<REPTIWARE/>

Getting Started Guide

Introduction:

Reptiware has been the vision of a dedicated team of developers, who also have a strong passion for reptiles.

After more than two years in development the first version was released in 2018, followed by an update a few months later. In 2019 a major update was released which proved to be quite a challenge for the development team given the powerful program Reptiware has developed into.

Reptiware now caters for a wide range of customers. From the hobbyist who has a single reptile, the enthusiast that has a few dozen reptiles, right up to the major breeder or retailer. Not only can you now keep track of all the husbandry requirements for your reptiles, you can keep records of suppliers and customers, maintain stock control, and track payments.

The reports section has also been improved with detailed reports in all the modules, with some having the added feature of selecting the order the data is displayed.

But we're not stopping there. We listen to our customers, and try to incorporate suggestions and additions in future builds of Reptiware. Future modules will include mobile app integration, improved feeder module with supplier integration, and more.

Thank you for choosing Reptiware, and with your continued support we are confident that Reptiware will become the number one choice for everyone in the field of herpetology

The Reptiware Team

Getting Started

Reptiware is subscription based. Current subscription options can be found on the Reptiware website. Once you have registered and chosen a plan, you will receive details of your subscription key and credentials via email, which is required as part of the installation process.

- Having downloaded the current version of Reptiware, extract the set up file to a folder on your PC.
- Run the executable file
- The installation wizard will launch
    - Confirm the language required
    - Having read the upgrade notice select Next
    - Accept the EUL agreement – select Next
    - Accept or browse to the installation folder – Next
    - Accept the start menu folder – Next
    - Select the option for desktop short cut - Next
    - Click Install
    - Files will be extracted and installed to the PC and upon completion will give options to view the manual and launch Reptiware. Leave the option to launch Reptiware checked and click the finish button
    - The set up window will shortly be presented. By default the new user option is set. If you are upgrading from a previous version chose the existing user option and click the Update Now button which will complete the installation and take you to the login screen.
    - If you are a new user enter your email address and licence key in the nominated boxes and click continue.
- If you set up the application as a new user, you will be presented with the quick start guide
    - Enter the name of your company (or just your name if you are not trading)
    - Enter the optional address data that will appear on printouts.
    - Select the paper size
    - Select the code for tax
    - Select the currency
    - Select the date format
    - Select the default language
    - Select the measurement standard
    - Select telemetry and error reporting options
    - Click Next
    - If required, select the option to track stock quantities
    - Click next
    - If upgrading form HerperPro follow the instructions to import the old data. If you are not updating from HerperPro select Skip
    - Accept the default options for modules
    - Click Next
    - Click Finish
    - You will then be presented with the Login Screen. The default user account is Admin with Admin as the password. Enter this password and click on Login

To get the most out of Reptiware you need to set up additional user preferences. By default Reptiware has been configured to land on this module the first time the application is run.

This guide covers the basics. Reptiware is so flexible that it's almost impossible to write a detailed in-depth manual. Guidance text is incorporated within the modules, but if you still need help then please submit a support ticket via the Reptiware website.

Preferences:

The preference menu is located down the left hand side of the screen. The options under each section will be displayed to the right, with some sections having multiple tabs at the top of the screen.

Starting at the top of the menu, the first option is **General Setup**

The licence and subscription status, a few self explanatory system settings and preview printing options are displayed to the right of the menu. These can be left alone in their default settings. The paper size should reflect the option set in the installation wizard.

The report icon defaults to standard, but you can chose custom, and then click the underscored custom to browse to an image or logo of your choice. Once selected a miniature thumbnail will be shown.

The main options are to the right of this panel. There are five main tabs: Regional, Modules, Backup/Restore, Auto Sequencing and Other. Below them are additional tabs relevant to the main tab selected. By default the Regional main tab is selected, with Currency sub-tab hi-lighted.

Regional Tab

Regional > Currency:
This should show the currency selected as part of the installation wizard. Below this is a table of exchange rates that the application uses these rates are automatically updated each time the application is launched so they remain current.

Regional > Date & Time:
This sets the date format for inserting time stamps in notes etc. Reptiware uses the format set under the system settings of the PC, so the PC date format will need changing if the desired format has not been set.

For the purpose of this getting started guide you can skip the **Regional > Address Formats** and **Country Address** tabs

Regional > Language:
This sets the default language the application will use. This should be defaulted to the same language chosen during the installation wizard

Regional > Tax:
This sets the default wording for sales tax the application will use. This should be defaulted to the same format chosen during the installation wizard

Regional > More:
This sets the default units of measurement the application will use. This should be defaulted to the same format chosen during the installation wizard

Module Tab

This allows you to select what modules are shown at the top of the main screen, and the order these can be arranged in. For now, leave the default settings which will show all modules apart from locations.

Backup & Restore Tab

This section allows you to set up the backup storage locations, both locally and remote.

By default the two notifications are turned on and can be left as is

You can tick as many options for backup locations as you wish. The first is the destination on a hard drive. This can be local to the PC the application has been installed on, or a mapped network drive on another PC / server / NAS drive. By default this location is set to C:\Users\username\MyBackup.

The same process goes for the Dropbox, MS One drive, Google drive, Box and Cloud Me folder locations. Whilst the backup is still stored locally under each of the chosen file locations, the synchronisation with the associated cloud location means the files are copied to these online storage locations as well. If you experience issues with accessing these remote locations please consult with the service provider on access requirements.

To manually backup the database select the **Backup Now** button

Restoring a backup:
Pay attention to the notes regarding restoring a backup. From version 1.0.4 the method was changed. If you need to restore a 1.0.4 backup file, follow the prompts that appear on the screen when the **Restore** button is selected.

If you need to restore a 1.0.3 backup then you will need to re-run the installation wizard and chose the “existing user” option.

Note:
Restoring a backup will over-write all the existing data, which is why its good practice to always do a backup after every change or update performed. The Reptiware development team accept no liability or responsibility for any loss of data under any circumstances.

Auto Sequencing Tab

This section allows you to set up and customise the numbering for sales orders, invoices, purchase orders etc. Typically this could be PUR for purchase orders, INV for invoices etc

Number Prefix:
If you want to prefix the numbering with your own lettering (max three characters) type them in the prefix box for sales orders. As you do you will see a preview of the layout in the example below the prefix box.

Hyphen:
If you want to insert a hyphen between the prefix and the numbering click in the (-) box. A green tick will be placed in the box and the example will be updated to reflect the change.

Dynamic Prefix :
Dynamic prefix options will add the date in whatever chosen format is selected from the dropdown list. By default this is set to None

Next Serial:
This allows you to set the numbering format. To set or change the number click on the pencil icon next to the numbering box. A pop up will appear; enter the format of numbering with leading zeros for example 000001.

Repeat this for the remaining sections (Invoices, Receipts, Shipping and Purchase Orders)

Other:
The numbering format for Reptile records, Contacts, Communications, Tasks, Products, Locations, payments, Projects, Documents and Purchase Invoices can be set by clicking on the relevant buttons. These options don't need setting as default and can be left unchanged.

Other Tab

In this section the screen layout and application settings can be set. The default options to display all data (unfiltered), check for plugin updates, telemetry and error logs are set active as default.

The default window size is set to maximum, which means that the application will launch at the screen resolution of the display monitor

Telemetry:
Full explanation of why this option is selected as default is explained in the onscreen notes.

Error Reports:
Full explanation of why this option is selected as default is explained in the onscreen notes.

My Company

The second menu option is **My Company**. Here you set up the main identity on the system.

Identity Name:
This can be your own personal name, trading name or business name. By default only one identity is created, but additional identities can be created by clicking on the + on the dark green header. The default identity check box will be ticked.

Logo:
A colour or black and white logo that can be selected which will appear on all printed documents.

Company Name:
Enter the trading name. This and the sub heading will be the same as the information entered as part of the set up wizard

Location:
This is used to track stock etc, and can be either areas within one physical location (stock room, warehouse, shop floor etc) or different locations such as remote warehouse or multiple shops.

For now leave it set to the default location 1 (main stock location). Locations can be added later by selecting the manage link, or by enabling the locations module (see the general setup section above)

The panel on the right of the screen covers additional settings for the identity. The first two options, **Identity Name** & **Identity Preference** can be left as per default settings

Report Icon:
Select the default icon, or custom icon that appears on all the reports produced by the system. To change the icon to custom click on the custom link and navigate to the image.

