Orders 1.5

User Guide

Welcome to Orders

Archive your customer orders

Orders is an application to archive your customer orders, typically coming in tabled or form orders, after a previous preprocessing or directly from web servers or other sources.

The Orders application is just a part of your work chain and it doesn't try to do all. Orders is about just one thing, archive your orders in a stable, secure place, easily maintainable and searchable, for successive output and post processing and for any successive use.

It can import from various source formats, a variety of common table formats: TSV (tab separated values), CSV (comma separated values), CSV-S (char separated values using semicolon) and form text files using different encoding formats.

```
——————————————————————————————
Example of data in table format (2 records inside):

name  product     date  date
John Smith Apple Pie  2034/06/22 19.99
Lara Campbell         Tiramisu   2034/05/13 14.99
——————————————————————————————
```

It can import also from 'form' format, from text files with a single record per file

```
——————————————————————————————
Example of data in 'form' format (always only 1 record per file):

name= John Smith
product= Apple Pie
date=2034/06/22
price= 19.99
——————————————————————————————
```

For the 'form' format the application can even be instructed to automatically import from a specific folder any text file inside this folder at startup or at a recurring time interval and move files, after imported, in another folder. All done unattended, archiving data coming in the input folder inside the internal core data database without any human intervention.

Orders is, as any of our software, a work in progress, as any alive software has to be.
In case the feature you need it is not yet in this release, send us an email and say us what you need to extract data from your data set, we use users feedback to improve our products, release by release.

Getting Started with Orders

Importing form a Table file

Orders is bundled in the release we distribute from our site with a Demo Documents folder
In case you purchased from the App Store you are welcome to our site to download the 'Demo Documents for Orders' containing only the demo doc used here.
If you have problem finding our site at www.TensionSoftware.com you can use the Help menu in the application to come to our web site.

Go to the Download section of our site.
Look for 'Demo document for Orders'
Download the 'Example for Orders' file, mount it (is a in Apple disk image format, just double click it to mount it on any Mac as a virtual external disk) and copy the folder in your home folder where you prefer, in a working area
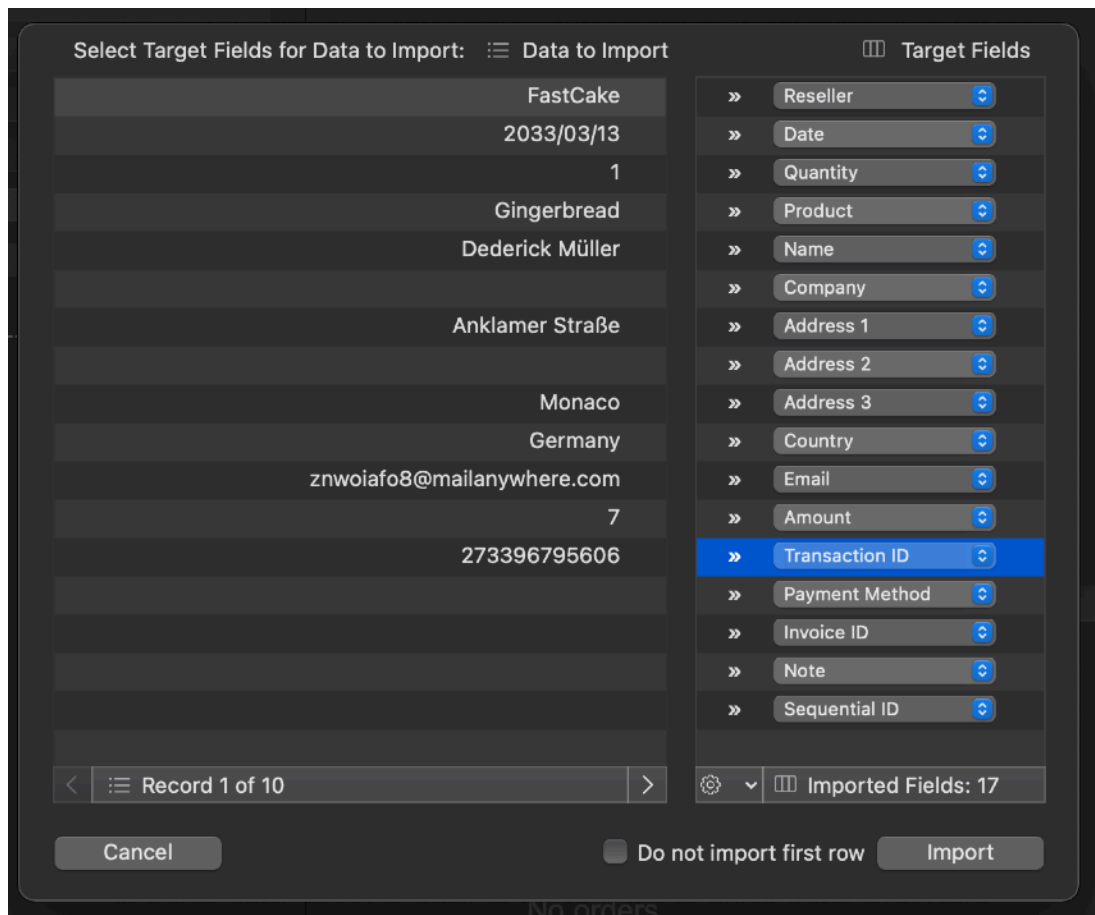
Warning for the non expert:
 Do NOT put the demo doc in your Application folder, use your application folder only for applications as any good Mac user has to do.

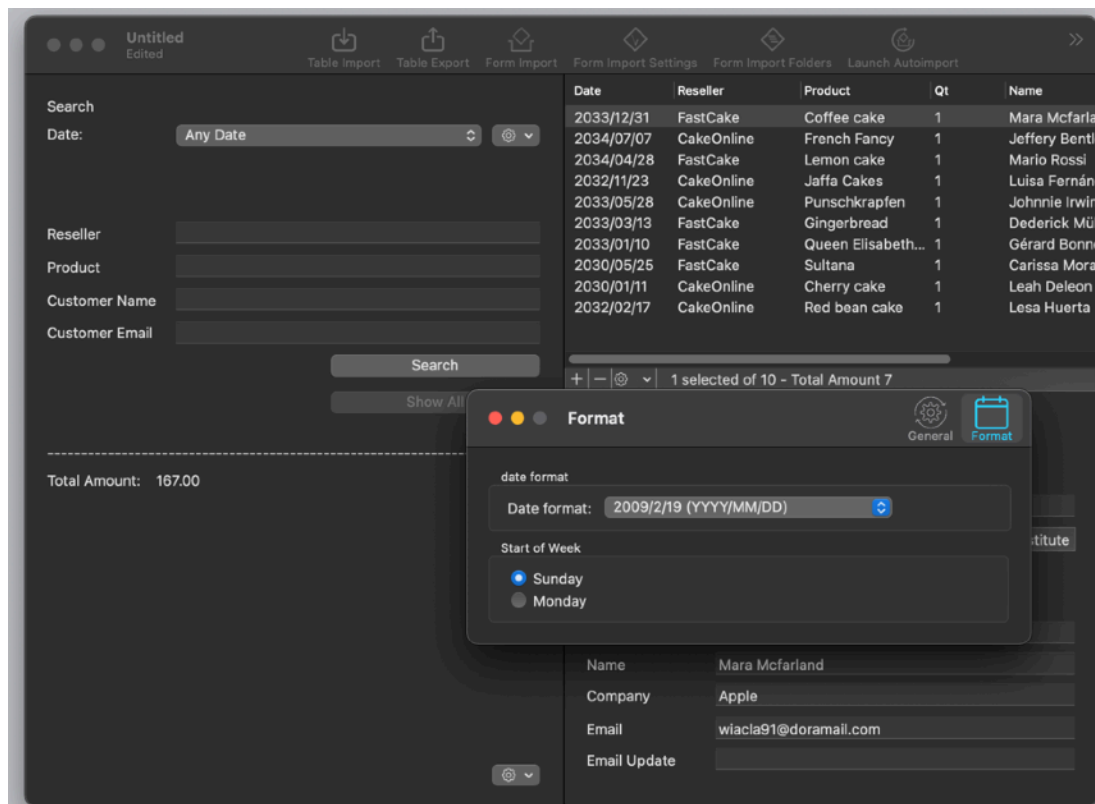Launch orders and select 'Table Import' from the toolbar

