

InFOREMAX RMA Web Portal 1.0 User's Guide



Welcome to the InFOREMAX RMA
Management System

*“Integrate a powerful e-business environment
today”*

InFOREMAX-based solutions enable your
electronic business programs and provide
new ways for you to enhance your customer
satisfaction and retention.

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Welcome to InFOREMAX Web Portal

InFOREMAX Web Portal is a web-based return material authorization (RMA) application that tracks product returns for service and manufacturing companies.

InFOREMAX Web Portal allows you to file return merchandise requests on web. It generates a unique number for the return request and sends notification email to your customers and service group. The Web Portal not only provides the ability to view the status of return requests, add comments and update customer profile online, but also it helps you to ship items for the return request by generating shipping labels and commercial invoices.

Unlike other web-based helpdesk solutions, InFOREMAX Web Portal allows your customers to register products online. As a result, you can manage different customers with their own registered products. The Web Portal also validates product warranty and flags warranty items whenever your customers file return merchandise requests online.

You can deploy InFOREMAX Web Portal on a third-party webserver as a standalone web-based application or deploy it in-house, integrated with InFOREMAX RMA Software to maximize its productivity for your repair services. Thanks to its fully customizable html template, InFOREMAX Web Portal is fast and easy to deploy.

Requirements

InFOREMAX Web Portal requires very little for basic operation. Your website is probably hosted on a Windows server. Just by uploading the InFOREMAX files to your website, you will surely be able to use the Web Portal in minutes.

However, InFOREMAX is a feature-rich application. If you want to implement send email, you may have to install specific components on your server or support other server features. Use the requirements below for web portal deployment.

Requirements for the server where you install web portal

- ✓ A Web Server that supports ASP scripts
- ✓ Support for one of the following databases: Access or SQL Server
- ✓ 50mb disk space

Requirements for web portal management

- ✓ Web Browser (preferably Internet Explorer 6 or higher)
- ✓ FTP Client
- ✓ An email account where you can receive web portal notifications

Requirements for optional features

- ✓ One of the email components supported by InFOREMAX (to send email): JMail, ServerObjectsASPMail1, ServerObjectsASPMail2, PersistsASPMail, CDONTS, or BambooSMTP.

Skill requirements

No special skills are required to use InFOREMAX, but you may need basic FTP file transfer and HTML knowledge to install the web portal, and ASP programming and SQL skills to customize it.

Getting Started

Before you can start using InFOREMAX Web Portal, the software must be installed on your server and configured. The following paragraph provides step-by-step instructions on how to perform this task.

Installing the Software

Installation on a local server

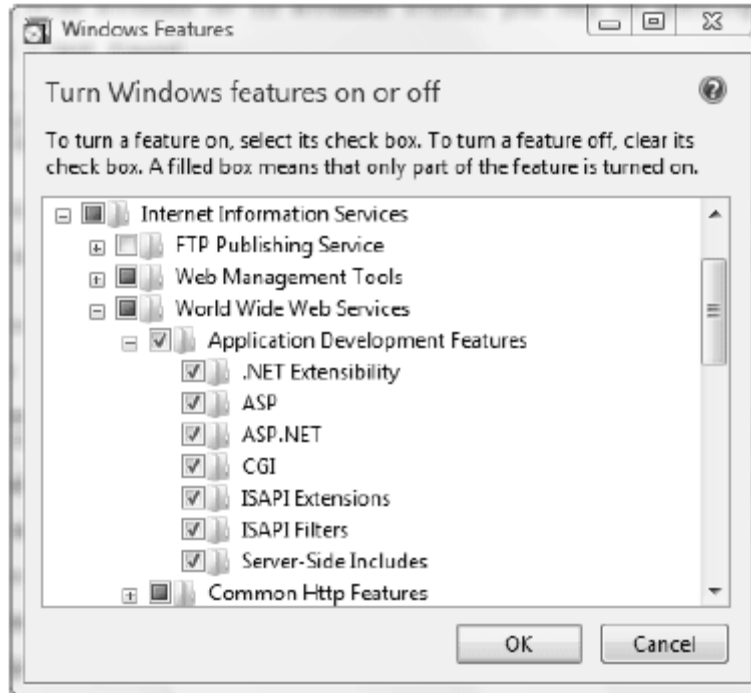
1. Unzip inforemax.zip into a folder named inforemax.
2. Copy the contents of inforemax folder inside WWWRoot (the root of your web server) or inside your designated site folder.
3. Your inforemax folder must have this structure:

```
.      <DIR>      12-20-08 9:22p .
..     <DIR>      12-20-08 9:22p ..
DEFAULT ASP  301   10-11-08 12:46p default.asp
GLOBAL ASA   634   12-02-08 12:33p global.asa
WEBPORTAL    <DIR>      12-20-08 9:22p webportal
INCLUDES     <DIR>      12-20-08 9:22p includes
DATABASE     <DIR>      12-20-08 9:22p database
BACKOFFICE   <DIR>      12-20-08 9:22p backoffice
```

