
FabSoft Demo Walkthrough

Tag Doc Order Entry Process



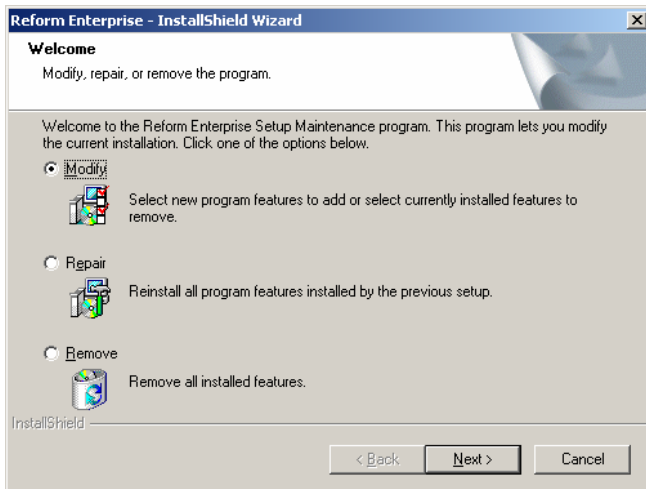
www.fabsoft.com

Before Starting

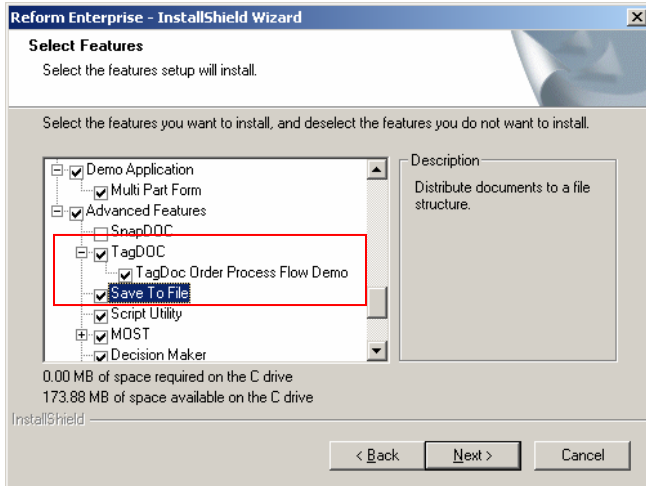
This demonstration suggests the use of ScanRouter V2 Lite. If this is not already installed on the computer, it will need to be downloaded and installed (the steps are described below). During the installation, you will need to restart your computer, so please save any open files before continuing to with the setup.

Installing Required Files

- 1) If Reform is already installed, go to Start > Control Panel > Add/Remove Programs.
 - a. If it is not installed, download it from www.Fabsoft.com and start the setup. Then skip to Step 5.
- 2) Find Reform in the list of applications
- 3) Click Change/Remove



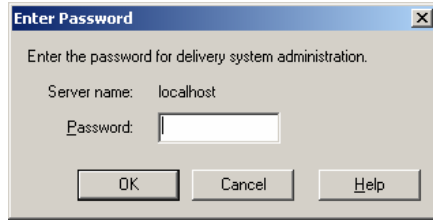
- 4) With Modify Selected, Click Next



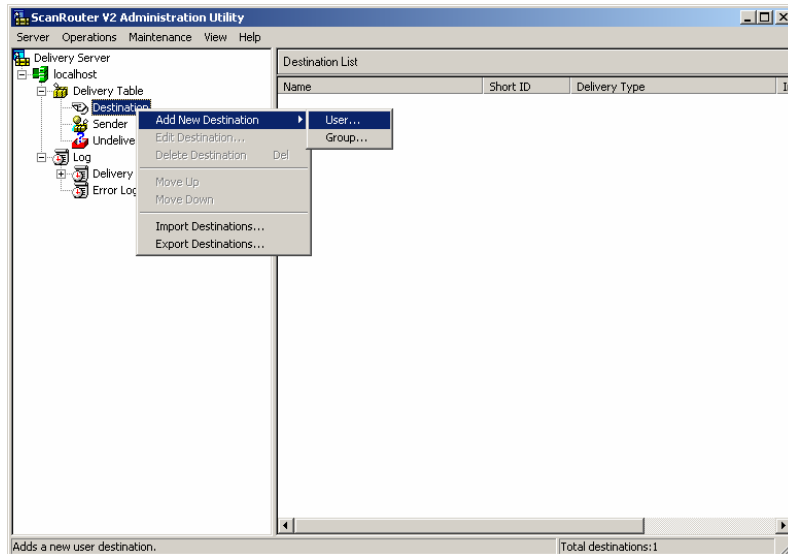
- 5) For this demonstration, be sure that Tag Doc, Tag Doc Order Process Flow Demo, and Save To File are all checked. Then click Next.
 - a. If you don't see Tag Doc Order Process Flow Demo, click the + next to Tag Doc
- 6) If a message pops up requiring IIS to be installed, click OK twice, IIS is not needed for this demo.

