

ShadeShop “How To”

Here’s a step-by-step sample to help you learn how to use your new software.

1. Starting the program

- a. Double click the “KCS Applications” icon on your desktop.
☞ The Application Startup Process Selector will be displayed.
- b. Select “ShadeShop”
- c. Select “ShadeShop DEMO”
☞ A “nag screen” will be displayed, as this is an unlicensed copy. Click ‘OK’.
- d. The ShadeShop Main Menu will be displayed.

A designer has entered the store and wishes to purchase a few shades.

2. Enter a new order.

- a. Select “SALES Order entry” from the main menu.

As they are a potential repeat customer, we should first set up an account for them.

- b. Add a new customer
 - i. Click the ‘Add Customer’ button at the bottom, center of the form.
☞ The Table Maintenance Menu will be displayed.
 - ii. Click ‘Add’ to add a new record.
☞ The data entry fields are cleared and made available for data entry.
 - iii. Enter the following information in the specified fields:

Customer ID:	5551234567
Cust Name:	Interiors By Inez
Billing addr:	123 Oak St.
City, St, ZIP:	Somewhere, FL 33123
Country:	leave blank
Contact:	Inez
Phone(s), FAX:	5551234567 5552461357
eMail:	leave blank
Sales Rep:	your name
Terms:	Net 30 days
Ship Via:	Customer PU
Special Instr:	leave blank
Sales Tax Nbr:	As this is a business account, enter a tax ID, e.g., 55-1234567
Inactive:	leave unchecked
 - iv. Click ‘Save’ and ‘Close’.
☞ The customer maintenance form closes; the order entry form is redisplayed with the newly entered customer selected.
- c. Enter a PO Number: “Test-01”
- d. Click ‘OK’.
☞ The “Detail” tab of the form will be displayed. Note that ‘Nontaxable’ is checked, as this customer has a tax number on file.

Inez wants to purchase 2 Morpho shades, frame style 703-18 in Bradley tan.

- e. Enter the first line item:
 - i. Enter “2” in “Qty”; press ‘Tab’.
☞ The style selector button will be displayed, with the “Description” column activated (Column header text in red, A-Z sort icon).
 - ii. Specify the frame style:
 - (1) Key in ‘703’.
☞ The first entry for “703” style frames should be highlighted. Use the mouse to drag the slide bar, or the up and down arrows to move the selector to the desired frame.
☞ If you wait too long between keystrokes (about 5 seconds), the search feature will “reset” and not select the proper entry. Use the standard movement keys (Page Up, Page Down and Up and Down arrows) or

the mouse & slide bar to make your selection.

- (2) Click on the row to select it (a ✓ will appear in the “Sel” column) and click ‘OK’.

The Style selector form will close; the selected frame style is added to the description at the top of the form, next to the “Qty”, and the “Each” and “Total” prices will reflect the price of the selected frame. The component selectors for Fabric, Lining, etc. are displayed.

iii. Specify fabric:

- (1) Click the “Fabric” selector button.

The “Fabric Selector” form will be displayed, with the “Description” column activated, as above.

- (2) Click on “Bradley”.

The color selector form will be displayed. Note that the only colors shown are those “assigned” to this fabric – no more guessing which fabrics come in what colors!

- (3) Click on “Tan” and ‘OK’ to close the color selector.

The description in the color selector will be changed to indicate the selected fabric and color.

- (4) Click on ‘OK’ to close the fabric selector.

The Fabric selector form will close; the selected fabric is added to the description at the top of the form and the pricing will be updated.

Since this line item doesn’t require a lining or treatments, we won’t click on those selectors. Notice that the border around the selector buttons changes to indicate: Red-nothing selected, Yellow-selection in process, Green-selection made, helping you keep track of where you are in the order entry process.

iv. Click the ‘Save Line’ button in the upper, right corner of the form.

The shade you just built is added to the order; the top of the form is cleared; the order total is updated.

Inez also wants 2 187-18 Morpho shades in off white Shantung with black soutache on the top and black braid on the bottom.

f. Enter line item two:

- i. As above, enter the quantity and specify the frame.

ii. Specify fabric:

- (1) Click the ‘Fabric’ selector button.

The “Fabric Selector” form will be displayed, with the “Description” column activated, as above.

- (2) Type in “Shan”.

The selector should be positioned at “Shantung”.

You really need only key as much of the description as required to get to the entry, “S” in this case, but for “live” data, you’ll probably need at least the first 4 characters. so you should develop that habit from the beginning.

- (3) Click on “Shantung” and press ‘Enter’ (or just press ‘Enter’ once the correct line is highlighted).

The color selector form will be displayed.

- (4) Click on “Off White”, or key ‘Off’, and press ‘Enter’ (or press ‘Enter’ once the correct line is highlighted).