Logo for Home Screen:
Select the default image, or custom image that appears on the home screen. To change the icon to custom click on the custom link and navigate to the image

Reptile Related

The third menu option is **Reptile Related**. Here you set up the main preferences for the reptile on the system.

Custom Fields:
There are 6 custom fields available for use in the reptile module. We've included these just in case you have a specific item you wish to record which has not already been covered. Here you can enter the label text for each of those fields

Growth:
Set the default units for weight and length.

Warnings:
To receive a notification when a reptile is due to be fed, or is under medical attention tick these boxes

Seller Guarantee:
If you are selling products or reptiles you can add a guarantee statement here.

Reptile Creation:
By default this is set to manual entry so you can specify your own reptile reference number for each record

Storage Management

The next item on the main menu is Storage Management.

Custom Fields:
There are 3 custom fields available for use in the storage module. As in other modules we have included these just in case you have a specific item you wish to record which has not already been covered. Here you can enter the label text for each of those fields

Feeder Inventory

The fifth item on the main menu is Feeder Inventory.

Custom Fields:
There are 3 custom fields available for use in this module. The labels can be set here.

New Record Defaults:
Set the units of weight and length

Track Feeder Inventory:
This keeps track of food items used for the reptiles.

List Values

The sixth menu option is **List Values**. As you will see in the middle panel there is a multitude of lists that the application uses. The majority of these lists can be left as default, but there are some that need modifying based on where in the world you are, and the species of reptile kept. This guide will cover those basic lists, but it's worth browsing through each list to see if you wish to edit them to suit your preferences. The main lists that need editing are:

Accounts – Nominal Codes:
If you are running a business the nominal codes can be edited, or additional codes created. To edit simply click the existing code or name and delete then retype the entry as required. If a code is not required it can be made inactive by ticking the check box under the inactive column. To delete an entry completely, click the X at the far right of the entry.

Accounts – Purchase Tax:
If you are purchasing items and are registered for sales taxes then you can set the taxation rates in this list. To edit simply click the existing code or name and delete then retype the entry as required. If a code is not required it can be made inactive by ticking the check box under the inactive column. To delete an entry completely, click the X at the far right of the entry.

Accounts – Sales Tax:
If you are selling items and are registered for sales taxes then you can set the taxation rates in this list. To edit simply click the existing code or name and delete then retype the entry as required. If a code is not required it can be made inactive by ticking the check box under the inactive column. To delete an entry completely, click the X at the far right of the entry.

Species List:
A few of the most common species of reptiles have been included, but depending on your region, or specialise in a rare species then changes to this list are required. To edit simply click the existing code or name and delete then retype the entry as required. To delete an entry completely, click the X at the far right of the entry. Click the + to add a new entry. Placing a tick in the live birth column for those reptiles that are Viviparous provides the key filter for breeding projects.

Morphs:
Click the + to add a new entry, assign the species and any genetics options as required

Companies / Contacts

The following menu option is **Companies / contacts**. This section is applicable if you are selling stock or reptiles. If you are a hobbyist keeping reptiles as pets and have no intention of breeding them then this section can be skipped.

For anyone selling reptiles or products then this section is required to set up the defaults for each company and customer that is added to the system.

New Records defaults:
The first two sections of the centre panel enable you to define the custom fields for these modules.

Warnings:
Place a tick in the box next to any of the three options to receive a warning if a customer has an overdue account, over the credit limit or has not been approved for credit.

Accounts Related Defaults:
Select the Purchase and sales taxation code from the drop down list, the purchase and sales nominal codes form the drop down list. Leave the default name check box ticked.

Charge out defaults:
Sets the hourly rate and day rate customers are charged

Employee Defaults:
Set the monthly holiday entitlement for any employees

Selecting Companies:
Leave the select from set to filter view unless you deal with thousands of customers and suppliers.

Credit Account Related:
Select the option to include your company name and subheading that you defined under the “My Company” section

Communications

The next menu option is **Communications**. This section is applicable if you are selling stock or reptiles. If you are a hobbyist keeping reptiles as pets and have no intention of breeding them then this section can be skipped.

This section allows you to set up the salutations for email, fax and letters, along with configuring the application to use the default email client or your own letterhead.

Unless you wish to edit the settings, these can be left as default.

Email Signature:
You can predefine the text for the system to use at the foot of any system generated email for each user. Click the + to create the signature. Select the user from the dropdown list (default is Administrator), and then type the name to use.

Electronic Signature:
You can predefine the signature for the system to use at the foot of any system generated email for each user. Click the + to create the signature. Select the user from the dropdown list (default is Administrator), and then paste the scanned image of the persons signature.

Templates

The next menu option is **Templates**.

To save time typing repetitive letters / faxes / e-mails or tasks etc you can set templates

Click the + and then click in the new blank field to the right of the triangular arrow, and name the template.

Then click on the arrow, the name should become bold. Now click in the right hand panel and type the message / reply etc for that template

Click out of the panel when completed.

Tasks

The following menu option is **Tasks**.

The first three options are custom field names. Use these if you need additional fields that are not catered for by default.

Start Date:
If you want the task to start from the date it was created enable this check box

Current User:
If you want the person entering the task to also be the person responsible for taking charge of the task then enable this check box

Priority:
Set the default priority for all tasks (Low , Medium or High)

Products / Services

This section is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default

New Record Defaults:
First three items allow the naming of the three custom fields.

Set the Purchase taxation code and purchase nominal code from the drop down lists, and enter a default mark up if you want to make a set mark up on all products.

Stock / Inventory Related:
Select the option to use sales orders or sales invoices to record the stock sold.

Tracking of stock:
Place a tick in the option to track stock quantities if you wish to maintain stock levels and track movements. If you also wish to track individual serialised items then place a tick in the next check box.

If you send items in batches then enable the next check box

If you have multiple locations then enable tracking of stock across all locations by placing a tick in this check box

Leave the option to use calcs to update stock enabled, unless the update takes a long time, in which case un-check this option.

Product Code:
The default is manual entry. This allows you to specify your own SKU product codes for the items you sell.

Code Selection:
Default to filter view unless you have thousands of products in which case select find view.

Customer Price List Related:
Select the option to include your logo, company name and sub heading (address etc as defined in the "My Company" section), and type in any text that you wish to appear at the foot of the customers pricelist.

Sales Invoices

This option is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default.

New Record Defaults:
Default names for the three custom fields in the orders module

Default Entry:
This sets the default tab of the invoice module when inputting data. Default is line entry

Auto Ship:
Create a shipping note from a new invoice.

Comments:
Enter any messages at the foot of the invoices.

Commission Related:
Select the option to pay commission based on either the sales amount or the profit made.

Details on Documents:
Select options that get printed on the invoices such as colour logo, company name and address, document title, product descriptions etc. Place a tick in the check box to enable the desired options.

Sales Orders

This option is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default.

New Record Defaults:
Default names for the three custom fields in the orders module

Default Entry:
This sets the default tab of the orders module when inputting data. Default is line entry

Include Signature:
Option to include the default scanned electronic signature

Sign off section:
Include a section on printed / emailed orders

Comments:
Enter any messages at the foot of the sales order.

Commission Related:
Select the option to pay commission based on either the sales amount or the profit made.

Details on Documents:
Select options that get printed on the invoices such as colour logo, company name and address, document title, product descriptions etc. Place a tick in the check box to enable the desired options.

Part Invoicing / Shipping:
When an order can only be partly completed select the option to create just the invoice, just the delivery note or create both.

Invoicing / Shipping from a Sales Order:
When the order is fulfilled, auto set its status to complete – options are yes, no or ask – default is yes

Allow the setting of the order status to complete when the either the order has been fully invoiced, fully delivered, or both.

Purchase Orders

This option is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default.

New Record Defaults:

Default names for the three custom fields in the purchasing module

Default Entry:
This sets the default tab of the purchases module when inputting data. Default is line entry

Comments:
Enter any messages at the foot of the purchase order.

Details on Documents:
Select options that get printed on the purchase order such as colour logo, company name and address, document title, product descriptions etc. Place a tick in the check box to enable the desired options.

Receipts

This option is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default.

New Record Defaults:

Enter any messages at the foot of the receipt.

