WaverlyStreet Software
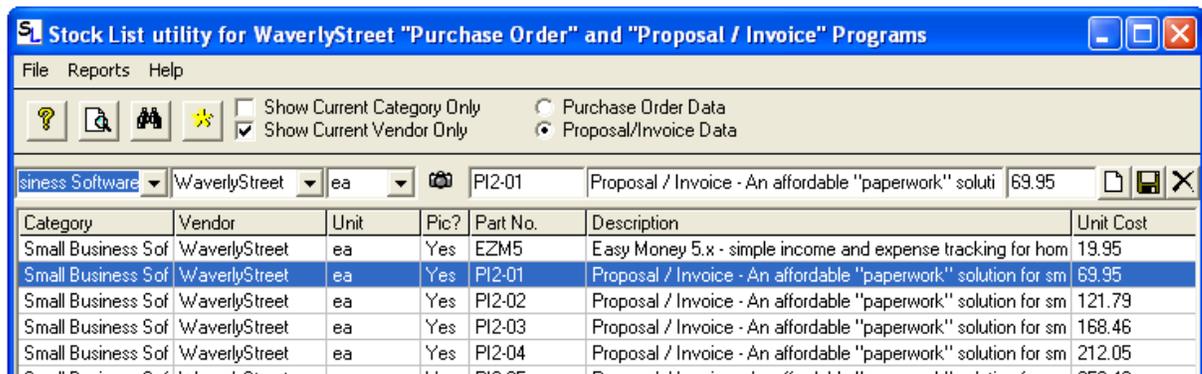## SL "Stock List"

Table of Contents

1 Introduction

WaverlyStreet's "Purchase Order" program is an affordable solution for small and medium size companies that handle their equipment acquisitions via purchase order. If you've been wanting to get away from using pre-printed forms but haven't been able to find any reasonably priced purchasing software, this may be the answer.

WaverlyStreet's Proposal/Invoice is an affordable "paperwork" solution for small companies & consultants. Easily create great-looking proposals, invoices, acknowledgements, and receipts for your customers and clients!

The **Stock List Utility** is an inexpensive companion program for both which creates item catalogs for IMPORT into Purchase Order and/or Proposal / Invoice.

With Stock List, vendors can make it much easier for their customers to purchase from them - do the data entry *for* your customers!

Stock List can either be installed on a single machine and store it's data locally, or installed on multiple machines and use a shared data directory.

2 Adding / Changing Stock Items

Stock items consist of 7 fields:

Category - this is simply a tag to help you find things or remind you of what they are for. Examples might be "Store Fixtures", "Cleaning Supplies", etc. (Does not print out on the purchase order.)

Vendor - the vendor from whom you buy this item at a particular unit price. If you buy the same item from

different vendors, make a copy of it for each one. (Does not print out on the purchase order.)

Unit (of measure) - for example "each", "box", "lb", "ft", "pack of 3", "lot", etc.

Picture - if desired, a small graphic file may be associated with each item. This will show on stock lists that the Stock List program creates. *(Not used by Purchase Order or Proposal/Invoice.)*

Part Number - up to 60 characters (optional). Is placed before the description on orders.

Description - up to 120 characters. Include manufacturer part number, etc. in this field. Note that this can be expanded upon after a stock item is added to an order.

Unit Cost - how much one unit of the item costs. Note that you do not need to figure in discounts here - use the list price, and specify your discount in the order.

WaverlyStreet Purchase Order (version 1.5 and higher) **and Proposal / Invoice can import and export Stock Item data.**

When you are first starting out, you must type in Categories and Units. As you add more items you will be able to select these fields from the drop-down lists (and never type them again).

Get all the fields correct and click the New button to save a new item, or the Save button to save changes to an item.

If you have a number of items with similar descriptions, save time by clicking on one of them to load the description, make your changes, and click the new item button.

3 Creating Stock Lists

To preview / print / email / ftp your stock list and data, click the preview button on the main form. This will bring up the Print / Preview form, with the current list loaded. Simply click the **Print** button to print, or the Configuration button to tweak the font, page "fit" values, etc.

The **FTP** button starts a simple built-in *file transfer protocol* program which can upload your list and data file to your website.