Select the 'Orders example 1 Imports.tsv' file

Assigne to the fields the correct destination inside the database using the popup in the successive panel

Then press 'Import' inside the dialog

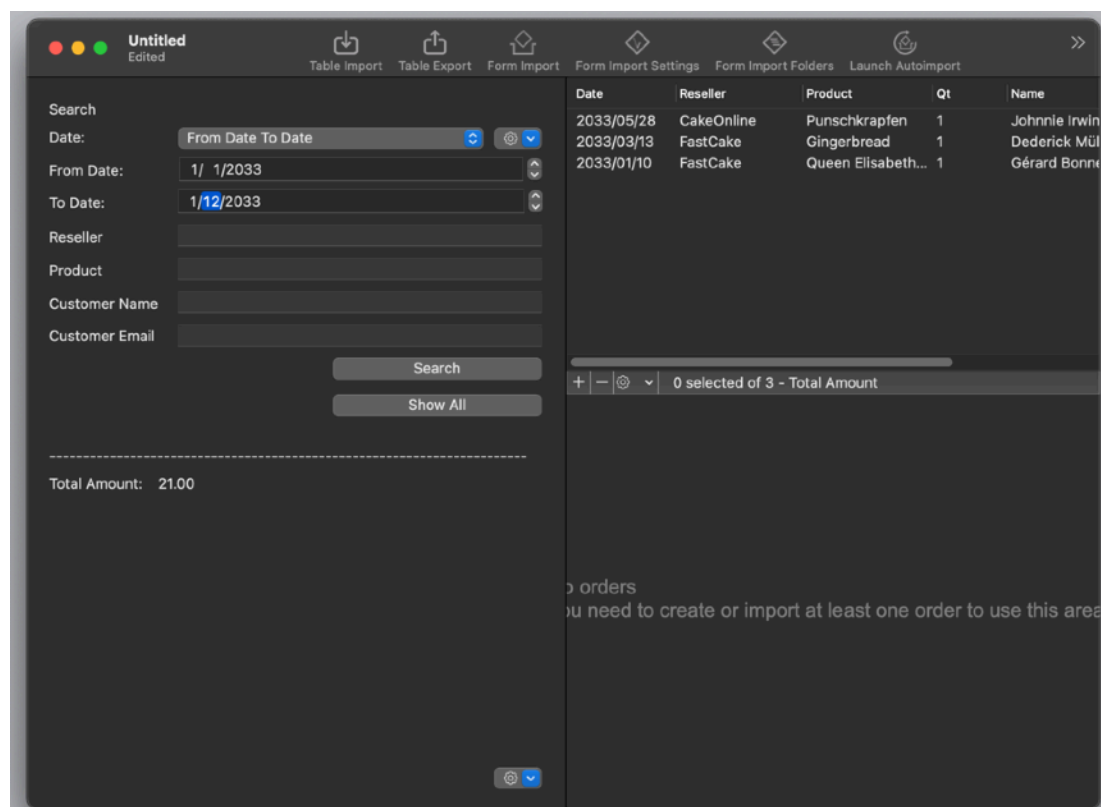All the record will be imported inside the database

Note that the date can be displayed in various format according to the application preference settings.

Now you can search for some orders

We will search for 1 jan, 2033 time 0:00 to 31 Jan, 2033 time 0:00 (European date format in the picture dd/mm/yyyyy)

We select 'From date to date' form the popup menu in the search field, insert the two dates and press the search button

The matching records are visualized

Importing from a Form file

We can now test the form import functionality, to import form the 'form' format

The form format has something similar to this:

```
reseller=WeCake
date=2034/06/22
quantity=1
product=Fruitcake
customername=Alta Benson
customercompany=
customeraddress1= Fillmore Street 150
customeraddress2= New York
```

```
customeraddress3=
country=USA
customeremail=snwltn@prontomail.com
amountusd=20.00
transactionid=344071126659
paymentmethod=VISA
invoice=2034/1001
note=OK
sequentialid=1234567890
```

Select the 'Form Import Settings' from the toolbar
You will see a list of Tag used to specify to which field import
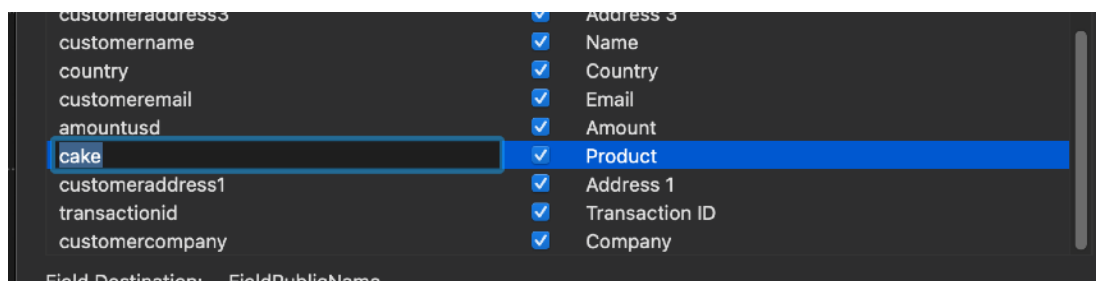
Attention:

**You can modify the tags according to your need
as example you may need to handle form files where the product is not
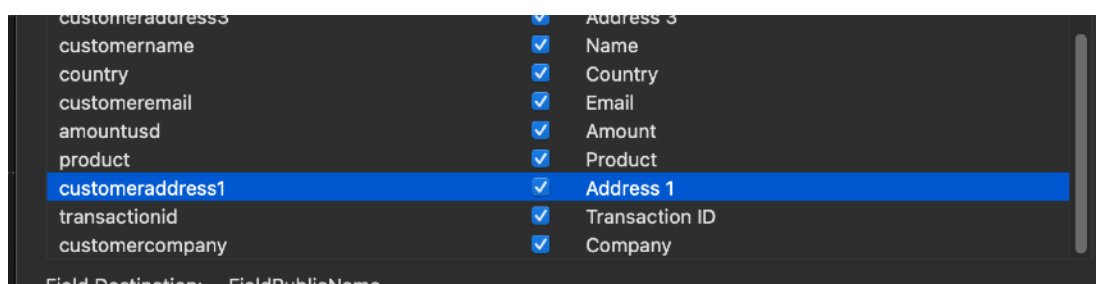specified as:**

product=Fruitcake

But as example as:

cake=Lemon cake

**in that case the product is specified using the tag 'cake' and you will have to
insert 'cake' as the tag for the 'Product' row**

In our example we are going to import from a form using the default case 'product'
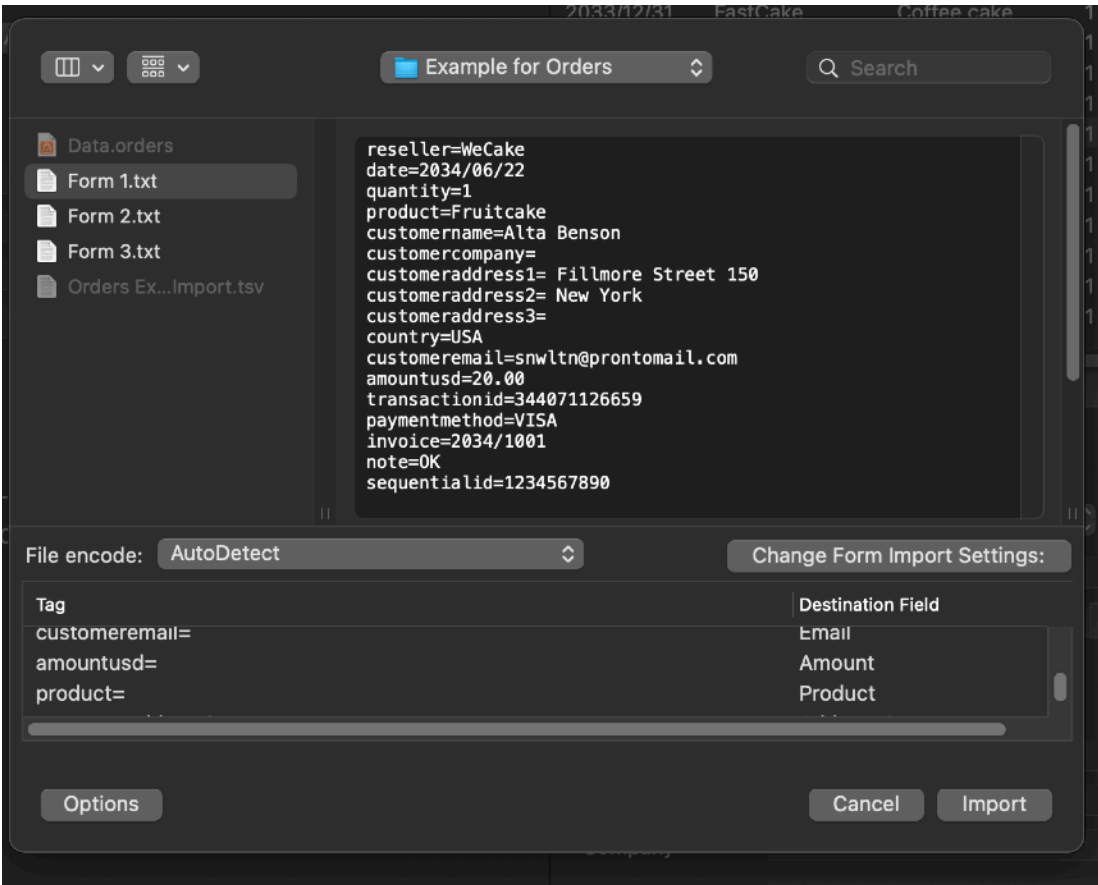as the tag to import into the 'Product' field, so we use the default 'product' tag.

