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## Lentune Trade Desktop User Guide

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## Introduction

The purpose of this guide is to allow users of the Lentune Trade Desktop to work productively and effectively with the software. It should be read by all users of the system. Its major sections are

- Installation and Getting Started
- User Interface
- Supplier Details
- My Details
- Troubleshooting

If you are reading this guide, you have probably downloaded it from the relevant part of the Wholesaler Web Site. You should also download the Lentune Export File Specification Document, if you intend to download Supplier Invoices and Prices for use with a spreadsheet or other software.

## Installation and Getting Started

### Contacting your Wholesaler

#### Web Page

The Wholesaler may direct you to the correct part of their web site to get started. There should be a page on their web site with links to this guide and other documentation, and instructions and a link for downloading the program.

#### User ID, Password, Account Access

Your Wholesaler, upon request, can assign you a User ID and Password to allow you to use the Lentune Trade Desktop. Full or limited access may be requested for more than one user to access your account, using a different User ID and Password. Ask for a user to have 'Account Access' to allow them to use all functions of the system. Otherwise very little is allowed.

The Wholesaler will inform you of the Web Site Address to type in when logging for the first time.

In order to use the software for invoicing your own customers you will need to provide your GST Number to the Wholesaler so they can enter it into the system.

If you wish to have a password changed or a User ID withdrawn, please contact the Wholesaler.

### Pre-Requisite Software

A Microsoft Windows Operating System with its latest Service Pack installed.  
Windows 2000, XP or Vista is recommended.

Microsoft .NET Redistributable Package, version 2.0 or later, with its latest Service Pack installed.

Microsoft Windows Installer, version 3.0 or later. Version 3.1 is recommended.

Microsoft Internet Explorer 5.01 or later. The latest version with its latest Service Pack is recommended.

An up to date version of a Portable Document Format (.pdf) reader such as Adobe Acrobat Reader.

### How the Lentune Trade Desktop Works

Your Wholesaler provides the program as a service to you.

- You have up to date access to your transactions with the Wholesaler
- You can download supplier invoice and price files
- You can prepare and manage quotes and estimates for your prospects
- You can invoice your customers and send them statements
- You can manage your customer accounts, payments and overdues

You operate the software through a copy of the program downloaded and installed on your computer. You may install it on multiple computers.

In response to your actions on windows forms, requests are sent to the Wholesaler's Web Site, and data is returned to you. This depends on you having a reliable internet broadband connection, configured to access your supplier's Web Site.

All the important data is held as part of a database at your Wholesaler. Your data is only accessible by your User ID and Password, and only through the Lentune Trade Desktop software.

## Download and Installation

### Install from Web Site

Lentune Trade Desktop is a program you download from your Wholesaler's Web Site or install from a CD provided by your Wholesaler. The program should be available via a link at your Wholesaler Web Site, as directed by your Wholesaler. Brief installation instructions are provided on the Wholesaler's Web Page for Lentune Trade Desktop.

The program is packaged as a Microsoft Windows Installer (.msi) file. The Wholesaler may also supply the file as a .zip file, which may be necessary to download instead if your firewall does not allow you to download .msi files. In this case you need to save and unzip the file to expose the .msi file.

Depending on your browser, you may be offered the choice to run or save the LentuneV7TradeDesktopInstaller.msi file.

If you choose Save, you can navigate to the file using Windows Explorer and double click to start the installer wizard.

If you choose Run, the installer wizard leads you through the installation process. Respond OK to the prompts for a default install.

After installation you should have a Lentune Trade Desktop (LTD) shortcut on your desktop. The program is also available through Start->All Programs->Lentune->Lentune Trade Desktop.

You may drag the desktop shortcut to the Quick Launch task bar located at the bottom of your screen. You may have to [Mouse, Right-Click]->Unlock the taskbar to do so.

### Uninstalling

Should you wish to uninstall the program, Start->Control Panel->Add or Remove Programs will list Lentune Trade Desktop. Choose it and the Remove button. This may be necessary when upgrading to a later version of the software.

