



# Order Manager

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An order-entry and report generator application for herdshare managers and CSA (Community Supported Agriculture) farms.

## **Requirements:**

Windows 2000/XP  
64 MB RAM  
1 GB Hard Drive  
Adobe Acrobat Reader

## **Abstract:**

The Order Manager application is intended for herd managers or farmers who provide food directly to consumers whose clients or shareholders are divided into distinct driving groups with their own pickup dates. The Order Manager application allows you to key in the incoming orders for each group, then print Pick reports to assemble the order and Detail reports to send back with each driver for billing purposes. Order Manager will track each member's milk usage and will indicate how many units are available and how many units have been used month to date based on the member's number of purchased shares. Order Manager can also print a Year End report, showing total item sales and total retail for a particular year for tax purposes.

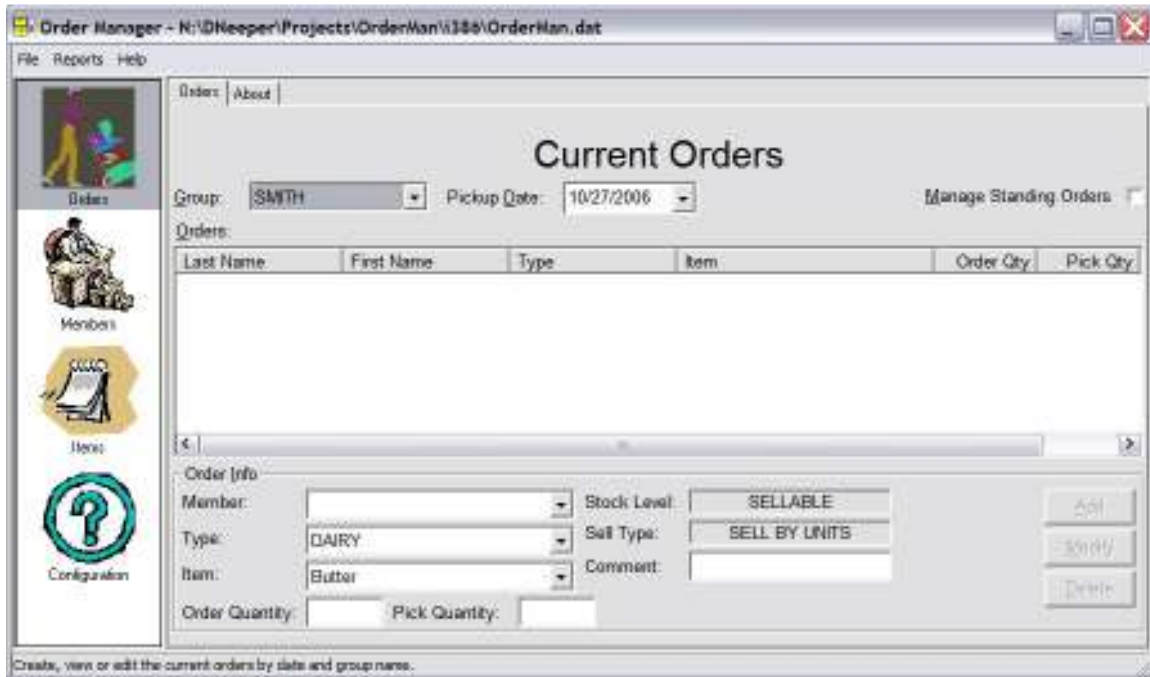
## **Terminology:**

Combined Items:	Items in an order that are not marked for a particular member. For example, short ribs must be packaged and labeled for a particular member but eggs and milk are combined in crates for all the members in the group.
Eaches:	An indication that an item is sold by an undividable physical container. Ex. Eggs and soap are sold by eaches, beef rib steaks are sold by weight and cream is sold by units.
Group:	A collection of members who rotate driving to the farm and return with every group member's order for that week.
Item:	One particular food or non-food sale offering. Ex: Eggs, milk, cream, bacon, soap, yoghurt, walnuts, etc.
Member:	Each shareholder or client entered into the Order Manager database.
Pick:	The act of physically assembling a group's order. The night before a driver arrives you print a Pick List report, gather all the non-perishable order items into cartons or boxes and put the perishable items together in the freezer or cooler.
Retail:	The actual price that a member pays for a particular item.
Standing Order:	An order line item that should be automatically repeated for each week. If a member always orders two gallons of milk each week then it is often easier to set up a standing order for two gallons rather than keying it in week after week.
Units:	One unit generally corresponds to one gallon of milk and one purchased herd share. One share entitles the shareholder to one gallon of milk per week, or its equivalent. Typically one gallon of milk is equivalent to one pint of cream, and one pound of butter is equivalent to three gallons of milk. Therefore one gallon of milk has a cost of one unit, one pint of cream has a cost of one unit and one pound of butter has a cost of three units. These figures may be adjusted as needed and are only suggestions.

