DataHouse 3
Operating Manual

Operating Manual for DataHouse 3
DataHouse is a Microsoft® Access™ Database Application.
Manual Version 3.0 Copyright 2003

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Chapter 1 - Introduction

DataHouse is a Microsoft® Access™ Database Application, designed to manage Customer & Supplier Information, Contact Management / History, Product Information, Quote / Sales and Purchase Order Tracking and Document Control. It includes facilities to add, modify or delete data from the database, ask questions (or queries) about the data stored in the database and produce reports summarising selected contents. DataHouse is written entirely in Microsoft® Access™ and can be readily customised to your specific needs.

What DataHouse ***does***

- Contact Information
  - Share contact information between all DataHouse users
  - Maintain several customer sites for one company
  - Changes that affect several contacts are made only once, ***not*** for each person
  - Manage your company's various sites
  - Maintain employee information
  - Keep contact history
  - Single click to email using outlook
  - Generate professional and consistent Fax and Letters
  - Phone Lists
- Item Master
  - Store information on products
  - Short description, long description and up to 10 specification fields.
  - 3 level pricing
  - Calculated product costs and margins
  - Keep Stock take information
  - View Activity (Sales / Purchase Orders) for a particular product
  - Documentation for Products
  - Price List
- Sales Orders and Quotes
  - Generate professional and consistent Quotations
  - Generate Invoices
  - Bill to and Ship to Addresses for Sales
  - Forecast future sales
  - Track quote success rate and trends
  - Track sales trends
  - Multiple Currencies for Quotes and Invoices
- Purchase Orders
  - Generate Purchase Orders
  - Multiple Currencies
  - Company balance sheet

1.1 - Installing DataHouse

Note that DataHouse is a Microsoft® Access ™ 2000 database. You must have Access™ 2000 *or greater (XP, 2003)* installed on your PC to run DataHouse. Access™ 2000 is usually distributed as part of the Office™ software suite. The DataHouse database file should always come with this manual. You can always access the latest version of both at www.datahousesoftware.com.
Apart from the Access™ executable no other components are required to run DataHouse.
If you do not have a copy of MS Access, please contact DataHouseSoftware for a runtime version.

1. Copy the database file in the distributed zip file to a folder on your LAN. This an be either a UNC path (eg //servername/directory/subdirectory) or a mapped drive (eg H:\). Give the destination folder a useful name (i.e. "DataHouse") If you are using a mapped drive it is wise to use a mapped drive that maps exactly the same for every user.
2. Copy a shortcut to the desktop or start menu of each user. Launch the database as you would any other file, by double clicking the link on the desktop, or clicking on the link in the start menu.

1.2 - Registering DataHouse

In the evaluation version of DataHouse all of the functions and features of DataHouse are available but you are limited to 200 records (Contacts + Items + Sales Orders + Purchase Orders). In order to add more records you must register. To register visit http://www.datahousesoftware.com/register.htm

There are two options for registering

- Option 1: Register and DataHouse as an MDE file. You will receive a code to unlock DataHouse, allowing you to add as many records as you require. Because this is an MDE file, modifications to the database design are not possible.
- Option 2: Register DataHouse as an MDB file. You will be sent a link to download the full MDB version of DataHouse, and then must import your data. Because this is an MDB file, modifications to the database design can be performed by the user, or on request by DataHouseSoftware.
- At any stage you can upgrade from option 1 to option 2.

What is the difference between an MDE and an MDB file?

An MDB file is the native format for a new Access database. An MDB file is able to be modified as you wish. Simple changes, such as adding logos, or changing the layout of a report are pretty easy. Other changes like adding new reports or new fields are a bit more involved. These can be done by you, or if you prefer by us at DataHouseSoftware.

An MDE file is an Access database where the DESIGN is locked. This means that you can't edit the forms and reports or view the code. You can still add data and run the existing reports in the database.

Search MS Access help for MDE for additional information.

1.3 - Upgrading DataHouse

Upgrading DataHouse is simply a case of obtaining the latest relevant version of the software and importing your data into it. You can use the following procedure to upgrade your MDE version of DataHouse (registered or unregistered) to the MDB version or upgrade your copy of DataHouse to the latest version (any variation MDE / MDB, registered / unregistered)

NOTE

- ***YOU CAN'T USE THIS PROCEDURE TO UPGRADE FROM DATAHOUSE 1.x OR 2.x TO DATAHOUSE 3.***
- ***THE REGISTERED MDE AND THE EVALUATION VERSION ARE THE SAME FILE. THE EVALUATION VERSION IS UNLOCKED WITH THE REGISTRATION KEY.***

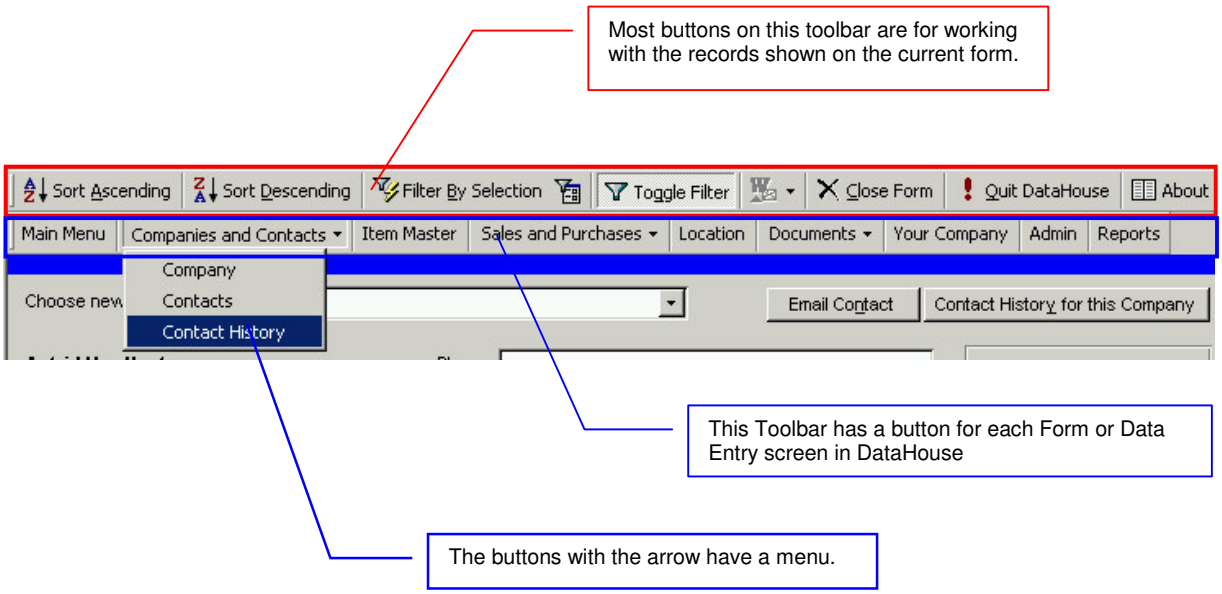
1. Download the registered version from the restricted section of the web site or the evaluation version from the general section of the website. (You can always download the latest version of the Evaluation / MDE database at http://www.datahousesoftware.com/downloads/DataHouse.zip)
2. Unzip the database file (.MDE or .MDB) to a temporary location
3. Perform the following operations when no-one else is using the database. To ensure this is the case, remove DataHouse from it's normal location so it can't be accessed.
4. Make a backup copy of the DataHouse database file. THIS IS VERY IMPORTANT. EVERY TIME YOU ARE TINKERING UNDER THE HOOD, MAKE SURE TO SAVE BACKUP COPIES.
5. Open the newly downloaded database.
6. Right Click on the Toolbar
7. Select the DataHouseUtility toolbar
8. Press the button marked Database window
9. Click on the "Tables" tab
10. If you have tables in the database file you downloaded then delete them ALL.
11. From the FILE Menu choose GET EXTERNAL DATA > IMPORT
12. Browse to the location of your original copy of DataHouse (see (3) Above)
13. Select ALL of the TABLES and Press OK
14. From the TOOLS Menu, choose DATABASE UTILITIES > COMPACT AND REPAIR DATABASE
15. Repeat Step 14.
16. Now you're ready to use the upgraded database.

1.4 - Navigation and Data Entry in DataHouse

DataHouse is set up to be easy to navigate using the hyperlinks on the Main Menu and the command buttons in the toolbar. Upon entering DataHouse you a greeted with a page containing a number of hyperlinks. Click on one of these or the toolbar buttons to go deeper into the database and access the information. Some of screens can be accessed using the function keys – the function keys are listed on the main menu next to the hyperlinks.

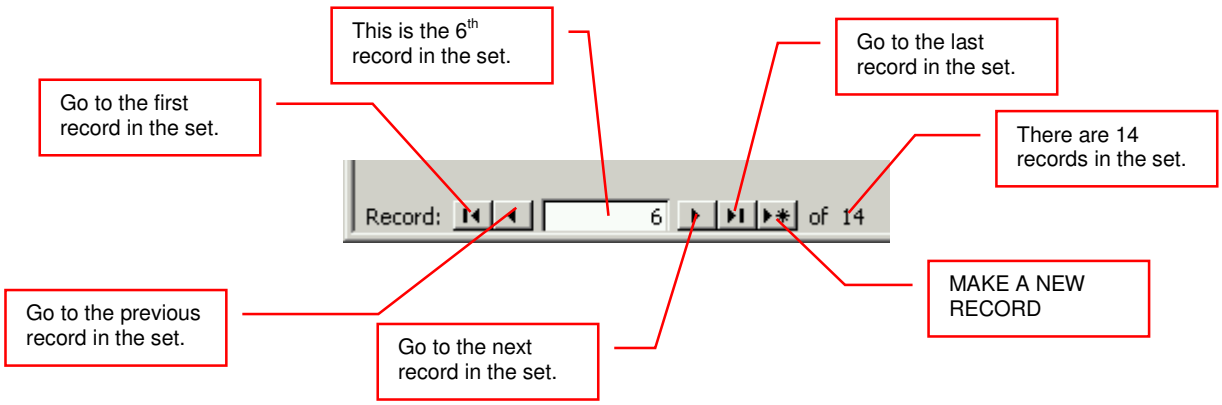
Toolbars

DataHouse has two toolbars that help with most navigation. They are shown below.