The **Email** button will start up your default *mapi-compliant* email program with the list, your top graphic (if used), and an import data file attached. Send this to your customers and they will be able to order products from you without having to do their own data entry.
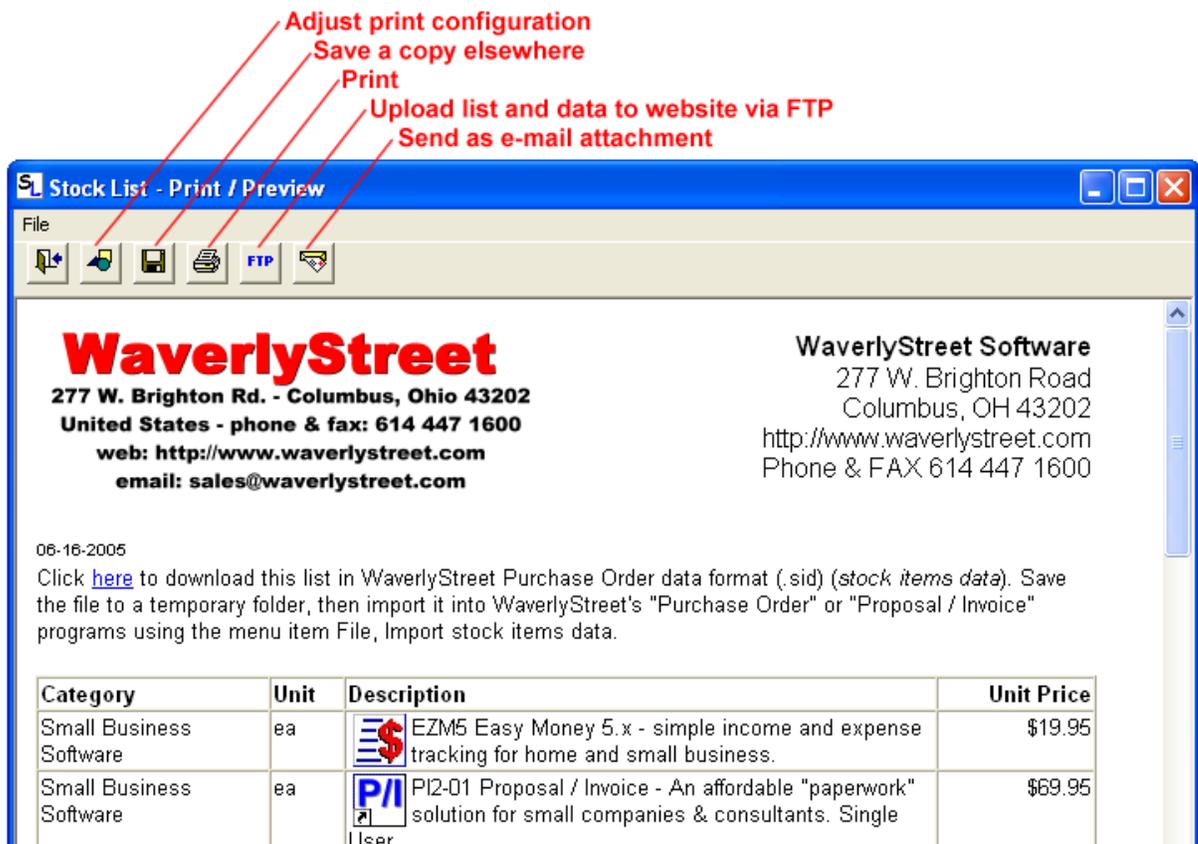
4   Customer-Specific Export (with discount)

