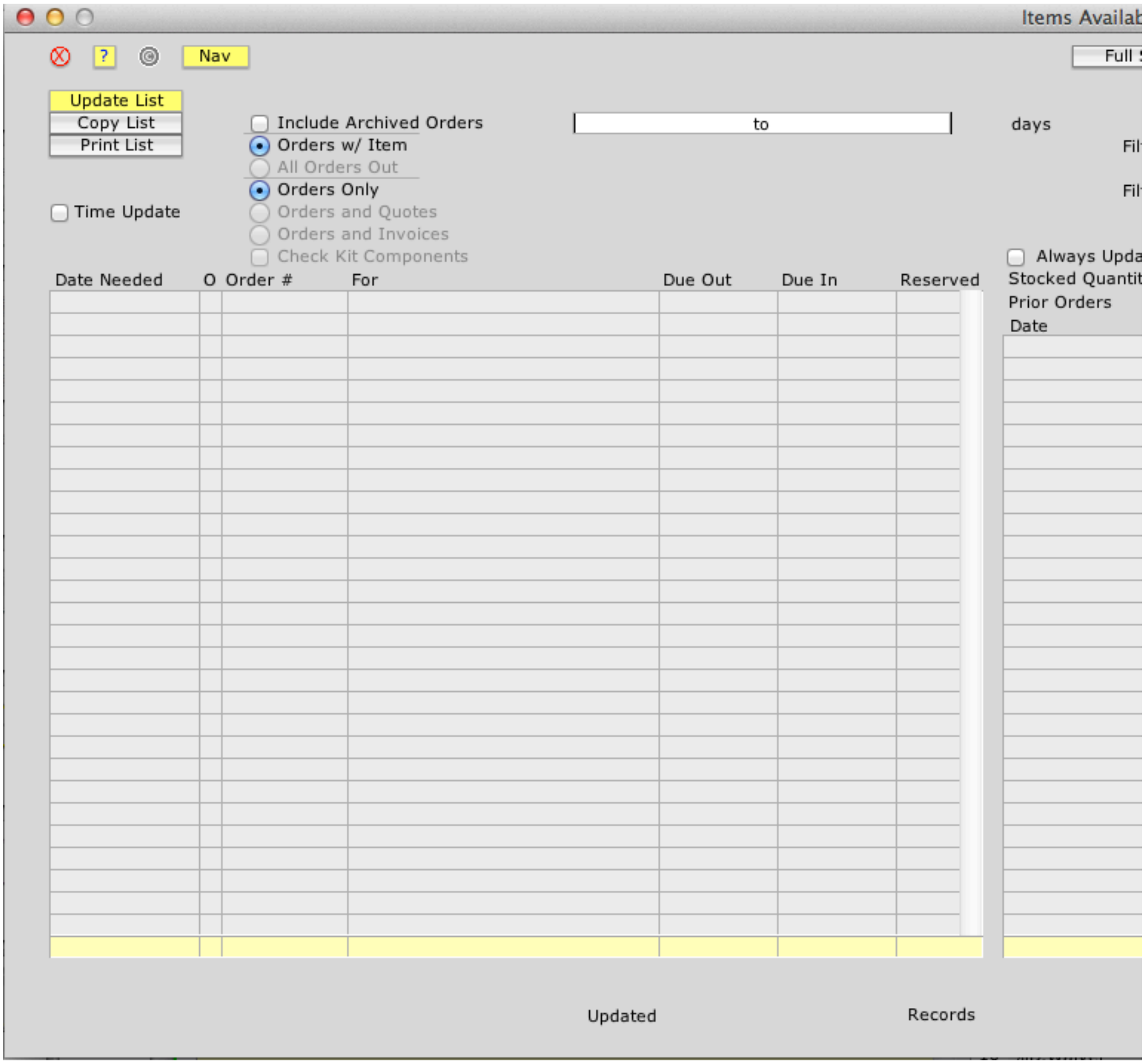
The most important and useful list in the Ahsomme system is the Navigator. It can display almost any information in any database in any order desired. Using the Navigator to make custom lists is covered in the Ahsomme Administrator Guidebook. There are other powerful List Programs designed for special tasks. Here they get a cameo appearance. You will immediately notice how they build on what you have already learned from using the Navigator - for instance, many of the programs described below even look almost identical to the Navigator.

With your knowledge of the Navigator from prior chapters, and a little assistance from Object Help, you should be able to run any of the programs in this chapter without further instructions.

One thing that may not be obvious, you can usually click on a line in any of these List Programs to open that record in its Editor.