Close the 'Form Import Settings' and select 'Form Import' from the tool bar.

Note that when you open the standard dialog to select the file you can see in the lower part of the selection dialog a list with the tags in use and where they will import content too, these values reflect your choice in the 'Form Import Settings' dialog you visited before.
They are just a reminder of the settings you are going to use in this 'Form Import' operation.

If you select the file in the open dialog you can see the file preview on the right and the settings in the bottom of the dialog.
These are informations useful to understand what will happen and in case analyze things if the import operation doesn't work as expected.

Then press 'Import'

The new record will be appended to the database
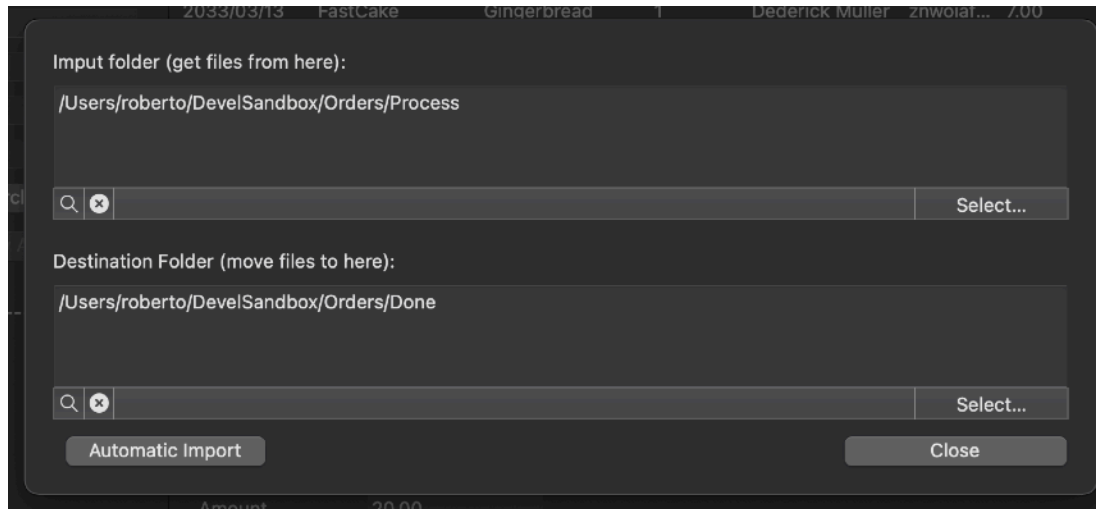
Form unattended import

Orders can import unattended from forms

To do that you need to specify a source folder for importing and a destination folder (where to move form files after imported)

To specify the source and destination folder select 'Form Import folders' from the toolbar

and select two folders on your hard disk for the purpose.
ATTENTION: you need to have write permission to these two folders!
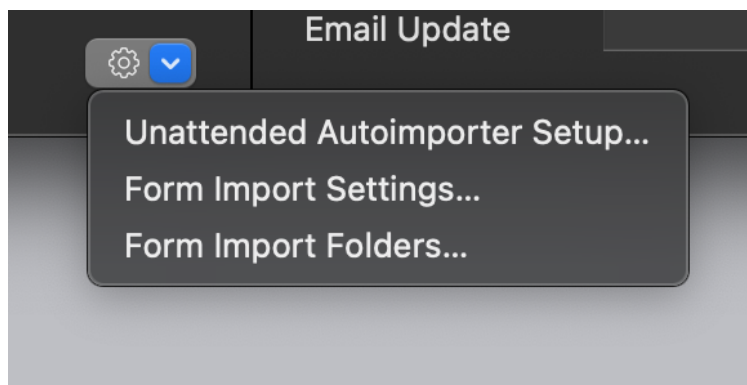
Now close the 'Form Import folders'

From the 'Demo document for Orders' copy the 'Form 2.txt' to the folder you specified as the source for Form Import.
Now press the 'Form Import' button in the toolbar
The application imports any form files it find inside the source folder according to your settings.
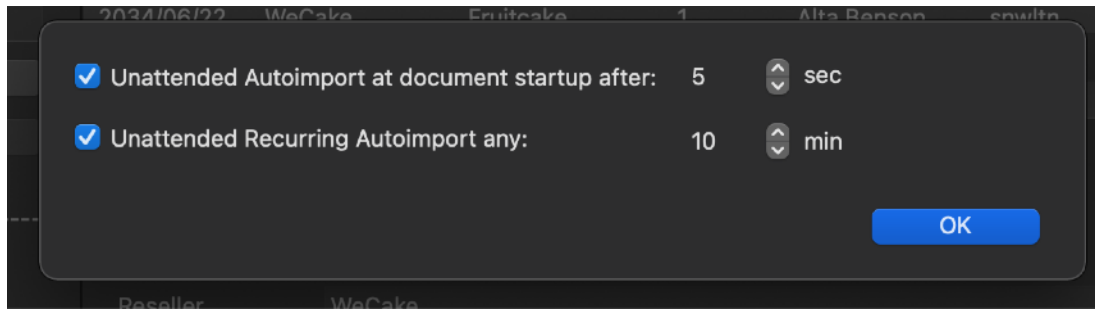
You just need a successive step to have Form Import work unattended:
From the tool popup at the bottom of the window select

'Unattended Autoimport setup'
Now you can specify to auto import form the source folder at the document opening (after a delay expressed in seconds)

and also at regular time intervals (at time interval expressed in minutes)

The latest possibility allows you to have Orders auto add record to the database as long as file are dropped inside the source folder automatically, without any manual input.

Do the test by yourself
Enable the 'Unattended Recurring Autoimport' features and close the dialog.
Now copy the 'Form 3.txt' in the source folder you specified … and wait
The import operation will be performed at recurring intervall as specified before.
Leave 'Orders' in the background in case while doing other tasks

When you will be back you will see Orders imported the content of 'Form 3.txt' and moved the files in the folder you specified as destination.

Orders Reference

About the app

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the Orders application is just a part of your work chain and it doesn't try to do all. Orders is about just one thing, archive your orders in a stable, secure place, easily maintainable and searchable, for successive output and post processing and for any successive use.

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Orders is, as any of our software, a work in progress, as any alive software has to be.
In case the feature you need it is not yet in this release, send us an email and say us what you need to extract data from your data set, we use users feedback to improve our products, release by release.

Document based

Orders is document based application
Inside any document all the settings used for importing and archiving are saved
ready for successive reuse

Organization of a document

The main Orders document has an left part used for search and a main central part
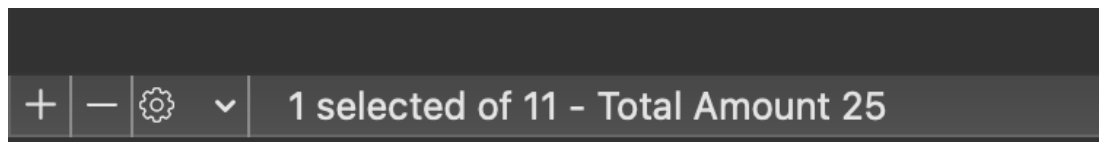where to show filtered record in master table

On the left part you can use the search area to search records inside the database
table.