The standard stock list creates a data file with full prices. If desired, you can also create special data files with any discount you want applied. Select the menu item File, Export stock items data (.SID format):
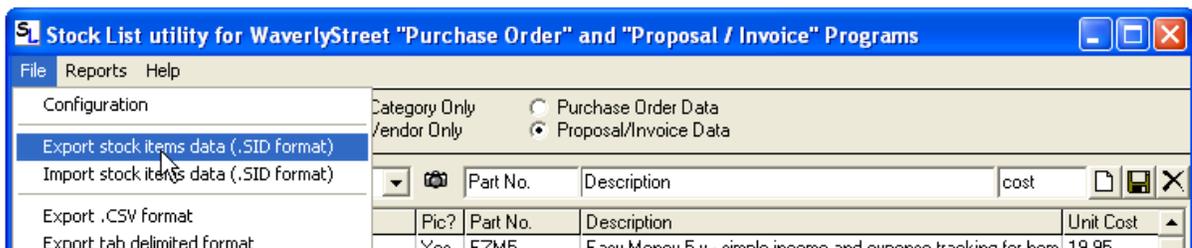

You will then be presented with this dialog:

Set the discount multiplier, select whether or not to round off the prices, and click either YES or NO. You will then be presented with a standard Windows file dialog. Name the export file and click Save in the file dialog.

If you leave the default "View results immediately after export is completed" option checked, you will then see this:
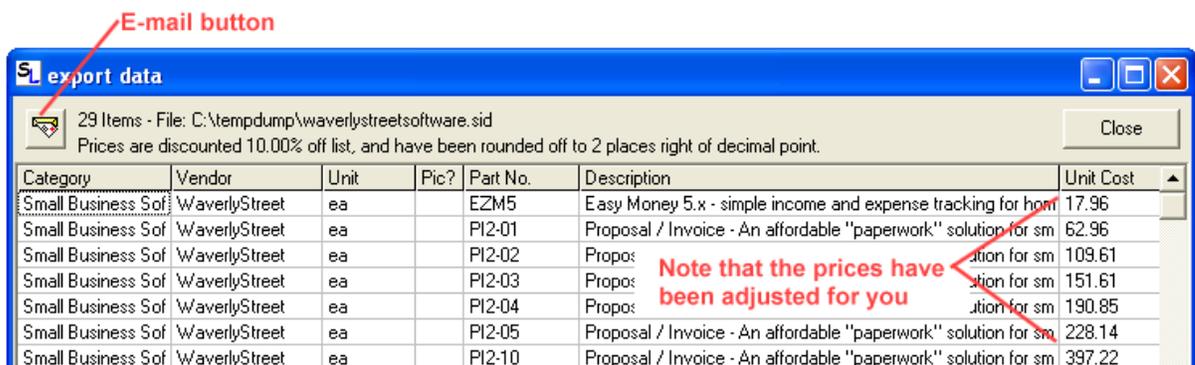
Export Results

If everything looks OK, then click the e-mail button to send the data to your customer. Your normal e-mail program will start up with the data file and instructions included (Outlook Express shown):
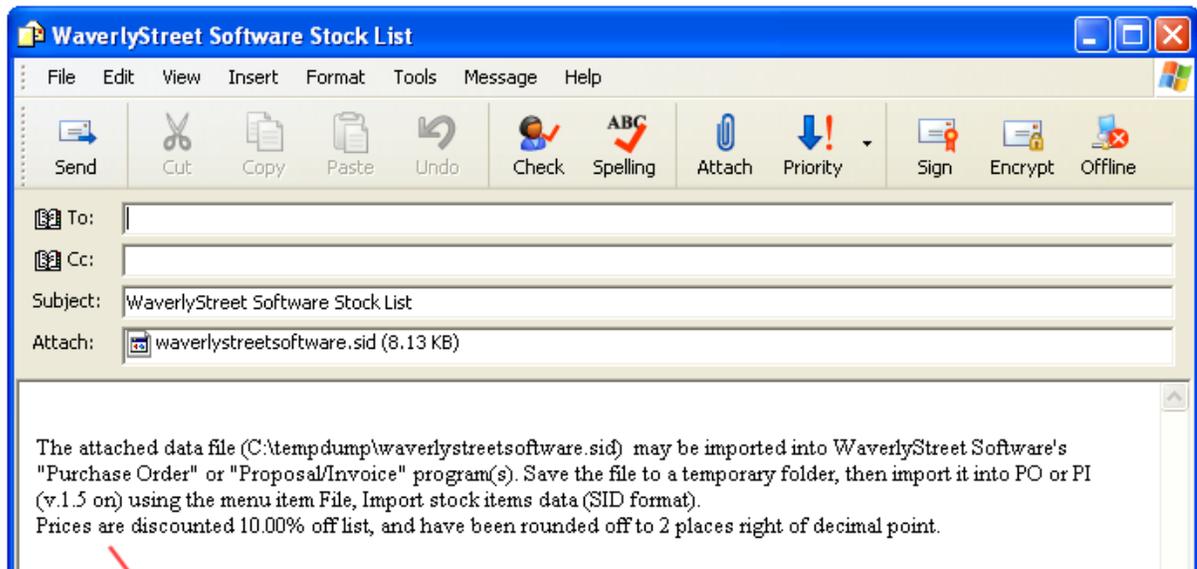
These instructions are automatically placed in the email. Type whatever else you wish to say and send just like any other e-mail!