Details on Documents:
Select options that get printed on the receipt such as colour logo, company name and address, document title, and account balance. Place a tick in the check box to enable the desired options.

Shipping / Receiving

This option is really applicable if you are running a business, or selling reptiles. If you are keeping a reptile as a pet or have no intention of breeding reptiles then this section can be skipped and left as default.

New Record Defaults:

Default names for the three custom fields in the invoice module

Default Entry:
This sets the default tab of the invoice module when inputting data. Default is line entry

Comments:
Enter any messages at the foot of the purchase order.

Details on Documents:
Select options that get printed on the invoices such as colour logo, company name and address, document title, product descriptions etc. Place a tick in the check box to enable the desired options.

Title options for outgoing and incoming documents can be selected from the dropdown lists. For example you might prefer *Delivery Note* rather than *Shipping note*

Access Privileges

This is where you set up profiles to restrict or grant access to modules and the options within those modules. The Administrator group by default gives access to all modules and options. In a business you might restrict some staff to just the reptile module as their responsibilities are related to the care of the animals and they are not permitted to access the sales or stock modules.

Again, if you have no need to set up user profiles then leave this with just the default Administer group enabled.

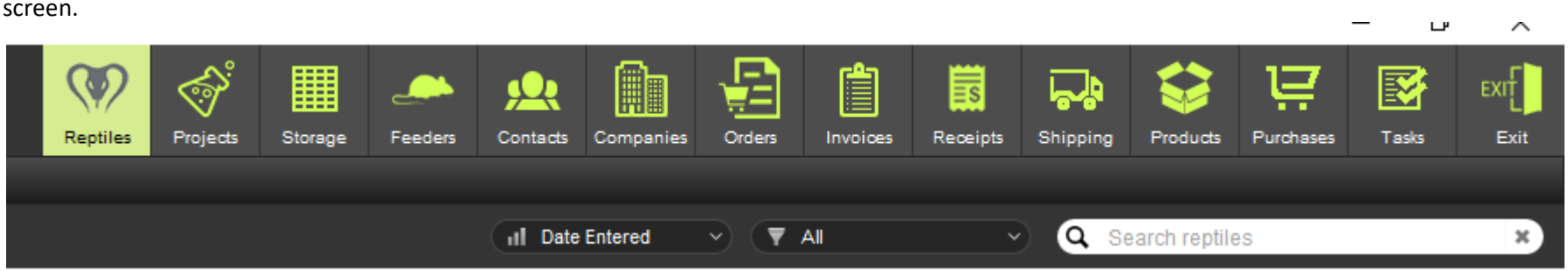
Groups:
Click on the + to create a new group. A pop up will appear inviting you to input the group name.

Select the newly created group, and then work through the module tabs below. By default all options are unchecked, so select the options you wish any user account to have access to.

Main Program

Now you have set up the preferences you can start to use the main program. As some of the changes in the preferences may require a restart of the application it's advisable to exit out of the program and restart it. Log in as admin unless you have set up additional users under the profile groups.

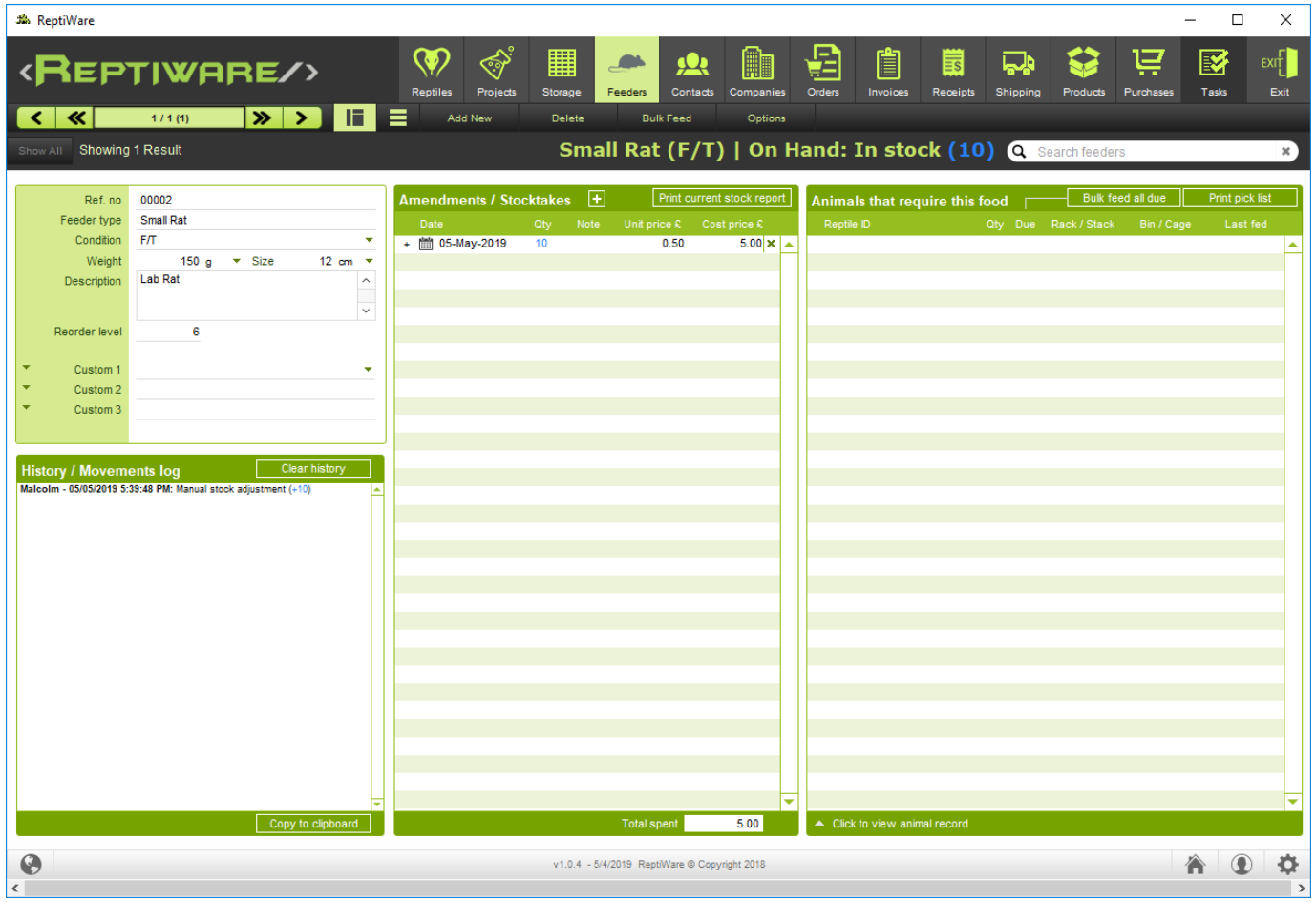
Reptiware is a modular application. The navigation between modules is performed by clicking on the module icons on the main header at the top of the screen.



By Default the program will open at the reptile module, however before setting up the reptiles there are two other modules that require configuring first to make the setting up of the reptiles easier.

Navigate to the **Storage module**. You will be presented with a blank screen with the "Add New Record" button in the middle. Clicking on the button brings up a pop up in which will give you the option of selecting racks and bins or Stack and cages. You will then be asked for a name of the rack or stack, how many columns and rows are in the stack and any individual optional prefix you desire. Click on the Create button to generate the record. If you wish to add any additional information such as the brand or size details you can, but it's not critical for when it comes to setting up the reptile module.

Now navigate to the **Feeders module**. You will be presented with a blank screen with the “Add New Record” button in the middle. Clicking on the button generates the first record.



In the Feeder type field, type in a description of the item, for example ***Adult Mouse*** or ***Small Rat***. Select the condition from the list in the dropdown menu, type in the average weight and size of the item, and any additional description you want to add.
If required, enter a reorder level.