Navigation Buttons

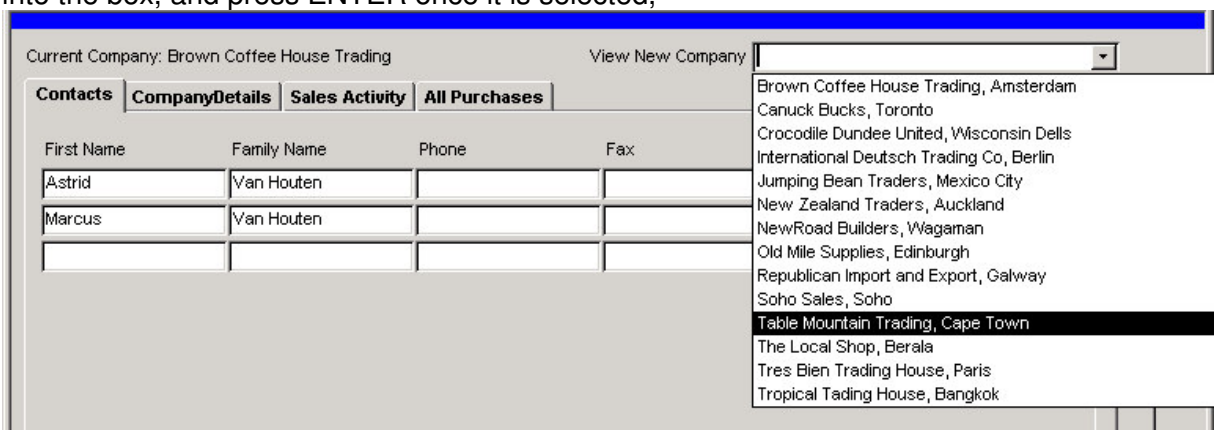
Most screens include the standard Access navigation buttons at the bottom left of the screen.



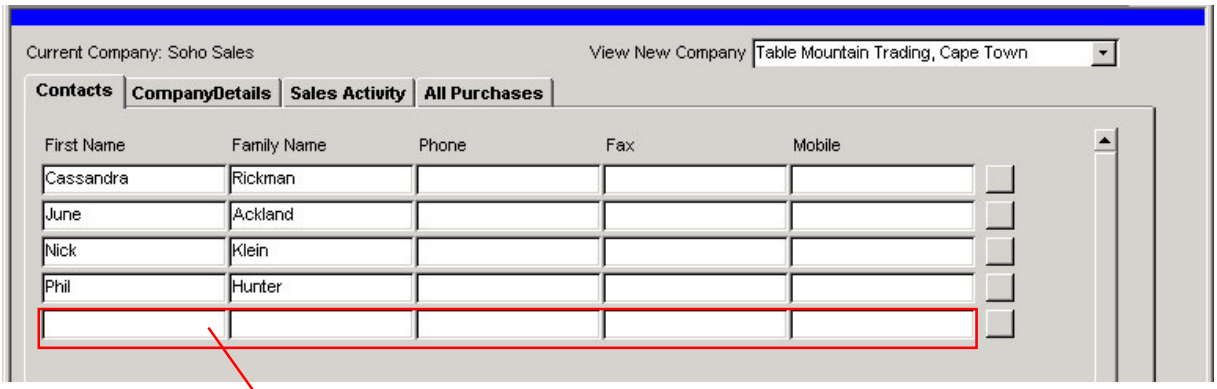
You can also use *PAGE DOWN* and *PAGE UP* to advance or retreat one record.

Jump to a Record using Drop Down Lists

Some (but not all) screens allow you to jump to a particular record using a drop down list in the top right of the screen. This list is sorted alphabetically for names and numerically for Sales Orders and the like. TO use this method, simply click on the arrow and scroll down to find the record you wish to view, or just start typing the name / number of the record you want into the box, and press ENTER once it is selected,



Data Entry in SubForms



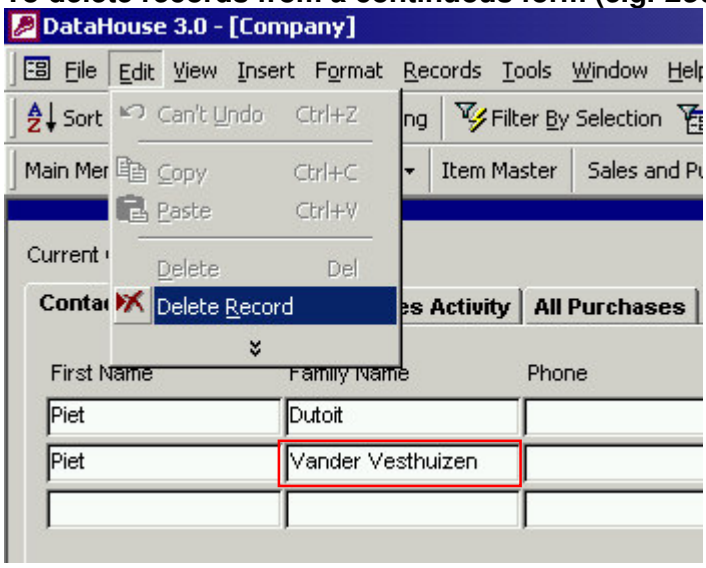
Enter new Data here, in this blank line at the bottom of the form. You may need to scroll down to see this line.

Deleting Data

During the normal operation of DataHouse you shouldn't need to delete records often, if at all. Many records can be marked obsolete, which is preferable, as it does not affect other related records.
If you decide to delete records, for instance the sample data that comes with DataHouse, follow the instructions below. If you need to delete lots of data all at once, please refer to section 13.3.

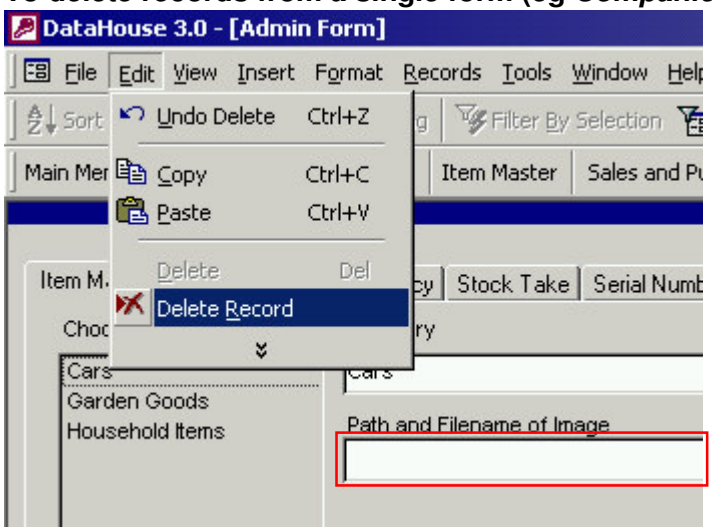
You can only delete a record if it has no downstream records or 'children' as this would leave 'orphans', records which have no place in a database. For instance, you can't delete a *Company* which has *Contacts*. You cant delete a *Sales Order* which has *Sales Order Details*. See the diagram in section 13.1 for details of how data is related to other data.

To delete records from a continuous form (e.g. *Locations, Contacts, Employees*)



To delete Piet Vander Vasthuizen, click in one of the boxes containing his contact information, such as the *Family Name* box highlighted. Then from the *Edit* menu, select *Delete Record*. Remember that you won't be able to delete this record if there are any downstream records related to Piet Vander Vasthuizen, such as *Sales Orders* or *Contact History* Notes.

To delete records from a single form (eg *Companies, Item Master, Major Category*)



Click in any text box associated with the record you wish to delete such as the *Path and Filename* box on the Major Category form. Then from the *Edit* menu, select *Delete Record*.

Chapter 2 - Getting Started with DataHouse

Assumes that you have
- Downloaded and unzipped the DataHouse Database file to a suitable location
- Read, understood and accepted the license conditions

DataHouse is a Database. You never need to save any records, this is done for you.

DataHouse is a Business Management Database. This boils down to people and things, and everything else relates to people (Customers, Suppliers, Employees etc) or things or both.

DataHouse is a relational database. This means in a nutshell, that you re-use information where it relates to several things. For instance if a Company has several employees, all working at the same place, then you need only enter the information relating to the Company once.
A consequence of this is that the order of when the information is entered matters, especially when you first start putting information into the database. Bear this in mind as we start entering the most general information first. For more details see Section 13.1.

Open DataHouse
Click “Enter DataHouse” to progress past the startup screen and enter the Database.

Sample Data

DataHouse is distributed with some sample data. Browse through the various screens and run some of the reports to get an idea of how DataHouse works and what information you can extract from the reports. Note that for the reports where dates are required that all of the sample data with dates is between January 1st 1991 and December 31st 1991.

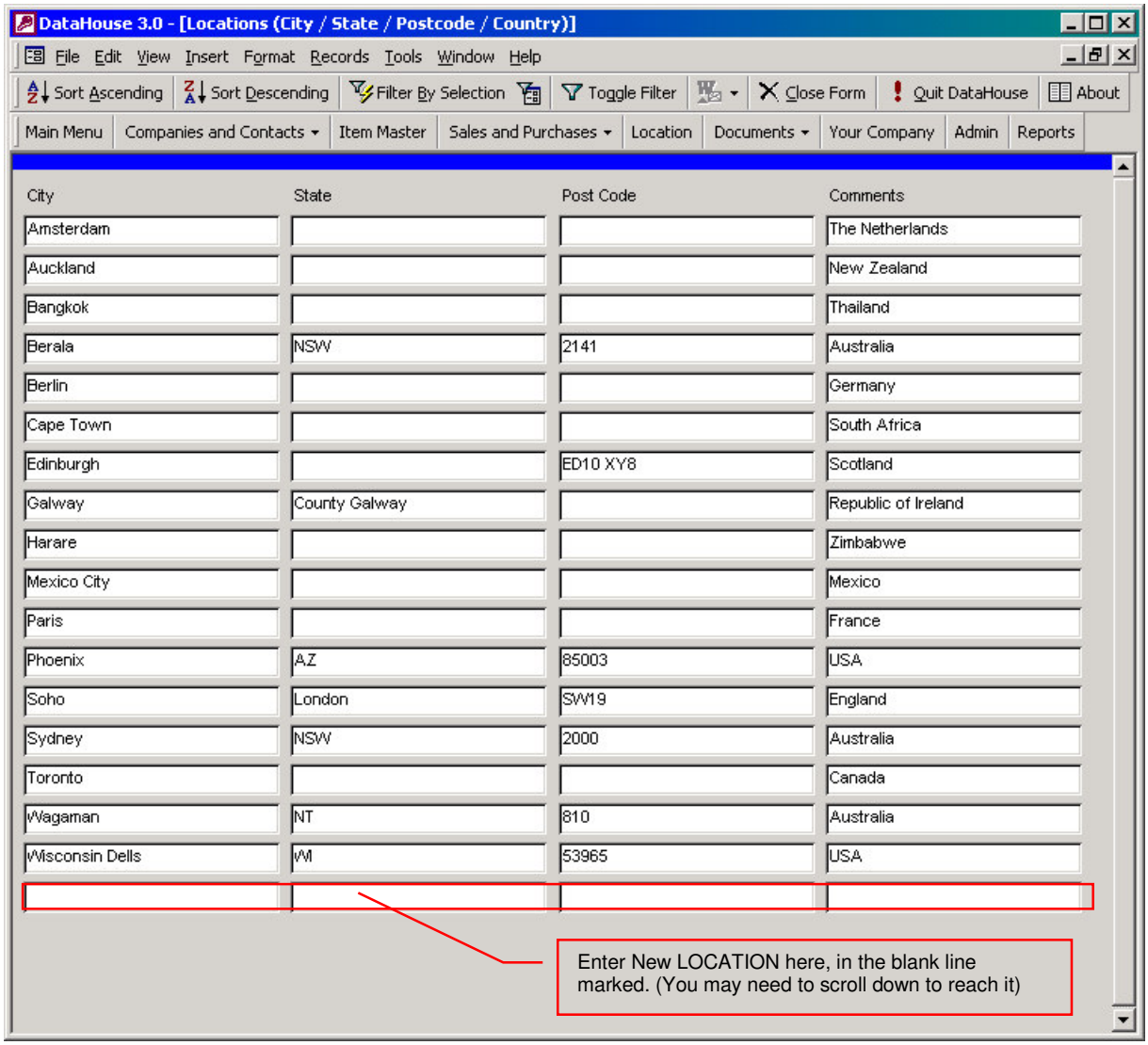
Entering Your Own Data

For all of the following points fill in as much detail as you can.
1. Enter a few *Locations* (see Chapter 3) Make sure to include where you are.
2. Enter a few *Item Master Categories and Subcategories* (Section 4.1)
3. Enter information on *Your Company* and your *Employees* (Chapter 5)
4. Enter information on a few *Companies* and *Contacts* (Chapter 6)
5. Enter Information on some products in the *Item Master*. (Chapter 9)