## Installation:

To install the program download and execute the OrderMan\_Install.exe program, which will create a new directory in the “Program Files” folder on your hard drive and extract all the files into that directory. (Ex: “c:\program files\OrderMan”.) An OrderMan folder will be created in the “All Programs” section of your Start Menu.

## Usage:



The icons along the left allow you to create/edit orders, manage the members of each driving group, manage your current items and set the program’s configuration. To create a new order or edit an existing order simply select the group and pick-up date, and any entries currently on the order will be displayed.

- To add a new entry to the order simply select a name from the Member field, select the item category from the Item field, select the actual item to be ordered from the Item field and enter the quantity requested in the Order Quantity field. (The Order Quantity is the amount that the member is requesting and the Pick Quantity is the amount that you are actually shipping.) Press the Add button or the Alt+A key to add the new entry to the order.
- To modify an existing entry, select it in the Orders list, modify any of the fields and press the Modify button or the Alt+M key to update the entry.
- To delete an existing entry, select it in the Orders list and press the Delete button or the Alt+D key.
- The Comment field can be used to indicate any additional information, and will print on the Pick List report. For example, a member may ask for a 2 to 3 pound beef roast, which can be put in the Comment field.
- When creating a new entry the Pick Quantity will default to the Order Quantity unless the item is out of stock.
- Note that the Order and Pick Quantities can be either weights or individual units, depending on the item. The Sell Type field will indicate whether the item is sold by

- weight, eaches or milk units. (“Eaches” is a technical retail term that means individual units, as opposed to cases.)
- Note that the Order and Pick Quantities for milk items are still specified in eaches. For example, if a member orders one pound of butter you would enter “1” as the Order Quantity and the system will multiply that by 3 units to determine the total “unit cost.”
  - You can sort the order by any of the column names – simply click on the header for the particular column and it will sort the screen by that criteria.

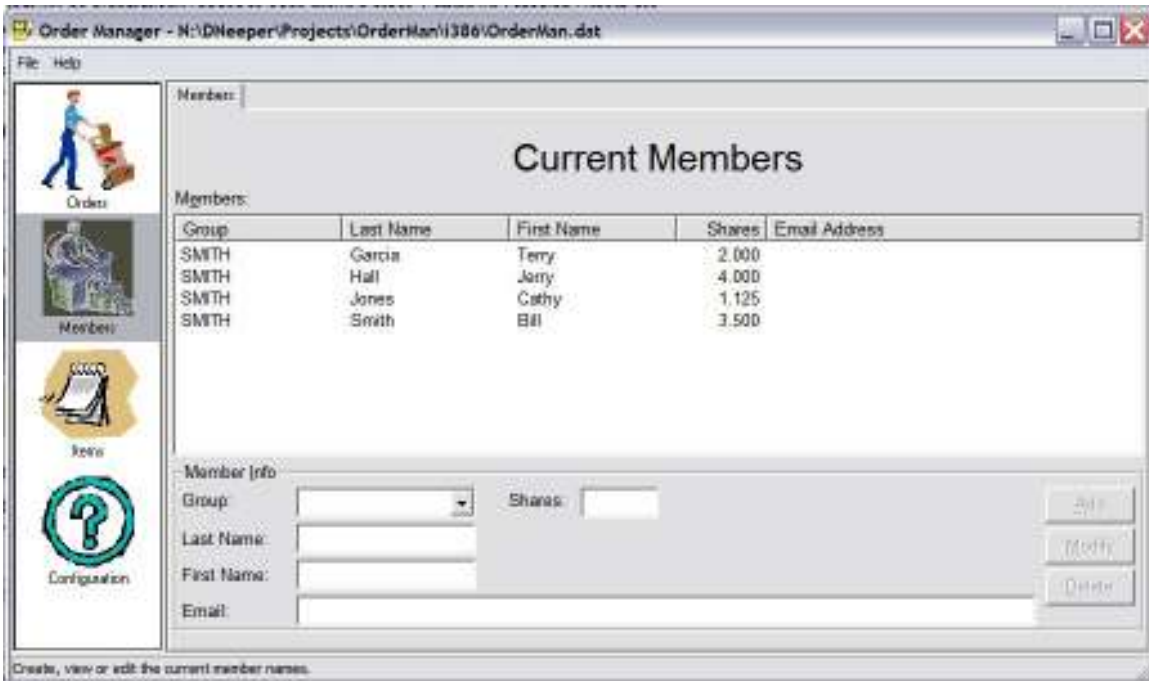
Once you have created all the entries for the order you can run two reports: The Pick List report and the Order Detail report. (The reports are available from the Report menu at the top of the screen.)