Items Available by Date

This wide window is split across two pages. Here is the left side:

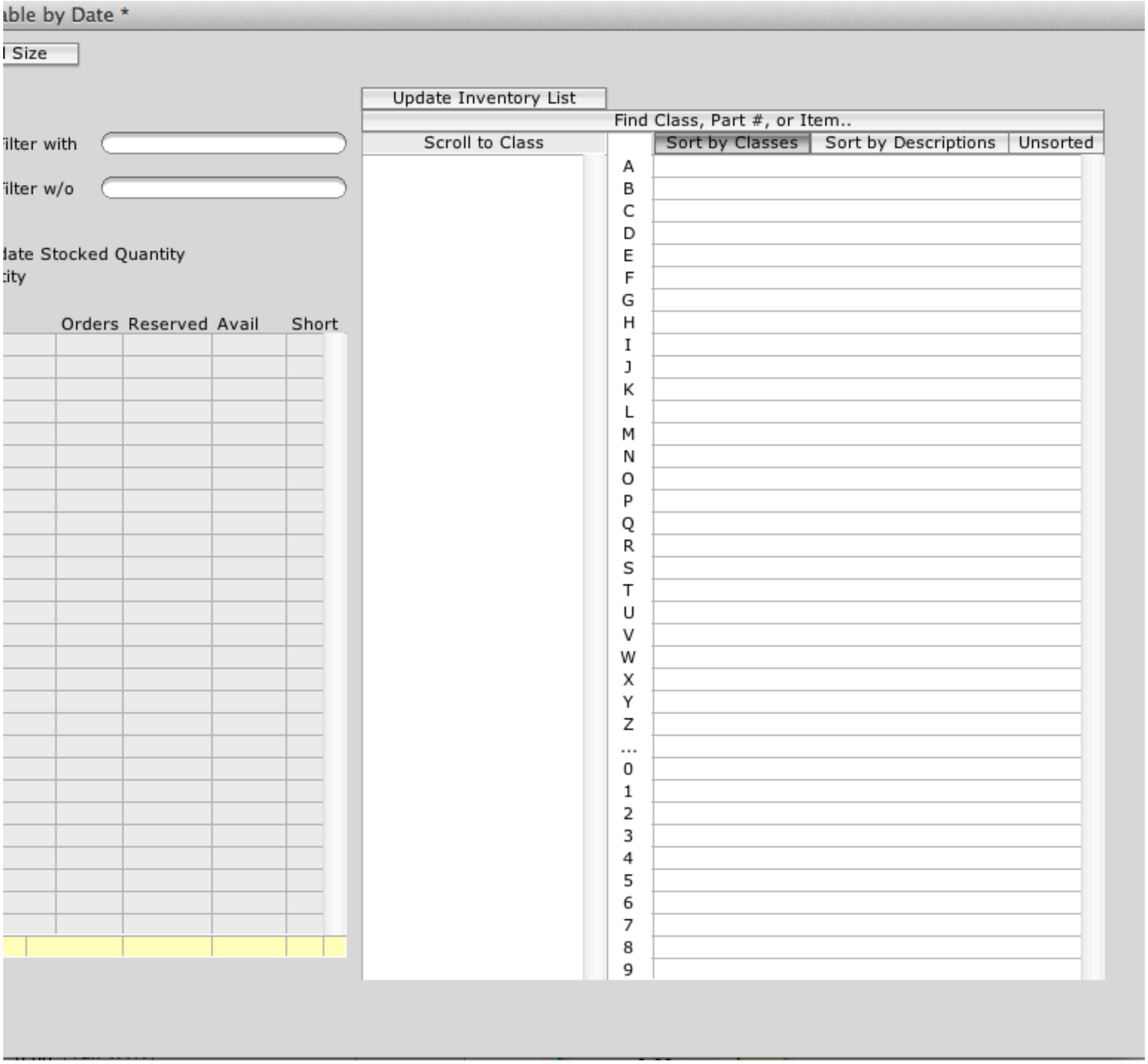

Items Availab
Nav
Full
Update List
Copy List
Print List
Time Update
Fil
Fil
Always Upda
Stocked Quantit
Prior Orders
Date
Date Needed
O
Order #
For
Due Out
Due In
Reserved
Updated
Records

