

Drägerware Delivery Note/Invoice User Manual version 5000/7000/9000 from version 2020.1



Contents

1	Introduction	3
1.1	For your safety	3
1.1.1	General safety statements	3
1.1.2	Definitions of alert icons	3
1.2	Description	4
1.2.1	Feature description	4
1.2.2	Intended use	4
1.3	Hardware requirements	4
1.4	Information on this manual	5
1.5	Field types and field functions in the programs	6
1.6	Function keys for ease of operation	8
1.7	Abbreviation of buttons	9
2	Program window	10
2.1	Controls in the main window	10
2.1.1	Header	11
2.1.2	Favourites tab	12
2.1.3	Notes tab	12
3	File menu	16
4	Delivery note menu	16
4.1	Create delivery note	16
4.1.1	Address tab	18
4.1.2	Delivery note header/footer tab	19
4.1.3	Tests tab	20
4.1.4	Equipment tab	21
4.1.5	Spare parts tab	21
4.1.6	Services tab	23
4.2	Open delivery note	25
4.3	Delete delivery note	26
5	Invoice menu	27
5.1	Create invoice	27
5.1.1	Address tab	29
5.1.2	Footer/Header tab	30
5.1.3	Delivery note tab	30
5.1.4	Tests tab	32
5.1.5	Equipment tab	32
5.1.6	Spare parts tab	33
5.1.7	Services tab	35
5.1.8	Items tab	37
5.2	Open invoice	38
5.3	Delete invoices	39

6	Lists menu	40
6.1	Overview of delivery notes and overview of invoices.....	44
6.2	Spare parts delivery note/Services and Spare parts invoice/Services.....	44
6.3	Multiple delivery note and multiple invoice.....	44
7	Settings menu	45
7.1	System settings	45
7.1.1	User management	45
7.1.2	System.....	45
7.2	User settings.....	46
7.2.1	Activate deactivated notes.....	46
8	User menu	47
8.1	Change user	47
8.2	Change password.....	47
9	Help menu	48
9.1	Info.....	48
9.2	Help	49

1 Introduction

1.1 For your safety

1.1.1 General safety statements

- Before using this software, carefully read the user manual.
- Strictly follow the user manual. The user must fully understand and strictly observe the instructions.
- Do not dispose of the user manual. Ensure that it is retained and appropriately used by the product user.
- Only trained and competent users are permitted to use this software.
- Comply with all local and national rules and regulations associated with this software.
- Do not use faulty or incomplete software.
- Do not make any changes to the software.
- Notify Dräger in the event of any faults or failure of the software.

1.1.2 Definitions of alert icons

The following alert icons are used in this document to provide and highlight areas of the associated text that require a greater awareness by the user.

A definition of the meaning of each icon is as follows:



NOTICE

Indicates additional information on how to use the software.

1.2 Description

1.2.1 Feature description

Drägerware.Workshop products are software for technical workshops in various organisations and industrial establishments.

They are used for inventory and support of administration and service of devices, systems, equipment, power units and vehicles in a central data pool and for all workshop areas of an organisation, including at different sites.

The software can be used to plan, perform and record services. Testing and monitoring processes can be set up.

Dräger test devices can be integrated via interfaces.

Additional test devices for other workshop areas, such as pump and hose test stands, can also be integrated into the service process.

1.2.2 Intended use

Drägerware.Workshop is software for installation on computers with the requirements described in 1.3 for support with inventory and service of technical safety equipment.

The Delivery note/invoice program is part of Drägerware workshop versions 5000 and 7000. It enables the creation of delivery notes and invoices based on the tests, inspections and maintenance work that has been carried out.

1.3 Hardware requirements

The general minimum requirements for workstations and servers are described in the **List of hardware and software requirements**.

The hardware requirements of each individual program are described in detail in the respective specifications of the scope of delivery.

1.4 Information on this manual

All Drägerware.Workshop applications are operated in the same way.

