DAC Office
Order Book Design Tool

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The Order Book Design Tool can be used to modify and create custom order books. The first time you run it, you will be asked if you want to download the default templates. It's a good idea to download these templates so you can see examples of what is possible. This documentation will describe how to modify those templates to fit your needs.

Settings Tab

Order Book templates are found in the folder specified by the "Orderbook Location" field. Each folder in that directory represents a template. In each template directory there is a settings file that contains all the report data. Creating a new template would require you to copy a template folder and then modify the following lines of the settings file.

```
<Template>Multiweek 8</Template>
<Logo>C:\DACOffice\Settings\Orderbooks\Multiweek 8\Logo.jpg</Logo>
<Report>Multiweek 8</Report>
<SettingsFilePath>c:\DACOffice\Settings\Orderbooks\Multiweek 8</SettingsFilePath>
```

In the above example, you would replace "Multiweek 8" with the folder name of your new template. The settings file can be modified using Notepad. As always, if you need changes made to any order book and don't want to modify the report yourself, you can request programming changes that could be done at the standard rate.

Report Orientation

Page Width and Page Height fields determine whether the report is Portrait or Landscape. Currently only the 8.5 by 11 sheet has been tested. To make the report Portrait open the settings file and make sure the height is 11 and the width is 8.5. The following lines show how you would change the settings file to make the report Landscape.

<PageHeight>8.5</PageHeight>
<PageWidth>11</PageWidth>

Report Margins

Adjust the margins by modifying the four fields on the Settings tab, Page Properties section. Values of these fields are in inches so .25 is ¼ inch.

Report Fields on Settings Tab

Certain fields on the Settings tab can be used within the report; the Orderbook Title, Logo and Orderbook Date. This will be explained again later, but to use these fields within the report, they will need to be placed in brackets. So if you want to display the title on the Header tab, you would enter [Orderbook Title] in the Data column of the header grid.

Customer Selection on Settings Tab

Currently, the order book can be run as a generic, non-customer specific report or for a single customer. Plans for the future include adding the ability to print books for all customers of a selected salesman, all customers of a selected route, and/or all customers for a selected salesman/route.

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Items Tab

Orderbook lines are made up of items. Items can be placed on the order book in a variety of ways: by Category, Class or Vendor. Select your restrictions on the left hand side of the grid and then click the "Add to Batch" button to populate the grid.
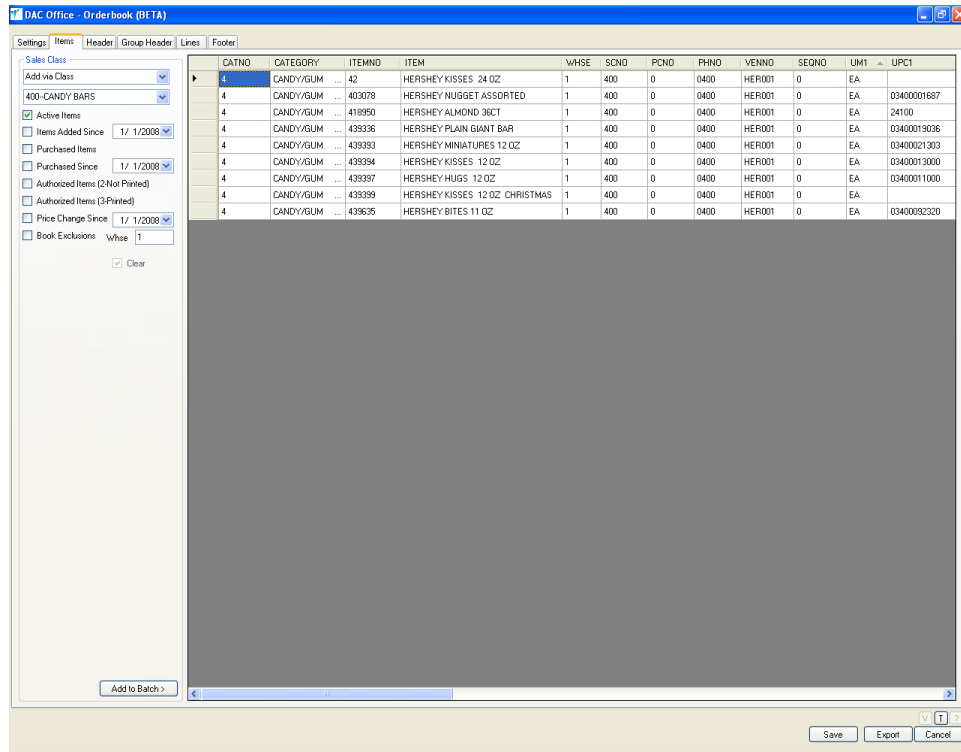
Report Fields on Item Tab

The Lines tab is used to describe how the lines of the report will be displayed. Any grid column on the Item tab can be displayed on the report. For example, to display the Category Number on the report, find the Category Number column within the grid and make a note of the column name "CATNO". Add brackets to the beginning and end and enter it in the data column of the grid on the Lines tab.