5   Attaching Graphics to Line Items

You can make your stock lists look more interesting by adding small graphics to the line items.

Simply right-click any item and select Add Graphic from the pop-up menu. Select a .gif or .jpg image, and click OK. This will copy the graphic file selected to your Stock List data directory, and change the line item display to say "Yes" in the graphic column.
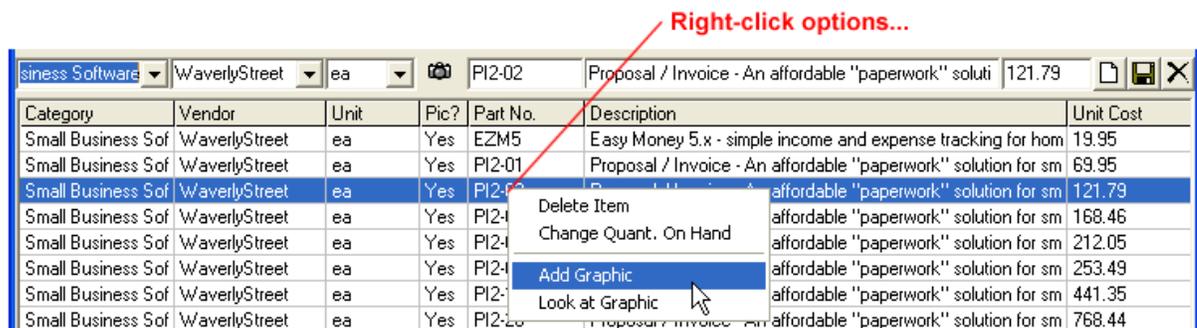
To look at a graphic already attached, right-click and select Look at Graphic from the pop-up menu. You may also remove a graphic on the "look at" form.
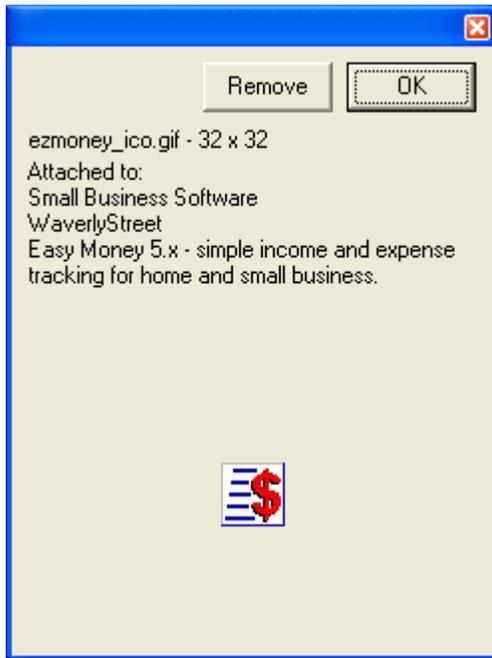
6   FTP Utility

Stock List includes two versions of a handy built-in FTP utility which makes it easy to upload your list and data file to a web site.