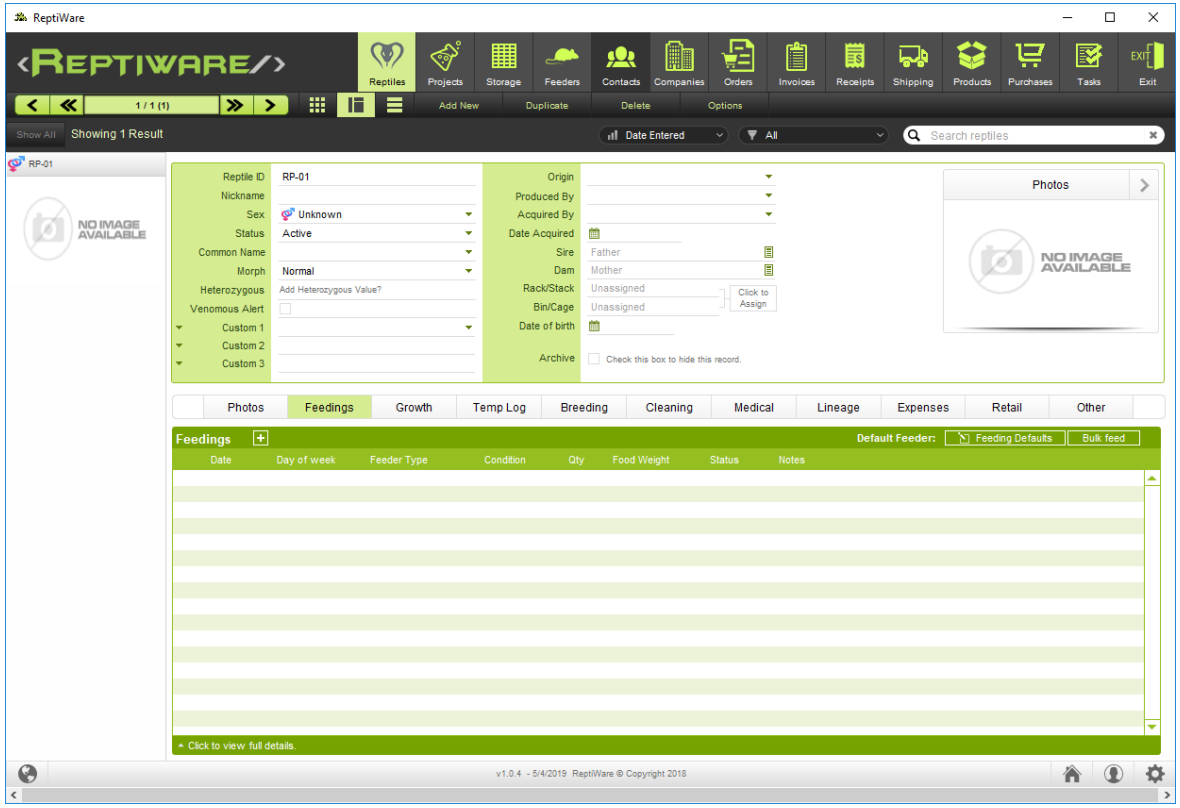
If you have the items in stock click on the + to the right of Amendments / Stocktakes. Enter the quantity and the unit price paid for them, and click on create. An entry will be placed in this panel and the On Hand stock will now show the quantity available

There will also be a movement record in the History panel.

Click on ***Add New*** to generate a new record and repeat the above for additional food items.

Now navigate to the **Reptile Module**

You will be presented with a blank screen with the “Add New Record” button in the middle. Clicking on the button brings up a pop up in which you can enter the ID for the reptile. This can be anything that means sense to you or the people working with the animals. Type in the ID and click OK



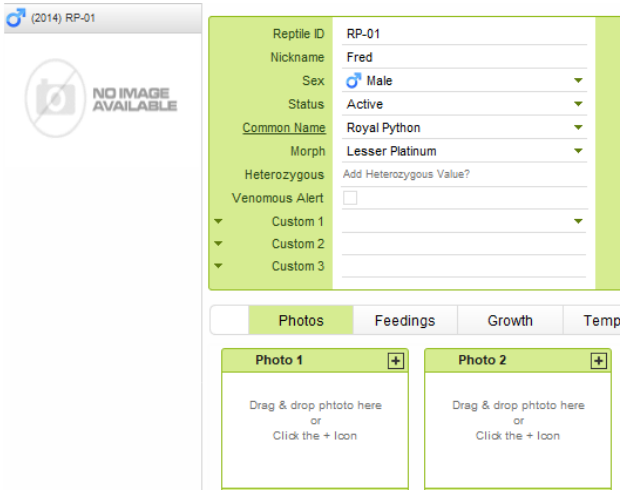
This will create the first reptile record in the module, and will default to the panel view. In this view the screen is split into two halves. The top section contains data that will be displayed all of the time whilst in the module. The lower half of the screen displays data under each of the tabulated sections which can be selected by clicking on the tab headings.

Fill in the data in the top section as required, selecting the sex, common name, morph, origin etc from drop down items managed by the list options in preferences.

To record where the reptile is housed, click the assign button and select the enclosure on the pop up panel.

If known, enter the date of birth for the reptile.

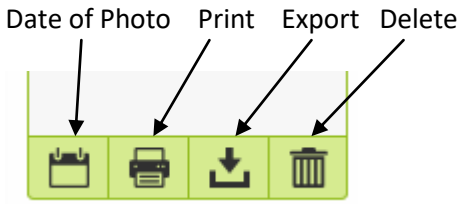
Once the top section data has been entered attention can be focused on the tab section in the lower half of the screen.



The first tab allows up to six photos to be added. An image can either be dragged and dropped into the photo box or click the cross on each header of the photo box and navigate to the desired image.

Photo 1 is the default image used in the record ID. You can then enter any notes for the image in the *Notes* field

At the foot of each photo box are four icons.



Select the **Growth tab** to record the current weight and length of the reptile. Click on the cross on the header of each panel and type in the information along with any notes as required.

Select the **Temp Log** tab to record regular temperature and humidity readings. Click on the cross on the header of each panel and type in the information

Breeding projects will be displayed under the **Breeding** tab. Breeding projects are covered in the Projects module section of this guide

Select the **Cleaning** tab to log cage cleaning tasks, when the reptile defecates or urinates and sheds. Click the cross on the header of each section to place an entry as required.

If a reptile requires any medical treatment select the **Medical** tab and record the issue and any treatment. As per other tabs, click the cross on the panel header to enter the details.

The **Linage** tab displays the blood line from the current reptile

The **Expense** tab allows the logging of any stock products used for this reptile.

The **Retail** tab is used when it comes to sell the reptile. Under the Retail Information panel enter the cost price (if purchased) the market value and the price you wish to sell the reptile for. In order to sell a reptile, change the reptile status to ***For Sale***

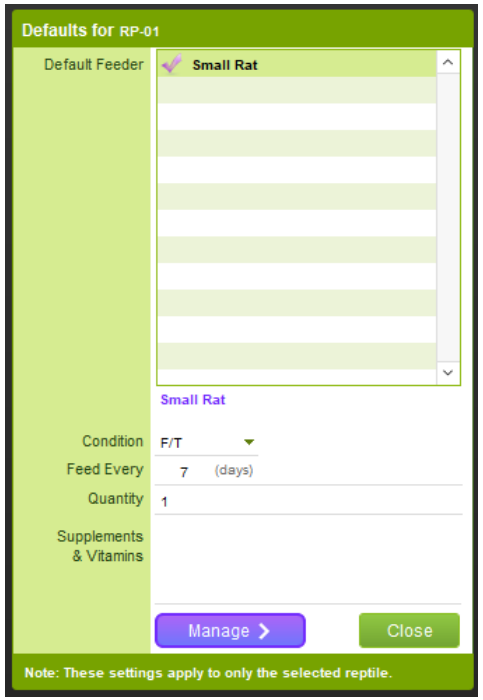
This popup will appear. Selecting **No** will simply leave its status set as For Sale, and the transaction will not be logged on the system. Once sold you can simply change the status to **Sold** and place a tick in the **archive** box.

Selecting **Yes** then generates a product entry within the Products module. To sell the reptile once it's a stock item requires the setting up of a contact and or company under the respective module.

The **Note** tab allows you to enter any additional notes for that reptile.

Finally the **Feeding** tab records all the feeding records for that reptile.