☐ Include Archived Orders
● Orders w/ Item
○ All Orders Out
● Orders Only
○ Orders and Quotes
○ Orders and Invoices
☐ Check Kit Components

to days

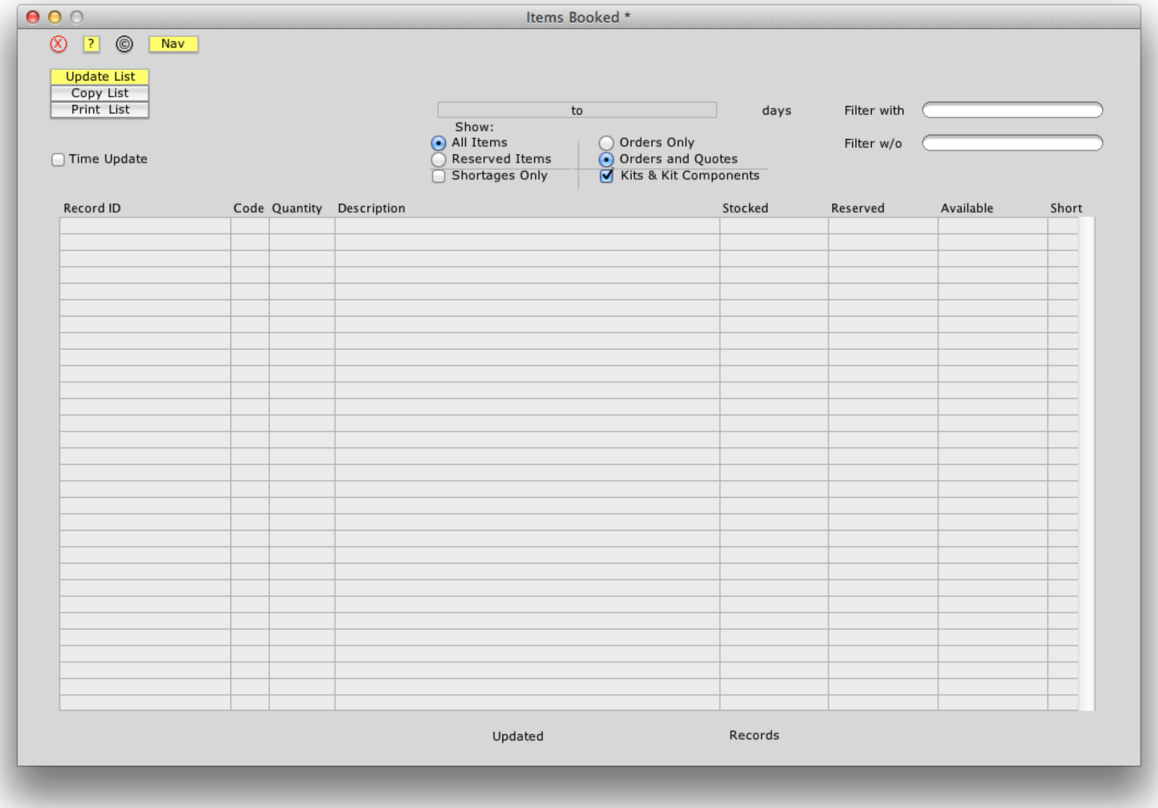
Choose a date range to review (click where the " to " is in the picture above), then choose an item to review - in the panel on the right side.

and here is the right:


ıble by Date *
l Size
Update Inventory List
Find Class, Part #, or Item..
Scroll to Class
Sort by Classes
Sort by Descriptions
Unsorted
ilter with
ilter w/o
late Stocked Quantity
ity
Orders
Reserved
Avail
Short
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ... 0 1 2 3 4 5 6 7 8 9

Here in the right panel you can click on any inventory item in the list to review its activity for the date range selected in the left panel. The Classes and the alphas work the same as they did in the Inventory window on the Orders Editor.

Items Booked


Items Booked *
Nav
Update List
Copy List
Print List
to
days
Filter with
Filter w/o
Record ID
Code
Quantity
Description
Stocked
Reserved
Available
Short
Updated
Records