The simple version is available when you create a "List and Data File for E-Mail / Printing". Access it by selecting the FTP button on the preview screen.
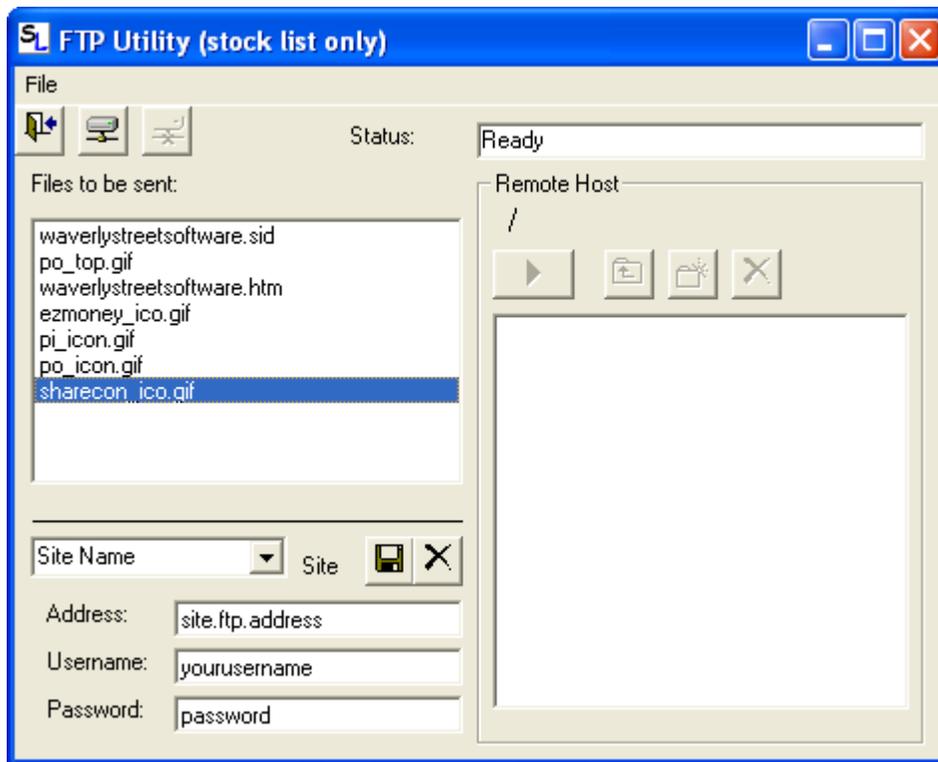
The first step is to type in your website server address, username, and password in the three spaces provided. Your web host will have provided this information. Also provide a name for this connection in the drop-down box. Click the save button. To connect to the site, click on the connect button, and confirm that you do indeed connect properly. If not, make sure you have entered all the login information correctly and try again. (Note that these items are usually case-sensitive.) These setting are preserved between sessions, and you may set up as many connections as you need.

Once connected, use the Remote Host file selection list to go into the remote directory where you wish to host your work. *(Note - when you first enter an EMPTY folder, it can take quite a while for the list operation to complete - just be patient and wait for the hourglass mouse cursor to go away!)*

The files you need to send will already be selected - just click the Send button.

When the send operation is complete, click the Disconnect button and then close the FTP form.

A more full-featured version of the FTP utility is always available under the main screen "File" menu.

7   Configuration

The Configuration form can be accessed either through the main screen menu item File, Configuration, or from the printing form.

Web Page Appearance

If you wish to change from the default font, "Arial", click the [...] button and select another. Note that not all fonts print the same way as they display in the viewer!

Your company information is shown in the upper right corner of all lists. You may also select a graphic file to be displayed on the left. If you use a graphic, make sure it does not exceed roughly 300 wide x 100 tall.

Use "On Hand" column in stock items listing

This optional feature adds another column in the Stock Items list which you may use to keep track of how many of each item you have on-hand. It's entirely manual - right-click on any item to adjust the quantity.

Printer "Fit" Adjustments

Stock List creates .html documents (web pages, essentially) and displays them in a scaled-back web browser for preview and printing. If your printed output does not look like you want it too, these three adjustments may be helpful. Each is changed by clicking the [+] or [-] buttons, or returned to the default setting with the little "default" button.

"Over-all width of form" adjusts just that - over-all width. The default is 640, which works well with most printers set at their default margin widths.

If you have called the configuration form from the Preview / Print form, then the "Rewrite" button will be enabled. Click it, and the list will be re-displayed immediately so that you can check it's appearance, printing characteristics, etc.