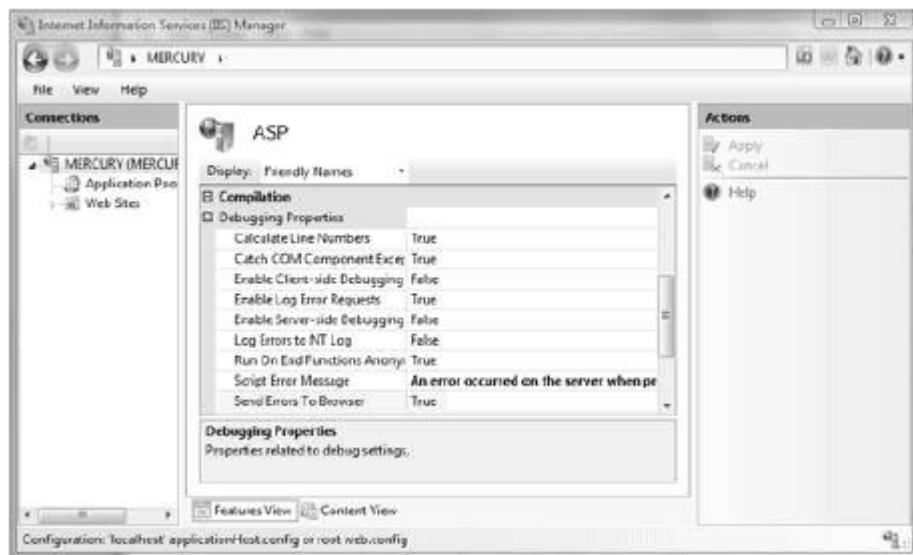
4. Define full permissions on database folder and database/webportal.mdb file according to the operating system you are using.

Windows Vista permissions

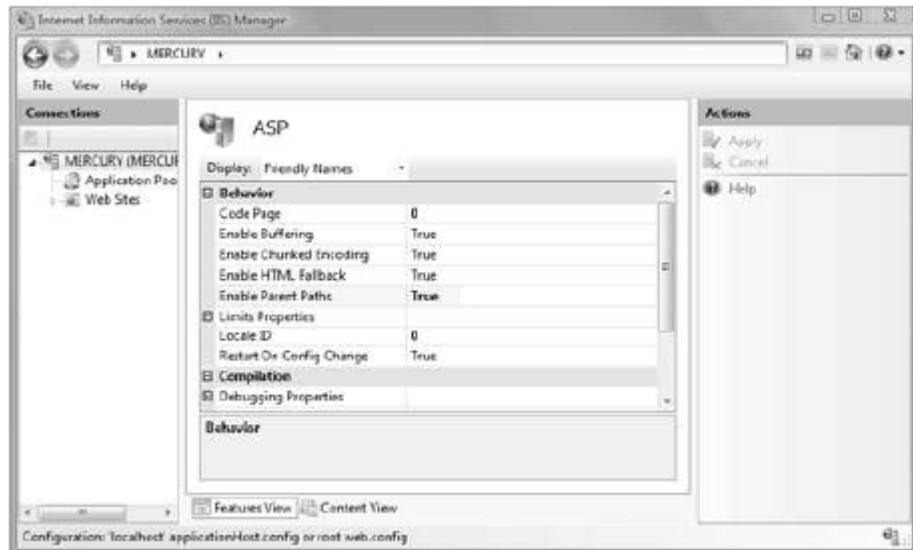
- a) Right click on inforemax /database folder
- b) Go to Security tab, give all permissions to IUSR account to the Windows directory security with Modify; Read & Execute; List Folder Contents; Read
- c) Enable ASP into Windows Features: Go to control panel > Programs and Features > Turn Windows features on or off > Internet Information Services > World Wide Web Services > Application Development Features.