The default folder for the program files is  
Program Files->Lentune Ltd->Lentune V7 Trade Desktop.

### Upgrading

You may be advised by your Wholesaler to upgrade the program from time to time. To do so, first uninstall the program, and then follow the Download and installation process above. Your data will not be lost or affected by a software upgrade.

## Starting and Stopping the Lentune Trade Desktop

Start the system via:

- LTD Icon Desktop Shortcut
- LTD Icon Quick Launch Task Bar
- Start menu->Programs->Lentune->Lentune Trade Desktop.exe

### Login Form

If you have not formerly checked 'Remember Me' during a previous login, the Lentune Web Service Login Edit form is presented.

Fill in the User ID, Password, Web Site Address and Database Name as provided by your Wholesaler.

Only if your company runs a Proxy Server to access the Internet, enter the Proxy Server User ID and Password as provided by your company IT Administrator.

If you wish to avoid filling the Login Form every time, check the 'Remember Me' box

Choose the Login Button. The main window of the Lentune Trade Desktop should now display.

Once the Menu bar becomes available you are ready to begin. The Receivable Account is your account at the Wholesaler, accessible only via the User ID and Passwords which have been set up by the Wholesaler to have Account Access.

If

- You have reset 'Remember Me' via My Details->My Setup Details->Reset Login Details button
- Requested a password change.
- Your password had been changed by the Wholesaler

...you are required to repeat filling in the above Login Form.

## User Interface

It is assumed that all users understand the standard classic Windows interface, how to choose and manipulate windows controls via both the mouse and the keyboard and the meaning of visual clues such as greying out for disabled. Non standard or additional features are covered below.

It is recommended that you use the system as you read the information below to familiarise yourself with how to operate the controls.

### Main Window Components

The minimum screen size supported is 1024 by 768 Pixels. If scroll bars appear on the main window, or you cannot see the entire window, you need to adjust your Microsoft Windows screen definition to at least this size. [Mouse, Right-Click] on your desktop and choose Properties, then the Setting Tab. Move the Screen Resolution slider.

Maximize, Minimize or Restore Down using the standard controls at top right. Drag with the mouse on a window edge or the bottom right corner to re-size.

Your User ID is displayed in the Title Bar of the main window with the Wholesaler's Name and the application name - Lentune Trade Desktop.

To stop the Lentune Trade Desktop choose File->Exit, LTD Icon (top left)->Close or click on the X in the top right of the main window. You may be prompted to save data.

The Lentune software uses a Multiple Document Interface (MDI) in which the main parent window has a client area where multiple active child windows can be open and used.

The main window major elements, from top left to bottom right, are:

- Title Bar with the User Id, etc.
- Menu Bar
  - Click or select via keyboard Alt then arrow keys and to see/launch options or Alt-x where x is a letter corresponding to the first or underlined menu character.
- Client Area – Main area for windows activated via Menu Bar choice.
- Status Bar at bottom –instructions, information and error message location.

Your staff are shown all menu options but if they choose an option you have not given them by agreement with the Wholesaler they get refused with a security message.

## Menu Items

You can activate windows to accomplish tasks using these.

File->Exit	Use this, the Icon at top left corner or the [X] in the top right corner the main window of to quit/leave the system. You may receive messages requesting you close the child windows in a particular order.
File->Close All	Use this to close all child windows in the Client Area. You may receive messages requesting you close the windows in a particular order.
File->Cascade Tile Vertical Tile Horizontal	By Default the active child window obscures the inactive ones. Use these options to present at least part of the inactive windows.
Windows	All the active windows open in the client area, even if hidden by others, are displayed as a numbered list below this Menu Item. The currently active window has a tick. Activate a different window via [Mouse Click], [Alt-W, number] or [Alt-W, Tab/Down Arrow, Enter]
Supplier Details	Displays the Supplier Account, Invoices, Current Quotes, Prices or Packing Slips child window depending on the menu choice. These to allow you to obtain information from the Wholesaler.  This menu item is only usable by users who have Account Access.
My Details	Most menu items here are to allow you to manage business with your own customers. Menu items for Invoices, Statements and Trial Balance Report are only usable by users who have Account Access
My Details-> My Setup Details	The My Setup Details form allow you to 'Unremember' your login details so you can re-fill in the login form next time, limit the number of lines returned in searches, and set messages for display on your customer invoices and statements.  This menu item is only usable by users who have Account Access.
My Details->My Report Details	Give access to a set of reports. The reports are presented in a Report Browse window, from where they can be exported to files in various formats and emailed as attachments via you default email program.