Setting Up the Scanner

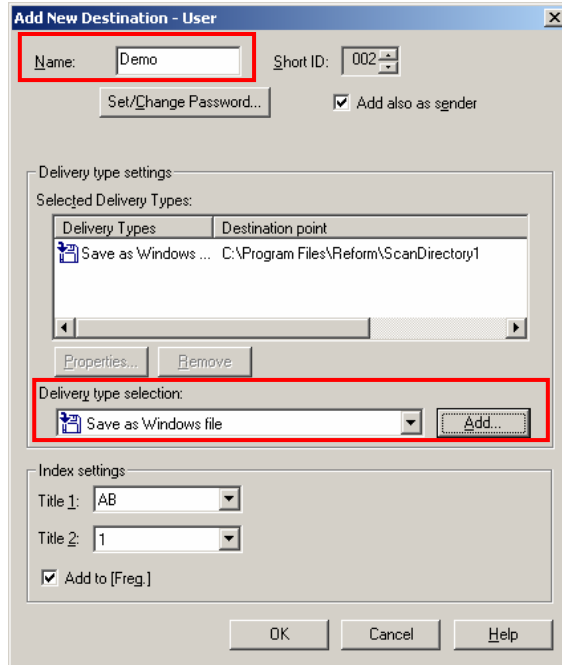
- 7) This demo needs the scanned documents sent to the Reform\ScanDirectory1\ folder from the scanner as a Tiff image.
Ex: When the user scans an image, the file TestScan1.Tif will be found in the c:\Program Files\Reform\ScanDirectory1\ folder
- 8) To accomplish this, it is suggested to use ScanRouter V2 Lite.
 - a. ScanRouter must be running on a computer that is logged in with administrator privileges.
 - b. Follow the installation wizard instructions. When it asks how you would like it to start, select as a service. When it is complete, you must restart your computer.
 - c. When logging in after the restart, it will ask for your login information. Here you will need to enter your windows password.
 - d. You will need to restart your computer again.
 - e. Then Goto: Start > Programs > ScanRouter V2 > ScanRouter V2 Administration Utility.
 - f. When it displays the window below, leave the password blank and press OK.



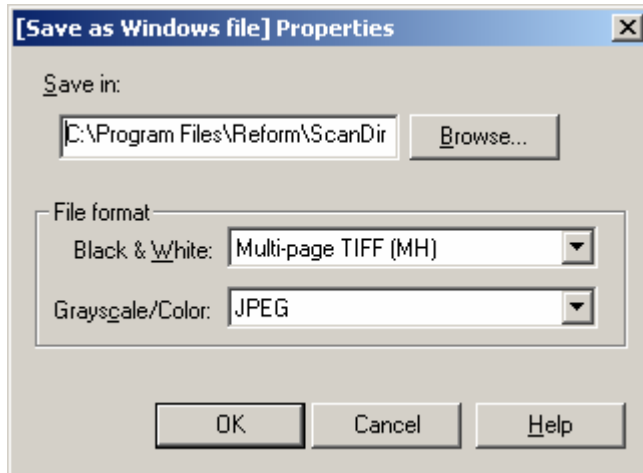
- g. At the top, Click Server > Set I/O Device
- h. Click Add
- i. Enter the IP Address of the MFP, or Press Browse to try to find it in the list.
- j. Once the Address is entered, Click OK
- k. Then, enter a Name you want to call this printer, and Click OK
- l. Click OK.
- m. On the left side of the screen, Click the + sign next to localhost.
- n. Click the + next to Delivery Table
- o. Right Click on Destination
- p. Click Add New Destination > User



- q. Set the Name to Demo
- r. Leave the "Add also as sender" box checked
- s. Change Delivery Type Selection to "Save as Windows File"
- t. Click Add