- d) Change the 'Send Errors To Browser' setting to 'True'. Go to IIS Manager > ASP > Debugging Properties



- e) Then change 'Enable Parent Paths' setting at IIS Manager > ASP > Behaviour



Windows XP permissions

- a) Disable the "Use simple file sharing" setting

Within Windows Explorer [Start -> All Programs -> Accessories -> Windows Explorer], open the Folder Options interface [Tools -> Folder Options] and then go to the [View] tab and deselect the "Use simple file sharing" option. Select [OK] to save the change. Now you will see the [Security] tab within the Folder Properties interface and the [Sharing] tab of the root file system of a drive shows the available setting options.

- b) Right click on inforemax/database folder
- c) Go to Security tab, give all permissions to Anonymus Internet User
- d) Go to Sharing tab, Share the database folder

Windows 2000/3 permissions

- a) Browse to the webportal.mdb file on the server
- b) Right click on the database file
- c) Click on Properties, click on Security tab
- d) Add the IUSR_MACHINENAME user to the permissions list, and grant this user full control (where MACHINENAME is the hostname of the server)

Open your Web Browser and load <http://localhost/inforemax/backoffice>

5. The first time you run BackOffice an installation Wizard will be launched. Follow the simple steps to complete installation. Among other settings, you will be asked for a password. Write down the password so you can login to BackOffice at a later time

Installation on a remote server

1. Unzip inforemax.zip into a folder named inforemax.
2. Use an FTP Client to upload the contents of the local folder to your web hosting space. Copy the contents of inforemax folder inside WWWRoot (the root of your web server) or inside your designated site folder. <http://www.Your Domain Here.com/inforemax> folder must have this structure:
3. Your inforemax folder must have this structure:

```
.      <DIR>      12-20-08 9:22p .
..     <DIR>      12-20-08 9:22p ..
DEFAULT ASP  301   10-11-08 12:46p default.asp
GLOBAL ASA   634   12-02-08 12:33p global.asa
WEBPORTAL    <DIR>      12-20-08 9:22p webportal
INCLUDES     <DIR>      12-20-08 9:22p includes
DATABASE     <DIR>      12-20-08 9:22p database
BACKOFFICE   <DIR>      12-20-08 9:22p backoffice
```

4. Define full permissions on database folder and database/webportal.mdb file according to the instructions provided by your web hosting service. Usually, you will have a web control panel to select the folder and assign permissions
5. Open your Web Browser and load <http://www.Your Domain Here.com/inforemax/backoffice>
6. The first time you run BackOffice an installation Wizard will be launched. Follow the simple steps to complete installation. Among other settings, you will be asked for a password. Write down the password so you can login to BackOffice at a later time.



Most installation problems are related to assigning permissions on the database. If you follow all steps closely, you should be able to achieve it.

Installation Wizard

InFOREMAX contains numerous configuration options, some of which require a long description, so we have created an Installation Wizard with the most common configuration options to help you set up the web portal in a matter of minutes.

After installation, when you try to access the web portal for the first time through the URL <http://localhost/inforemax> or <http://www.Your Domain Here.com/inforemax> you will be redirected to the Installation Wizard.

Step 1 - Company Information

The Wizard requests information on your company. The company name will be displayed in outgoing emails, and full company details will be displayed on the invoices, shipping labels and other internal pages with contact info.

Step 2 - Regionalization

The Wizard requests region-specific information such as date format and currency. The currency symbol will be displayed on all pages where prices are shown. The date format will be used to interpret the date received from the server. Contact your web hosting support or go to Settings/Regionalization to find out your server's date format.

Step 3 - WebPortal Behaviour

Several web Portal options are enabled or disabled: disabling registration of new customers (used for private stores), retrieving forgotten password generating (so that customers can retrieve their forgotten password via email), displaying custom fields, and others.

Step 4 - Email Settings

The Wizard configures settings to send email from the store. If you are not sure about the information required, leave NONE as the email component, since an incorrect configuration could produce errors during RMA request. We suggest you contact your web hosting support and ask:

- a) What email components are installed on the server?
- b) What is the SMTP URL?
- c) What POP accounts are configured for my domain?

The answers will help you configure this Wizard step.