- (5) Click on ‘OK’ to close the color selector.

The description in the fabric selector will be changed to indicate the selected fabric and color.

- (6) Click on ‘OK’ to close the fabric selector.

The Fabric selector form will close; the selected fabric is added to the description at the top of the form and the pricing will be updated.

iii. Specify Treatments:

This shade has no treatments to be applied, so we do not need to do anything.

iv. Specify Trim:

- (1) Use the right arrow to move the highlight from the Fabric button to the ‘Trim’ button and press ‘Enter’.

- (2) Click “Braid”.

- (3) On the color selector, specify “Black”.

- (4) Click in the “Bottom” column of the Braid (Black) row.

A check should appear in the appropriate row & column.

- (5) Click, the Soutache row

(The sample data has only one color for Soutache, so the color selector is not displayed.)

(6) Click in the “Top” column.

(7) Verify your selections:

(a) Click on the “Description” title.

The column header should change to display a red flag, indicating that the list is only displaying selected items and the list should change to only show the two selected items: Braid and Soutache.

(b) Click on the header again to restore the display.

(8) Click ‘OK’.

The Trim selector form will close; the selected trims are added to the description at the top of the form and the price will reflect the price of the shade as currently specified.

v. Click the ‘Save Line’ button to add the line to the order.

As Inez lives across town and it's a long drive, she won't pick up the order until all the shades arrive.

g. Add a comment line to the order:

i. Click the ‘Add Comment or Special’ button.

The Special Item Entry form is displayed.

ii. Select “Comment” in the “Line type” box and key in some text. For example: Call customer for PU when all shades arrive.

iii. Click ‘Save’.

The comment is added to the order. Note the red “X” in the “MA” column indicating that this is an item requiring special attention.

As you've experienced shipping damage to previous shipments and the customer is willing to foot the bill for extra sturdy boxes:

h. Add a special line item to the order:

i. Click the ‘Add Comment or Special’ button.

ii. Select “Special” in the “Line type” box and key in some text. For example: Pack in double cartons to thwart shipping elephants.

iii. Enter a quantity of 1 and a charge of \$5.00

iv. Click ‘Save’.

i. Save the order.

If you have a printer attached to the computer, click the ‘Print’ button. Otherwise, click ‘Save’.

The order is saved (and printed). The “Header” tab is once again displayed, waiting for you to enter another order.

j. Either enter another order or click ‘Close’ to return to the main menu.

After discussing her selections, you've convinced Inez that braid and soutache is not a good combination and she'd be happier with soutache trim on top and bottom.

3. Edit an order.

a. Select “Order correction” from the main menu.

The orders on file will be displayed. If they were printed, they will have an order number. If they were saved without printing, the order number will be 0.

b. Click on the order to be corrected.

A check mark will be placed in the “Sel” column of the selected orders.

c. Click ‘OK’.

The Sales Order Correction form will be shown.

d. Edit a line item:

i. Click on the description of the line item to be changed (line 2).

The line item detail, along with the individual component pricing, is displayed on the “Line Item Detail Edit” form.

ii. Change the trim:

(1) Click on the Trim selector button.

(2) Click in the “Bottom” column of Braid (to de-select it).

(3) Click in the “Bottom” column of Soutache (to select it).

(4) Click ‘OK’.

The status column shows “ADD”, “CHG” or “DEL”, depending on what you have done. If you select a frame with dimensions different from the original entry and the shade has items whose pricing is dependant on frame size, e.g., trim, the status of other components may change, too. Also note that the shade is “re-priced” to reflect the changes.

(5) Click ‘Save’ to accept the line, as changed.

☞ The changed line item is displayed. Note that the status column (“Stat”) says “CHG” for this line item.

Our customer has also decided that they just have to have a pair of Montana Lampshade 233, 12" white shades.

- e. Add a line item (during order correction):
 - i. Click on the ‘Add Line’ button.
 - ii. Enter quantity of 2.
 - iii. Click the ‘Style’ button and select the ML-233-12-W shade (near the bottom of the list) and click ‘OK’.

☞ As this shade is fully described by its style, there are no selections for fabric, lining, etc.

- iv. Click ‘Save’ to accept the line and add it to the order.

Now our customer has discovered that she left her credit card at the office and doesn't have enough cash to cover the last item.

- f. Delete a line item:
 - i. RIGHT click on the line item we just added (ML-233-12-W shade).

☞ The action confirmation dialog will be displayed.

- ii. Click ‘Yes’.

☞ The line item status shows ‘DEL’.

- g. Save or Print your changes by clicking on the appropriate button.

☞ You can delete an entire order by right clicking on the order number field in the upper right corner of the dialog.

There are obviously a lot of features we haven't touched on, but you should now have a good understanding of how to process the basics. We suggest you go back and review the User's guide, put together some “play” orders and give it a go!