The points below get you further into the detail of DataHouse.
6. Documentation (see Chapter 10)
7. Contact History (see Chapter 8)
8. Sales Orders (see Chapter 11)
9. Purchase Orders (see Chapter 12)

Chapter 3 - Locations

You cannot enter information on City / State / ZIP Code (Postcode) / Country from the main company screen. You MUST enter it as an entry in the Locations form.
Click on the Locations button in the DataHouse toolbar, or the hyperlink on the Main Menu..
Enter location details in the bottom, blank line of form (scroll down to it if necessary). Every time you add data a new blank line will appear at the bottom. Note that you are not adding the complete address here, just the City (or Suburb), State (or County), Postcode and Country. DataHouse is a Relational Database, which means that this data is entered once, and is then available for any businesses that have the same location details.



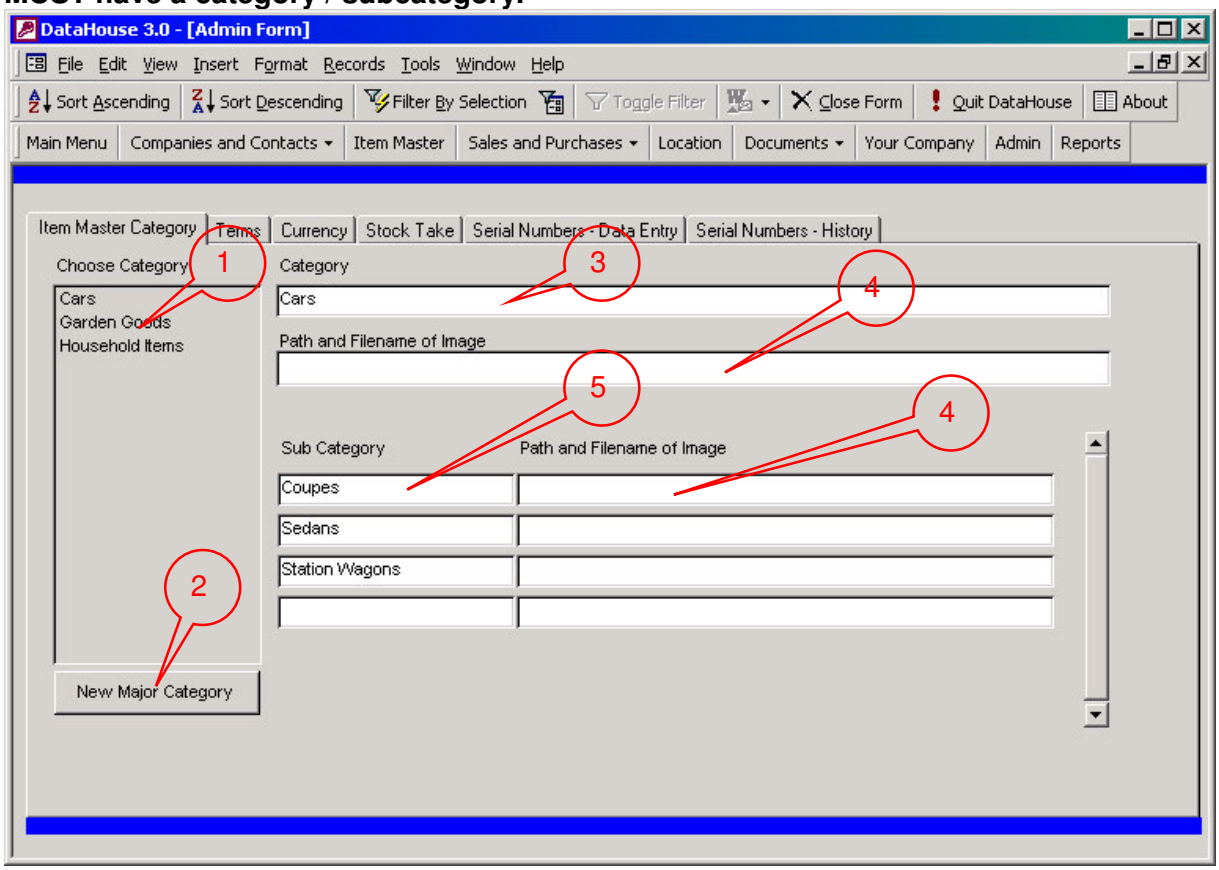
City	State	Post Code	Comments
Amsterdam			The Netherlands
Auckland			New Zealand
Bangkok			Thailand
Berala	NSW	2141	Australia
Berlin			Germany
Cape Town			South Africa
Edinburgh		ED10 XY8	Scotland
Galway	County Galway		Republic of Ireland
Harare			Zimbabwe
Mexico City			Mexico
Paris			France
Phoenix	AZ	85003	USA
Soho	London	SW19	England
Sydney	NSW	2000	Australia
Toronto			Canada
Wagaman	NT	810	Australia
Wisconsin Dells	WI	53965	USA

If you have a lot of data to enter you should consider using the import feature. See Section 13.2 for details.
Members of the DataHouse discussion list can download Location files from http://www.datahousesoftware.com/downloads.htm

Chapter 4 - Admin Form

4.1 - Item Master Category and SubCategory

Each Category MUST have at least one SubCategory. Each Item in the Item Master MUST have a category / subcategory.



Your company has various products, they belong to different categories. E.g.;

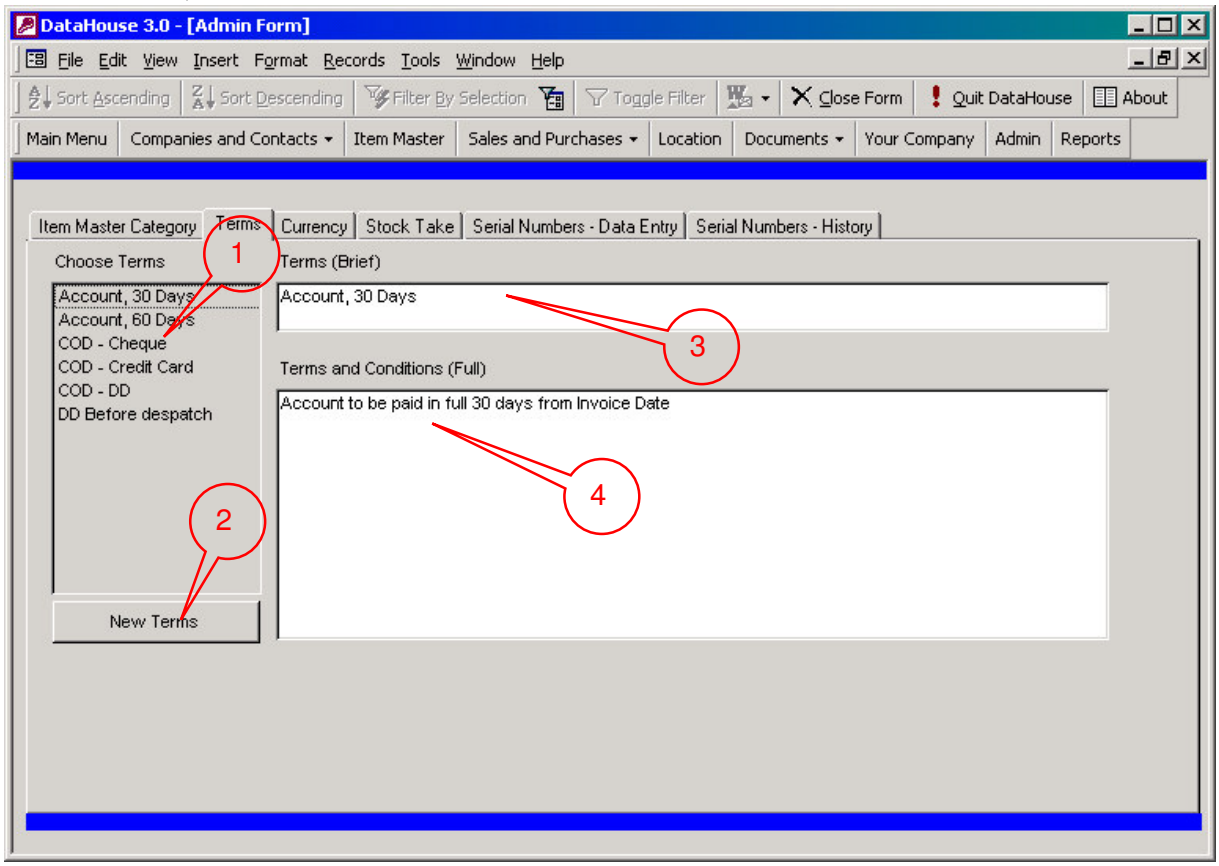
- Main Category: Winter Accessories
  - SubCategory: Hats
  - SubCategory: Gloves
  - SubCategory: Scarves
- Main Category: Men's Clothes
  - SubCategory: Suits
  - SubCategory: Sweaters
  - SubCategory: Socks

The definitions you choose will be relevant to your business, and likely no one else's. Each Item you enter must have an Item Master Category and Subcategory. Each category MUST have at least one subcategory.

1. List of currently defined Categories. To edit the information for a currently defined category , simply click on the name in this *listbox.*
2. If you need to start a new Major category – click this button.
3. Category Name. Enter or edit category name
4. Picture – if you have a picture for this category or subcategory enter the Path and Filename here. This picture is used in the price lists. The Major Category picture displays as 5cm wide by 4cm high and the SubCategory picture displays as 2.5cm wide and 2cm high.
5. SubCategory – You MUST enter at least one subcategory. Enter the name of the subcategory in the blank line at the bottom of any previous records. Scroll down the page if necessary

4.2 – Terms and Conditions

Each Sale / Quote must have Terms and Conditions



1. List of currently defined Terms and Conditions. To edit the information for a currently defined set of Terms and Conditions, simply click on the name in this *listbox.*
2. If you need to start a new set of Terms and Conditions – click this button.
3. Terms and Conditions brief description. Enter or edit category name
4. Full description of Terms and Conditions.