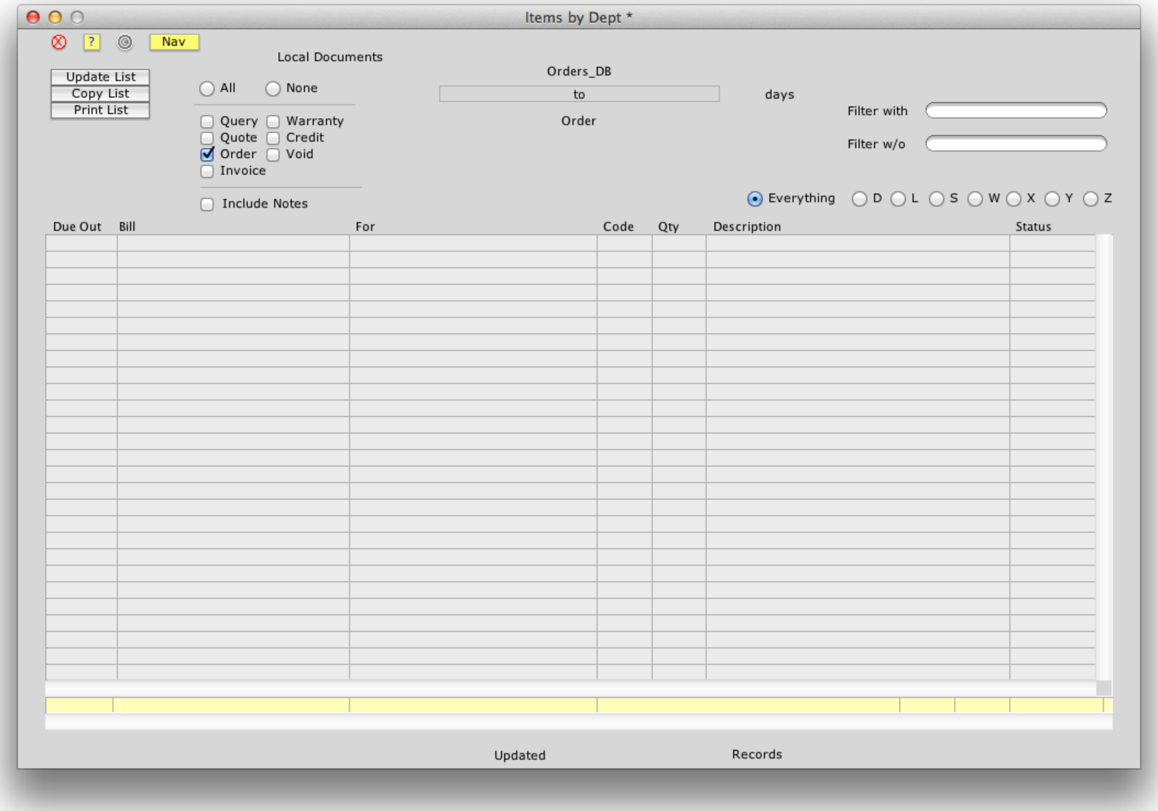
☐ Time Update

Show:
● All Items
○ Reserved Items
☐ Shortages Only
○ Orders Only
● Orders and Quotes
☑ Kits & Kit Components

Many of these List Programs are linked.

This is a good example. Click on a line here in the Items Booked. That will take you to the Items Available by Date (pre-loaded with the data for the item you clicked). Then click on a line in the Items Available by Date and it will open the Orders Editor, showing all of that order.

Items by Dept.


Items by Dept *
Nav
Update List
Copy List
Print List
Local Documents
Orders_DB
to
days
Order
Filter with
Filter w/o
Due Out
Bill
For
Code
Qty
Description
Status
Updated
Records

○ All ○ None

☐ Query ☐ Warranty
☐ Quote ☐ Credit
☑ Order ☐ Void
☐ Invoice

☐ Include Notes

● Everything ○ D ○ L ○ S ○ W ○ X ○ Y ○ Z

The most important part of this program is the ability to see the type of inventory required by department - usually for cleaning and general preparation.

The departmental codes are as follows:

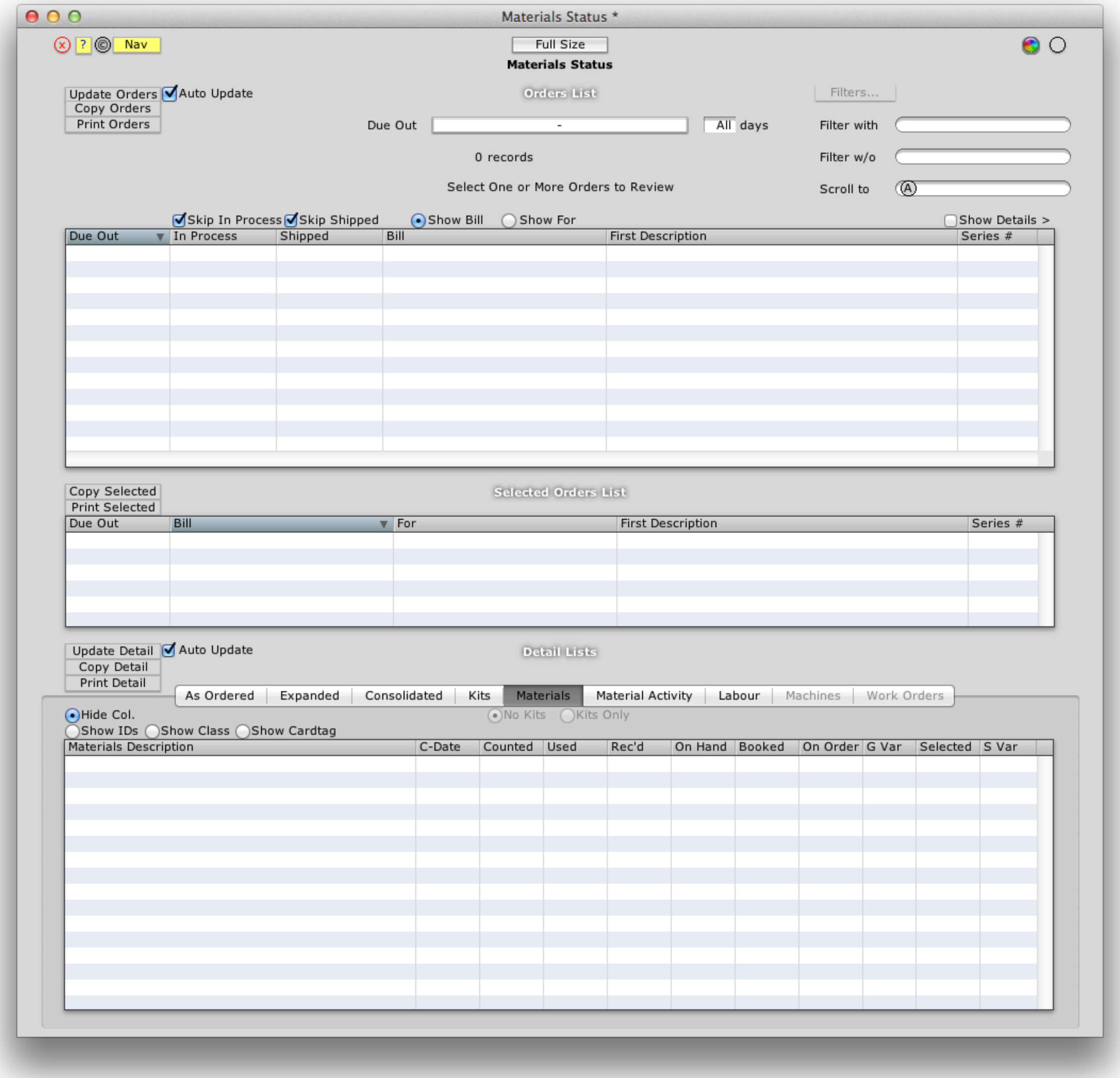
D - Dish-room; china, silverware, etc.

L - Laundry or linen

S - Service

W, X, Y, Z - user-defined, can be assigned to any department you wish; “W” might be for generators and “Y” might be for heaters, for instance. You can redefine “D”, “L” and “S” if you don’t use them for their default purposes.