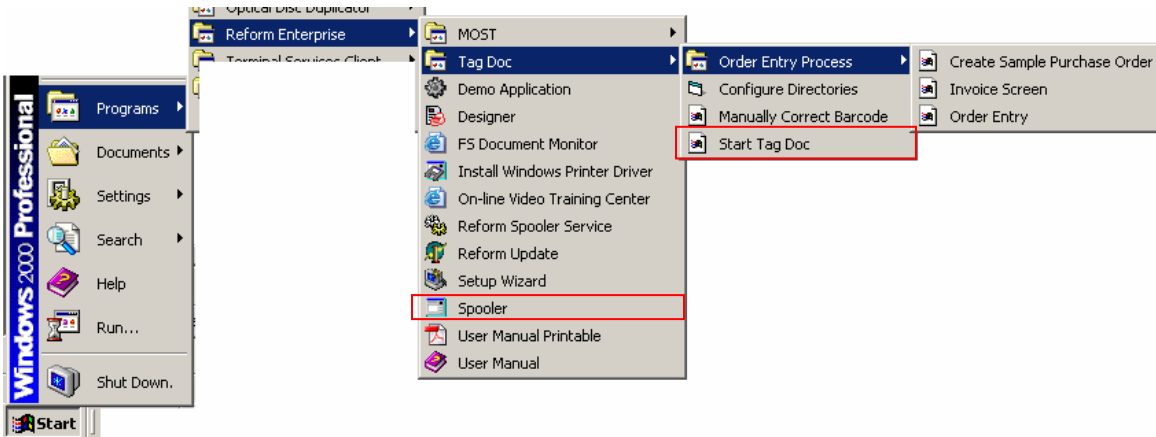
- u. Click Browse
- v. Navigate to the Reform\ScanDirectory1\ folder, Select it, and Press OK
- w. Change Black & White to "Multi-page TIFF (MH)"
- x. Keep Grayscale/Color as JPEG



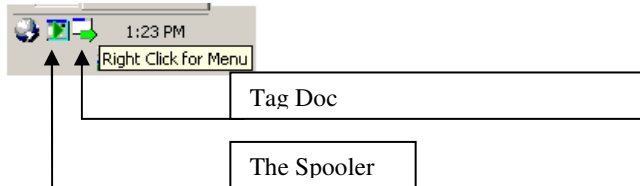
- y. Press OK
- z. Press OK
- aa. The name "Demo" should now appear in the Destination List.
- bb. You can now exit the Scan Router Administration Utility.

Before Starting the Demo

- 9) Please have the following processes running in the background:
 - a. Reform Spooler
(Start > Programs > Reform > Spooler)
 - b. Tag Doc
(Start > Programs > Reform > Tag Doc > Start Tag Doc)
 - c. ScanRouter Service
(Start > Programs > ScanRouter V2 > Start Delivery Services)



- 10) To tell if the spooler and Tag Doc are running, check the taskbar (next to the clock) for the icons shown below.



- 11) To check if ScanRouter is running, goto the MFP and press the scanner button. "Demo" should appear as an available destination.

The Demo

- 12) Once everything is correctly set up, click
Start > Programs > Reform > Tag Doc > Order Entry Process > Create Sample Purchase Order

Order Entry System 1 of 1

Purchase Order No: Date:

Shipping Information:

Company Name:

Shipping Contact:

Address:

City: State: Zip Code:

Shipping Method: Terms: FOB:

Order Information:

Item 1:	<input type="text" value="Z24L5"/>	Description: <input type="text" value="Couch - Red"/>	Quantity: <input type="text" value="1"/>	Unit Cost: <input type="text" value="1599.99"/>	Total: <input type="text" value="1599.99"/>
Item 2:	<input type="text" value="CE237"/>	Description: <input type="text" value="Office Desk - Oak"/>	Quantity: <input type="text" value="5"/>	Unit Cost: <input type="text" value="359.99"/>	Total: <input type="text" value="1799.95"/>
Item 3:	<input type="text" value="AW4K2"/>	Description: <input type="text" value="Desk Chair - Black"/>	Quantity: <input type="text" value="5"/>	Unit Cost: <input type="text" value="69.99"/>	Total: <input type="text" value="349.95"/>

Approved By: Purchase Order Total:

- 13) Make any changes to the demo data that you like, and click Print.
- 14) The sample purchase order will be printed.
(This purchase order, would normally come from a customer's company, but for this demo, it will be printed.)
- 15) Next, click
Start > Programs > Reform > Tag Doc > Order Entry Process > Order Entry