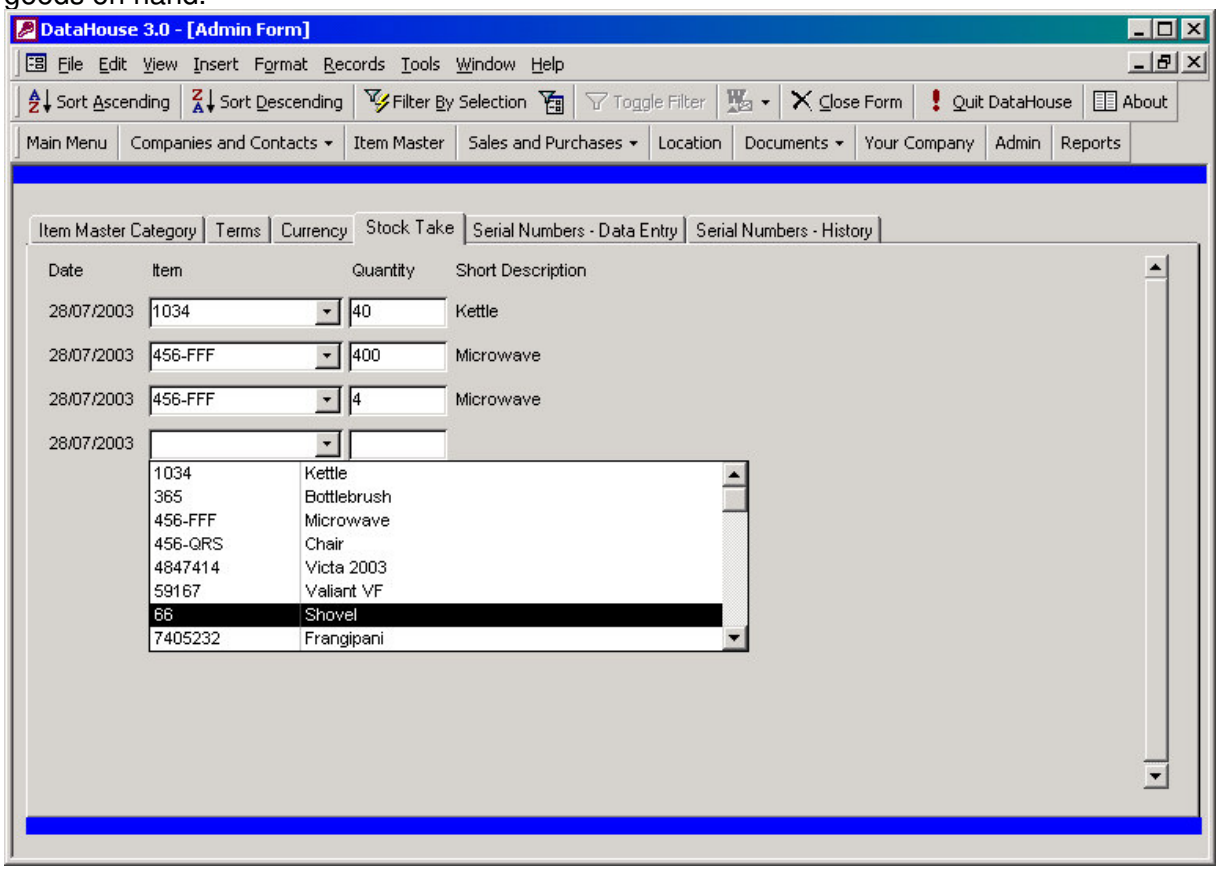
4.3 - Currency

Enter Currency and Currency Symbol here. Put the main currency you use at the top of the list. These entries are used to send quotes and invoices in any currency you choose.

IMPORTANT NOTE
DataHouse keeps track of monetary value as a SINGLE BASE CURRENCY.
Sales and Purchases are made in whatever currency you like, so long as it is defined here.
For all subsequent calculations and reports the sales and purchases are converted to the SINGLE BASE CURRENCY at the rate specified on each Sales Order and Purchase Order.
In all reports the Single Base Currency is displayed with the dollar sign “$”. Users with the MDB version of DataHouse can change this if required.

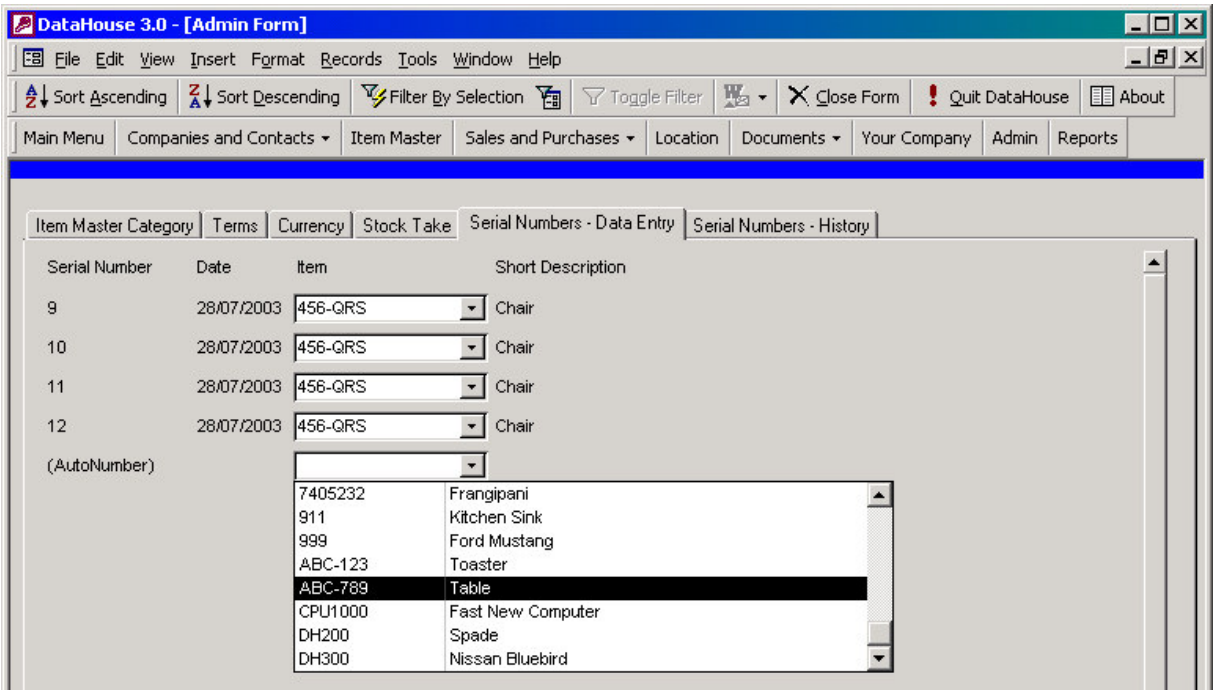
4.4 – Stock Take

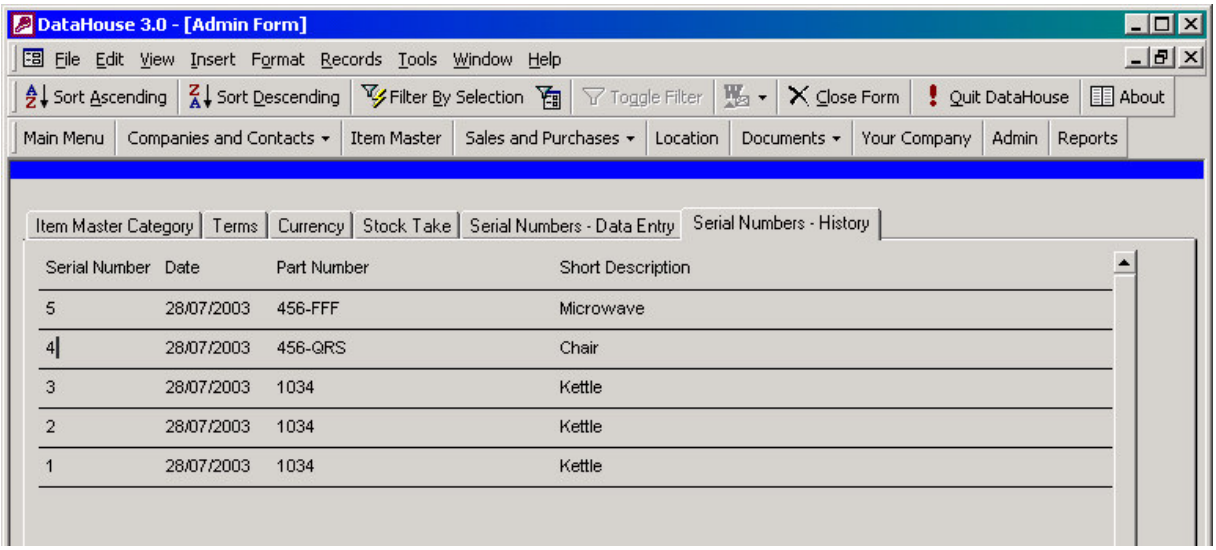
If you business buys and sells physical goods, then you'll need to perform a stock take from time to time.
You choose the Item (by Part Number) from the drop down list and enter the quantity, DataHouse time stamps the record. This information is used later to calculate quantity of goods on hand.



4.5 – Serial Numbers

If you need to record Serial Numbers, you can do this using DataHouse. Simply pick the Item part number from the drop down list, DataHouse will time stamp the record and assign a Serial Number (if you need to re-start numbering, see section 13.4) To assign new Serial Numbers us the *Serial Numbers – Data Entry* page. To view old Serial Numbers use the *Serial Numbers – History* page.





Chapter 5 - Your Company

Click the button “Your Company” in the Toolbar or follow the hyperlink on the Main Menu to add details on you and your company. When you enter this form, all sites for Your Company are shown, there is no filtering. To go from one record to another use navigation buttons in the bottom left of the screen.

- YOUR COMPANY NAME and CITY are required (compulsory) fields
- State (County), ZIP (Postcode) and Country are all filled in automatically once you’ve chose the City from the list. You cannot enter a new City / State / Postcode / Country from this form. You MUST enter these from the *Locations* form.
- WEB SITE, SWITCH PHONE and MAIN FAX are for information only, and are not used extensively throughout the database. The PHONE and FAX for each contact are used in several other forms and reports, so even if each person has the same Phone and Fax number, you need to enter these for each person.
- You can have as many sites for your company as required, and as many employees at a site.
- If someone leaves Your Company DON’T delete the DataHouse record for them, as this will affect several other records such as Sales and Purchase Orders they raised. Instead mark them OBSOSLETE by ticking the box at the far end of the datasheet. This will prevent them from appearing in this form, and as a choice to raise new Sales and Purchase Orders.

Chapter 6 - Companies

Click on the Companies button in the toolbar or follow the hyperlink on the Main Menu to view / add / edit details on other companies (Suppliers / Customers / whatever).

Each "Company" entry has an address. If you have one company with multiple locations, it may suit best to set these up as several "Company" entries on DataHouse, or it may be most suitable to have only one address (say the Head Office).

Upon starting this screen you will see the first record in an unsorted set.
You will probably want to either - Find the Company that you're currently interested in – or – Enter a new Company.