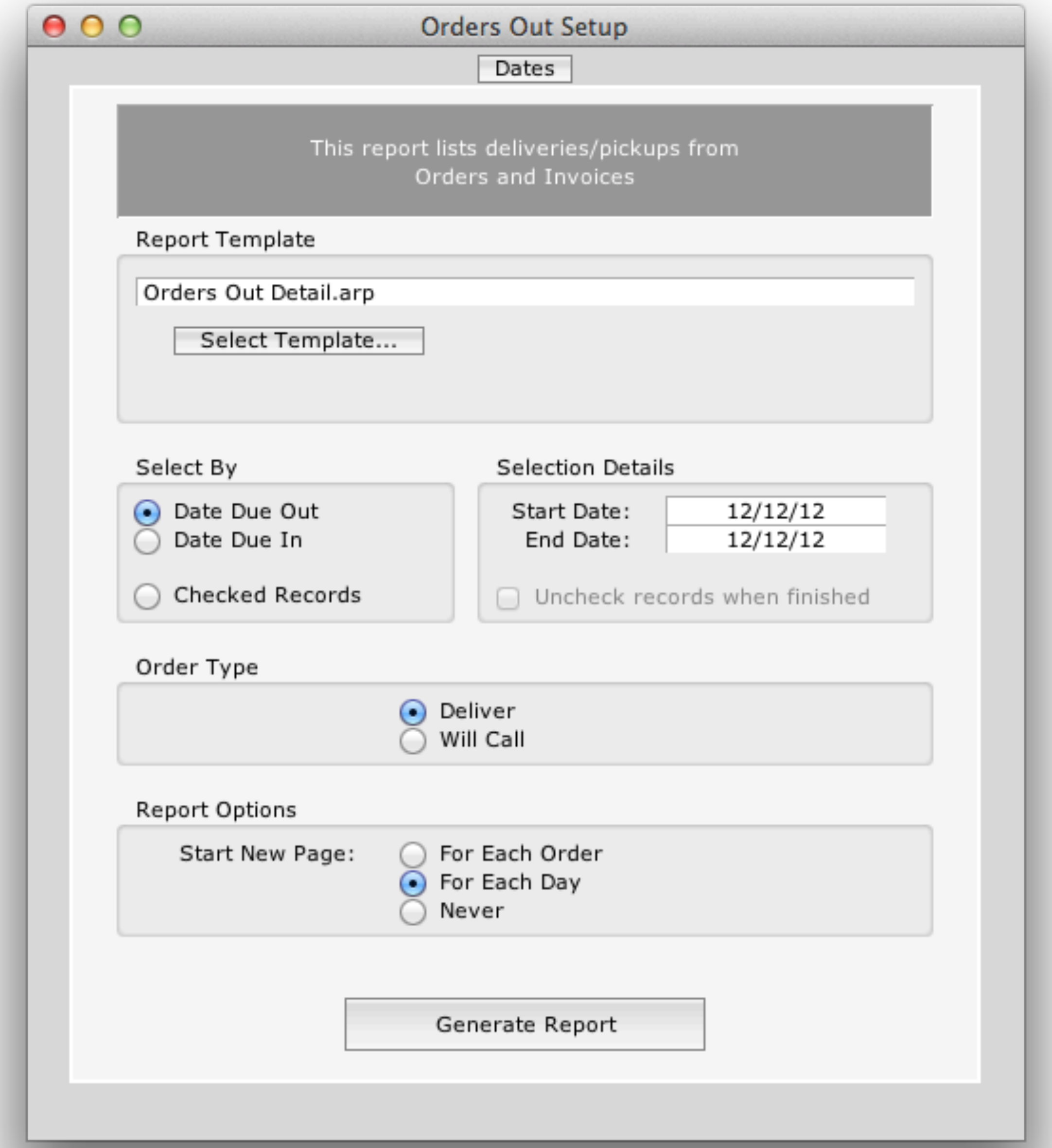
Materials Status


Materials Status *
Nav
Full Size
Materials Status
Update Orders
Copy Orders
Print Orders
Orders List
Filters...
Due Out
All days
Filter with
Filter w/o
Scroll to
0 records
Select One or More Orders to Review
Due Out
In Process
Shipped
Bill
First Description
Series #
Copy Selected
Print Selected
Selected Orders List
Due Out
Bill
For
First Description
Series #
Update Detail
Copy Detail
Print Detail
Detail Lists
As Ordered
Expanded
Consolidated
Kits
Materials
Material Activity
Labour
Machines
Work Orders
Materials Description
C-Date
Counted
Used
Rec'd
On Hand
Booked
On Order
G Var
Selected
S Var

☑ Auto Update
☑ Skip In Process ☑ Skip Shipped ● Show Bill ○ Show For ☐ Show Details >
☑ Auto Update
● Hide Col. ○ Show IDs ○ Show Class ○ Show Cardtag
● No Kits ○ Kits Only

The twin of Production Status (pictured later), shows if there is enough material available to begin manufacturing an order.

Orders Out Setup



Orders Out Setup
Dates

This report lists deliveries/pickups from Orders and Invoices

Report Template

Orders Out Detail.arp

Select Template...