The Main Table

The main table shows the record one per line

Date	Reseller	Product	Qt	Name	Email	Amount
2033/12/31	FastCake	Coffee cake	1	Mara Mcfarland	wiacla9...	7.00
2034/07/07	CakeOnline	French Fancy	1	Jeffery Bentley	bypano...	50.00
2034/04/28	FastCake	Lemon cake	1	Mario Rossi	epffche...	25.00
2032/11/23	CakeOnline	Jaffa Cakes	1	Luisa Fernández	ilym788...	7.00
2033/05/28	CakeOnline	Punschkrapfen	1	Johnnie Irwin	sisz570...	7.00
2033/03/13	FastCake	Gingerbread	1	Dederick Müller	znwoiaf...	7.00
2033/01/10	FastCake	Queen Elisabeth...	1	Gérard Bonnet	jklomxn...	7.00
2030/05/25	FastCake	Sultana	1	Carissa Mora	foycz6...	25.00
2030/01/11	CakeOnline	Cherry cake	1	Leah Deleon	nyzlc7...	25.00
2032/02/17	CakeOnline	Red bean cake	1	Lesa Huerta	kpueoe...	7.00
2034/06/22	WeCake	Fruitcake	1	Alta Benson	snwltn...	20.00

You can add or removing records using the buttons at the bottom of the table

+ − ⚙ ∨   1 selected of 11 - Total Amount 25

e and a detail part below the master table

you can use the 'Details', 'Internal Note' parts to insert and modify additional data. The Void part is to void the order, as example if the customer returned the product or voided the payment asking for a cashback

Search Area

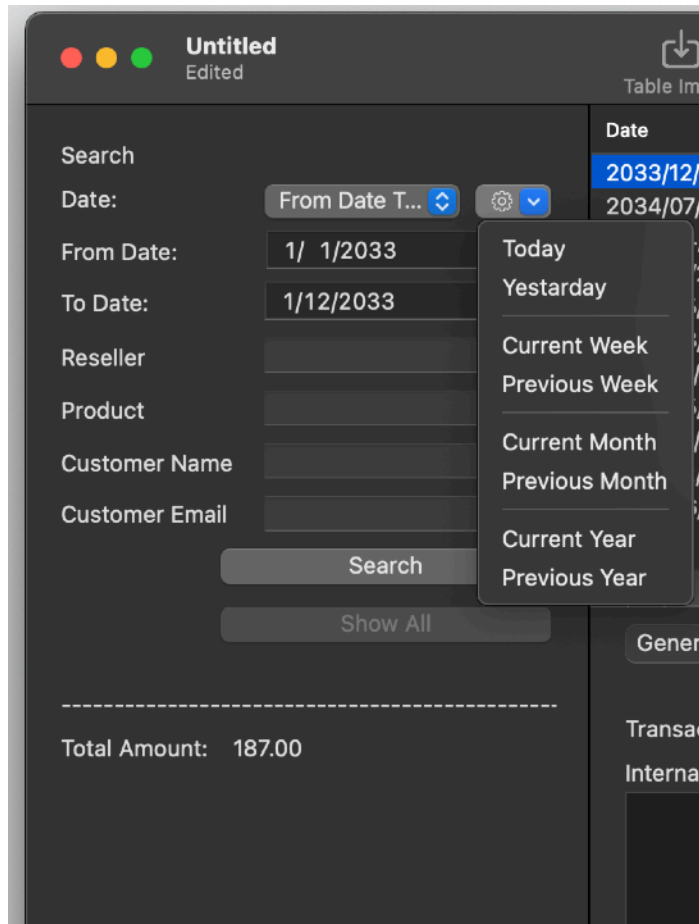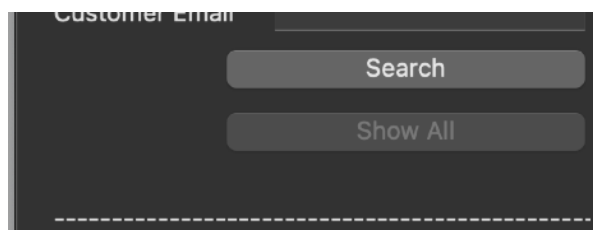The search area allows to insert search terms and specify filtering rules to filter content in the main table area

It is possible to use various key field to search and various date options using the popup menu inside the search area

you can also use the tool popup to select pre-fixed periods of time:

Selecting them the two dates (start and end of the period) are automatically inserted.

After any changes is applied in the search field you need to press the 'Search' button to apply for changes in the visualized records.

Importing orders

The importing functions are the more important in Orders because probably you will not enter your order manually but you will import them from other sources, such as web forms or payment processor email notifications.

Orders can import order in two different format, one, the classical table format used to exchange data records, is the classical, multi record table format, both as TSV (tab separated values), CSV (comma separated values), CSV-S (char separated values using semicolons) and the 'form' format used for one record for file.
The application can be instructed to import automatically for the 'form' format.

Importing orders from table format

The table format are the classical import format used to exchange data records, is the classical, multi record table format, both as TSV (tab separated values), CSV (comma separated values), CSV-S (char separated values using semicolons)

To import from a multi record file, select the Table Import icon from the toolbar
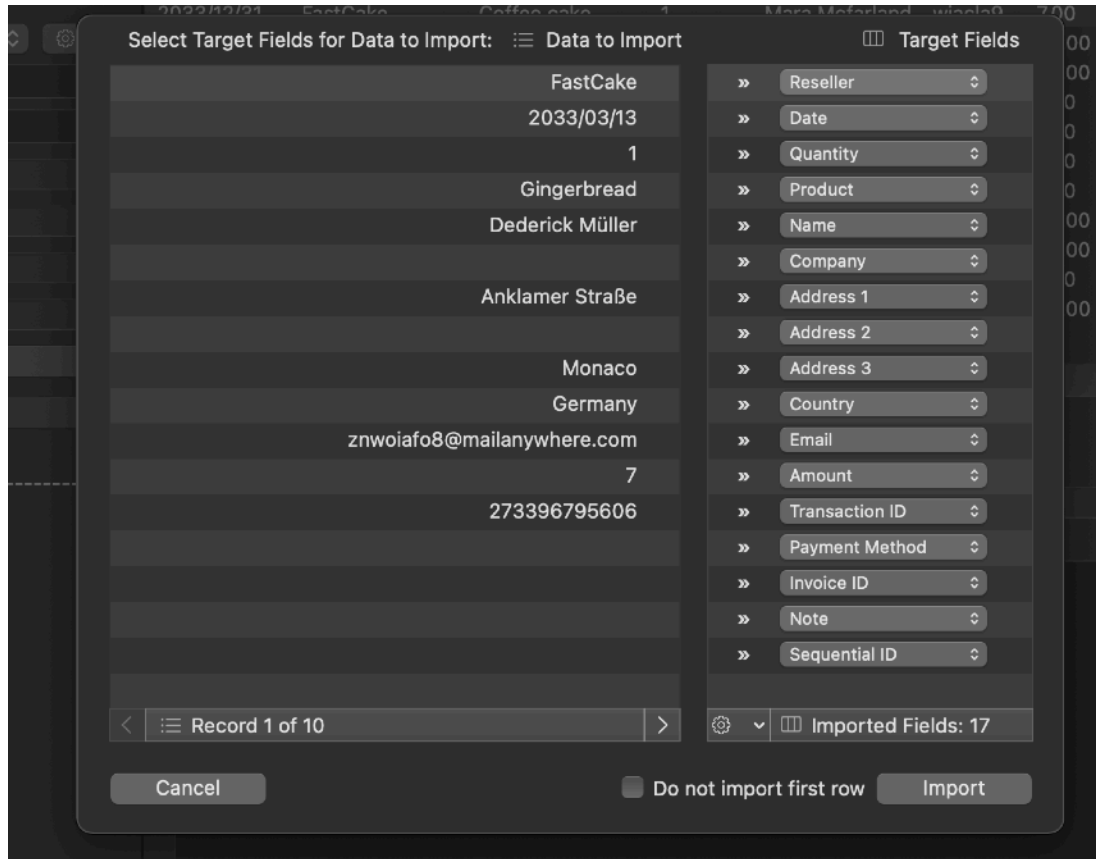

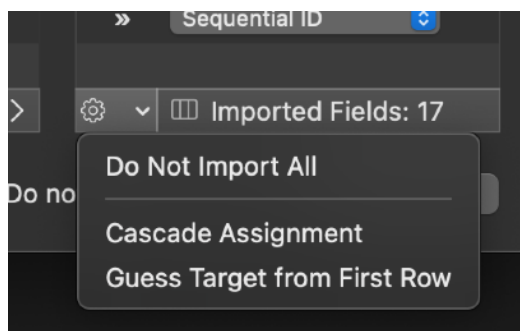Select in the successive dialog the file to import.

then select from the popup, in the successive dialog, where (in which fields) to import:

You will select one by one where (in which field) to import data

In addition 3 utilities functions are provided at the bottom of the import dialog via a pop up menu to allow you a fast destination selection.