6.1 Finding a Company in the Company Form

The main way to find a Company is to use the *JumpTo Record* drop down list in the top right of the screen. Refer to Section 1.4 for details of how to use this screen object.
Alternatively you can

- Sort Ascending / Descending by any field on the Company Details page.
- Use the Navigation Buttons to advance through the records.
- Filter by Form

6.2 Enter a New Company

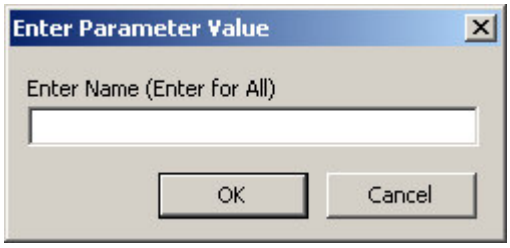
- Press the New Record button of the Navigation button set.
- Fill in Company details first, and then Contact details. This screen is the ONLY one where you can enter Company or Contact records.

- COMPANY NAME is a required field.
- CITY is a required field. You can choose only Location combinations that already exist in the database. To enter new Locations see Chapter 3. If the City / State / Postcode combination that you need is not listed, choose a temporary one, close the company screen, enter the location and then come back and change the location for the company. ***If you do not enter a location, the company record will not be saved.***
- If this Company is a Customer, tick the box marked CUSTOMER, similarly for SUPPLIER. Note that a company can be either, both or neither. When you are choosing contacts for Sales and Quotes, only those contacts whose company is a CUSTOMER will be displayed. Similarly, only contacts whose company is a SUPPLIER will be available to choose from when raising a Purchase Order.
- If this company becomes obsolete for whatever reason, mark the box for OBSOLETE. Don't delete the company, as this may affect earlier records for Purchases and Sales.
- Similarly, if someone leaves This Company DON'T delete the DataHouse record for them, as this will affect several other records such as Sales and Purchase Orders where they were a customer or vendor. To make them obsolete use the Contact History screen (see Chapter 8). This will prevent them from appearing in this form, and as a choice to raise new Sales and Purchase Orders.
- WEB SITE, SWITCH PHONE and MAIN FAX are for information only, and are not used extensively throughout the database. The PHONE and FAX for each contact are used in several other forms and reports, so even if each person has the same Phone and Fax number, you need to enter these for each person.

- For COMPANY NOTES, enter notes that apply to the whole Company. For notes relating to an individual, we'll use the Contact History section. (Chapter 8)
- Contacts
    - Contacts are listed in ascending alphabetical order by Forename. The PHONE and FAX for each contact are used in several other forms and reports, so even if each person has the same Phone and Fax number, you need to enter these for each person.
    - Enter Contact Records at the bottom, blank line of the form. You may need to scroll down to see this line.
    - Use the *JumpTo* button on the Contacts page to go to the Contacts Management screen. Form here you can compose letters and faxes, enter email address, launch an email using Outlook, enter contact history notes and mark a contact obsolete when required.
- Sales Orders are listed in descending numerical order by Sales Order number. Note that you can't enter information here, you can only view information. Click on the *JumpTo* button next the *QTY* field to jump to a particular Sales Order.
- Purchase Orders are listed in descending numerical order by Purchase Order number. Note that you can't enter information here, you can only view information. Click on the *JumpTo* button next the *QTY* field to jump to a particular Purchase Order.

Chapter 7 - Contacts

Entering this screen shows a simple summary form showing contact information for individuals. From here you can Export and Filter the contact information or enter the Contact History Form



Upon starting this screen you will be prompted to *"Enter Name (Enter for All)"*
You may have information on thousands of individuals stored in DataHouse, so a search function is important. This search will restrict (filter) the records shown to those that match the search criteria.
If you enter "S" the search criteria will filter all (Full) names for *s*, which is to say it will find any contact with "s" in the name. The following individuals (assuming they exit in your Database) would be found: "John **S**mith" and "**S**am Harker" Searching for "sm" will find "**Sm**ith" but not "Sam"
If you enter nothing in the search box (simply press enter) the search criteria will filter Surnames for **, and will therefore find ALL records.

The main uses for this particular form are.

- Search by name.
  - If you remember a contact name you can then retrieve their phone number, fax number etc as well as the company information from there.
- Check all of the contacts that you want to include in an arbitrary set
  - (eg Christmas card list or party invitation) and then export these checked contacts to an Excel spreadsheet for further manipulation and mail merges, or report on the Contact History / Notes of this set.
- View / Edit Contact History
  - Click on the *JumpTo* button to the right of the Filter Checkbox to view and edit contact history.

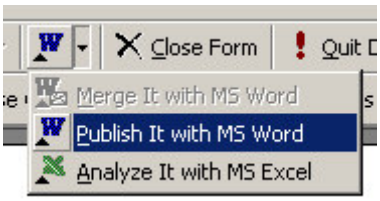
Command buttons on this screen are

- Search Again – re-enter a name to search for
- Apply Filter – Restrict the found set to those records who have a tick in the box marked FILTER
- Export Contacts – Export a list of contacts to Excel spreadsheet. If the APPLY FILTER button has not been used, then ALL CONTACTS will be exported, If the APPLY FILTER button has been used, then only those filtered contacts will be exported.

Chapter 8 - Contact Management Screen

You can access this screen from the Main Menu, the Toolbar, and from *JumpTo* buttons on the Company and the Contacts forms.

- Enter Company Specific Notes in the field marked *Notes Relating to CompanyName*.
- Enter new notes for the contact. Once you close the form and the record is saved, this note can only be Viewed. It can't be edited.
- Make this particular contact, or the entire company, obsolete.
- Command Buttons on this screen
    - Contact History For This Company – Prints a report on all contacts at this company which have contact specific notes.
    - Email contact – Uses MS Outlook to launch an email to the contact.
    - Letter and Fax templates
    - Choose the employee from the list below
    - press the LETTER (or FAX) button to bring up a formatted and addresses letter (or fax) template.
    - Click on the Office Links button and choose MS Word
    - Finish writing your document in Word.



Chapter 9 - Item Master

Most businesses deal with products bought, sold and / or processed. DataHouse lets you store information relating to a product. The information here is used in DataHouse for Sales Orders and Purchase Orders, and for such things as price lists.
Before purchasing or selling a product, you will have to enter information in the Item Master.

The Item Master is at the heart of DataHouse. To use DataHouse effectively you must know ho the Item Master section works.

To access the Item Master, click on the button marked Item Master in the toolbar, or follow the hyperlink from the Main Menu.

Item Data Page

- The Record Number is a unique, sequential number, assigned by DataHouse. As the Part Number must be unique, appending the record number to the end of the part number should usually ensure this.
- The Part Number is assigned by the user. You can use whatever part numbering system you like, but it's best to have a consistent approach to part numbering. **THIS FIELD IS COMPULSORY, AND DATAHOUSE USES THE PART NUMBER THROUGHOUT THE DATABASE TO REFER TO THIS ITEM**
- Short Description is the description used elsewhere in DataHouse.
- Long Description is a Compulsory field.
- Category is a compulsory field. You must Choose a Category / SubCategory combination for each item. Each Category must have at least one subcategory.
- Marking the Item as obsolete will prevent it from being viewed in this screen, and will remove it as a choice for new Sales & Purchases.
- Search For Item - Search by entering all or any of Part Number / Supplier's Part Number and Description. (See section below – Searching for Items)

Costing Page

Enter the Cost and Sell Prices for a Product.
An indicative COST price is shown, which is the average of the last 5 completed Purchases.
Margins are shown, based on the Sell Price, and the Cost price that has been manually entered.

Specifications Page

Enter any relevant specifications here. These specifications are used for the *Extended Quote.*
Put the Parameter in the left hand, shorter box (e.g. weight, depth) and the value in the right hand box (e.g. 40kg, 495mm)

Stock Levels Page

No Data can be added or edited on this page.
Date of Last Stock Take – If no stock take has been taken for this Item, the date displayed and used for calculations will be 01/01/1901.
Future Activity – Sales are shown as negative quantities, purchases as positive quantities.

All Sales / Quotes / Purchases

Shows All instances of the Item on Sales and Purchase Orders
No Data can be added or edited on this page.

Documents Page

Assign documents to an item. The documents must be created in the Directory form first. You can have as many documents relating to an item as you like.

Searching for Items

You may have information on hundreds of products stored in DataHouse, so a search function is important. This search will restrict (filter) the records shown to those that match the search criteria.
If you enter “vic” the search criteria will filter the Part Number / Suppliers Part Number / Long Description for *vic*, which is to say it will find any product with “vic” in the Part Number, Suppliers Paper Number or Long Description. The following product descriptions (assuming they exit in your Database) would be found: “**Vic**torian Mineral Water”, “Bench **Vic**e” and “…for sale only in **VIC**” or Part Numbers “**VIC**100” and “123**VIC**XYZ”.
NOTE even after filtering you may have to choose between a number of records that satisfy the search criteria.

If you enter nothing in the search box (simply press enter) the search criteria will filter Part Number and Description for **, and will therefore find ALL records.

The search function concatenates the Alt Part Number, Suppliers Part Number and Long Description (SearchField: [PartNumber]&’ ‘&[SuppliersPartNumber]&’ ‘&[LongDescription]) and the search is for “”&[WhateverYouEnter]&”*”*

Example:
Assume we have the following parts in the database

	Part Number	***Long Description***
1	Bat12100	12V 100Ah Valve Regulated Battery
2	DC50	DC-DC Converter 49W Output
3	Rack42RU	42RU Rack, Steel 600mm x 600mm. 100kg
4	023410045	Radial Car Tyre. 17”. Steel belted

- If we search for “100”, items 1, 2 and 4 will be found as this particular text string occurs in the Alt Part Number of some, and the Long Description of other items.
- If we search for “100Ah” item1 only will be found. This particular text string appears only in the Long Description of Item 1.
- If we search for “10045” item 4 will be found. This particular text string appears only in the Alt Part Number of Item 4.

Chapter 10 - Document Management

In any business there are usually several documents you need to refer to, produce and update. Keeping track of documents is not a simple task, particularly when (as most business do) you have several documents, several types of documents and several computer users. According to DataHouse, documents are grouped together into directories (or folders) where all documents in a folder share a common theme. For instance, an architect may keep all information relating to one property in one directory, using a new directory for each property. An engineering dept may keep all information relating to one product in one directory.
The DataHouse Document Management structure is designed to be flexible enough to work with your own software filing system. Refer to *Appendix 1 to* see an explanation and examples of a soft filing system specifically designed to align with DataHouse's document management structure.

10.1 - Directory Form

This form is where you will create, maintain and edit information on your documentation. On entering the screen you will go straight to the last record that was viewed. All records that are not obsolete are available, they are not filtered in any way.
The Main Form contains information pertaining to the Directory or Folder, the information in the subform relates to the documents contained within that directory.

The following fields are available on the Main Form

Directory Number	This is an arbitrary number. DataHouse needs a number to keep track of records such as Directories, but it can also be used to make it easy for you to keep track of directories. Refer to *Appendix 1* to see an explanation and examples of a soft filing system specifically designed to align with DataHouse's document management structure. DataHouse automatically assigns these numbers, you can't change these yourself.
Directory Description	Enter a description of the purpose / contents of the directory here. This description is not used for any searches.
Obsolete?	Mark the directory as obsolete. Obsolete directories won't appear in the directory screen, and the documents therein won't be available to pick in the Item Master screen.