## Child Windows

Child windows are created using the Main Window Menu.

They have a Title Bar at the top with the name indicating what they do. The Top Left and Top Right corners contain controls to close the window. There is no Menu Bar. Instead the main window Menu Bar is used. Tab controls are sometimes used to allow the form to better organise its data. There is usually a row of buttons just above the Status Bar at the bottom. They perform common tasks such as saving the contents of the form in the database or escaping from the form without saving.

Child windows are typically 800 by 600 pixels in size, which will fill most of the main Client Area on a terminal of size 1024 by 768 pixels.

Drag with the mouse on a window edge or the bottom right corner to re-size.

You may also Minimize, Restore and Maximize using the controls at the top right corner.

It is common to have multiple child windows open simultaneously in the Client Area. However they may be obscured by the currently active window. Use the Windows Menu Item to bring any window in the menu list to the front and make it the active window or use File->Cascade, Tile Vertical/Tile Horizontal.

## Special (non-child) Windows

The system sometimes opens special windows which are not MDI Child windows, but are independent. An example is the Report Preview window. The system may also activate Adobe Acrobat Reader, Microsoft Word and Microsoft Excel using documents exported from the system. Depending on your role you may need to familiarise yourself with these products.

## Dialogue Boxes

The system sometimes opens special windows which are not MDI Child windows but ask you a question to which you must respond. There are often Yes, No, Cancel buttons, with one highlighted as the default action if you hit Enter.

## Searching and Matching

### Search Button

The Search button is used with a combination of values in other controls

By filling in more information, less data is returned to scroll through. If no data is returned you may need to remove, shorten or correct some search words.

### Code

This typically contains an upper case single word, which will be matched to the item's Code using 'begins with'.

### Keywords

Many windows contain a **Keyword** field. Enter groups of number and characters separated by spaces and Search for records matching **ALL** the 'words'

### Numeric Fields

The search criteria for numeric fields depends on context, but is often a match on 'less than or equal to', rather than an exact match.

### Start and End Dates

These may be given independently. If given, they are matched using 'greater than or equal to' and 'less than or equal to' some date property of the item, depending on context.

### Drop Downs

Only items which have been marked with the displayed value will be searched for. For example, Type of 'Tax Invoice' will ignore all Quotes and Estimates.

### Top Number

By default this is set to 200. Its purpose is to reduce the transfer of data from the web site.

### Active

By default this is checked. For example if you lose a Quote you can mark it as inactive. Then when you search, only the winnable quotes are searched for.

## Special Controls

### Editable Text Fields

Click on a field or [Tab]/[shift-Tab] to it paints a yellow background and highlights the text content for replacement. Click at an insertion point within the text to override the default behaviour of replacing the entire field as you type.

## Form Buttons

Buttons are used to access functions within the system from the window you are currently in. Not all buttons are displayed on every window. Buttons can be activated by [Mouse, Click] or by Tab. One Button is usually highlighted. If this is the desired action you may hit Enter, or Tab to the desired button and Enter.

## Date Control

The standard form for date input is dd/mm/yyyy. dd/mm/yy is also accepted. Complete the field by using Tab or Alternate Tab (Numeric Keypad +).