Select By

● Date Due Out
○ Date Due In
○ Checked Records

Selection Details

Start Date: 12/12/12
End Date: 12/12/12
☐ Uncheck records when finished

Order Type

● Deliver
○ Will Call

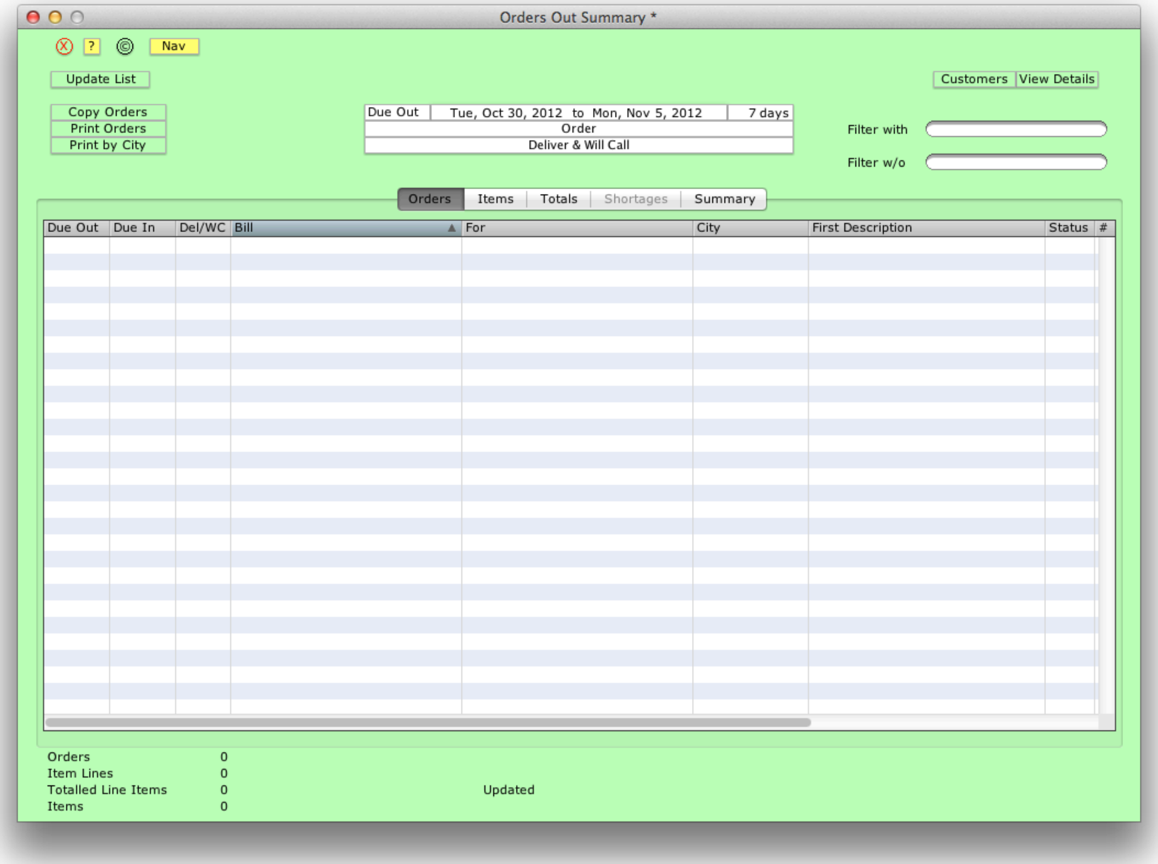
Report Options

Start New Page:
○ For Each Order
● For Each Day
○ Never

Generate Report

Use this to create the daily load lists.

Orders Out Summary


Orders Out Summary *
Nav
Update List
Customers
View Details
Copy Orders
Print Orders
Print by City
Filter with
Filter w/o
Orders
Items
Totals
Shortages
Summary
Due Out
Due In
Del/WC
Bill
For
City
First Description
Status
#