The final items on the Configuration form are the **Data Directory** selections. There are spaces for both Purchase Order and Proposal/Invoice directories. Click the [...] buttons to select. Click the small button to the right of [...] to

automatically select the default, local directory. Stock List is designed as a multi-user application. Select the same shared folder for all users, and everyone will have access to the same data.

8   Importing Data From Other Sources

Stock List can import any list of items that you can display in a spreadsheet program (such as Microsoft Excel). Simply arrange the columns in the correct order (in the spreadsheet) and export a .CSV or tab-delimited text file. Stock List can then read in the data and put it in the correct format for our Purchase Order and/or Proposal / Invoice programs.

Step by step instructions:

1) In your spreadsheet program (Microsoft Excel for example), arrange the data in the six (or seven) columns shown below, and in the order shown below.

Category | Vendor | Unit (of measure) | Part Number | Description | Unit Cost | Quant. On Hand (optional)

2) Select (in the spreadsheet) menu item File, Save As and pick either ".CSV (Comma Delimited)" or "Text (Tab Delimited)" for the "Save as type:" value. Give a file name, click the "Save" button, and quit the spreadsheet program.

3) Start Stock List, and select "File, Import .CSV or tab delimited format". On the import form, click the correct button (.CSV or Tab Delimited) and find that file you just created. Stock List will import the data and display if for checking.

4) If the data looks good, you can either incorporate it directly into the data Stock List is currently using with the Merge w/ Stock List button, or save it as a separate .SID format file with the Export SID button.

9   Import / Export Stock Items (Purchase Order)

Our **Purchase Order** and **Proposal /Invoice** programs can import and export Stock Item data. This means that you can take the list of stock items created at one installation and transfer it to another, thus saving all the data entry work.

Vendors - create lists of all your products and email the data to your customers who use our Purchase Order program!

See the menu items File, Export stock items data and File, Import stock items data.
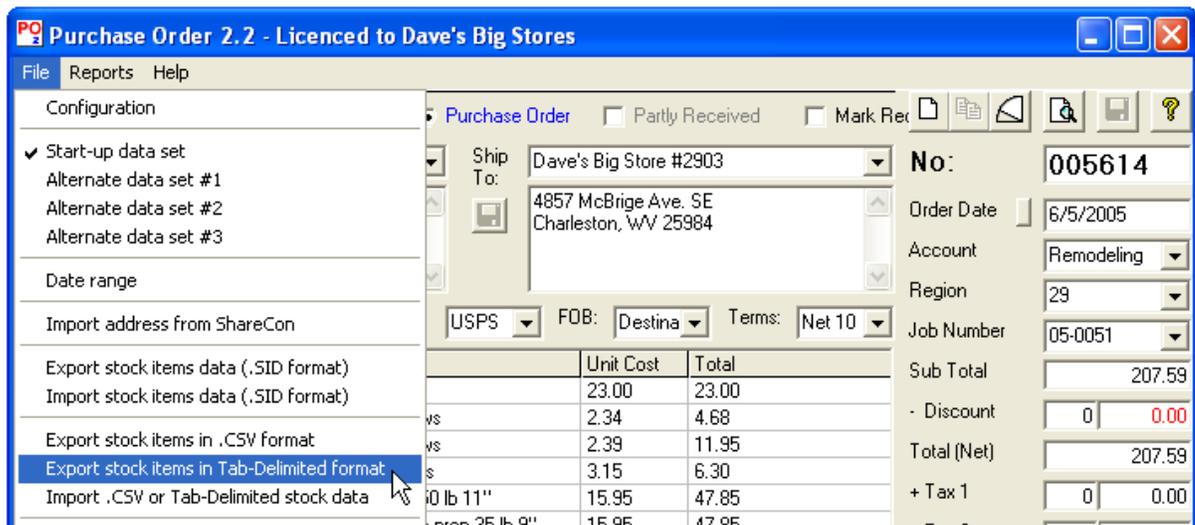
The export operation includes only the items currently displayed on the stock items list. In this way you can narrow it down to a single vendor by selecting that vendor in the "To:" field and checking the box to "Show Only Stock Items For The Current Vendor". If a single vendor is selected the program will suggest naming the export file with that vendor's name. If multiple vendors are selected, the export file will have a generic name. Simply select the menu item File, Export stock items data, accept the suggested filename (or provide another) and click Save. The export file will have the extension ".sid" (stock items data). Create the file and email it to its destination.