To speed data entry some special values may be entered:

- T=today
- Y=yesterday
- +n, -n = n days from today or the original date in the field.
- n = nth day of current month.
- ME1-ME12 = last day of month, calendar year months.
- MB1-MB12 = first day of month, calendar year months.
- M+n, M-n = n months from today or the original date in the field.
- dd/mm is accepted. The current year is assumed
- 9999 is treated as dd/mm.
- 999999 is treated as dd/mm/yy, 99999999 as dd/mm/yyyy.
- ddMMM, dd.MMM. or dd/MMM (where MMM is a standard month abbreviation or month name) is accepted.

Separators can be . / - or space.

Invalid dates are assumed to be Today.

Depending on context, the date you enter may be transformed into an equivalent Month End date.

## Grid Control

A grid presents data in rows and columns, with column headers. Many functions of the grid are accessible by keyboard but some advanced options require the use of the mouse. The area showing lines may have vertical and horizontal scroll bars.

### Header Column Cells

These describe the type of data in their column.

Re-size a column by [Mouse, dragging] the line between the Header Column cells.

Move a column by [Mouse, dragging] the Header Column cell.

Sort the Grid by a column by [Mouse, Click] on the Header Column cell, and again to reverse the sort sequence.

## Main Grid Area

### Scrolling

When scrolling is necessary, horizontal and/or vertical scroll bars appear. These follow conventional Window mouse behaviour.

After you tab to or focus on a grid:

- The [Page Down] and [Page Up] keys scroll by a displayed page worth of Rows.
- When Arrow Keys reach an edge, they scroll a row/column at a time.

### Selecting Rows

[Mouse, Click] to select a row (and sometimes cell).

[Shift + Mouse, Click] to select contiguous rows.

[Ctrl + Mouse, Click] to select additional non-contiguous rows.

After you Tab to a grid you may move to a line and cell using Arrow Keys.

The selected line is highlighted by colour.

The focused cell (if allowed by the grid) is highlighted by a special border.

### [Add, Edit, Delete](#)

Depending on context you may be allowed to Add, Edit or Delete rows.

[Mouse, Right Click] shows a context menu allowing you to Add, Edit or Delete the row.

Select row, [Edit (F12)] or [Mouse, Double Click] on a row to invoke an Edit window for the row.

Use [Insert] to add a row. Some of the row contents may be used as defaults in the Edit window.

Select row, [Delete] to delete a row.

### [Editing Cells](#)

Depending on context you may be allowed to edit the contents of a cell.

Using the Keyboard, once you have tabbed to a grid collection, you can use the arrow keys to focus on a row and column cell, then [More Info (F2)]. See below for recommend mouse actions.

### [Other Actions on a Row](#)

What happens to the selected row or cell depends on the action key or mouse choice you make and the purpose of the window containing the grid.

Many grids display read only data. [Mouse, Double-Click] may display further detail, such as by running a report or displaying a window form. [Mouse, Right Click] may display other context menu options. [Enter] may take the default action for a row.

Column cells section above.

### [Tab Control](#)

Subsets of the field controls on many Edit windows are organised using Tab controls which present subsets of the window in a style similar to a filing cabinet with a 'tab' per folder.

You choose a tab to bring to the front using [Mouse, Click] or, if already focused on a tab, using the arrow keys and [Space Bar]. Moving away from a tab often results in some aspect of the data to be saved in the database.

### [Splitters](#)

A thick black vertical or horizontal line within a form is a Splitter. Drag the splitter to enlarge or reduce areas of the form.

### [Edit Windows](#)

These windows may appear through choosing from the 'My Details' Menu.

These windows usually allow the user to see or update aspects of one of the items of the system or some form of business transaction. The more complex items will have controls over and above the regular Windows controls.

### [Standard Edit Buttons](#)

Whilst an Edit window may contain many buttons related to its function which perform other tasks, there are a common set of buttons listed below on most Edits.

#### [Save \(F10\)](#)

Saves the item, and any ancillary data which was changed, in the database, then closes the form.

#### [Accept \(F10\)](#)

This is typically in an Edit (child form) opened from within another Edit (parent form).

It remembers the changes in memory to return to the parent form, then closes the child form. Its parent form Saves the data to the database later, or can Cancel. An example is an Invoice Line Edit within an Invoice Edit.