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Header Tab

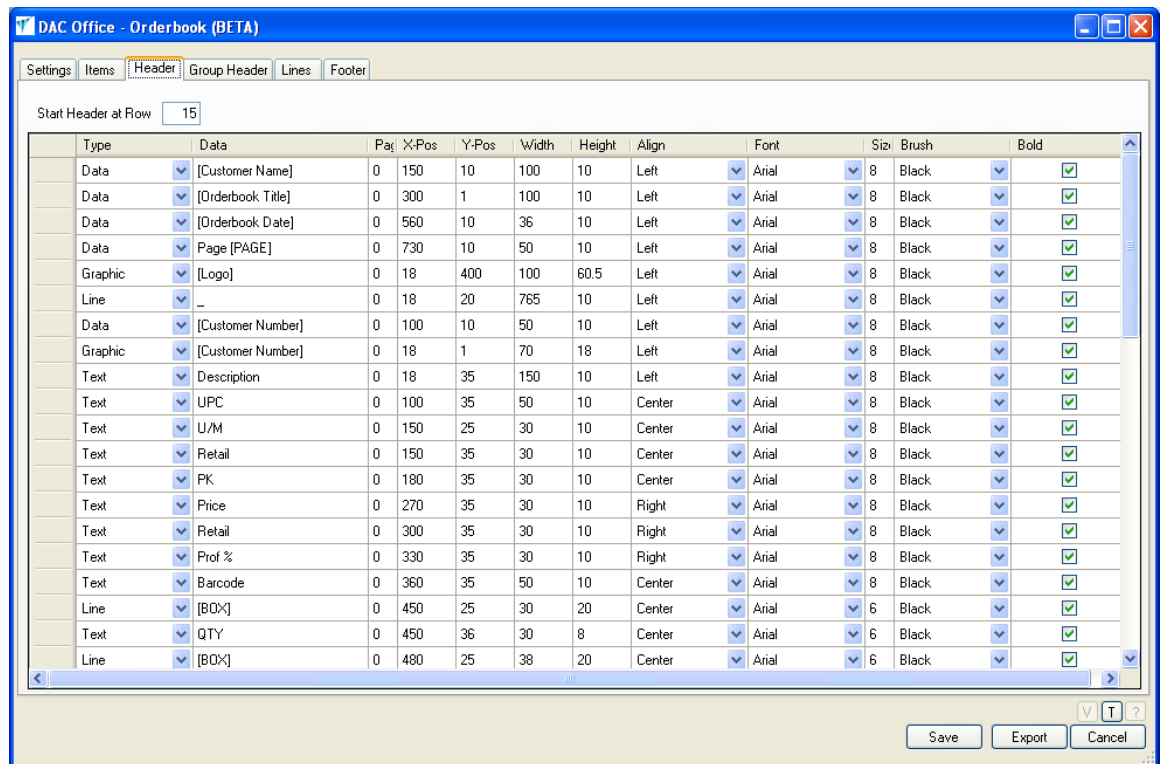The header of the report is considered anything that you want displayed on the top of each page of the report. There are four different header types available: Text, Data, Line and Graphic. Each piece of data can have its own font, font size, alignment, height, width and location on the report. This allows for truly customized report creation.

DAC Office - Orderbook (BETA)