The Command buttons on this screen have the following functions

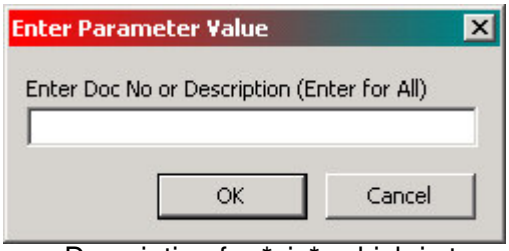
Explorer	Opens Windows Explorer

The following fields are available in the subform

Record Number	DataHouse automatically assigns these numbers, you can't change these yourself.
Document Number	Here you can input an alternative document number, reference number etc. If you have another software application assigning document numbers, you can enter those here. If you have a particular naming convention that you wish to use, you can enter that here. This becomes the Document Number that DataHouse uses throughout the rest of the database. This must be unique. (If you enter a number that is not a unique part number and then move close the screen, then the data entered will not be saved.) The number to the left – Record Number is a unique, sequential number. It is recommended that you use this number as part of your Alt Ref Number, which will ensure it's uniqueness.
Short Description	Enter a succinct description here. This description is the one that will appear on reports, and in other sections of the Database. This description is not used for any searches.
Long Description	Enter a full description here. Be as verbose as you like. The more detail the better, as this field will be used for subsequent searches.
Obsolete?	Mark the document as obsolete. Documents marked obsolete won't appear in the Document or Directory screens, and won't be available to pick in the Item Master screen.

10.2 - Document Form

Once you've entered the details on a particular document in DataHouse, you or others will want to refer to them later. The document form uses a simple search function to make finding documents as easy as possible.



Upon starting this screen you will be prompted to *"Enter Doc Number or Description"*
You may have information on hundreds of documents stored in DataHouse, so a search function is important. This search will restrict (filter) the records shown to those that match the search criteria.
If you enter "vic" the search criteria will filter the Long Description for *vic*, which is to say it will find any company with "vic" in the Long Description. The following documents (assuming they exist in your Database) would be found: "**Vic**torian Mineral Survey", "Map of **Vic**toria" and "Terms and Conditions for Software Solutions **VIC**"
If you enter nothing in the search box (simply press enter) the search criteria will filter Company Names for **, and will therefore find ALL records.

This screen is therefore useful for tracking down the document number and location of documentation. Of course you won't find it unless the information has been entered into the *Long Description* field for that document, in the Directory screen

The only field that can be modified here is the *Long Description* field.

Chapter 11 - Sales Orders

Sales are the reason for being a business; therefore the Sales Order screen of DataHouse is one of the most important. Many of the reports relate directly to Quotes and Sales.

Click the toolbar button marked Sales Orders, or follow the hyperlink from the Main Menu.

Upon starting this screen you will see the first record in an unsorted set.
You will probably want to either - Find the Sales Order that you're currently interested in – or – Enter a new Sales Order.

11.1 Finding a Sales Order in the Sales Order Form

The main way to find a Sales is to use the *JumpTo Record* drop down list in the top right of the screen. Refer to Section 1.4 for details of how to use this screen object.
Alternatively you can

- Sort Ascending / Descending by any field (Except those on the Items page).
- Use the Navigation Buttons to advance through the records.
- Filter by Form

11.2 Enter a New Sales Order

- Press the New Record button of the Navigation button set.
- Fill in details page by page. **Make sure that a choice is selected from each drop down boxes.**
- The Sales Order Number is automatically assigned. If you need to restart the numbering of Sales Orders, please refer to Section 13.4
- The Forex Rate is used to calculate the base currency values for this particular Sales Order. Use the exchange rate current at the time that you edit the Sales Order. The rate you must enter is your Base Currency DIVIDED BY the Foreign Currency.
    - Example 1: Base Currency = Dollars, This Sale is in Dollars. FOREX RATE = 1
    - Example 2: Base Currency = Dollars, This Sale is in YEN, $1.00 = ¥100. FOREX RATE = 0.01
    - Example 3: Base Currency = Dollars, This Sale is in Pounds Sterling, $1.00 = £0.65. FOREX RATE = 1.54
- The BillToDetails lists all Contacts who belong to Companies who are Customers. This list is sorted by First Name, Family Name and then Address)
- The ShipToContact will automatically be filled in to be the same as the BillToContact. You can change this on the ShipToDetails page.
- Enter all relevant dates on the dates page. Note that all Quote reports are based on the date Quoted, and all Sales reports are based on the date sold.

Items Page

- Line Number – specifies where the Item will appear on a Quote or Invoice. Line number 1 appears at the top, followed by line 2, etc.
- Part Number – chosen from a list of all parts in the Item Master. Note that this list also shows Cost and Sell prices defined on the Item Master screen, for information.
- When you enter a price in the details section, you enter the actual sell price of the goods in the currency you are selling them.

Chapter 12 - Purchase Orders

Click the toolbar button marked Purchase Orders, or follow the hyperlink from the Main Menu.

Upon starting this screen you will see the first record in an unsorted set.
You will probably want to either - Find the Purchase Order that you're currently interested in – or – Enter a new Purchase Order.

12.1 Finding a Purchase Order in the Purchase Order Form

The main way to find a Sales is to use the *JumpTo Record* drop down list in the top right of the screen. Refer to Section 1.4 for details of how to use this screen object.
Alternatively you can

- Sort Ascending / Descending by any field (Except those on the Items page).
- Use the Navigation Buttons to advance through the records.
- Filter by Form

12.2 Enter a New Purchase Order

- Press the New Record button of the Navigation button set.
- Fill in details page by page. **Make sure that a choice is selected from each drop down boxes.**
- The Purchase Order Number is automatically assigned. If you need to restart the numbering of Purchase Orders, please refer to Section 13.4
- The Forex Rate is used to calculate the base currency values for this particular Purchase Order. Use the exchange rate current at the time that you edit the Purchase Order. The rate you must enter is your Base Currency DIVIDED BY the Foreign Currency.
    - Example 1: Base Currency = Dollars, This Sale is in Dollars. FOREX RATE = 1
    - Example 2: Base Currency = Dollars, This Sale is in YEN, $1.00 = ¥100. FOREX RATE = 0.01
    - Example 3: Base Currency = Dollars, This Sale is in Pounds Sterling, $1.00 = £0.65. FOREX RATE = 1.54

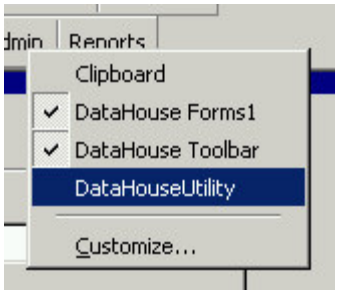
Items Page

- Line Number – specifies where the Item will appear on a Quote or Invoice. Line number 1 appears at the top, followed by line 2, etc.
- Part Number – chosen from a list of all parts in the Item Master. Note that this list also shows Cost and Sell prices defined on the Item Master screen, for information.

Chapter 13 - Under the Hood

There are a few database functions that need to be performed from time to time rather than being everyday tasks. These functions also have effects on the data that might not be obvious, so they are not advertised to the casual user.

WHENEVER YOU ARE WORKING WITH THE UTILITY MENU YOU MUST BE ZEALOUS ABOUT BACKING UP YOUR DATABASE. AFTER YOU HAVE MADE CHANGES, DON'T START USING THE DATABASE WITH NEW, LIVE DATA UNTIL YOU ARE ***SURE*** THAT THE EXISTING DATA IS BEHAVING AS YOU THINK IT SHOULD.

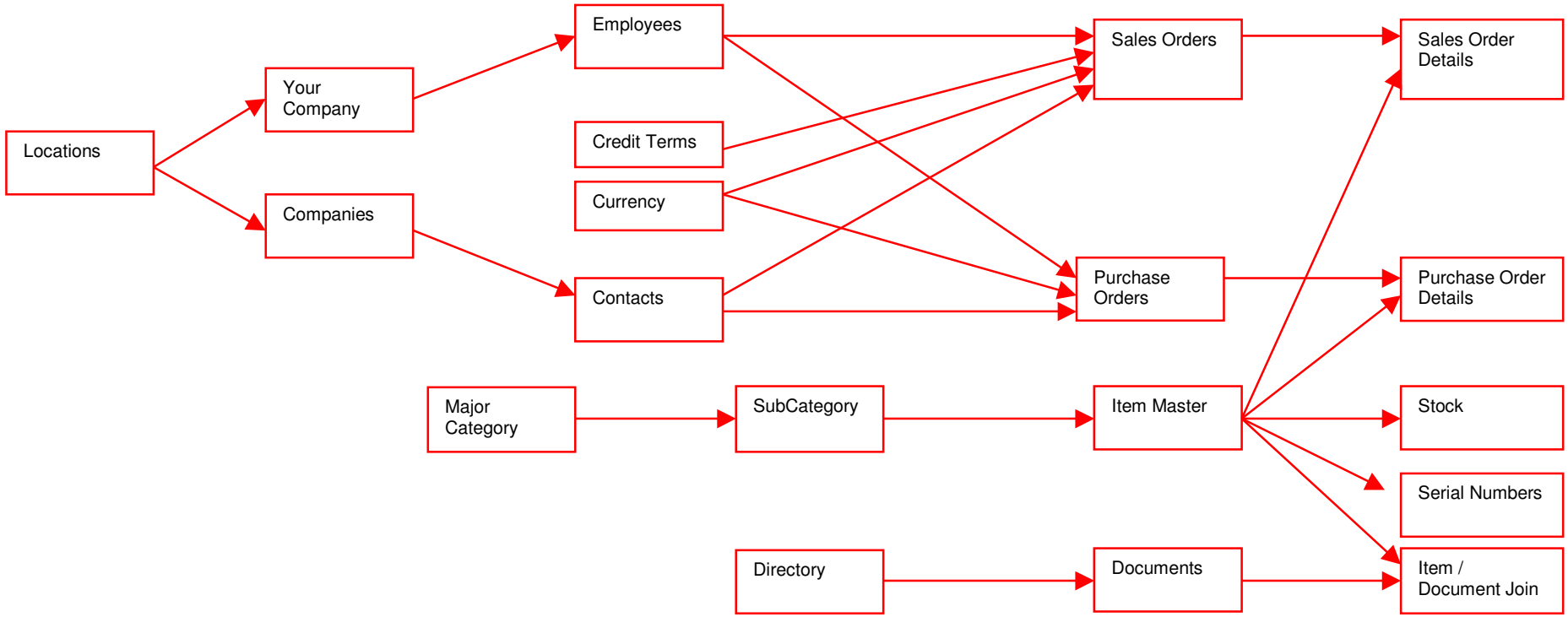


To access the Utility menu right click on the toolbar section and select the DataHouse Utility menu.

This will bring up the Utility Menu which allows you to access powerful features that you won't need to use all the time. These are

13.1 DataHouse Relationships

The diagram below shows the relationships in DataHouse.