- The Pick List report is the report you will use to go out and actually put together the order. It shows you totals for the milk, egg and other combined items, and the amounts requested for the meat, cheese and other items that are labeled for a particular member.
- When using the Pick List report to assemble the order, there is a column available for you to write in the amount actually put in the order if it differs from the requested amount. For example, the member may request 3.25 pounds of ground beef but if you only send 3 pounds you would write “3.00” on the report.
- Once the order has been assembled, take the Pick List report back to the computer and update the Pick Quantity fields on any entries where the amount put in the order differs from the amount requested. The system uses the Pick Quantity field to compute the member’s bill for the order, so it needs to reflect the amount that was actually shipped.
- You can then run the Order Detail report to produce the print-out that you will send back with the group’s driver. This report breaks the order down and displays the items ordered by each member, the amount you actually shipped and the total retail and unit costs. The report also displays the number of milk units the member has used in the current month, and the number of milk units remaining in the current month.

There is also a “Send Email to Group” option available on the Report menu, which allows you to send an email to each member of the current group and optionally attach the Order Detail or Item List report. This allows you to send the Order Detail report out with your “Driver Estimated Time of Arrival” email so that everyone knows what they are getting and how much they owe before they pick up their food. (Note that you need to configure your email server address on the Configuration screen before you can use this option.)

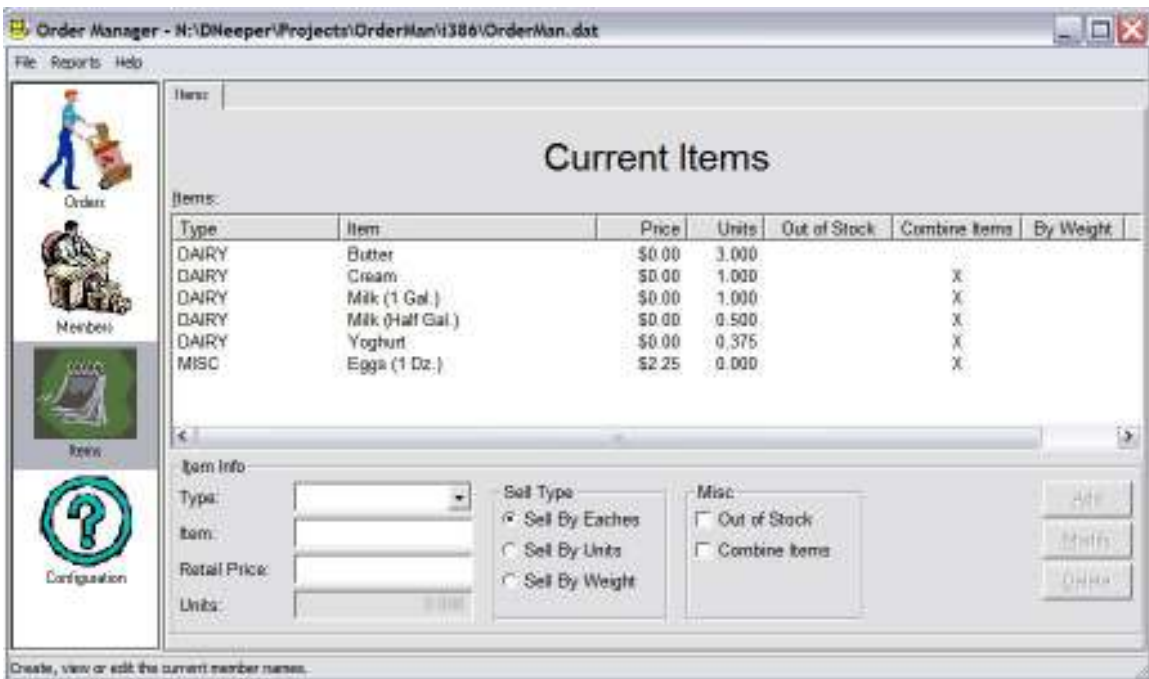
The “Manage Standing Orders” checkbox disables the Date field and allows you to enter order line items that will be automatically added to each group’s order. Setting up Standing Orders are useful if some members order the same items week after week and don’t want to bother asking for them each time. The onus lies on the member to cancel any standing orders that he or she no longer wishes to receive, but if there is a high level of trust between the manager and members then Standing Orders can make the process more convenient for everyone involved.