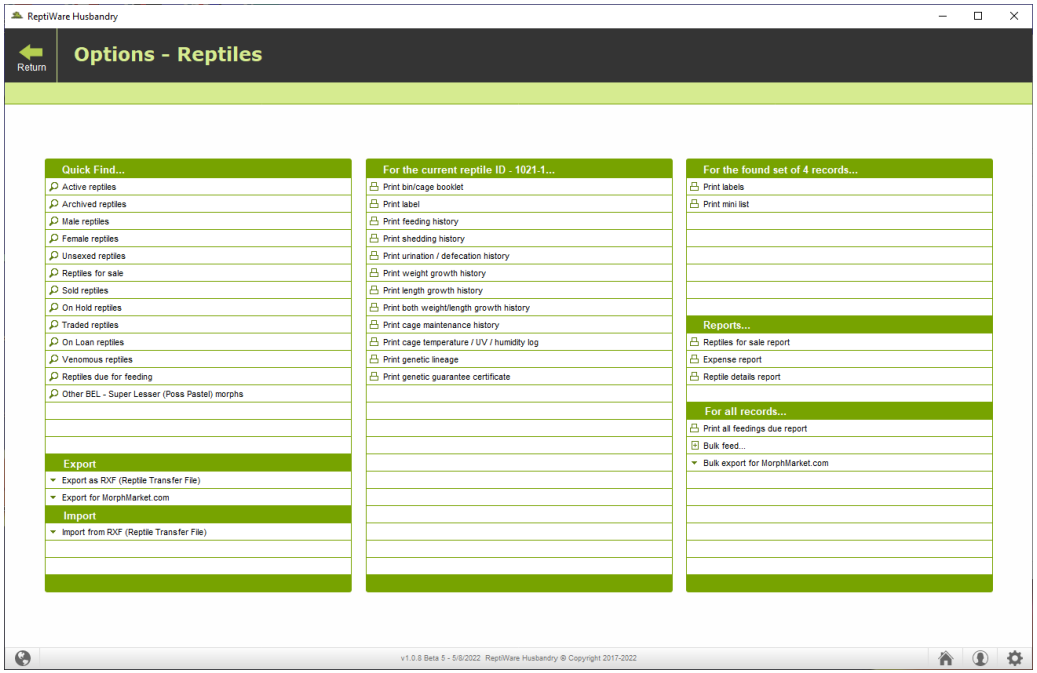
Click on Feeding Defaults to set the default food item for this reptile. A popup will appear listing all the records you have entered in the Feeder module. Select the item that is normally fed to the reptile from the list, and if required change the frequency of feeding. Then click close to remove the popup. You can manually feed the reptile by clicking on the cross on the header of the feeding panel. Or if you have a lot of reptiles that are all due a feed on the same day, use the bulk feed option. By default the feeding status is set to **FED**. This can be changed to reflect if the reptile consumed the item, or refused the item, plus other options.



As already touched upon, the **status** of the reptile plays an important part in the management of the reptile record. Not only does it cover the availability of the reptile, but also if the reptile is in hibernation, active or not etc.

If you have a large collection or stock, then you will really only be interested in reptiles that you currently have and not those that have been sold or died. To the left of the search bar is a filter, select an option from the dropdown list to display records that match that status.

To add additional reptiles to the database, click on the **Add New** button. Or if you have another reptile of the same species or came from the same supplier then click the **Duplicate** button to generate a new record. Give the record a new ID and click OK. Only the information in the top half of the screen is replicated. All data under the tabs will be blank. Edit the data in the top section as required, and then proceed to work through the tabs entering data applicable to the second reptile.

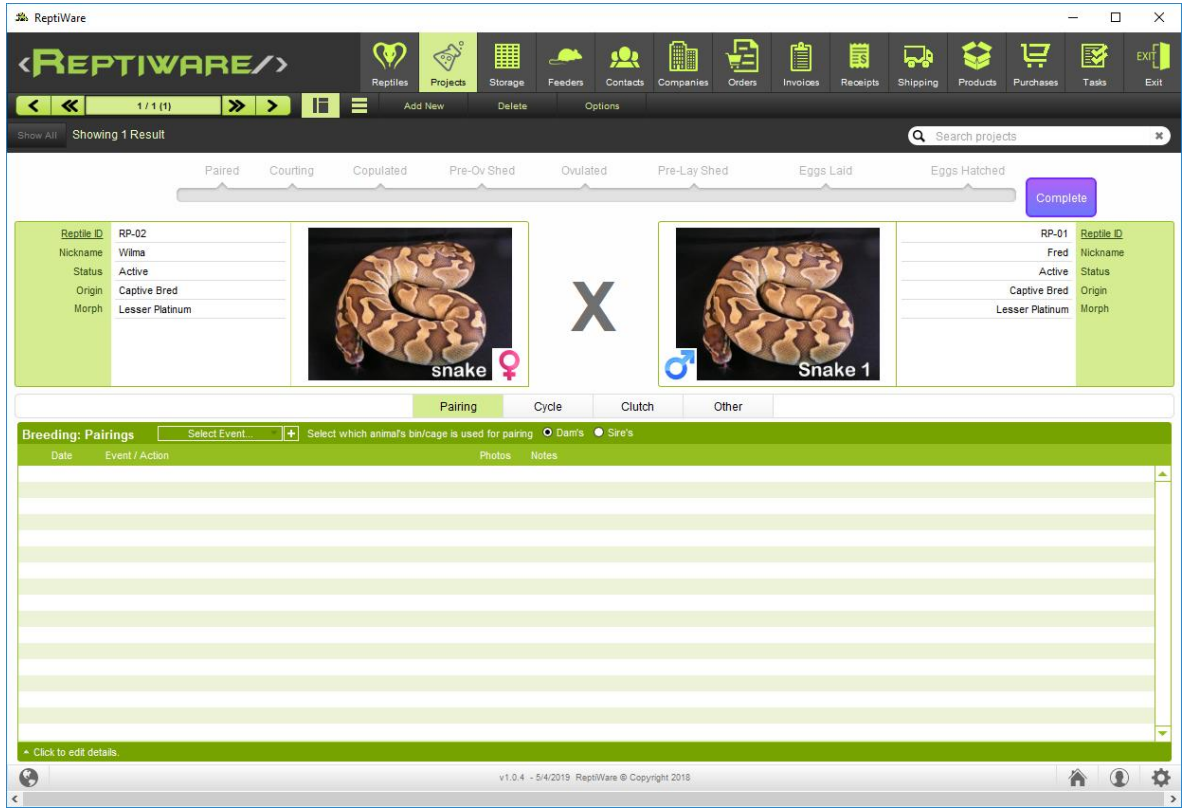


Lastly, under Options you'll find a host of printable reports, including cage booklets, labels and logs. We are constantly updating these reports and adding new ones. You will also find options to export data to Morph Market, as well as exporting a single reptile record. This is helpful when selling reptiles to other users of Reptiware as it saves them manually entering all the data.

Projects Module:

The projects module is used to record all your breeding projects.

Navigate to the **Project module**. You will be presented with a blank screen with the "Add New Record" button in the middle. Clicking on the button results in a pop up prompting you to select if the project results in a clutch of eggs or litter.



The first thing to do is select the sire and dame by clicking in the selection box, and selecting the reptile from the resulting popup.

The lower section of the screen has four tabs (clutch is replaced by litter based on the selection entered). By default the **pairing** tab is highlighted.

On the header there is the "select event" dropdown list. This list contains events in logical order, introduction, courting, copulation and removal. Select the first option and then click the cross next to the list box to insert it into the panel below.

Repeat this for any additional events observed. Multiple entries can be logged.

The same process is repeated under the **cycle** tab, selecting events such as ovulation and pre lay shed.