## Cancel(ESC)

Closes the form without saving the item or printing documents. You may be presented with a 'Warning: Changes not saved' Save Changes? dialog box with Yes, No and Cancel buttons. This details the data which will be lost if you choose the No button.

## Report Preview Window

After the report completes it is presented in a Report Preview window. This is NOT a typical child window of the system, but an independent window, which either may be

- minimised or behind

or

- maximised and in front of

... the main Lentune window. If behind, it will be on the task bar in the list of windows above your Lentune System Icon, and named Preview. Choose it and it will display maximised in front of the main Lentune window. [Alt-Tab] can be also be used to select and activate it.

## Report Format

Depending on the report it may be in landscape or portrait format. Most report pages have a title area with the organisation name, report name and date, with a sub-title area containing selection criteria used. A footer area may contain date and time, the report name and 'Page N of M' information.

Reports are often sorted and grouped, with a grand total area on the last page.

## Controls

The report browser contains a Menu Bar and a Tool Bar just below it which allow you to find text, print on a default printer or via a Print Dialog, choose page format, Zoom, Scroll, etc.

Depending on context there may be a vertical and horizontal scroll bar. You may use these, the 'Hand' tool or Arrow Keys to scroll.

If the report is more than one page long, toolbar icons permit you to move to the next and previous, first and last page. The [Home] key takes you to the first page and the [End] key to the last page. The [Page Up] and [Page Down] keys scroll a page at a time.

Towards the right of the toolbar is an Export icon and a Send via Email Icon.

They permit you to save that report in a wide variety of formats, with an option to open the file using the default software assigned to that format or to email it using your default mail program. If saved in a file format with good formatting support such as Excel, PDF or Rich Text Format, most of the visual formatting of the report is preserved in the saved file. It is often useful to save as a Comma Separated Variable (.csv) file then open that in a spreadsheet in order to remove the report formatting and allow spreadsheet capabilities such as sorting to be performed.

## Adobe Acrobat Reader

It is common for reports to be exported as PDF documents. The file type .pdf must be associated with a Portable Document Format reader. Usually Adobe Acrobat Reader is activated to display such documents. All users should familiarise themselves with the Adobe Acrobat Reader application. From within this reader you should be able to print the document or email it as an attachment in .pdf format.

## Some Common Keyboard Shortcuts and Mouse Actions

### Context menus

[Mouse, Right Click] is used extensively throughout the system to present you with action options such as:

Add, Edit or Delete

... or to present context property sheets.

## Some Windows Defined Keys

[Alt-F4] [ Esc]	Close the window without saving. This is equivalent to a Cancel button or clicking on the X in the top right corner.
[Alt]	If there is no active window this key puts you into the Menu bar. You can then use arrow keys to view/select a menu item, then [Enter]
[Alt-X]	Activates the control with an underlined letter of X. For example Alt-W in the Main window is equivalent to [Mouse, Click] on the Windows menu item.
[Enter]	Takes the action corresponding to the default (focused) button.

All of the Window controls are selectable and can be activated via the Mouse. Most are also selectable through use of the Tab key.

## Lentune Defined Action Keys

These keyboard shortcut keys allow the keyboard to be used efficiently to achieve system tasks. Where they correspond to a Button control, they are shown in brackets in the Text on that button. When available as an alternative to a [Right Click] Context Menu, they are listed there. A separate document, Help->Keyboard and Mouse Quick Guide, is a 2 page document showing the most common shortcuts, also shown here.