If you have your own server and you are unsure about email configuration, we suggest the following:

- a) Download the free email component Jmail from www.dimac.net
- b) Install it on your server
- c) Select Jmail at this step of the Wizard
- d) Take the SMTP mail server and email from account information as they are configured in your mail client (Outlook or other)

Step 5 - Security

The Wizard requests your administrator password and encryption key. The password will then be used to log into the Backoffice, where you will be able to manage your customers and RMA. Remember the user for login will be "admin".

This step will generate an encryption key. The encryption key is a combination of numbers and letters. It will be used to encrypt sensitive data in your web portal. The string by default is a random combination.



Did you know that...?

If you run the installation wizard later again, a new encryption key will be generated. Your old key will be lost and cannot be recovered – and your existing users will not be able to login to the system with their previous password.

Step 6 - RMA setting

The Wizard requests an RMA prefix. The prefix will be used to add in the beginning of all automatic numbers for RMA.

After completing Step 6 you will be able to access the Backoffice to load products, and finally test the web portal.

Backoffice

BackOffice is the basic control panel you will use to manage your web portal.

Login

To enter BackOffice, type in your browser the URL
<http://www.Your Domain Here.com/inforemax/backoffice>, or
<http://localhost/inforemax/backoffice> in the case of a local installation.

Enter the user "admin" and the password you selected at step 5 of the Installation Wizard.

If the information is correct, you will see a menu with options.

Settings Menu

Configuration

From this option you can modify most configurable aspects of your web portal. Before making a change, make sure you understand the scope of your actions.

You should also be especially careful with the pEncryptionPassword field. Any modification to this setting will disable all passwords stored previously.

Administrators

From this option you can create a new users or modify an existing one. By default the following three roles exist in the BackOffice.

<u>Role</u>	<u>Security Privileges</u>
Administrator	Full Permission
Power User	Read and Write Permission (excluding <i>functions under settings and utilities menu.</i>)
Contributor	Read and Write Permission on customer and RMA data only. (cannot modify products)

From this section, you can also modify the password for the web portal administrator (admin). Make sure you use a combination of letters and numbers from 6 to 10 characters long.

RMA Notification

From this option you can add and edit custom message. This message will be included in an email notification sent to your customer whenever a RMA request is submitted on web.

Screen Messages

From this option you can manage all messages that appear on screen. Real ID is the id provided by the database. Assigned ID is one number assigned by the administrator. If you have a multilanguage web portal, this ID should be the same for the original string and the translated string. Then you have the file name, which is only used as a reference and the screen message.

Storefront Menu

From this menu you can manage items and products.

Products

From this option you can add and edit products. The add product page prompts you to choose a product and enter its warranty period. You need to enter items first before you can choose a product. Remember only the fields marked with an asterisk are required. Unit of Measure and Harmonized Tariff Code will be used in commercial invoices.

Note that products cannot be deleted. If you want to exclude a product from the selection, you can disable it from the web portal.

Items

From this option you can add and edit items. The add item page presents several fields for you to fill in. Pricing information will be used in commercial invoices. Remember only the fields marked with an asterisk are required.

Note that items cannot be deleted. If you want to exclude an item from the selection, you can disable it from the web portal.

Sales Menu

From this menu you can manage customers, RMA, reports and product registration.

Customers

From this option you can search customers by entering a string from their names or email addresses. After locating a customer you can send an email, modify personal information, enter a RMA, register a product, and disable them if you don't want them to log in the system.

RMA

From this option you can list the RMA that were submitted at the web portal. An RMA list is displayed first. You can click on any RMA to see details.

At the RMA details page you can see all information on the RMA. You can change RMA status, enter tracking number, and leave a message for the return request. From this section, you can also generate shipping label, commercial invoice and RMA worksheet.

RMA Report

From this option you can get a simple RMA report by month, including a chart. You will be able to view detailed statistical reports including RMA/product, RMA/status and RMA/month.

Utilities Menu

In this menu you will find utilities to maintain, configure and diagnose your web portal.

Encryption

From this option you can enter strings for encryption or decryption. It is especially useful to decrypt password information information.

SQL Query

From this option you can operate on the database by means of SQL sentences. Using this utility requires SQL knowledge, and incorrect use could delete important data from the database and damage the web portal.

Users with SQL knowledge will find it very useful to diagnose problems, execute simple reports, and configure aspects of the web portal that are not readily manageable from Backoffice

Reset Functions

From this option you can delete all data in customer, RMA, item and products database. Consider the deleted data cannot be recovered.