Do not Import at All, which deselect all previous field assignment

Cascade assignment, which assigns fields in order form the first to the latest destination

Guess Target from First Row, which assigns target field based on the content value of the first row to import, considering them valid field names and looking for similar name destination columns.

When selected the right destination fields, click import to import the content.
The new records will be inserted in the document table.

Importing orders from the 'form' format

The form format was thought to have a record for any file. That means to import 10 records you will have 10 separate files, each one containing a single record.

The format of the form import is:

file in text format with .txt or .text extension
one record for file
inside the file, one field for row, each separated by a newline
field specified as 'tag=value' where the tag specify where to put the single value.

As example having
• 'reseller' as tag for the Reseller field
• 'date' for the tag for the date field
• 'transactionid' as tag for the Transaction ID field

the file containing:

reseller=Magic Vendor Online
date=2014/06/26
transactionid=123456

will import the value on the right (after the =) in the correspondent fields.
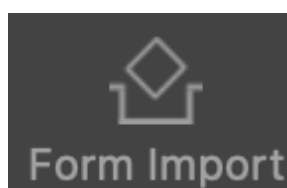
Tags used are user customizable, you can change the tags in settings and have

• vendor=Magic Vendor Online
• time=2014/06/26
• operationN=123456

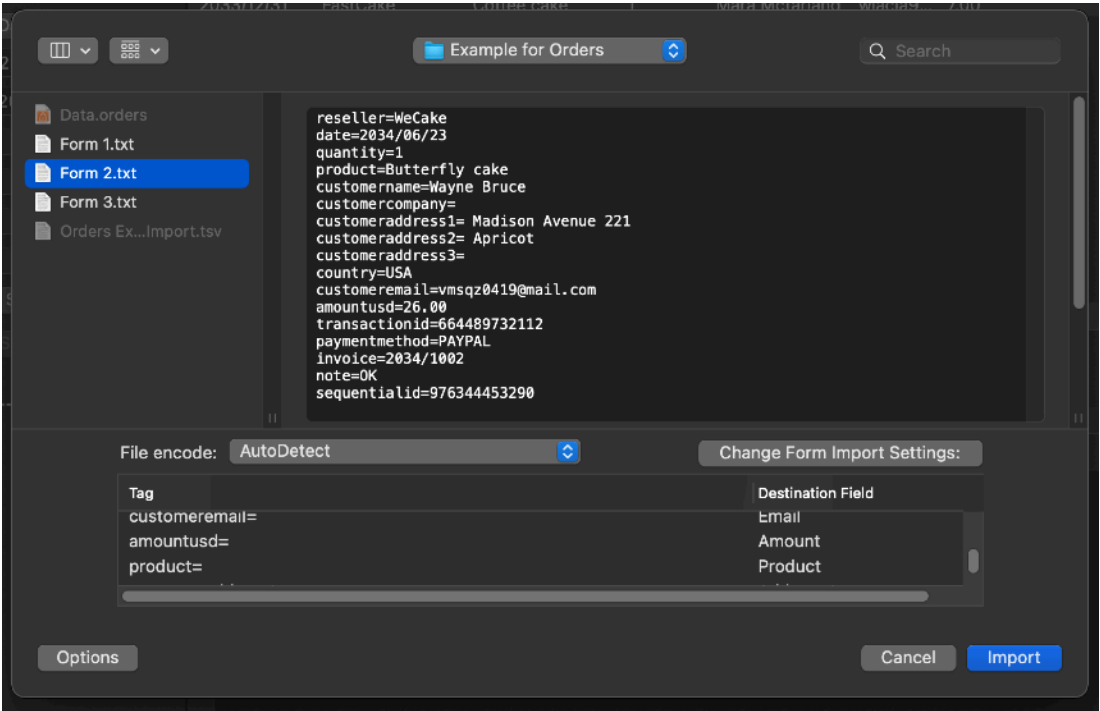be imported in the same way, you just need to specify in the settings that :

• 'vendor' as tag for the Reseller field
• 'time' for the tag for the date field
• 'operationN' as tag for the Transaction ID field

To import form a form file select 'Form import' from the toolbar:

A dialog will allow to select the file in 'form' format to import and in the lower part the tag settings in use
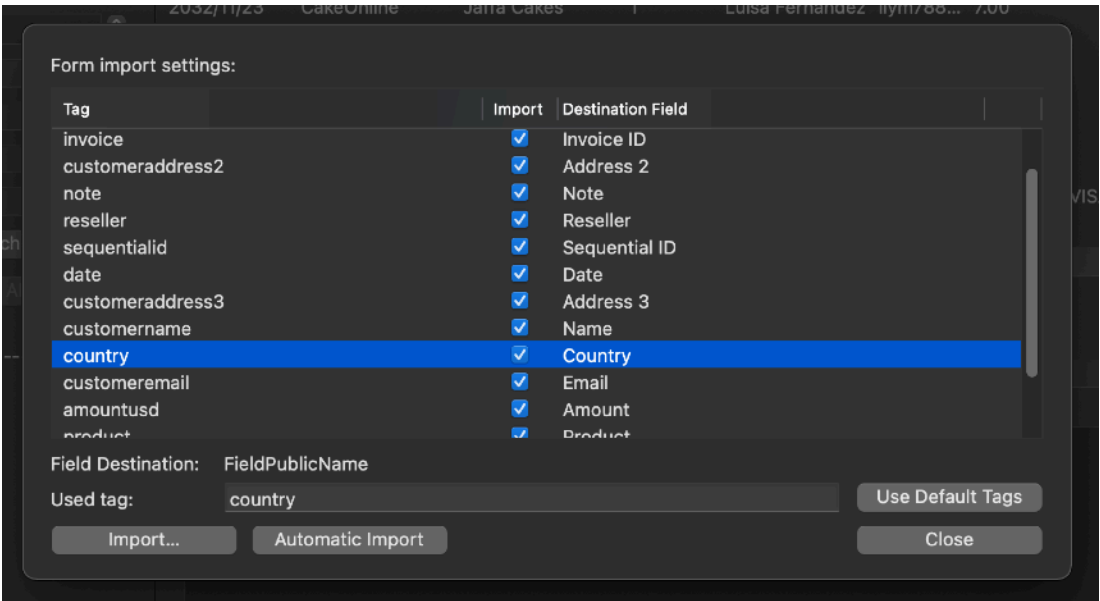
This allow to see the tags that will be recognized inside the file to be imported
Selecting also the file to import you can have in the same view the file preview and
tags in use. This can be very useful for debugging of tags value.