Key	Meaning	Description
<b>Escape</b>	Abort	Corresponds to the Cancel(Esc) button in Browse and Edit
<b>Numeric keypad '+'</b>	Alternate Tab The "Add" key	Can be used instead of Tab key, and Shift++ instead of Shift-Tab for movement into and out of controls.
<b>Insert</b>	Insert	Corresponds to the Add context menu in a grid
<b>Delete</b>	Delete	Corresponds to the Delete context menu item in a grid
<b>F2</b>	More Information	In a Lookup, display a browse list matching the string in the lookup field, with Enter meaning Select. Roughly equivalent to Tab
<b>F3</b>	Summary	In a lookup, show a summary window for the field if it has one. For example a Receivable Account lookup shows contact information, aged balances and a monthly sales history.
<b>F2/F5</b>	Search	Corresponds to the Search button in a Browse
<b>F6</b>	Clear	Corresponds to the Clear button in a Browse or Lookup
<b>F8</b>	Add New Record	Add, usually taking the highlighted row into account as the insert point.
<b>F10</b>	Accept	Corresponds to the Save, Ok button in Edit.
<b>F10</b>	Edit record	Edit the highlighted row in a grid
<b>F12</b>	Edit record	Edit the highlighted row in a grid
<b>Shift-F9</b>	Delete Record	Delete the highlighted row in a grid

## Context Menu Items

Within a window, [Right Click] may present a Context Menu. Some or all of the items below may be presented, depending on the type of form.

Set Defaults		Remember values in fields
Clear Defaults		Clear remembered values
Add New Record	F8	
Edit Record	F12	
Delete Record	Shift-F9	

Edit Record (alternate Shortcut)	F10	
Search	F5	
Search (Alternate Shortcut)	F2	
View Summary	F3	
Clear	F6	

## Supplier Details

This part of the software allows you to access your account and transactions with the Wholesaler, to allow you to reprint or otherwise use the data, and to download invoice and price data. This menu item is only usable by users who have Account Access, as agreed with the Wholesaler.

## Account

This form displays a grid of Account Month End rows. Double Click to drill down to a grid of invoices and credits for the month. Within that grid, double click on an invoice row to display a copy of the Invoice/Credit.

## Invoices

You may search for invoices between 2 dates and/or by a combination of your order number/reference provided to the supplier when purchasing the goods. This corresponds to the text in the Client Order No and Reference fields shown on the printed Invoice.

If you select a row in the grid, double click displays the printed invoice with a diagonal red watermark indicating it is a Copy; Quick Invoice Preview shows the invoice in a form.

The Export Invoices button downloads the data corresponding to the search as a comma separated value (.csv) file which can be loaded into a spreadsheet or other software. The format is documented in the separate Lentune Export File Specification Document.

## Quotes

A grid showing your unexpired Supplier Quotes is presented. Informal, pricing only, quotes are not displayed, only formal Contract Quotes or Branch Quotes. Double Click on a row to obtain the Quote Document.

## Price

The Keyword text box allows you to enter one or more words or parts of words. An Example search string **double 10A whi V 692** produces a short list of products for a 10 Amp double outlet vertical white switch. The more you type the less you have to scroll through. The 'Search for Stock' button fills the grid.

The 'Download Full Stock File' button downloads a large Comma Separated Value (.csv) for import into a spreadsheet or other software. It may take several minutes on a Broadband connection to download the file. The status bar shows progress.

It contains Stock Code, Trade Price and Your Price. The format is documented in the separate Lentune Export File Specification Document.

The 'Download Bought Items' button downloads a file in the same format, but only includes items you have ever bought.

The 'Create Lentune Import Files' is for use by customers using the legacy Lentune V5 application.

## Packing Slips

This form displays a grid of Packing Slips which may not yet been invoiced by the Wholesaler. Double Click to drill down to the lines on the Packing Slip, presented in the Packing Slip Details tab. Preview Packing Slip displays a copy, usually with a red diagonal watermark saying it is subject to change.

## My Details

This part of the software allows you to access your purchase transactions with the Wholesaler, and add in your own stock or labour for the purpose of developing quotes or estimates and on charging to your customers. You can also manage your banking and customer payments.

## Location of Data

Note that all data resides on the Wholesaler's computer, and is saved in a part of their database accessible by you. The only data saved on your computer is Supplier Invoice or Price data you download or saved Portable Document Format (.pdf) files which are a by product of your previewing reports, invoices, etc.

You also obtain supplier prices via the Supplier menu and can download a price file.