Import

If you have an existing customers and products, you will surely prefer to import it rather than load all the information manually. From this option you can import Excel files with your customers and products.

Consider File System Object must be enabled in your server, and the import files must be located in the BackOffice folder.

The Excel templates used for importing data are present in the ../backoffice/excel folder.

Detailed instructions for importing spreadsheet data into the database are available in the BackOffice

Logoff

Make sure you log off after using BackOffice so that nobody else can access your control panel while you are away from the computer.

Security Concerns

We will provide some initial tips to secure your web portal.

Database: if you are using Access you must consider that the database is stored in one file named webportal.mdb By default anyone can download the file by knowing the real location and name.

What can you do to prevent this?

1. Rename the database file and change the database folder name also reflecting those changes at inforemax/includes/settings.asp
2. If it's possible move the database file to some folder outside public access and relate the file to your store using DSN
3. Add a password to the database folder so if anyone tries to download the file the login screen will appear
4. Add a password to the database file from Access and reflect that change to inforemax/includes/settings.asp

If you are using SQL Server just be sure that your password is not the default and prevent remote DB administration if possible. You may also check with your database vendor for regular patches to security bugs.

Encrypted information: InFORMEAX Web Portal sensitive information using RC4 algorithm (or DES if you enable this feature). If anyone gets a password from the database, he will still have to decrypt that information. The only way to decrypt the information is with the Encryption Key located at settings table. We provide a random encryption setting created at Wizard execution. Consider that all your previous passwords and encrypted data will not be accessible anymore if you change the key.

Settings

The file `inforemax/includes/settings.asp` allows you to configure the database location, database type and default email configuration for Error Trap script. All other settings are contained in settings table in the database and you can modify them with BackOffice.

BackOffice Programs also have their own `settings.asp` file located in `inforemax/backoffice/includes/settings.asp` where you can configure some basic functions of the BackOffice (like demo mode, etc)

StoreFront Basic Settings (`inforemax/includes/settings.asp`)

By editing this file with a text editor you will be able to define an alternate connection string, database type or database location. You can also define Email Settings for Support Error script: these settings are used for outbound Support Error. Email configuration of Advanced Settings is not used for Support Error since those settings are stored into the database and if some error occurs, probably database will not be accessible.

StoreFront Advanced Settings

Using BackOffice you can browse to Settings/Configuration. From this option you can edit in real time all the advanced settings of the web portal grouped in several categories.

Company Information: Company or site name and address appear on shipping label, commercial invoices and on most e-mail messages sent to customers. Here you can also specify the phone, fax, zip code, etc

WebPortal Behavior

`pEncryptionPassword` is the encryption string for RC4 algorithm. If you want to change this setting, all your previous passwords will not be recognized. Make sure to change the password before you logout or you will not be able to login again to the BackOffice if you changed the encryption password.

`pAllowNewCustomer` is used to enable new customers form in login process; if you don't want new customers to register just change this setting.

pForgotPassword is used to enable password notification e-mail for existing customers; if you don't want customers to retrieve their password on web just change this setting.

E-mail Settings

InFOREMAX Web Portal automatically sends your customers e-mail messages under these circumstances:

- ✓ When they submit an RMA, to confirm the RMA request.
- ✓ When you submit an RMA request on behalf of your customers through BackOffice.
- ✓ When they forget their login password, to remind them about the password.

The e-mail settings allows you to configure:

1. The E-Mail component is probably the most important setting in this section. This is what tells InFOREMAX the e-mail program that your Web server is using to send e-mail messages. "CDONTS" is the default setting. CDONTS is a script used by a large number of Web hosting providers to allow Web sites to send e-mail messages to their visitors. Check with your Web hosting provider to find out what application is installed on your Web server to handle e-mail messaging. Other popular applications (COM Objects) used for this purpose are: JMAIL, PersitsASPMail, ServerObjectsASPMail and BambooSmtplib.
2. Admin E-mail: This is typically the address of the person that is managing the web portal, or "administrator". This address receives RMA notifications.
3. "From" E-mail: This is the address that is used for all messages sent automatically from your web portal to a customer. This address shows up as the "From" address in the message that the customer receives, and it is therefore also the address that replies will be sent to, if the customer decides to reply to a message.
4. SMTP Server. This is the send mail transfer protocol server. It can be a remote server also.
5. Debug Email: This option is useful to determine the cause of email sending errors since it will display the error description on screen.