selecting import will now import the file into a record inside the database

Setting for the form import

You can select 'Form Import Settings' form the toolbar and select the tag used to
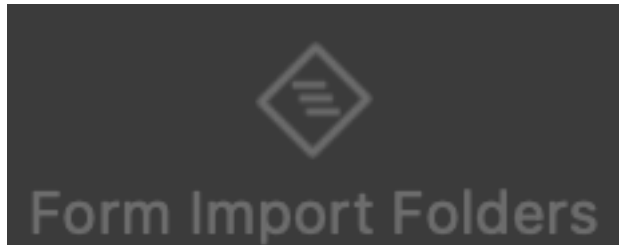import for the 'Form Import' functionality and which field importing enable or not.
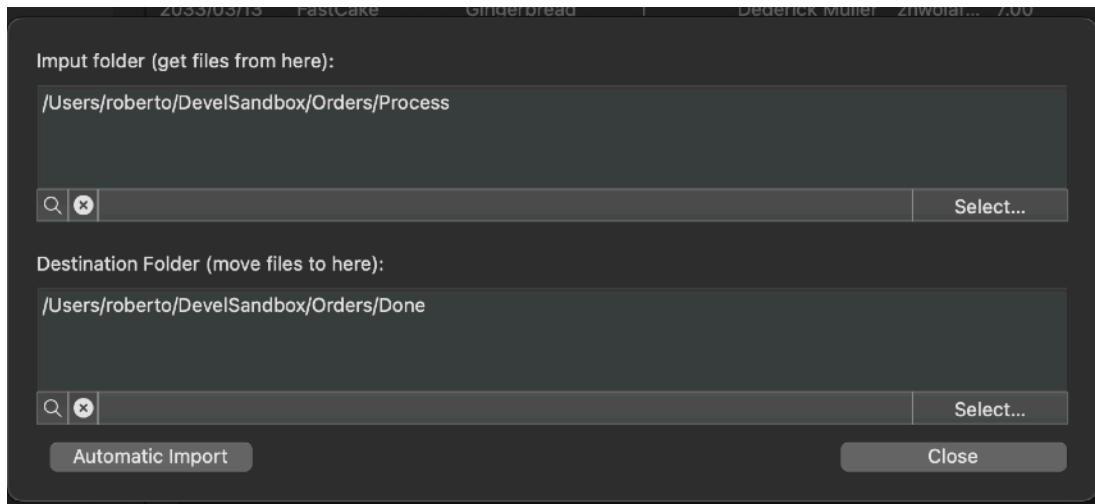
Automatic Form Import

Form Import can use automatic import features.
The applicant can set a folder to watch and import anything inside as 'form' import text using the tags specified in 'Form Import Settings'

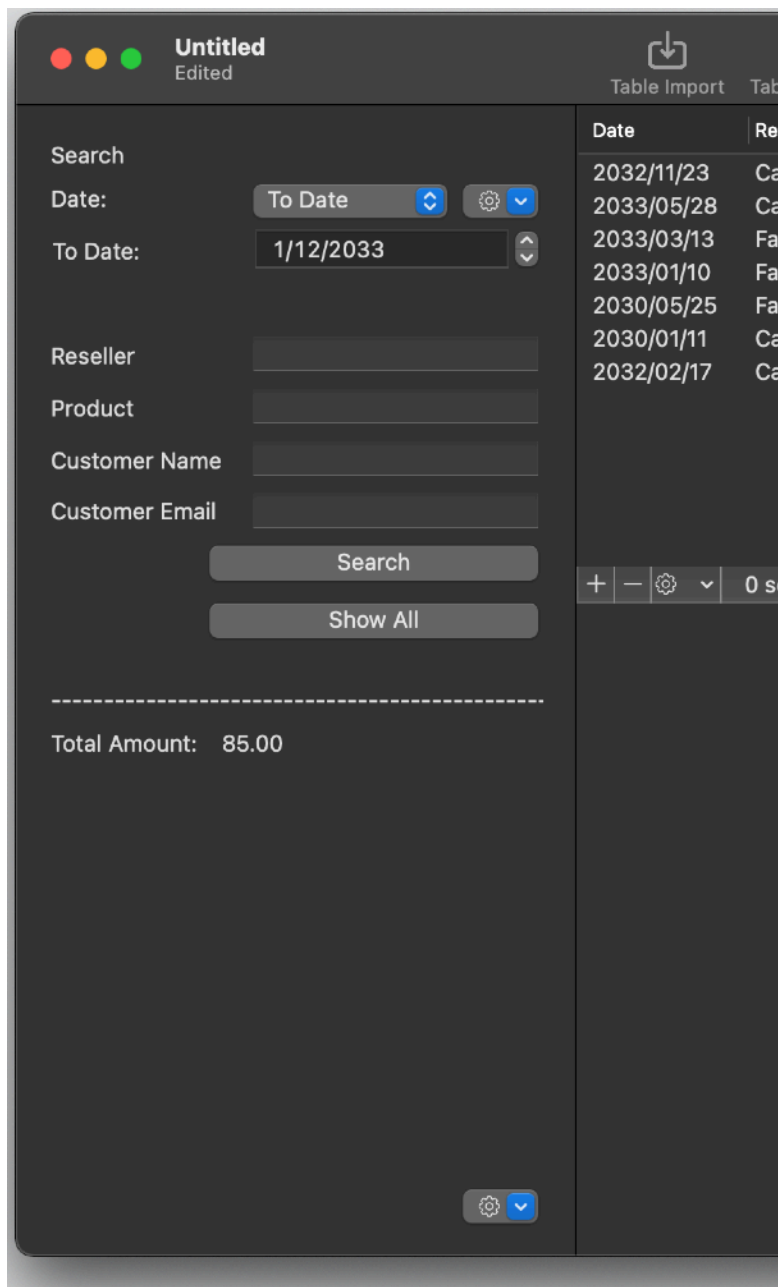To specify the folder to watch select the 'Form Import Folders' icon in the Toolbar

A dialog will let you select a folder to watch for text file to import only as form (input folder) and a folder where to move the files when processed (output folder).
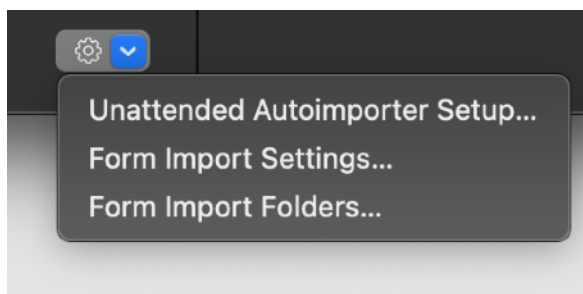

You need write permission to operate correctly on these folders.

You can manually launch automatic import using the 'Launch Autoimport' icon from the toolbar
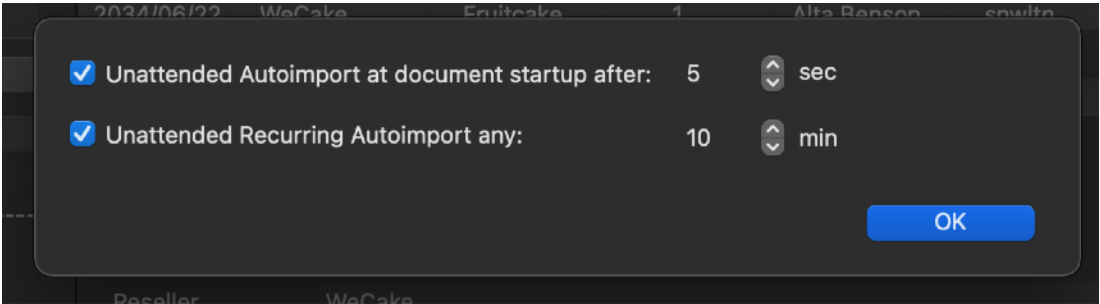
All the file inside the 'Input Folder' will be imported and moved to the 'Output Folder'