## Typical Process for Selling to Customers

The purpose of items under the My Details menu is to allow you to prepare quotes and estimates, ensure that products purchased for a job are assigned to a customer invoice at a profit, and to allow you to manage invoices, account balances and payments by your customers.

## Clients

Before preparing a quote for a new customer, use the My Clients menu item to add a client record and enter details you wish to record about the client. Besides contact information and a notes area you can set either a default mark up on cost or discount on trade for the client. You can also set a Client to Active via a check box. Inactive clients don't show by default in the search lists.

You should allocate a unique code for each client. This will make it easy to choose when preparing quotes, etc.

If at any time you wish to search for or update a client record use the My Clients menu item, Select the client to update and choose the Edit Highlighted Client button.

## Products and Prices

The supplier's products, costs and trade prices will be available when preparing quotes, etc. You can also manage your own 'products', be they material or labour charge rates, travel charges, freight, etc.

Add or Edit your products, costs and prices using the My Stock menu item. Choose the Add New Stock button, enter the details and choose Accept button.

You should allocate a unique code for each product. This will make it easy to choose when preparing quotes, etc.

If at any time you wish to review your prices, use the My Stock menu item, select the stock item to update and choose the Edit Highlighted Stock button. From that point onwards the new prices and costs will be used. Already prepared quotes, etc. will use the old prices and costs.

## Quotes or Estimates

To prepare quotes or estimates use the My Invoice / Quotes / Estimates menu item to access the Trade Invoice Edit form. Use the Type dropdown to choose whether you are making a quote or

estimate, and the Status dropdown to indicate the stage the quote is at (To Send, Sent). You can add lines for items you purchased from the supplier for stock and your own product items such as labour charges using the area at the bottom of the 'Manage Lines' tab. Select a line in the top grid where you want to insert the new line. Choose 'Supplier Stock' or 'My Stock' tab. Search for and select the stock item, then complete the quantity, EITHER Discount OR Markup if appropriate, and Description if appropriate. The line is added after the selected line in the top grid.

Note: If you choose the wrong one of Discount or Markup, tab to the wrong one and enter 0 and tab. This will open the other one for editing.

The Trade Invoice Edit 'Manage Lines' tab also allows you to change the sort order of the lines on the invoice and to edit all the fields on a line. Select and Edit the line.

You can Print or Email a quote or estimate via the Preview button which displays the document in your PDF reader software.

### Preparation of Invoices

After you win the job you can use the Type dropdown to turn the document into an Invoice. Alternatively you can add a Trade Invoice using the Trade Invoice Edit form.

You should add a due date, for example 20th of next month, at that stage so that the customer's expected payment date is recorded, and you can use the Status dropdown to mark the work as In Progress.

If you purchase goods from the supplier for a job, you can assign them to a customer invoice at a profit, using the Assign Supplier Invoices form. One mode of operation is to assign or mark as processed all that you purchase, so the left hand grid becomes empty. This ensures you at least consider charging for everything you buy.

You can add or edit invoice lines for items you purchased from the supplier for stock and your own product items such as labour charges using the area at the bottom of Assign Supplier Invoices and the Trade Invoice Edit. The line is added after the selected line in the top grid.

You can Print or Email an invoice via the PDF reader software.

### Sending Statements

You can print Statements via the PDF reader software.

### Following Up on Payments

You can use the Outstanding Invoices and the Trial Balance reports to follow up on payments.

### Processing Payments

When customers pay, you should enter them using the Daily Banking menu item. This posts the payments to the customer account. You should also allocate them to invoices using the Payments tab of My Invoices/Quotes/Estimates->Trade Invoice Edit. This ensures the invoices are marked as paid, so they won't show as overdue or on the Outstanding Invoices report.

### My Details Menu Items

#### Assign Supplier Invoices

This form allows you to create a new Trade Invoice for you to charge your customers.

You can use

- Items you purchased from the Wholesaler
- 'Supplier Stock' such as cable from your own supplies
- 'My Stock' lines such as labour costs

and add them to the Trade Invoice, adding a discount on trade or a markup on your cost.