RMA and Customers

This section includes everything related to RMA and Customers such as viewing information about your customers, e-mailing a customer, adding a new customer to the database, viewing reports and charts, registering products and more.

Viewing Customer Information

To locate a specific customer, you can search using the customer name. Or you can browse all registered customers by clicking on *RMA / Customers / List All*.

When you find the customer you were looking for, click on the Modify button to view customer details.

Note that customers cannot be deleted. If you don't want a customer to use the web portal, you can disable it from the web portal.

Adding a New Customer

By adding new customers in BackOffice you can register them in advance with your web portal. You can then e-mail them their user name and password, and a link to your web portal.

When they register products or submit RMA, they will not have to register with the web portal, as their account has already been set up. All they will have to do is log in with the user name and password that you provided, and contact, billing, and shipping information will already be there.



If you set up a new customer, remember to provide him/her with the login information that you created (user name & password). The customer's e-mail address is the user name.

Adding custom fields

You can add up to three custom fields to each customer. You can use these fields for information like: EIN/VAT Number, customer type, etc.

Instructions:

1. Go to BackOffice/Settings/Configuration
2. Enter the field label for CustomerFieldName1, Customer FieldName2 and Customer FieldName3

RMA Requests

You can locate one specific RMA with the RMA number, list all RMA or list RMA by status.

Once you have selected one RMA you can view all the details of that RMA such as Date, original PO number, Shipping Details, Defective Products, Return Reasons etc.

You can also add information about the Shipping Tracking like UPS, USPS, FedEx tracking numbers and any other information about shipping. This information will be available from RMA Tracking listing to the final customer. Shipping Tracking can be updated using BackOffice.

From *Your Account* menu, customers can click on RMA request link and fill out the form to request an RMA. When the customer submits a RMA request, the RMA request will be sent to the store administrator for approval. When the RMA is approved by the admin, the customer will be able to print a shipping label and commercial invoice from RMA details.

Managing Your RMA Requests

One of the most important functions of the RMA Display is the ability to change the status of the RMA. By default all RMA are stored as Submitted. To understand how the Manage RMA component of InFOREMAX works, let us first summarize how RMA are handled by your web portal.

Status	Id	Previous Status	Security Privileges
Submitted	2	N/A	At first all RMA will be saved as Submitted.
In-Progress	3	2	Once you receive the defective product and start working on the repair, you may change the status to In-Progress.
On-Hold	4	3	
Closed	5	4	You can also change the status of the RMA to Closed when you complete the repair and return the product to your customers.
Cancel	6	2,3,4	Cancel an RMA if you receive invalid RMA. Cancelled RMA will not be considered for reports and charts.

Generating RMA Worksheet and Invoices from the BackOffice

With BackOffice you can generate RMA Worksheet and Commercial Invoices based on RMA request. You will have to select one specific RMA and then you will be able to print the above documents in your printer directly from the web application.

The Invoice template is located in the script
- *backoffice/rma_invoiceTemplateReturn.asp*
- *webportal/rma_invoiceTemplate.asp*

The RMA Worksheet template is located in the script
- *backoffice/rma_worksheetTemplate.asp*

You can change the layout using any HTML editor. If you have BackOffice a bar code chart will be printed in the Invoice so you can use a Bar Code Reader for your accounting programs or third-party applications.

Generating RMA Reports

To view sales reports for your web portal, select Sales. The window that is displayed provides the following information:

- RMA per product
- RMA per status
- RMA per month

InFOREMAX allows you to filter per year depending on the report. Some reports will show charts using Java technology (included with most popular web browsers like IE 5.0 and above).

Utilities

Utilities menu is a compilation of tools that will assist you in the day by day management. Here you can find a Decryption/Encryption Tool, a form to post SQL Queries to the database, Reset Functions to blank the database, Import Utilities, etc.

Generic SQL

This menu is one of the most important for debugging and testing. You can post SQL Queries such as:

```
SELECT * FROM CUSTOMER
DELETE FROM ITEM WHERE item_id >2
INSERT INTO admins...
```

You can find several guides and resources about SQL in the Internet such as <http://www.w3schools.com/sql>

Reset Functions

Be careful with these links. The main purpose of Reset Functions is to clear certain parts of the database. You can clear all RMA and customer records with one click. If you want to make this procedure manually it will get complicated since there are 3 related tables and sometimes you cannot delete one record if there is another related record.