To set the application to launch it automatically select the popup menu at the bottom of the search area, and select Unattended Autoimport Setup…

a dialog will let you set when to launch form import automatically, after startup or at regular time interval.
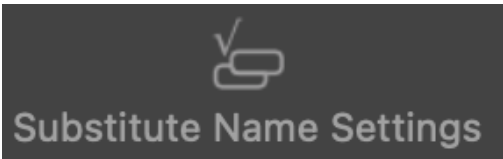
In that way Orders can be instructed to process files as they come from a server or via email in a specified folder.
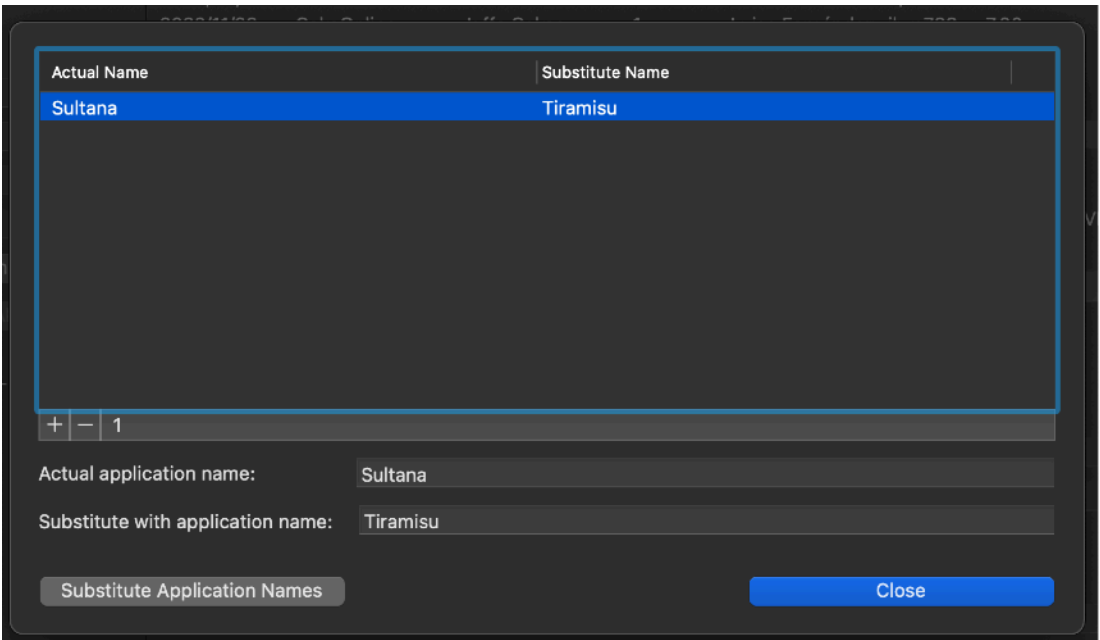

Name Substitution

Name of products some time are managed using various product name for the same products, including SKU numbers or other string
Orders provides a functionality to substitute names with another string inside the product field in the database

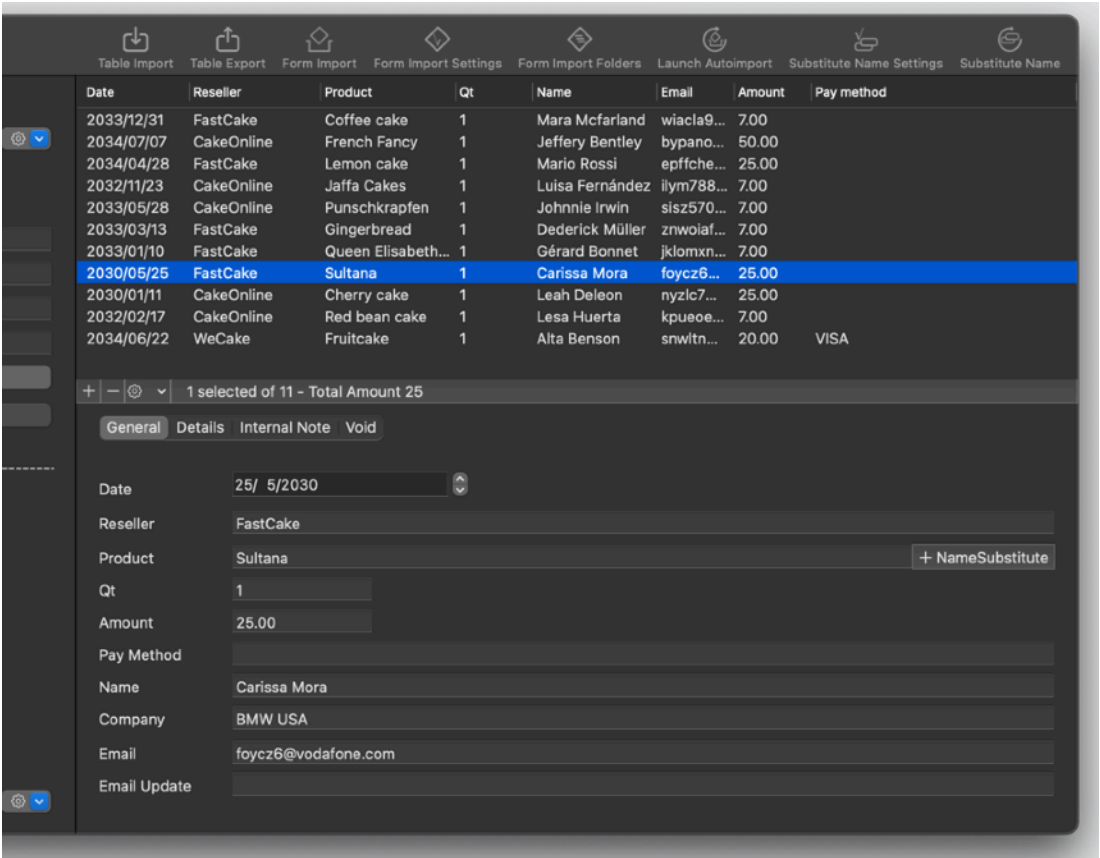To isert names to substitute select Substitute Name Settings from the Toolbar
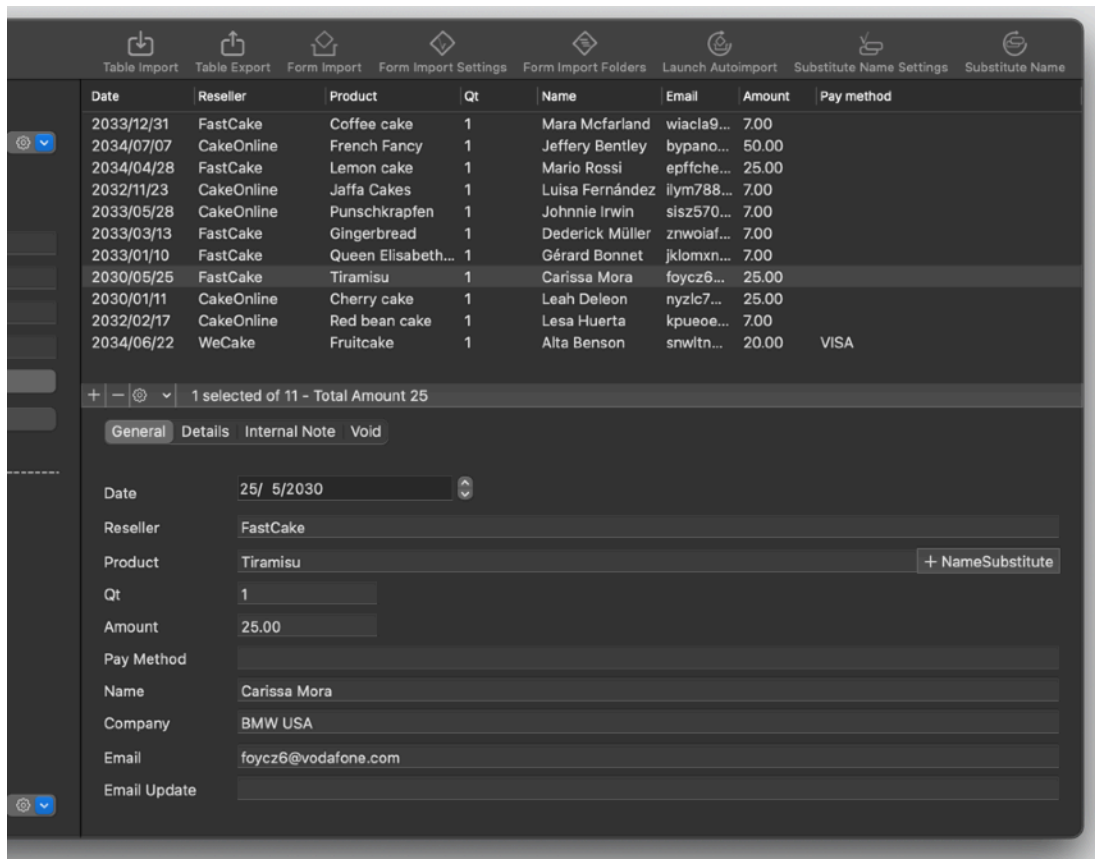