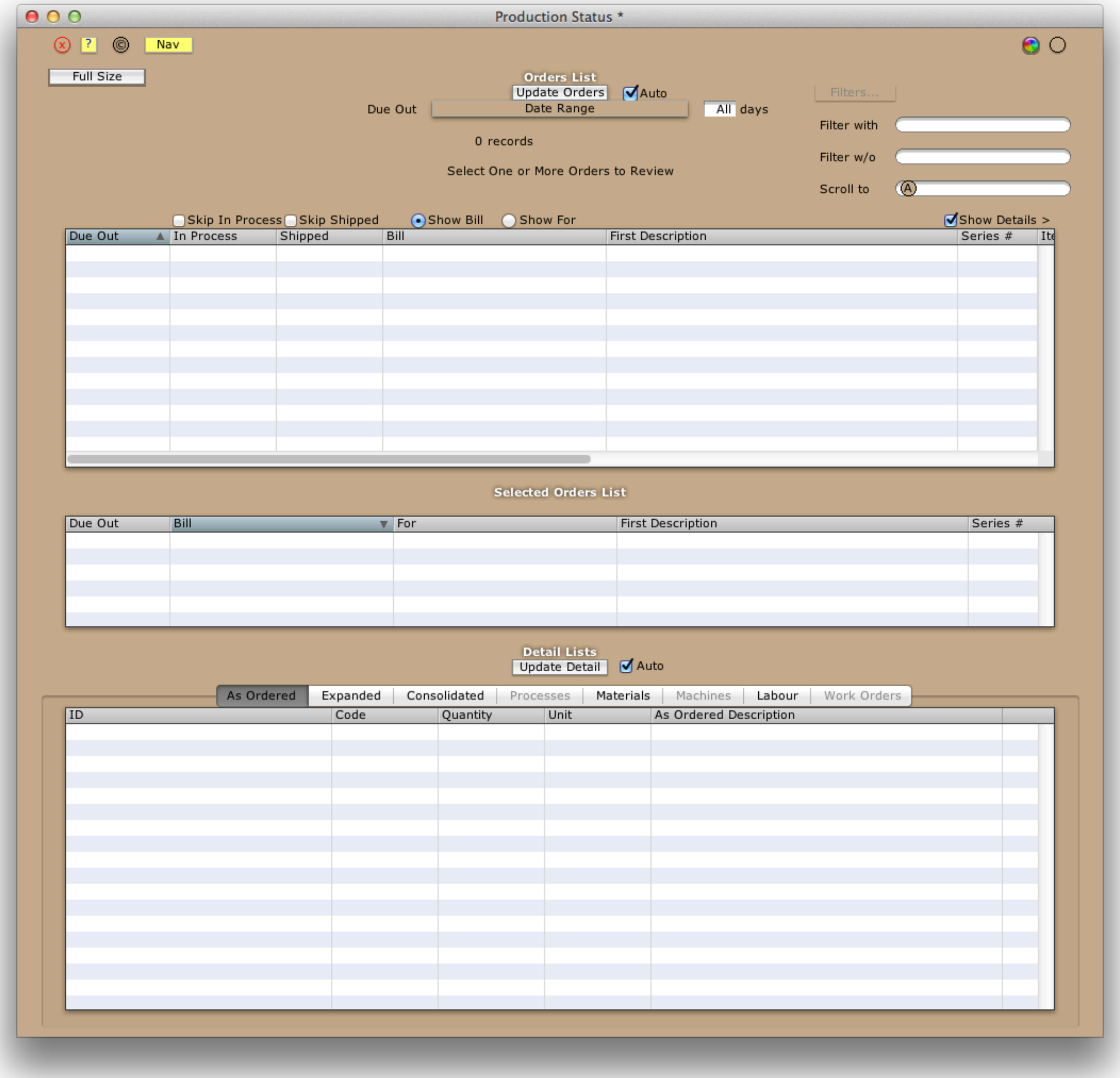
Due Out | Tue, Oct 30, 2012 to Mon, Nov 5, 2012 | 7 days
Order
Deliver & Will Call

Orders	0
Item Lines	0
Totalled Line Items	0
Items	0

Updated

Tells almost everything related to orders that are out, have been out, or are going out. Be sure to check out the five tabs above the main list - each displays a different list with additional information.

Production Status


Production Status *
Nav
Full Size
Orders List
Update Orders
☑ Auto
Due Out
Date Range
All days
Filters...
Filter with
Filter w/o
Scroll to
☐ Skip In Process ☐ Skip Shipped ● Show Bill ○ Show For
☑ Show Details >
Due Out | In Process | Shipped | Bill | First Description | Series # | Ite
Selected Orders List
Due Out | Bill | For | First Description | Series #
Detail Lists
Update Detail
☑ Auto
As Ordered | Expanded | Consolidated | Processes | Materials | Machines | Labour | Work Orders
ID | Code | Quantity | Unit | As Ordered Description

0 records

Select One or More Orders to Review

The status of everything being manufactured. Companion to the Materials Status. Can generate Work Orders (not covered), if needed.

Postscript

If you have marched through all the chapters of this Guidebook, from “Hans and Otto” through “Other List Programs”, practicing along the way, you can rightfully call yourself an Ahsomme Power User.

Congratulations!

We sincerely hope that your knowledge will help you for decades to come.

Although we are celebrating the 25th Anniversary of this business system, we expect it to continue to grow and improve. We welcome suggestions, insight, critique, and advice from Power Users, like you, to make it better for yourself and future users.

***

Most User Guidebook readers will have learned all they need (or want?) from this book. A few will continue with the second book in the Guidebook trilogy, the Administrator Guidebook, which tells how to setup and customize your Ahsomme system. We hope that a few of our readers will even graduate to the final book, the SS C/S Architecture Reference, which describes programming of the under-lying client/server databases used by Ahsomme.

Wherever you decide to exit, we hope it has been an interesting journey. Please let us know if there is any way we could have made it better for you.

***

By the way... As you were reading did you wonder if there was some logic to the colors used throughout the system? There is:

Red is for all payable (purchase) programs
Green is for receivables (sales and rental orders)
Blue is for contacts
Teal (blue of contacts and green of orders) is for customers
Magenta (blue of contacts and red of purchases) is for vendors
Grey is for inventory programs (used by both payables and receivables)
Brown is for operations and manufacturing
Gold is used on accounting and financial programs
Light yellow is the default for the Navigator
Bright yellow is used for the Notes program and order notes on all Editors

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