DataHouse is a relational database. This means that the information in a table can be re-used elsewhere. This cuts down on time wasting and errors due to double handling and makes reporting easier.

Two important points to note are that Sales and Purchase Orders do NOT relate directly to Companies, but rather to Contacts and through them to their Companies, similarly Items in the Item Master relate to SubCategories and through them to the Major Category.
Each relationship shown is a One-To-Many, for example a Company can have many Contacts.

DataHouse does not allow Orphans, for example you cannot have a Contact without a Company.

The tables in DataHouse are related, one to another, using ID numbers or Primary / Foreign Keys. Each and every record has a Primary Key which uniquely identifies that particular record. When this Primary Key is then used to relate that table to a child, the child table keeps a copy only of the ID number of the Parent record. In the Child record this is called the Foreign Key.

When you are using DataHouse you never need to know what the Primary Key of a record is, or the Foreign Keys of it's parents. The exception to this rule is when you are importing data, see below for details.

13.2 – Import Data

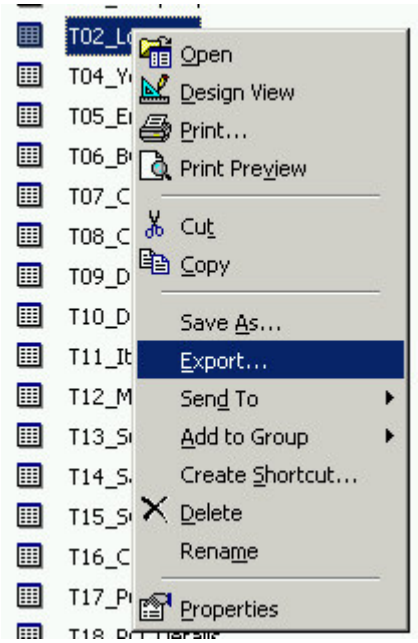
Usually when you're first setting up your database, there is a lot of existing data that you have to enter. DataHouse has some import functions to make this a bit easier.

Importing Location Files

1. Download the location file from the downloads page http://www.datahousesoftware.com/downloads.htm
2. Save the Excel spreadsheet with the data you wish to import as "C:\temp\Locations.xls" The NAME and the PATH be exactly as specified.
3. Right Click on the toolbar and select the Utility Toolbar, and then the Import Data screen.
4. Press the button marked Import Locations.
5. Repeat the steps above for any subsequent Locations files. Each will need to be saved as "C:\temp\Locations.xls" Alternatively you can merge all the data into one large file and import this. It must have the same PATH and NAME, and the column headings must be as per the downloaded location file.
6. A blank Location file template can be downloaded from http://www.datahousesoftware.com/downloads/DH3ImportTemplates.zip

Importing Other Data

1. If you are importing data other than Locations (Location records have no parents), you will need to know the value of the Primary Key in the Parent table. For instance if you are importing Contacts, you'll need to know which Company they belong to before you start importing.
2. Click on the button in the Utility Toolbar marked Database Window.
3. Find the relevant parent table. If you are importing Companies, the relevant table is Locations, for Contacts it is Companies and for Items it is SubCategories.
4. Right Click and Export the table concerned, we recommend that you export as an Excel spreadsheet.



5. Find the ID number of the parent record. In the example we will import a Company Record, so we will need to know the ID number of the Location where this Company is located. After exporting the Locations table we can view the Primary Keys of that table. In the example, let's assume that we want to import a Company that is located in Phoenix Arizona. The Primary Key for Phoenix is **36248**, so we will use this in the import spreadsheet for the Company.

	A	B	C	D	E
1	T02_PK	City	State	Post Code	Country
2	17	Wagaman	NT	810	Australia
3	199	Sydney	NSW	2000	Australia
4	498	Berala	NSW	2141	Australia
5	25976	Dells	WI	53965	USA
6	36248	Phoenix	AZ	85003	USA
7	39565	Galway	County Galway		Ireland
8	39566	Auckland			New Zealand
9	39567	Toronto			Canada
10	39568	Mexico City			Mexico
11	39569	Cape Town			South Africa
12	39570	Harare			Zimbabwe
13	39571	Bangkok			Thailand

6. Download the Import Templates (MS Excel files) from http://www.datahousesoftware.com/downloads/DH3ImportTemplates.zip You MUST use these templates for the import functions to work and you MUST keep the row headings exactly as they appear in the spreadsheets. (These are the field names in the underlying tables)
7. Copy / paste / shoehorn your data into these spreadsheets. You must enter only text format, no other format (eg hyperlinks, dates) In our example you can see we are importing Companies located in Phoenix, Galway and Auckland. You can import as much data as you like in one go, but NO ORPHANS ARE ALLOWED, so each record you import must have a meaningful Parent **Primary Key**.

	A	B	C	D	E
1	T02_PK	T01_01_C	T01_02_St	T01_06_W	T01_C
2	36248	Phoenix Frankfurters			
3	39565	Galway Black Pudding Company			
4	39566	All Blacks	Rugby Supplies		
5					

   a. For the Locations records no fields are compulsory
   b. For the Company records, Company Name and Location Primary Key are compulsory fields.
   c. For the Contact records, only the Company Primary Key is compulsory
   d. For the Item records, The Sub Category Primary Key, Part Number, Short Description and Long Description are compulsory
8. Save the files in the C:\temp directory. The import function will ONLY import the following files
   a. "C:\temp\Locations.xls"
   b. "C:\temp\Companies.xls"
   c. "C:\temp\Contacts.xls"
   d. "C:\temp\ItemMaster.xls"
9. If you are importing records from Locations.xls, Companies.xls and Contacts.xls it is essential to do them in the order listed above.
10. Click the buttons to begin importing data. (in the order (a) – (d) above)

13.3 - Delete Records

If you need to delete several records all at once, you can save time and effort by using the built in delete function.

Pressing the *Delete Data* button on the Utility Menu brings up the following screen;
The individual buttons are self explanatory, but heed this important note;
NOTE
Pressing a button to delete a type of record will also delete all related downstream records or children.

Delete Sales Orders – also deletes
- Sales Order Details

Delete Purchase Orders – also deletes
- Purchase Order Details

Delete Documents – also deletes
- Item / Document Association
- Directories

Delete Items – also deletes
- Sales Order Details
- Sales Orders
- Purchase Order Details
- Purchase Orders
- Stock-take information
- Serial Numbers
- Item / Document Association
- Item Master

Delete Contacts – also deletes
- Sales Order Details
- Sales Orders
- Purchase Order Details
- Purchase Orders
- Contact History
- Contacts
- Companies

13.4 Restart Numbering

There are many reasons why the numbering of Sales Orders, Part Numbers etc currently in DataHouse doesn't suit your immediate requirements. Some of them may be

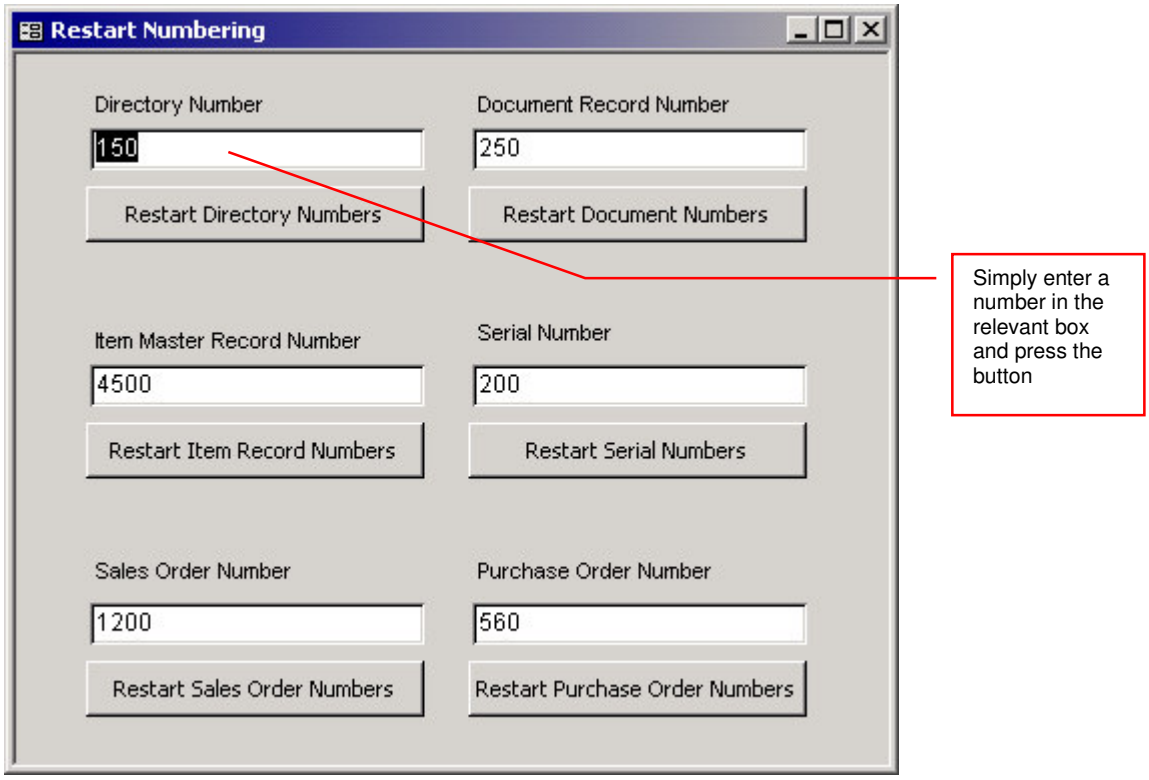
- You have just downloaded DataHouse, and you need the part numbering to start where your previous part numbering system finished
- You want your Purchase Orders to restart at a particular time (say start of a new tax year)
- You need to reduce the size of your database by deleting current records.

From the Utility Menu, press the *Reset Numbering* button

From this screen you can restart numbering of all

- Directories
- Documents
- Sales Orders
- Purchase Orders
- Items
- Serial Numbers

You can restart the numbering for all objects listed above wether there are records in those tables or not. If there are records in a table, and you are just re-starting the numbering at a new value, make sure that this new value is higher than what is currently in the database.



Appendix 1 - A Soft Filing System

When several people in an organisation are using, creating and modifying documents, it makes sense to use a considered system for soft filing rather than an “every man for himself” strategy, which inevitably leads to duplication, errors, keeping far more documents than are necessary, and not knowing what is the relevant / up to date copy.

The following information spells out a way that I personally believe is a good filing system and one that will work well with DataHouse. Use some or all of it, modify it or ignore it as you see fit.