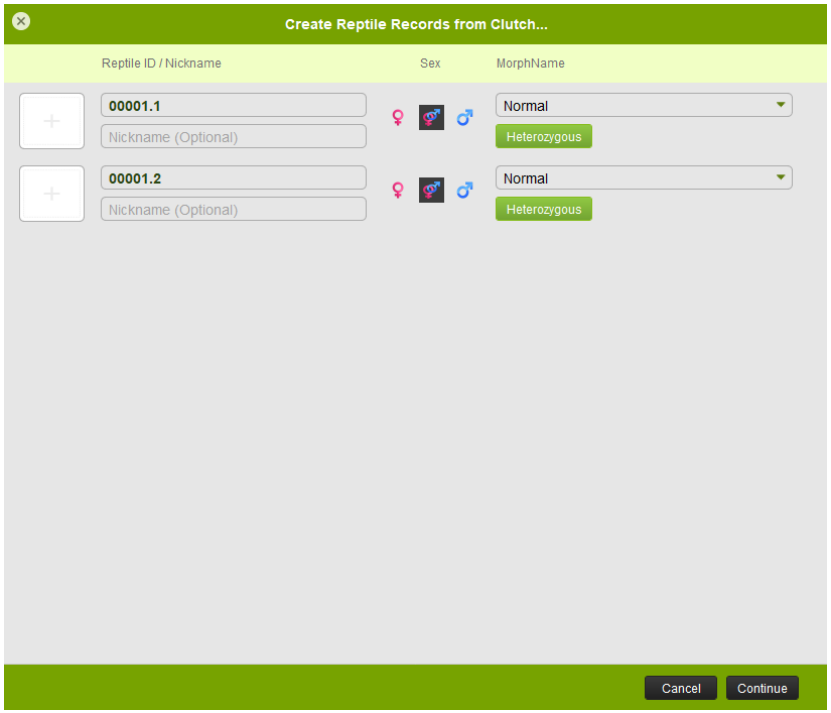
Again the same process is repeated for the clutch or litter tab, however on this section you can enter data on the number of egg laid and litter produced.

You will also notice that the timeline at the top of the page progresses as the project advances.

Under the **Clutch** tab click on the + button and the line entry is created. The status will be set to **Eggs Laid**. To the right of the screen details of the clutch can be entered. Click the **Place into incubator** button and enter the normal number of days that the species eggs traditionally take. The estimated hatch date is generated.

When the eggs hatch click on the **Mark as hatched** button and the date hatched is entered into the system. Enter the number of eggs that hatched – the survival rate is calculated.

To save time, the system can automatically generate reptile records for each hatchling. Click the **Create reptile record for babies** button



In the pop-up you can enter the ID and Nickname for each hatchling, select the sex of each hatchling and the morph

Click the **Continue** button

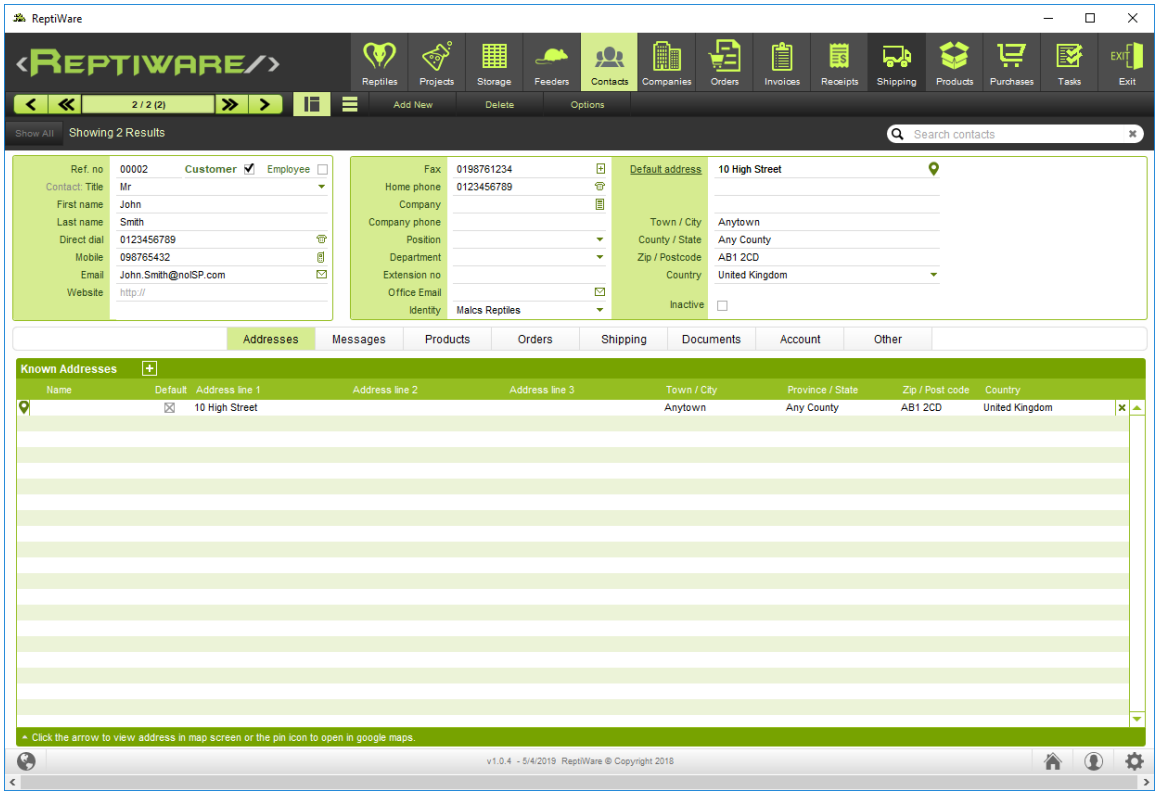
The window will close and the status will change to In System and the date the clutch was complete logged.

At this point the project is complete. You cannot edit the details of eggs laid etc.

The details of the breeding project is added to both parents records under the **breeding** tab

Selecting any of the records for the new hatchlings or neonates their linage and genetics guarantee can be printed by selecting **Options** and selecting the relevant report.

Contacts Module:



The contact module stores all the individual contacts, such as customers, suppliers or employees. By default the first record is the Administrator. To add a new contact click the **Add New** button, and then complete the details as required. If the contact is an employee tick the check box as required.

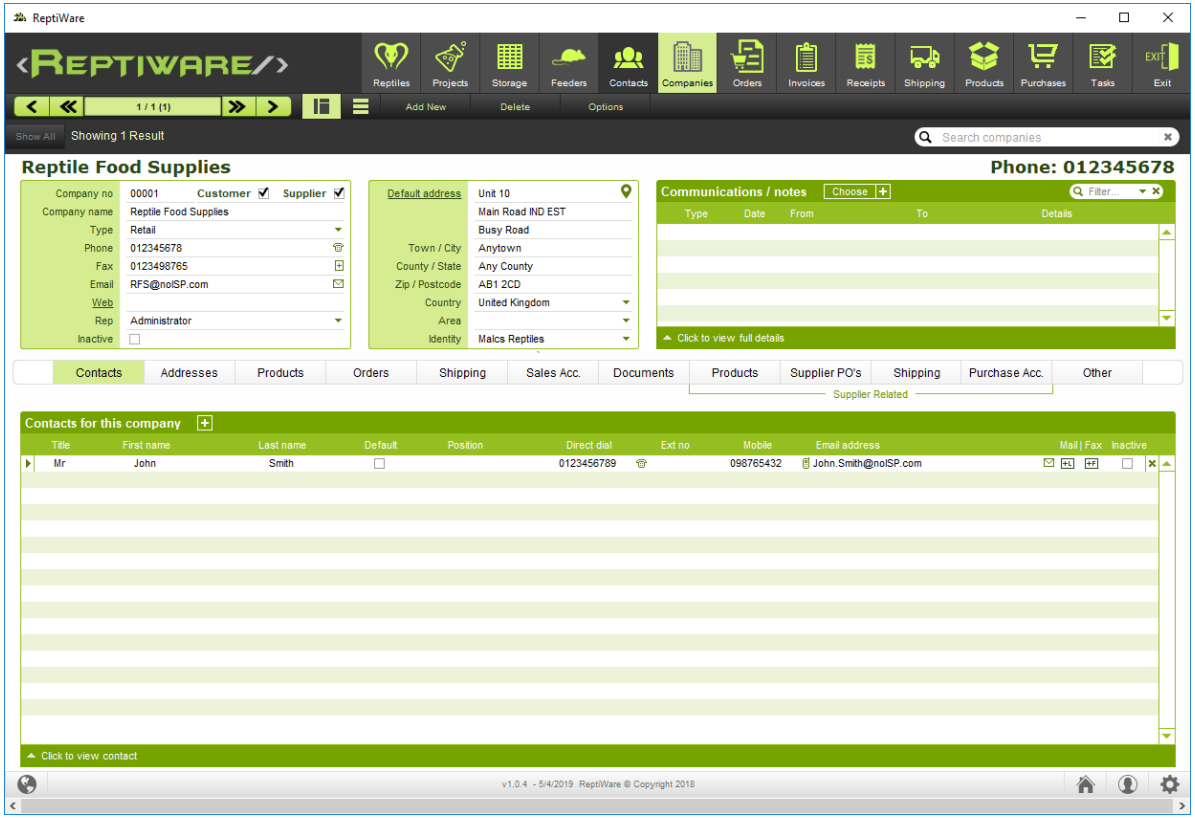
The tabbed section allows for additional **addresses**, records any notes or **messages** related to the contact, and any discounted pricing structure, both globally or for individual **products**. All orders placed by the customer gets recorded under the **orders** tab, together with deliveries under the **shipping** tab.