Order Entry System 1 of 1

Purchase Order No: Date:

Shipping Information:

Company Name:

Shipping Contact:

Address:

City: State: Zip Code:

Shipping Method: Terms: FOB:

Order Information:

Item 1:	<input type="text" value="Z24L5"/>	Description: <input type="text" value="Couch - Red"/>	Quantity: <input type="text" value="1"/>	Unit Cost: <input type="text" value="1599.99"/>	Total: <input type="text" value="1599.99"/>
Item 2:	<input type="text" value="CE237"/>	Description: <input type="text" value="Office Desk - Oak"/>	Quantity: <input type="text" value="5"/>	Unit Cost: <input type="text" value="359.99"/>	Total: <input type="text" value="1799.95"/>
Item 3:	<input type="text" value="AW4K2"/>	Description: <input type="text" value="Desk Chair - Black"/>	Quantity: <input type="text" value="5"/>	Unit Cost: <input type="text" value="69.99"/>	Total: <input type="text" value="349.95"/>

Approved By: Purchase Order Total:

- 16) This simulates someone entering the order information into the computer system.
- 17) Once you make the changes that match the example purchase order that was printed, click Print.
- 18) A Cover Page and Picking Ticket will be printed. The Cover Page is archived with the original Product Order for company records. To do this, scan the both pages together.
 - a. To scan a page, put the pages into the MFP.
 - b. Press the "Scanner" button.
 - c. The scan resolution must be 300 dpi.
 - d. When it displays the available destinations, select "Demo".
 - e. Press the "Start" button on the MFP to start the scan.
- 19) The Picking Ticket is then marked and signed by the warehouse manager as the items are picked for shipping. Once this is done, scan this page.
 - a. To scan a page, put the pages into the MFP.
 - b. Press the "Scanner" button.
 - c. The scan resolution must be 300 dpi.
 - d. When it displays the available destinations, select "Demo".
 - e. Press the "Start" button on the MFP to start the scan.
- 20) Then click on Start > Programs > Reform > Tag Doc > Order Entry Process > Invoice Screen

The image shows two screenshots of the 'Invoice Entry System' software interface. The left screenshot is titled 'Contact Information' and shows a 'Purchase Order Number' field with the value '117237'. The right screenshot is titled 'Invoice Entry System Cont.' and displays a detailed invoice form. It includes fields for 'Invoice No.' (I8502) and 'Date' (02/02/2006). The form is divided into sections: 'Billing Information' (Company Name: Furniture Stores Inc., Billing Contact: Gary Martin, Address: 1111 Main St, City: Lincoln Park, State: ND, Zip Code: 07034), 'Shipping Information' (Company Name: Furniture Stores Inc., Shipping Contact: Larry Johnson, Address: 157 Robertson Way, City: Pompton Plains, State: NJ, Zip Code: 07055), 'Order Information' (listing three items: Item 1: 224L5 Couch - Red, Item 2: CE237 Office Desk - Oak, Item 3: AWWK2 Desk Chair - Black), and 'Additional Information' (Shipping Method: Federal Express, Terms: Net 30, FOB: Destination). The total amount is \$902.47. Buttons for 'Next', 'Cancel', and 'Print' are visible at the bottom of the form.

- 21) Click Next
- 22) Make any necessary changes and then click Print.
- 23) 3 Pages will print. An internal copy of the Bill of Lading, customer copy of the Bill of Lading, and the Invoice. At the same time, a copy of the Invoice has been archived as the file I + the invoice number (Ex: I8502).
- 24) Since the invoice has been printed, it can be mailed or faxed to the customer.

- 25) When the order is delivered, the customer signs the both copies for the ordered items, and keeps his copy of the bill.
- 26) The internal copy of the bill of lading is then brought back to the warehouse and archived for company records. To do this, scan the internal copy.
 - a. To scan a page, put the pages into the MFP.
 - b. Press the "Scanner" button.
 - c. The scan resolution must be 300 dpi.
 - d. When it displays the available destinations, select "Demo".
 - e. Press the "Start" button on the MFP to start the scan.
- 27) Now that the order process is complete, locate the folder Reform\Data
Ex: C:\Program Files\Reform\Data\
- 28) In this folder should be a directory Orders\TYZ37\
TYZ37 is the demo purchase order number that we were using.
- 29) This is where the archived documents are stored as PDF files. It contains:
Picking Ticket, Purchase Order, Bill of Lading, and I8502.