You can also add lines to an existing Trade Invoice.

The Save and Continue button should be used on a frequent basis to protect you from unreliable communication over the internet. The Accept Button saves your work and quits the form.

### [My Invoices / Quotes / Estimates](#)

This allows you to search for, Edit, Preview (to print) or add Invoices, Quotes and Estimates, and to change Estimates and Quotes into Invoices. Double Click on a grid line to Edit. The Due Date is used for accounting purposes for your Aged Trial Balance and managing overdue accounts.

### [My Daily Banking](#)

This form allows you to add payments made by your customers and post them to their account. This menu item is only usable by users who have Account Access.

### [My Clients](#)

This allows you to add, search for and Edit your clients, including contact information. You can also set a standard invoice discount on trade or markup on cost.

### [My Stock](#)

You can add or edit Stock records which could be actual material but could also be hire charges, freight or hourly labour charge rates. You can record both a cost and trade selling price.

### [My Setup Details](#)

The My Setup Details form allows you to:

- Reset ('Unremember') your login details so you can re-fill in the login form next time
- Limit the number of lines returned in searches
- Set messages for display on your customer invoices and statements.

This form is only usable by users who have Account Access.

### [My Reports](#)

#### [Outstanding Invoices](#)

This is a report of customers who owe you money.

This menu item is only usable by users who have Account Access.

#### [Trial Balance Report](#)

This is a detailed showing the up to date account balance and overdue status of your customers. This menu item is only usable by users who have Account Access.

#### [Client Summary](#)

This is a report of client contact information.

#### [Statements](#)

This is a statement report for you to send to customers who have outstanding balances. Within My Setup Details there is a standard message to appear on all statements, which could be for example your bank account details.

This menu item is only usable by users who have Account Access.

#### [Invoice/Credit Summary](#)

This is a detailed, or optionally summary, report showing invoices and credits with your customers. You can optionally select an individual client and from or to dates.

## Payments

This is a detailed, or optionally summary, report showing payments by your customers. You can optionally select an individual client and from or to dates. You can use this to take to the bank with your daily banking payments, as entered below.

## Trouble Shooting

### Pre-Requisite Software

If your software is not as specified in the pre-requisite software list and appears (mostly) to work, then fine. However neither your Wholesaler nor the authors of the software have out of date computer software or old or non-Microsoft operating systems with which to test or fix software problems unique to you. There is no point in asking them to unless you wish to pay for the computers, software, time and effort involved in solving your unique problem.

### Internet Access

The software is intended to be used over broadband Internet using Port 80, the standard used for issuing HTTP requests to web servers.

### Is the Wholesaler Web Site Available?

You should use your browser to access the Wholesaler's web site by typing the Web Site Address you typed in to the login screen. You should get a HTTP 403 Forbidden response, or a web page. Now append /webservice.asmx to that address. You should get a page entitled WebService, with a list of functions provided by the Lentune Web Service. If you do not, either the Wholesaler web site is not available (their problem) or you cannot contact it (your problem).

### Invalid User ID or Password

Contact your Wholesaler.

### Screen Resolution

The minimum screen size supported is 1024 by 768 Pixels. If scroll bars appear on the main window, or you cannot see the entire window, you need to adjust your Microsoft Windows screen definition to at least this size.

[Mouse, Right-Click] on your desktop and choose Properties, then the Settings Tab. Move the Screen Resolution slider. Choose OK. If you are not allowed to do this, contact your own company IT administrator or log in on an Administrator windows account.

### Firewalls and Proxy Servers

If your company imposes restrictions on Internet connections using this kind of software, it is your company responsibility to configure the connection to the supplier's Web Site. It uses only Internet Port 80, the normal port also used for web pages. The software supports Basic Proxy Authentication, when users have to enter a proxy User Id and Password to gain access to the Internet.

### First Point of Contact

If you are experiencing difficulty using the software or having Internet problems, your first point of contact should be your Wholesaler. Their technical staff should help you and will contact Lentune if something needs their attention.