The dialog for the name to change will be opened

You can insert how many substitution you like

After that, pressing Substitute Name fem the toolbar all the name will be substitute as specified in the settings.
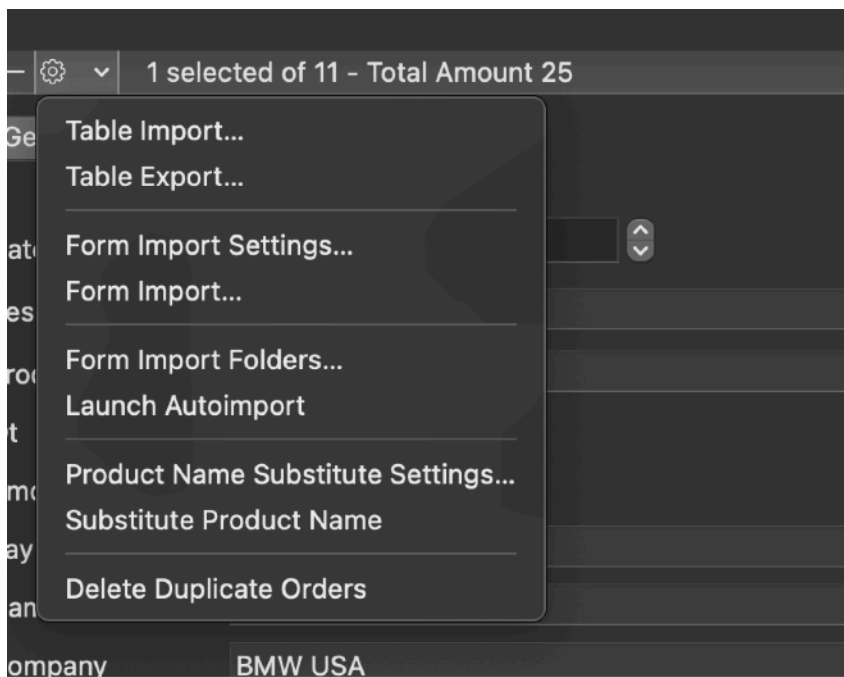

At any moment you can add the product name of the selected order inside the substitute settings using the + Name Substitute button inside the detail form

Delete Duplicate Orders

Duplicate orders can be deleted selecting the command form the tools popup button at the foot of the DB table

Duplicate orders will be deleted

macOS Advanced Features

Orders adopts and makes use of the latest Apple technologies

They are used in the standard Apple way, so nothing new to learn if you already know how to use them.

• Resume – the app will reopen at the point and state the user left it included opened documents and unsaved one

• Auto save – the app saves using the macOS autosave functionality

• Versions – the user can look at previous versions of documents and restore to any earlier version (just select Revert to Saved from the menu or the down arrow at the right of the title window, it appears only if you move the cursor over)
To use the Versions you can select 'File > Revert To > Browse All Versions' from the menu

• Full Screen - the user can switch at any time to full screen using the native macOS full screen mode and commands (use the upper right icon in the window to go full screen and bang the mouse in the upper part of the screen to re-obtain the menu and eventually clicking the standard icon to exit the full screen mode)
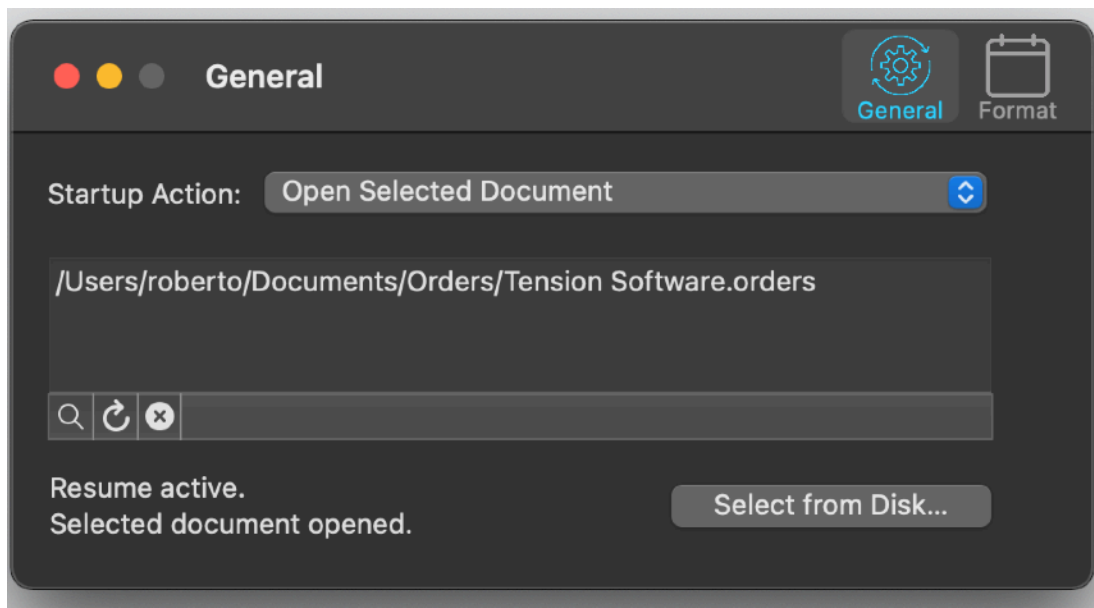
Dark Appearance Mode

This application is also fully compatible with Dark Appearance Mode available on macOS from macOS 10.14 Mojave and successive.

Preferences

General

Specify the action to do at startup:

• Standard Behavior
• Open Dialog if No resume
• Open Dialog Always
• Open Selected document

To select a document press the select from disk button and select it from the open dialog that will follow

At any successive relaunch Orders will execute the option selected.
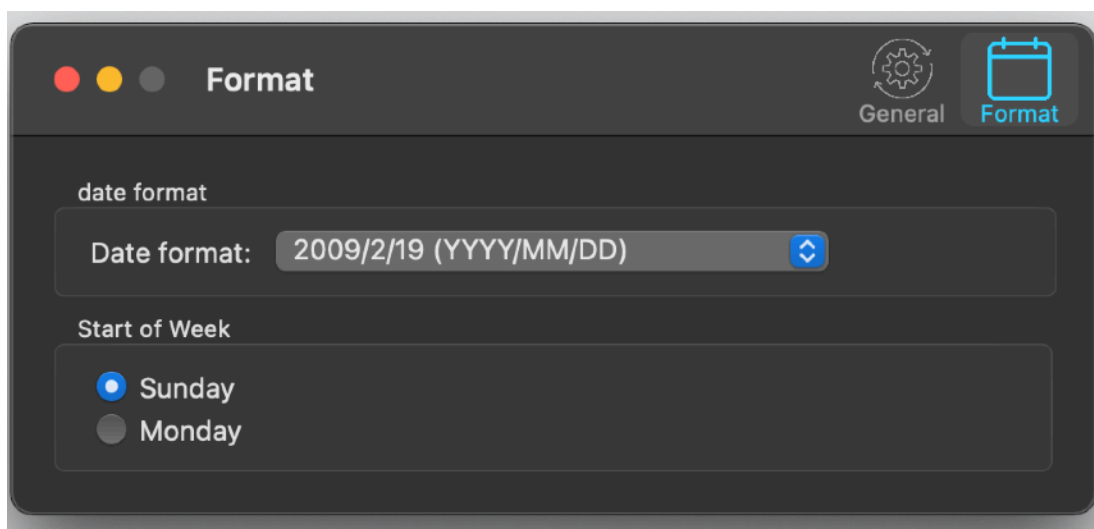The additional 3 buttons at the foot of the edit field let you:
• Show in the finder the selected file
• Test open the selected file as it will be done at the next application launch
• Delete the bookmark reference to the file (you will need to reselect a file)

The reference to the file is taken using scooped bookmarks and they work even if you move the file on your disk, even if your file is in the trash.
To update the path display in case the file was moved, click the 'show in finder' or the 'test open' button

Format

• Allow to insert the date format
• Allows to specify the start of the week on sunday or monday

Help

Orders provides a user guide in PDF.

Support

You can also obtain support using the 'Support Email...' command. An email will be prepared using your email client with the correct address to send to.
Yes, we answer to your emails.

Licensing Orders

If you are using a version from the Apple App Store:
a license is already included with your App Store purchase and you don't need to buy a license

About Tension Software and Ecleti

All the software asset by Tension Software is now under Ecleti
New company name but still the same owner and main developer (Roberto Panetta)
So for the users nothing changes. We provide the same software and the services.
All the user licenses are valid and assistance is provided as before to all our users.