The Member screen allows you to manage the members of each group, and looks as follows:



You work with this screen in a way similar to the Orders screen, and the database contains a sample member list for the Smith group. To create a new group simply type in the new name in the Group field, enter the remaining information and press the Add button or Alt+A key. If you enter the number of herd shares for each member then the Order Detail report can display the number of units remaining in the current month.

The Item screen is again very similar to the Order and Members screens, and looks as follows:



You can create new item categories by simply keying in a new Type value, or select one of the existing types.

- The Sell Type field indicates how the item is sold: By individual items (“Eaches”), by milk share units or by weight. The only difference between Sell By Eaches and Sell By Weight is that items sold by eaches do not allow fractional quantities while items sold by weight do. For example, you can’t order 1.25 cartons of eggs but you can order 1.25 pounds of beef. Items sold by eaches typically have the size included in the item description, such as “Maple Syrup (1 pt.)” and “Maple Syrup (1 qt.)”.
- Every item must have a unique name, even if the items are in different types. For example, the items “Loin Chops (Lamb)” and “Loin Chops (Pork)” must have the animal in their name to make them unique.
- You can set the Out of Stock flag to indicate that the particular item isn’t available. This is displayed on the Item List report, and defaults the Pick Quantity to zero on the Orders screen.
- The Combine Items flag indicates that the Pick List report will display the item once with a total quantity for all the members. For example, milk, cream, eggs and yoghurt are “combined items” because you do not label them for a particular member. Most other items are not combined because you need to label them for a particular person when assembling the order.
- You can sort the order by any of the column names – simply click on the header for the particular column and it will sort the screen by that criteria.
- The Retail Price field is also the “Price per Pound” field for items sold by weight.
- Items sold by units may also be assigned a surcharge in addition to the unit cost. For example, a herd manager may decide to assess a surcharge to cover the cost of the plastic gallon milk jugs rather than increase the monthly boarding fee.
- There is an Item List report available on this screen that lists every item, its price and whether or not it’s in or out of stock. This report can also be emailed to each member in place of the email you send out each week.

The Configuration screen allows you to set the system parameters, and looks as follows:



- Specify your email server to allow the system to send out emails to each group member. You can obtain the email server address from your regular email client, and may be "mail.earthlink.net" or "smtp.earthlink.net".
- The "From Email" is the default "From:" address in the "Send Email to Group" dialog box.
- The "Retain Orders" field indicates how long the orders are retained before being deleted from the database. I have this defaulted to one year, but you can set it to any level if you want to keep the old orders around longer.
- The "Monthly Boarding Fee" field indicates the monthly cost per share for boarding the animals. This cost is computed for each member and is automatically added to the Order Detail report for the first week of each month.
- The "Combine Surcharges" field indicates that any items having surcharges are combined into a single line item on the Order Detail report instead of enumerating a separate surcharge line for each item.
- Backups – the database is stored in the file OrderMan.dat, and every time you run the program it backs up OrderMan.dat to Backup1.dat, and copies Backup1.dat to Backup2.dat. So, as you use the system it is maintaining two database backups. To restore a backup simply exit the program and copy the backup file to OrderMan.dat. It will probably be a good idea to periodically copy the OrderMan.dat file to a diskette, cd-rom or other storage media.

### **Support:**

Limited support for the Order Manager application can be obtained by sending an email to Don Neeper at [dneeper@mindspring.com](mailto:dneeper@mindspring.com). Order Manager is provided as a service to the raw milk community and can be freely distributed.

### **Future:**

- Order Manager currently only supports a single type of herdshare and doesn't support multiple herdshares on the same farm. (For example, a farm may have both goat and cow herdshares with different boarding fees and share prices.) A future enhancement may be adding support for multiple herdshares, although that will require significant changes to the database and the application. The only current solution is to run two copies of Order Manager out of different directories to establish different databases for each herdshare.