The special characteristics of a workshop program are dealt with in separate sections or supplementary sections which the customer receives on acquisition of the Drägerware.Workshop application.



NOTICE

This manual describes all the functions of the software.

If functions that you cannot access are explained, they have not been purchased.

The scope of the installation is described on the delivery note and specifications.

Optional functions can be added to the Drägerware.Workshop base package at any time (modular principle). They can be ordered directly from Dräger.


This manual can be accessed as an aid in the program and with the <F1> function key.


Dräger recommends having software updates performed exclusively by Dräger or authorised Dräger partners.

1.5 Field types and field functions in the programs

The same field types and field functions are used in all the Drägerware programs for processing data.

They are listed in the following table:

Alphanumerical fields	The standard input fields permit the entry of all characters.
Numerical fields	Numerical fields only permit the entry of numbers (e.g. personnel number, account number).
Selection fields	With few exceptions, selection fields comprise alphanumerical or numerical fields. Selection fields enable the retrieval of a user menu (user table) using the <F4> function key. Tables which simplify data acquisition are saved in the user menus so that recurring texts do not need to be entered via the keyboard and spelling mistakes are avoided.
Output fields	Unmodifiable data are referred to as output fields. The field content of output fields is highlighted and cannot be processed via the input field.
Date fields	<p>Date fields accept the date format: 01.01.2003. The day and month must always be entered using two digits. The dot between day, month and year is automatically entered by the program. The first two digits of the year are automatically assigned the first two places of the current year if the number of the year is entered using 2 digits. Please take care that the <Caps Lock> key is not pressed when making the entry as otherwise no entry is possible.</p> <p>Date fields contain special input functions. Press the "H" key (today) to import today's date into the date field; press the "G" key (yesterday) to import yesterday's date, and press the "M" key (tomorrow) to import tomorrow's date. In addition, by entering the "+" or "-" character, a number, and that of the identifier "D" (for days), "M" (for months), "Y" (for years), the currently specified date is increased or reduced. Thus, in the case of the following entry: +3w the date currently displayed in the input field is moved forward 3 weeks.</p> <p>Pressing the <F4> function key or the  key next to a date field opens a perpetual calendar. A date can be selected in the calendar, which is then included in the date field. Users can scroll forward and back through days and weeks with the arrow keys and forward and back through months with <Page Up/Down>.</p>
Time fields	Time fields require the entry of a time. The current time is entered by pressing "N" (Now). The colon between the minutes and hours is automatically entered by the program. In addition, by entering the "+" or "-" character, a number, and that of the identifier "H" (for hours), "M" (for minutes), the current time is increased or reduced. Thus, in the case of the following entry: -3h the current time indicated in the display field is moved back by 3 hours.
Logical fields	These fields only accept the entries "Y" for Yes and "N" for No. These fields can be edited using the spacebar - Y, N, blank field appear automatically.
Memo fields	These fields are used to save additional information. Additional information in plain text can be saved for every data set.
Mandatory fields	Mandatory fields are identified in the program by a red dot next to the field. An input in a mandatory field is necessary before a data set can be saved. If a user menu is saved for a mandatory field, it is displayed automatically if the user tries to skip a mandatory field without making an entry. When trying to save a data set without fully completed mandatory fields, the user is prompted to fill the blank fields. Examples of mandatory fields are a person's first name and surname or the type of an application.