The **Account** tab details all the invoices for that contact, and the option to set up a credit account if required. Click on the **create account** button takes you to the credit account sub section. Here you can set the credit limit and payment terms. Click on the **Acc Approval** tab to enter any references, banking details and approve the account. Click done to return back to the contacts module.

The **document** tab allows the attachment of scanned documents or images to be logged via the document sub module.

Printable labels and reports are available from the **options** button.

Companies Module:



The companies module stores company records, either suppliers, or customers. A company can be either or both simply by ticking the check box for the option required.

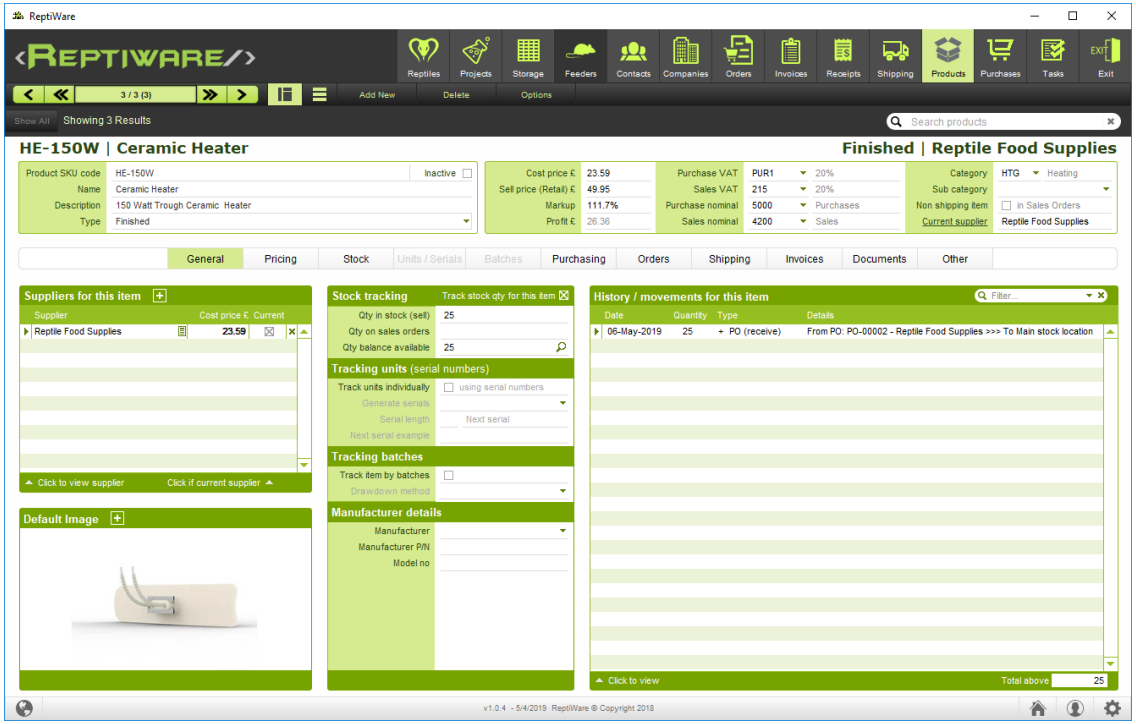
A company record doesn't need to have a contact, but if you have a contact already on the system who is also the contact for the company a link can be established simply by clicking on the cross on the header next to "contacts for this company". Select "existing" on the popup and a further list box will pop up where you can select the contact.

Additional addresses, dedicated pricing structure and products are set up for customers are set up the same way as the contacts module. All associated sales orders, delivery notes and documents are logged under the corresponding tabs.

The **sales acc** tab logs all the invoices associated with the company, and the credit account can be set up via the **create account** in the same way as a contacts account.

If the company is a supplier, four additional tabs are displayed as shown in the image above. **Products** tab lists all the items that are purchased from this supplier, along with any other products that are not stocked. The **Suppliers PO's** tab logs all purchase orders associated with the company, with the **shipping** tab logging all associated delivery notes. You can also set the carrier the supplier uses under this tab. Finally the **Purchase Acc** tab logs all the associated invoices from the company for goods you have purchased.

Products Module:



Having set up a supplier you can set up the inventory. Select the product module and click on the "**add new**" button. You will be presented with a popup asking for a product SKU code and once entered press OK which generates the new record. Fill in the name and description fields and add the pricing details. Under the panel with the header "***suppliers for this item***" click the **right arrow** on the first line, and from the resulting popup select the suppler. If you have an image for the item this can be added by clicking the cross to the right of "***default image***" on the panel below. Navigate to the image you wish to use.

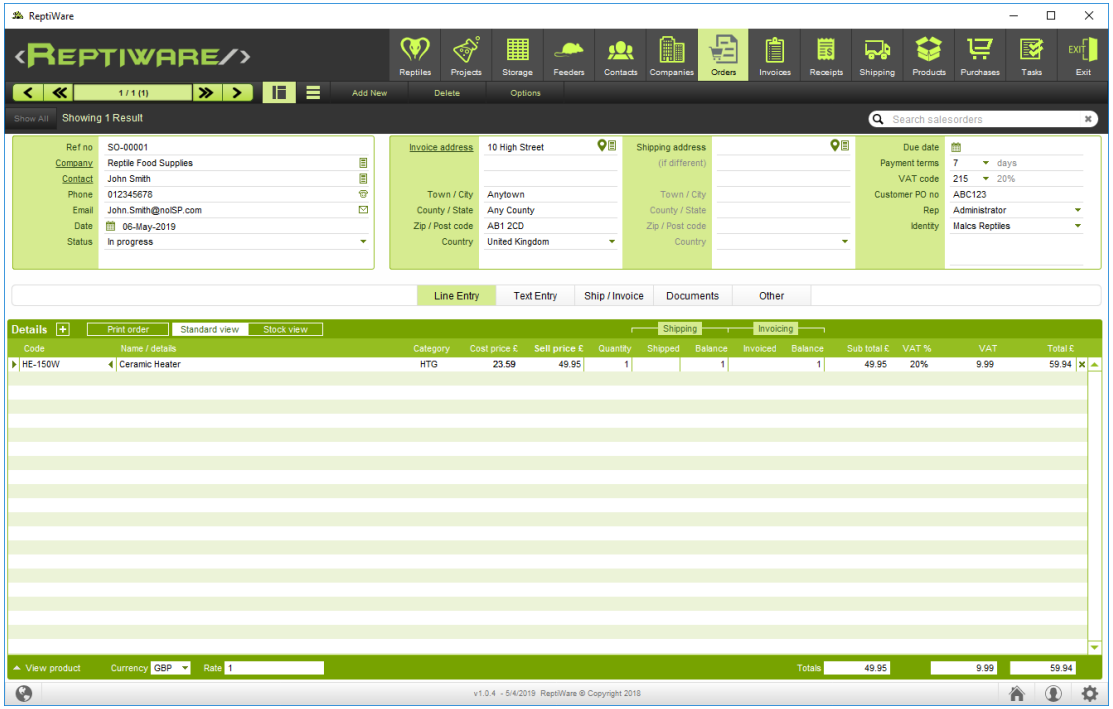
Click on the **purchasing tab** and click on the **plus** to the right of "***purchase orders for this item***". This will jump out to the purchase module and create a pre-filled purchase order. Enter the quantity that you are purchasing. When the goods are received go to the purchase order and click on the **shipping / received** tab. Enter the amount received in the resulting popup. This will change the purchase order status to "received"

The items are placed into stock and under the **general** tab of the product module the stock level is displayed and an entry in the items ***history / movement*** panel is logged.

The **pricing** tab allows for different pricing options to be set up, such as a retail price or trade price. You can also set up price breaks for quantity discounts.