Settings | Items | Header | Group Header | Lines | Footer

Start Header at Row   15

Type		Data		Pag	X-Pos	Y-Pos	Width	Height	Align		Font		Siz	Brush		Bold
Data	⌄	[Customer Name]	⌄	0	150	10	100	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Data	⌄	[Orderbook Title]	⌄	0	300	1	100	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Data	⌄	[Orderbook Date]	⌄	0	560	10	36	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Data	⌄	Page [PAGE]	⌄	0	730	10	50	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Graphic	⌄	[Logo]	⌄	0	18	400	100	60.5	Left	⌄	Arial	⌄	8	Black	⌄	☑
Line	⌄	_	⌄	0	18	20	765	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Data	⌄	[Customer Number]	⌄	0	100	10	50	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Graphic	⌄	[Customer Number]	⌄	0	18	1	70	18	Left	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Description	⌄	0	18	35	150	10	Left	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	UPC	⌄	0	100	35	50	10	Center	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	U/M	⌄	0	150	25	30	10	Center	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Retail	⌄	0	150	35	30	10	Center	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	PK	⌄	0	180	35	30	10	Center	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Price	⌄	0	270	35	30	10	Right	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Retail	⌄	0	300	35	30	10	Right	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Prof %	⌄	0	330	35	30	10	Right	⌄	Arial	⌄	8	Black	⌄	☑
Text	⌄	Barcode	⌄	0	360	35	50	10	Center	⌄	Arial	⌄	8	Black	⌄	☑
Line	⌄	[BOX]	⌄	0	450	25	30	20	Center	⌄	Arial	⌄	6	Black	⌄	☑
Text	⌄	QTY	⌄	0	450	36	30	8	Center	⌄	Arial	⌄	6	Black	⌄	☑
Line	⌄	[BOX]	⌄	0	480	25	38	20	Center	⌄	Arial	⌄	6	Black	⌄	☑

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Save   Export   Cancel

How to Add the Orderbook Title to the Header

On a new line, select "Data" as the type and enter "[Orderbook Title]" in the data column. Enter values for the remaining columns and click Save and then Export to view your report. Modify the "XPos" and "YPos" columns to adjust the location of the data horizontally or vertically. Modify the Width column if the title is truncated horizontally. Modify the Height column or Font Size if the title is truncated vertically. As a rule, the Height should be one digit bigger than the font size.

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How to Add a Logo to the Header

On a new line, select "Graphic" as the type and enter "[Logo]" in the data column. Enter the "XPos" and "YPos" to indicate where to place the logo. Enter the values for the width and height of the logo.

How to Add a Line to the Header

On a new line, select "Line" as the type and enter "_" in the data column. Enter the "XPos" and "YPos" to indicate where to start the line and then enter a width value to set how long the line will be.

How to Add a Box to the Header

On a new line, select "Line" as the type and enter "[BOX]" in the data column. Enter the "XPos" and "YPos" to indicate where the upper left corner of the box will be. Enter the Width and Height to specify how wide and tall the box will be.

How to Add Page Number to the Header

On a new line, select "Data" as the type and enter "[PAGE]" in the data column. Enter the "XPos" and "YPos" to indicate where to place the page number. With all fields, you can add text to the field by placing it outside the brackets. For example, "Page [PAGE]" will place the page number immediately after the word Page.

How to Add a Customer Number Barcode to the Header

On a new line, select "Graphic" as the type and enter "[Customer Number]" in the data column. Enter the "XPos" and "YPos" to indicate where the upper left corner of the barcode will be. Enter the Width and Height to specify how wide and tall it will be.

How to Add Text to the Header

On a new line, select "Text" as the type and enter anything you want displayed on the report in the data column. Enter the "XPos" and "YPos" to indicate where the text should be placed.

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Group Header Tab

Currently only the Category field has been tested as the group header. Each time the category changes or the page breaks, the category will be displayed as described in this grid. Any column in the Item grid should be a valid group header.
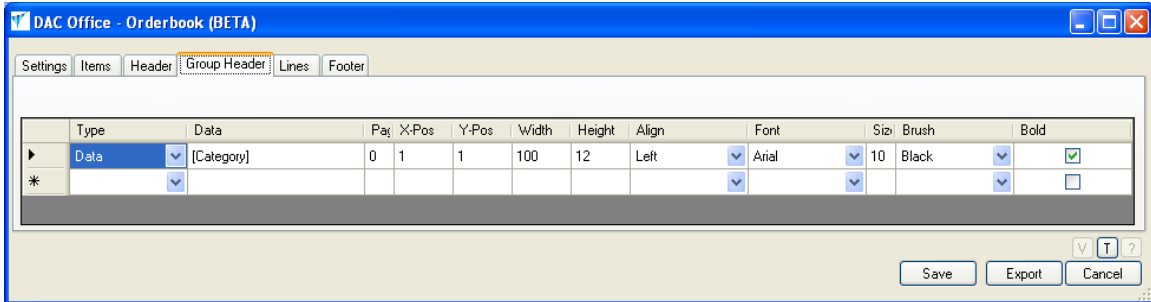
Lines Tab

You define how the items will display on the Lines tab. Change the "Start Line at Row" field to move the starting place of the lines on the vertical axis. Modify the Line Spacing field to adjust the amount of space between lines. For a font size of 10, you'll want a line spacing value of 12 or more. If your report will have more than 1 column, enter the horizontal (XPos) location of where column 2 and/or 3 will start on. Each grid element will correspond to data to fit within the columns.