Exact fields	Exact fields are displayed with a grey background in the program. An entry in an exact field must correspond exactly to an entry in the user menu. The fields are also case-sensitive. If the field contents entered do not match a menu item, the following message appears: "Entry is not in the user menu!". This type of field is necessary so that fields for which an evaluation can be performed can be populated uniformly and can be fully evaluated. If the user manual needs to be expanded, this takes place via the "Create Entry" user menu if the necessary privilege was assigned.
User menu	Freely definable tables which the user can call up and also change with the corresponding authorisations. Retrievable, among other things, using the <F4> function key.
User menu with address link	User menu that provides the option of address links to Drägerware address management, if Drägerware address management is licensed. A user menu with address links is identified by the  icon.
Radio button	Radio buttons are round buttons, usually combined in groups. Only one radio button of a group can be selected at a time.
Checkbox	In contrast to radio buttons, checkboxes are square. Multiple checkboxes in a group can be selected.
Pull-down menu	Menus that can drop down using the mouse to select a function. If using a keyboard, a pull-down menu is opened with an Alt + <key> combination (e.g. Alt + D for the File pull-down menu). The key to be activated together with <Alt> can be seen from the underlined letter in the menu title.

1.6 Function keys for ease of operation

The following keys or key combinations can be used in many dialogue windows:

Key or key combination	Area of validity	Meaning
F1	everywhere	Calls up Help.
F4	Selection fields	Opens the user menu to select an entry.
h	Date fields	Enters today's date.
j	Time fields	Enters the current time.
g	Date fields	Enters the date of the previous day.
m	Date fields	Enters the date of the following day.
+/-xD	Date fields	Takes the current date and adds or subtracts x days.
+/-xW	Date fields	Takes the current date and adds or subtracts x weeks.
+/-xM	Date fields	Takes the current date and adds or subtracts x months.
+/-xH	Time field	Takes the current time and adds or subtracts x hours.
+/-xM	Time field	Takes the current time and adds or subtracts x minutes.

The Microsoft Windows® default keys or key combinations for programs remain valid.

You can also change the column width of tables for a clearer view. This is done by moving the respective column divider in the header with the mouse. Press and hold the left mouse button to drag the column to the required width.
















The program is not case-sensitive (e.g. for user menus and identification).

If the keyboard is preferred to the mouse, the <TAB> key can be used to move between the fields.

1.7 Abbreviation of buttons

The application contains the following icons. However, not all icons are activated on every page and in this case will not be active.

The icons available in the application are listed in the following table:

Symbol	Meaning
	Opens a data set and also provides an overview display.
	Saves a data set.
	Creates a new data set.
	Copies data sets.
	Scroll back to previous data set.
	Scroll forward to the next data set of the prior selection.
	Deletes data sets.
	Calls up the Help function.
	Reset filter (list selection).
	Preview
	Prints a data set.
	Open saved database (e.g. article database).
	Remove entry.
	Add entry.
	Edit dialogue.

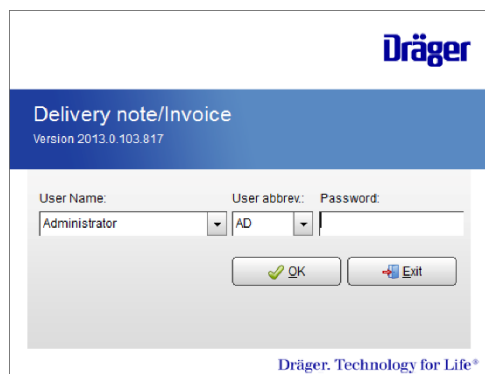


NOTICE

Scrolling forward and back only works if an item of equipment or a test has been selected via Selection or Overview. If a piece of equipment has been selected via identification, scrolling is not possible.

2 Program window

After starting the **Delivery note/invoice** application, the login window opens first. The users are the same for all Drägerware.Workshop programs.



Delivery note/invoice login

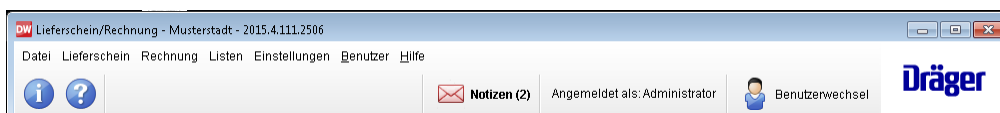
2.1 Controls in the main window

After log-in, the main window of the program appears. This window is divided into several sections, which are described in more detail in the following chapter.