A successful filing strategy needs

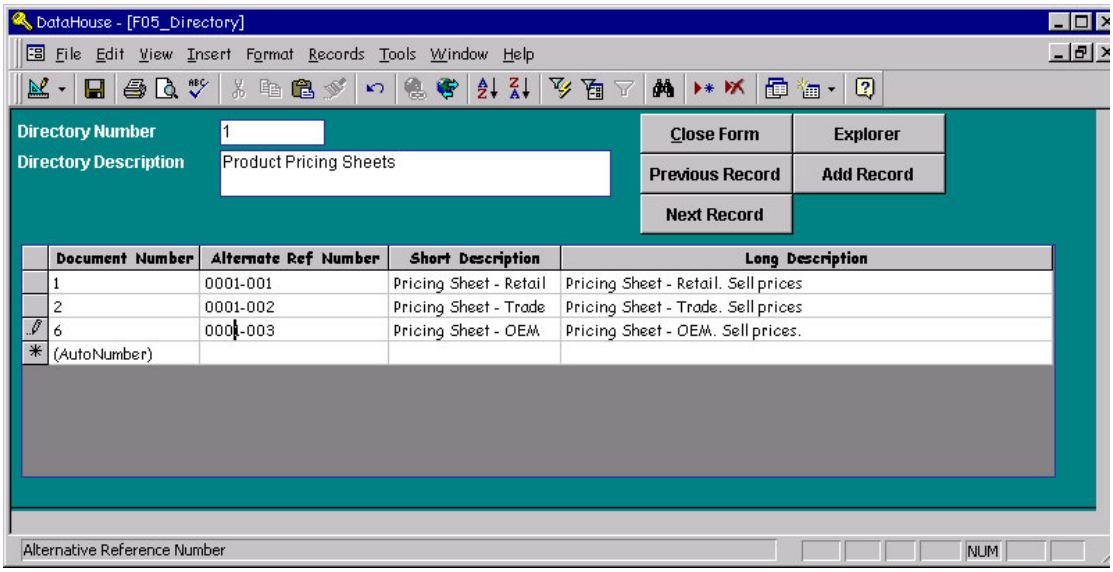
- A single place to store information
- A document numbering system
- An information retrieval / search function
- The location of the document to be included as part of the document

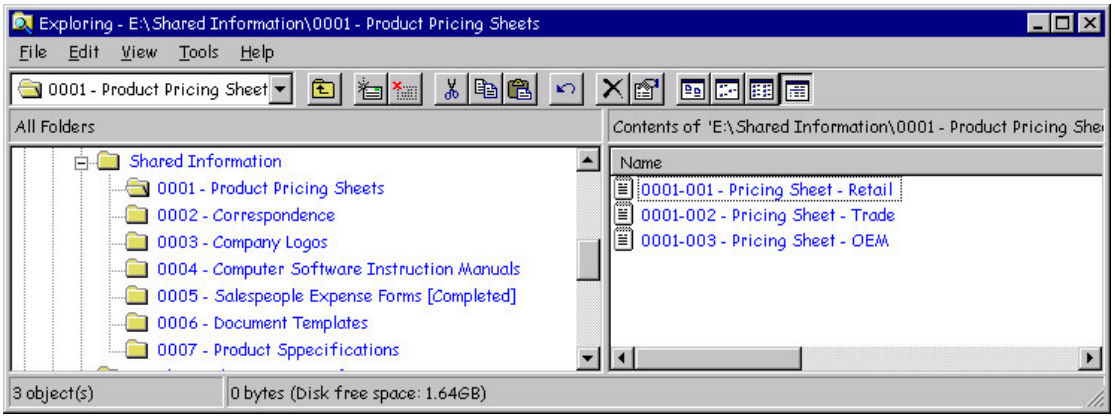
A single place to store information
Designate one place on the computer network to file shared documents. Make sure everyone has the relevant access to it.
A document numbering system
DataHouse fills this position. It assigns numbers to documents as the entries are entered into DataHouse.
An information retrieval / search function
DataHouse manages this role too. By searching for keywords in a documents Long Description you can retrieve the document number and hence location.
The location of the document to be included as part of the document
Make sure that the document number / document name is included in the header or footer of the document. That way any printed copy of the file will include the location of the document on the computer, which will make it easy to track down the up to date copy.

Example

1. Select either a network drive or a location on the network server where the shared files will go. In my example I’m using the location “E:\Shared Information” but of course you can use any place you like.
2. Let’s assume that there are currently no shared files, and therefore no information on them in DataHouse. Go to the Directory screen in DataHouse. Click on the “Add New Directory” button. Write in the description of the Folder. Our first Folder will be where we keep our company price lists, so the folder description should be “Product Pricing Sheets” or something similar.
3. Next we’ll add information regarding the documents we intend to keep in this folder. We have three pricing sheets, Retail, Trade and OEM. Each one is a separate document, and therefore needs it’s own entry in DataHouse.

4. DataHouse automatically fills in the Document Number field on the far left. The Alternate Ref Number is filled in by you, the user. In this example I have used the simple "FolderNumber-SequentialDocumentNumber" System. 1 or 0001 is the Folder / Directory Number, and documents are given the next available sequential number as they are added. Another equally suitable alternative would be "FolderNumber-DataHouseDocumentNumber"
5. Write in a short description. Keep this simple and succinct
6. Write in a Long or description. Make this as informative as you can, as DataHouse uses this field for subsequent searches. Therefore, using the data that exists below, a search for "Retail" would find only document "0001-001", whereas a search for "Sell" would find all three.
7. If you name the files in the windows explorer to include as the file name the Alternate Ref Number, and include the file name in the document footer, then every time that the file is printed, the footer will contain the location of the file, and maintaining it becomes simpler.
8. Use new entries in DataHouse for new Directories (in the example Correspondence / Company Logos / etc) and importantly **DO NOT LET THE DATABASE AND THE COMPUTER FILES GET OUT OF SYNC.**





Appendix 2 – Sorting and Filtering

Sorting

The data shown in a Form is quite likely to not be sorted in the order you need. To sort the data in a particular order click in then field you need to be sorted and then click the *A-Z* button on the toolbar (Ascending Order) or the *Z-A* button (Descending Order).

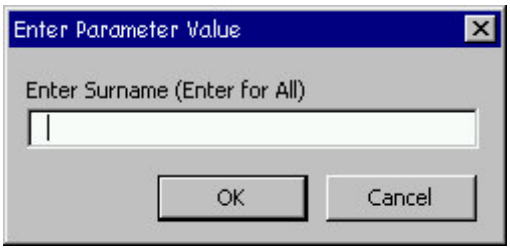
The following examples are written with the Company / Contact form in mind.

Example 1 — Imagine you have three Companies in your Database, *Victorian Minerals*, *Telikom Victoria* and *Software Solutions VIC*. Click in the Company Name box and then Click on the *A-Z* button. The Companies will be listed in the order *Software Solutions VIC*, *Telikom Victoria* and finally *Victorian Minerals*

Example 2 — Let's imagine that Telikom Victoria has 3 employees, with first names *Yasmine*, *Adam* and *Sarah*. Click in the Forename box in the Subform and then click the Z-A button. They'll now appear in the order *Yasmine*, *Sarah* and finally *Adam*.

Filtering

Filtering is one of the most useful functions of any Microsoft® Access™ Database and is the ability to restrict the data displayed according to criteria you choose. DataHouse has some built in filtering capabilities, which are discussed in depth in the appropriate sections, but the ability to use the standard Microsoft® Access™ filtering techniques exists in every screen. The two main methods of filtering are *Filter by Form* and *Filter by Selection*.



Note that in DataHouse several forms always display a search box whenever you enter them which already acts to filter the data. When you click the *Activate Filter* (funnel) button on the toolbar those forms which have a search box will pop it up then. You can use this to filter the data again, or simply press *Enter* to ignore the effects of this pop up box. You will also be shown this box when you remove a filter. Pushing Enter on it's own won't restrict the data at all.

Filter by Selection

This is the simplest way of filtering the data. When you're viewing data on a form or subform, click in the field that has the exact match for the data you want to filter for. Next click the *Filter By Selection* button on the toolbar, and the data is immediately filtered. When you've finished with the filter and need to see all of the data again, click on the depressed funnel button in the toolbar

Filter by Form

In the toolbar there is a symbol for *Filter By Form*. Click on this button to begin setting the criteria by which you will filter the data.

Enter Data in Individual Fields.

It is only possible to filter for data that exists in the Database, so you'll find that each field now has a drop-down box. Use this to choose data that already exists in that particular field of the database. It is possible to enter text directly into any field that you would enter text if you were filling in a new record, but note that the filter will look for an exact match. If you want to filter to find **Jo**hn, **Jo**e and **Jo**sephine then entering "Jo" in the field and filtering will find none of these. We have to use the * character to find these. By entering "Jo*" the filter will return all of the above names, by entering "*Jo*" the filter will find all the names above as well as Floe-**Jo**. Similarly entering "C*" will find all names starting with C, and entering "*C" will find all names ending with C.

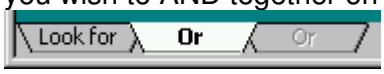
Using AND

When you have several records, it is likely you'll want to restrict the data based on more than one criterion. On a single form page you can enter data to search by in several fields. Each of these criteria is ANDed together.

Example: If you enter **John** in the *Forename* field AND **Smith** in the *Surname* field, then the filter will return only instances of any John Smiths' in the Database. John Jones and Alan Smith will be excluded.

Using OR

You can use the tab at the bottom of the form to use the OR function. Enter all the criteria you wish to AND together on the first form page. Click on the OR Tab



and enter data in this second page. You can use several OR statements in one filter if you wish.

Example: if you enter **John** in the *Forename* field AND **Smith** in the *Surname* field of the first form page, **Johnathon** in the *Forename* field of the second page and **Jones** in the *Surname* field of the third form page then the filter will return **John Smith**, **Johnathon** Laws and Alan **Jones**. John Laws and Alan Smith would be excluded from the filter.

When you have set up the filter criteria, the funnel on the toolbar ceases to be greyed out. Click on this to Apply the filter.

When you have finished with the filter and need to return to the complete data set, click on the funnel again (it will appear depressed, as shown below) and the filter will be removed.

Drop Down Lists

In any Database, data from one area is often required in another. Writing the data in a second time is not just a pain, but can easily lead to errors. Drop Down Lists in Microsoft® Access™ allow you to choose one entry from a list of data to eliminate duplication and keying errors. Whenever a field has an arrow in the right hand side, this indicates that it contains a Drop Down List. Click on the arrow and the list will be revealed, click on the list item that contains the data you need and it will be selected. Alternatively, if you know without seeing the list what you are going to enter (for instance a suburb name) the as you type in the first few letters of the word, the list will appear, and adding letters narrows down the list to the record you need.

Appendix 3 - Miscellaneous

Glossary

Runtime – a special version of the MS Access executable. Using the runtime version will allow you to use an Access database, but not modify any tables / queries / forms or reports. The Runtime version of Access may be distributed royalty free by Access developers such as DataHouseSoftware.

Shortcuts

To enter today's date press CTRL ; (hold down the Control Key and press the semi colon)
To show the Database window press F11

Backup Strategy

It is likely that DataHouse will contain a great deal of important information, and that as time goes by the consequences of losing this data become greater and greater. It is important that you choose a backup strategy that reflects the importance of not losing this data, be that hourly, daily or weekly backups/

Security

DataHouse does not include any security features.
See http://www.rogersaccesslibrary.com/knowledge.html for information on security and other Access issues and features.

Changes

V3.0 07/08/2002
Initial Release of DataHouse 3