Importing data to Microsoft Excel Spreadsheets

With this function you can import products, items, customers and registered products spreadsheet data into the database

The Excel templates used for importing data are present in the.../backoffice/excel folder.

Professional Databases

Your web portal includes an Access database and a SQL script that creates professional database structures in a SQL Server. The following paragraph provides step-by-step instructions on how to create SQL database. These instructions assume you have a working knowledge of Microsoft© SQL Server. If you have any problems following these instructions please don't hesitate to contact technical support.

Creating the Microsoft SQL Server Database

1. Open SQL Enterprise Manager and Create a new database called "InFOREMAX".
2. In SQL Enterprise Manager go to Tools>SQL Server Query Analyzer. On the drop down box at the top right make sure your database "InFOREMAX" is selected.
3. Then copy and paste the contents of InforemaxWebSQL2005.txt into the Query Analyser.
4. Click the green play button at the top. No errors appear.
5. Go to Security, Login Sessions, add a user name "Inforemax" using database "Inforemax". Put SQL Server authentication.
6. Select Users in tree view. New Database User named "Inforemax". With public and db_owner checked.
7. Open inforemax/includes/settings.asp and change the connection to SQL method. Change the IP of the server (127.0.0.1 for local server) and change the password by the one you selected on item 5.
8. Now you can open the web portal with BackOffice

Appendix A: Customizing your web portal's graphical interface

It is a good idea to keep the look & feel of your Web site consistent across all pages. This helps you convey a sense of professionalism and quality to your Web site visitors. For this reason, your web portal pages should appear just like any other page of your Web site. This section explains how to integrate your Web site's design with the pages generated dynamically by InFOREMAX Web Portal. The following paragraphs require a basic understanding of HTML.

First Step: create a template.

A template is typically a Web page that contains the main graphic and navigation elements that make up a Web site's interface. For example, the template on the right features a few graphic elements at the top, and a navigation menu on the left side. The page content would typically go where the "Insert Code Here" message is located. Web portal code would be inserted in the same area. When you create a template, it is a good idea to change all the navigation and image locations from relative (e.g. images/myimage.gif) to absolute (<http://www.mysite.com/images/myimage.gif>). This ensures that none of the links will be broken, regardless of the directory or subdirectory where the page may be located.

Second Step: create "header.asp" and "footer.asp".

Place your mouse cursor at the beginning of the section where the page content should appear. If you are using an HTML editor such as Macromedia® DreamWeaver or Microsoft® FrontPage, you can do this in the design view by positioning the cursor at the center of the cell that is going to contain the page content (i.e. web portal code, etc.). Now switch to the HTML view to display the code. Copy all the code from that point to the beginning of the page, paste it into a new Notepad file, and save it as "header.asp". Go back to the template file and

now copy all the code from that point to the end of the document, paste it into a new Notepad file, and save it as "footer.asp"

Third Step: upload the files.

Upload both files to the "inforemax/webportal/" folder on your Web server. You will see that sample files are already located in that folder. Rename the sample files before you upload your files to the server so that you can use them as a reference.

Appendix B: Database description

Customer Table

Field Name	Date Type	Max Length
Customer Name*	Text	100
Job Title	Text	50
First Name	Text	50
Last Name	Text	50
Email	Text	250
Phone Number	Text	30
Fax Number	Text	30
Billing Address	Text	250
Billing City	Text	50
Billing State	Text	50
Billing Zip	Text	20
Billing Country	Text	50
Shipping Address	Text	250
Shipping City	Text	50
Shipping State	Text	50
Shipping Zip	Text	20
Shipping Country	Text	50
usrdeftext1 - 3	Text	100

Product Table

Field Name	Date Type	Max Length
Product Name*	Text	50
Warranty Period*	Integer	
UOM	Text	30
HTC	Text	50

Item Table

Field Name	Date Type	Max Length
Part Number	Text	30
Part Name*	Text	50
Cost	decimal(15, 2)	
Price	decimal(15, 2)	

Customer Product Table

Field Name	Date Type	Max Length
Company Name*	Text	100
Product Name*	Text	50
Serial Number*	Text	30
Purchase Date*	Date/Time	
Purchase Location*	Text	50