The import operation looks at the new records to determine if they are duplicates. A duplicate has the same Vendor name AND the same Description (not case sensitive). Duplicates are *always* replaced by the new record. In this way the export / import operation may be used to change prices, categories, and units of measure for existing items. New items contained in the import file which are not duplicates are simply added to the list.

Prior to running any import operation it is strongly suggested that a complete data backup is done.

10   Data backup / restore

Stock List includes convenient data backup and restore functions. These are accessed through the menu items File, Data backup and File, Data restore.

As with any computer program, it is a very good idea to backup your data from time to time so that if the disk drive containing the main data folder fails, you won't lose everything. (And all drives WILL fail eventually!)

11   License - disclaimer of warranty

Great care has been taken to make sure that "StockList" is a solid and dependable computer program. The program is written in Microsoft Visual Basic version 5 (SP3), and the installation is performed by Inno Setup 2.0. The program, installation, and un-installation have been extensively tested on several in house machines and also by a number of outside "beta testers". However, it is simply not possible to test on every conceivable hardware/operating system combination, and so therefore it is impossible to say for sure that "Stock List" will function flawlessly on your system.

License - disclaimer of warranty:

Prior to installing "Stock List" (hereinafter referred to as the SOFTWARE) you agreed to the license terms and other provisions contained herein:

The SOFTWARE and accompanying documentation are protected by United States copyright law and also by international treaty provisions.

NO WARRANTY - THE SOFTWARE IS PROVIDED ON AN "AS IS" BASIS. WAVERLYSTREET DISCLAIMS ALL WARRANTIES RELATING TO THE SOFTWARE, WHETHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NEITHER WAVERLYSTREET NOR ANYONE ELSE WHO HAS BEEN INVOLVED IN THE CREATION, PRODUCTION, OR DELIVERY OF THE SOFTWARE SHALL BE LIABLE FOR ANY INDIRECT, CONSEQUENTIAL, OR INCIDENTAL DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THE SOFTWARE, EVEN IF WAVERLYSTREET HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR CLAIMS. THE PERSON USING THE SOFTWARE BEARS ALL RISK AS TO THE QUALITY AND PERFORMANCE OF THE SOFTWARE.

WaverlyStreet's maximum liability under this Agreement for all damages, losses, costs and causes of actions from any and all claims (whether in contract, tort, including negligence, quasi-contract, statutory or otherwise) shall not exceed the actual dollar amount paid by you for the software.

This agreement shall be governed by the laws of the State of Ohio (USA) and shall inure to the benefit of WaverlyStreet and any successors, administrators, heirs and assigns. Any action or proceeding brought by either party against the other arising out of or related to this agreement shall be brought only in a STATE or FEDERAL COURT of competent jurisdiction located in Franklin County, Ohio. The parties hereby consent to in personam jurisdiction of said courts.

12   How to buy Stock List

In order to use "Stock List" beyond the 50 use trial period, you must buy it from WaverlyStreet. It only costs $29.00 US! When you buy, we will generate for you a matching Registration Name and Registration Key, which you will then enter into the appropriate boxes under Help, Enter Registration Key. Once registered, all program functions are restored.

To buy, use one of the following two methods:

1) If you wish to use a credit card, and have internet access you may purchase on line right now:

Click here to order on line!

2) If you wish to use surface mail, send a check, money order, or cash (US funds only please) for the correct amount to WaverlyStreet Software, 277 W. Brighton Road, Columbus Ohio 43202, United States. Be sure to include a return address (either surface or email) so we can send you your registration code!

Surface Mail Order Form: (please print clearly)

Total enclosed: $29.00 USD

COMPANY: _____

ADDRESS:_____

_____

Mail to: WaverlyStreet Software, 277 W. Brighton Road, Columbus, Ohio 43202 (US)

Thanks for your support!