Orders, Shipping and **Invoice** tabs list all the respectively associated records for this item.

Orders Module:



Any sale of a stock item starts with the raising of a sales order. The pre-requisite is that the customer is set up as a contact or company.

Select **Orders** from the main module navigation bar. Initially for the first order you will be presented with a blank page with the "***add new***" button. Once this has been clicked on a blank sales order will be raised.

Click on the relevant list icon to either select the company or the contact from the resulting pop up list.

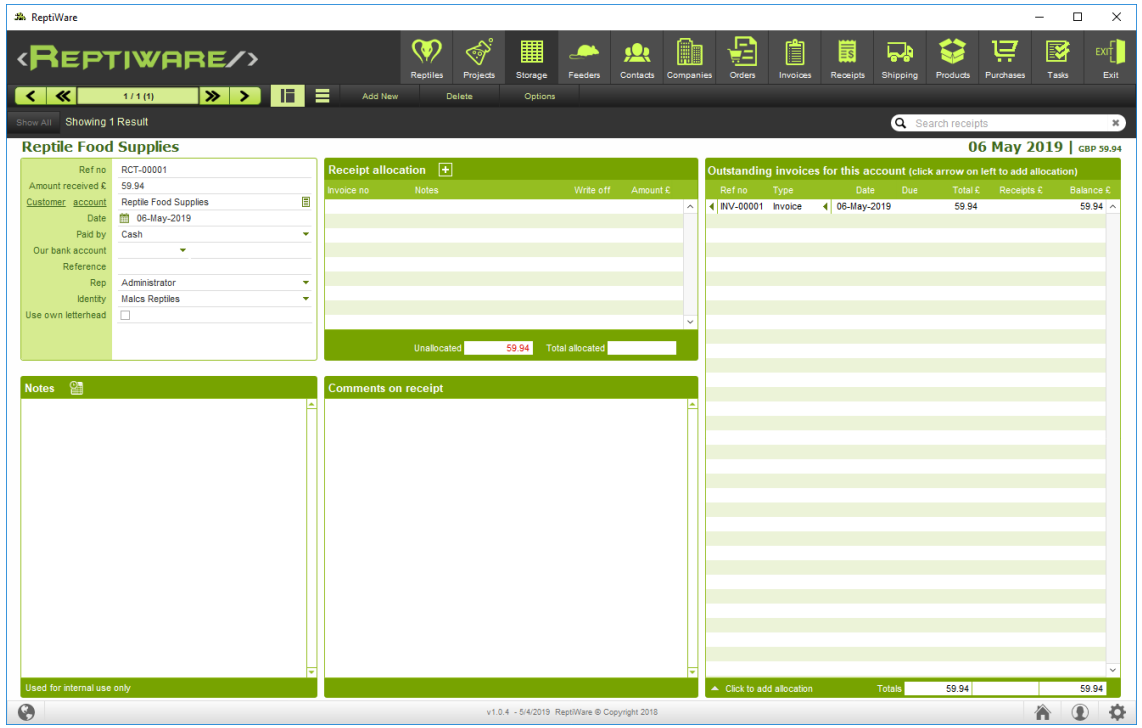
The data entry will default to either line entry or text entry depending on the setting chosen in the preferences

Click the plus to the right of "***details***" to create a product entry. Click the arrow at the far left of the line entry and a list box will pop up containing all items that are socked – select the item to be sold, and the list box will close and the line entry added to the sales order. By default the quantity is set to 1, but this can simply be typed over with the required number if more than 1 of the product is required.

At this point the stock tracking in the product module reflects the quantity on order, and adjusts the number remaining available. Once the order has been picked, packed and despatched, the order status can be set to complete and an invoice raised by selecting the ship / invoice tab in the orders module. Depending on the option set in the preferences you can create a full shipment / full invoice, or have the shipping note automatically generated when the invoice is raised. Click on the "***create full invoice***" button if the order is completely fulfilled, a popup will ask you if you want to create a shipping record. Selecting yes will change the status of the order to complete, raise a delivery record and set it to shipped, and raise an invoice that will have an "***invoiced***" status.

The stock status in the products module is updates and a record of the stock movement logged in the history panel.

Receipt Module:

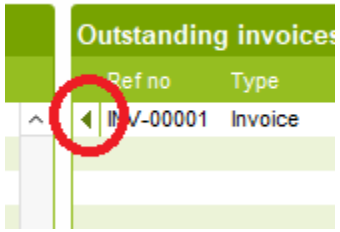


Select **receipt** from the main module navigation bar. Initially for the first use you will be presented with a blank page with the "***add new***" button. Once this has been clicked on the first receipt entry will be raised.

Click on the list icon and select the customer or company that the payment has been received from.

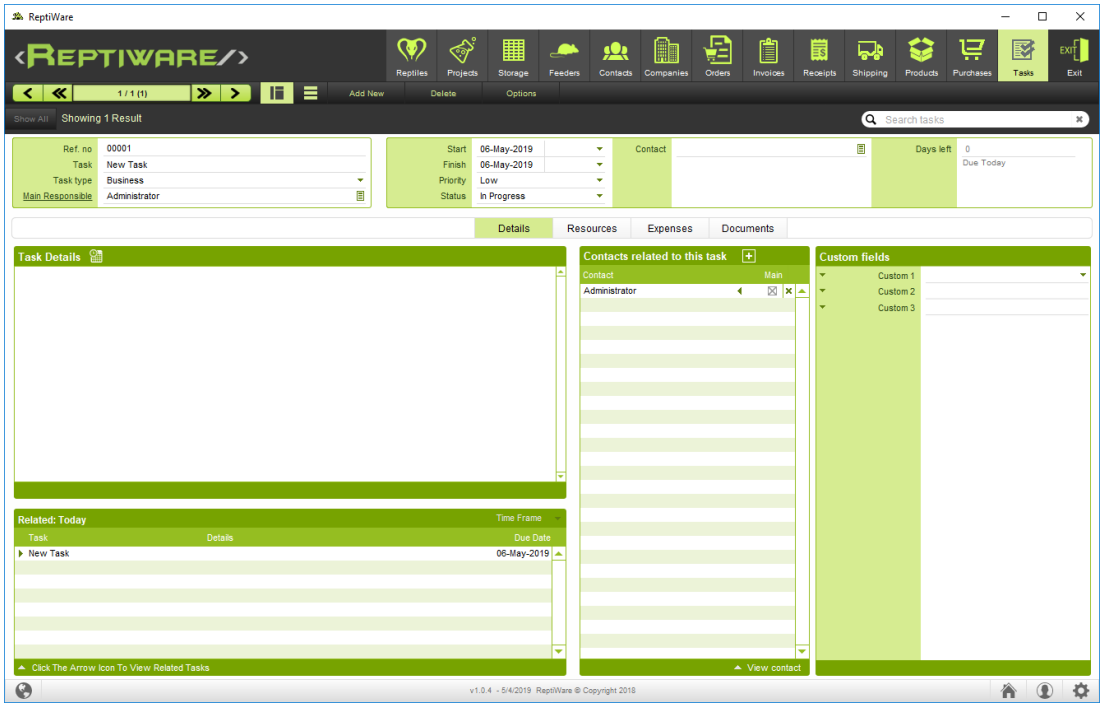
Enter the method of payment, and the amount received. This amount will also appear in the unallocated field at the foot of the receipt allocation panel.

A list of outstanding invoices will be shown on the right hand panel. To complete the receipt process and set the invoice status to paid, the invoice(s) need to be allocated. To do this click on the arrow as indicated. You will be prompted to confirm part or full payment received. Make the appropriate selection and the prompt will disappear and the receipt process completed



A list of printable reports can be obtained from the options button.

Tasks Module:



Tasks and duties can be set via the task module.

Select "***add new***" to generate a new task. The task type, start and finish dates, priority and status can be set accordingly.

Clicking on the list icon allows you to select the person responsible, and the contact.

Click in the "task details" and type in the details of the task. The task can be prefixed with a date/time stamp by clicking on the icon to the right of "task details" on the panel header.

Additional resources, products taken from stock and documents can be added under the relevant tabs.

Copyright © 2019 – Reptiware Software

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law. For permission requests, email the publisher, at support@reptiware.com.

Manual Revision RV4 – 05/2022