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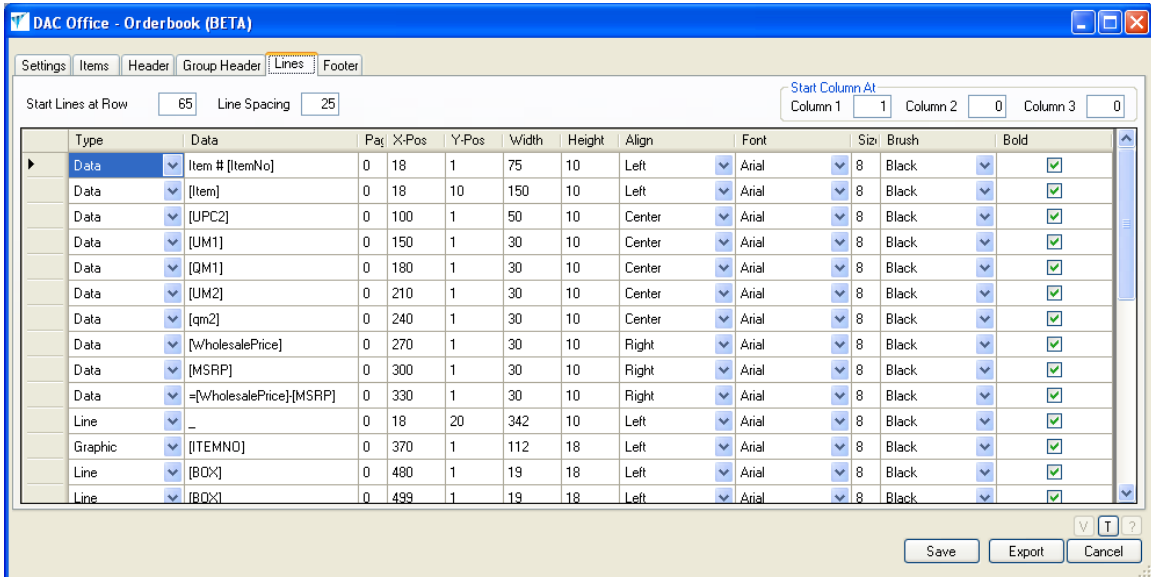
How to Add a Graphic to the Lines
On a new line, select "Graphic" as the type and enter the filename of the graphic file in the data column. If the filename is a column in the grid, enter the column name, surrounded by brackets. Enter the "XPos" and "YPos" to indicate where to place the logo. Enter the values for the width and height of the logo.

How to Add a Line to the Lines
On a new line, select "Line" as the type and enter "_" in the data column. Enter the "XPos" and "YPos" to indicate where to start the line and then enter a width value to set how long the line will be.

How to Add a Box to the Lines
On a new line, select "Line" as the type and enter "[BOX]" in the data column. Enter the "XPos" and "YPos" to indicate where the upper left corner of the box will be. Enter the Width and Height to specify how wide and tall the box will be.

How to Add Data/Text Fields to the Lines
On a new line, select "Data" as the type and enter the column name surrounded by brackets, such as "[ITEMNO]" in the data column. Anything outside the brackets is considered text and will be displayed as is. Enter the "XPos" and "YPos" to indicate where to place the page number.

How to Add a Item Number Barcode to the Lines
On a new line, select "Graphic" as the type and enter "[ITEMNO]" in the data column. Enter the "XPos" and "YPos" to indicate where the upper left corner of the barcode will be. Enter the Width and Height to specify how wide and tall it will be.

How to Add Text to the Lines
On a new line, select "Text" as the type and enter anything you want displayed on the line in the data column. Enter the "XPos" and "YPos" to indicate where the text should be placed.

How to Add Calculated Fields to the Lines
On a new line, select "Data" as the type and enter the equal sign followed by the data fields to be calculated. Valid calculations currently only include plus and minus. Enter the "XPos" and "YPos" to indicate where the data should be placed.   An example of this would be "=[WholesalePrice]-[RetailPrice]".

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Summary Tab

Currently this works the same way as the other tabs. The grid should have at least one line.