Drägerware.Workshop - main window

2.1.1 Header



Main window - header

The header also contains the menu bar, which is described in more detail in the various chapters of this manual.


Logged in as:

The user currently logged into the application is shown here.

Change user:

A quick user change can be implemented with this button (see Chapter 8.1 on Page 47).

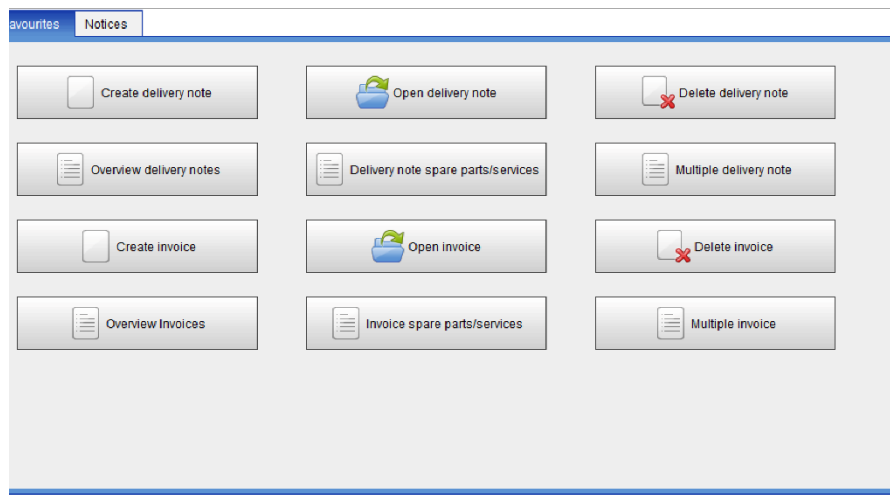
2.1.1.1 Info

The  button opens the information window (see Chapter 9.1 on Page 48).

2.1.1.2 Help

The  button opens this **manual** as a PDF document (see Chapter 9.2 on Page 49).

2.1.2 Favourites tab

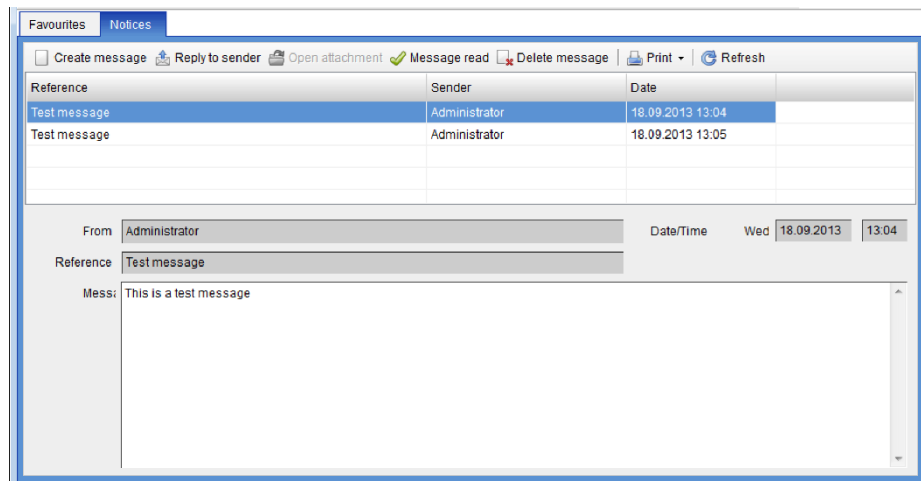


Favourites tab

The various program functions can be selected by buttons in the **Favourites tab**.

2.1.3 Notes tab

The **Notes** tab provides an internal information system and is displayed or hidden in the header via the **Notes** button. The information system allows users to exchange messages within the system (similar to the functions of an email program)

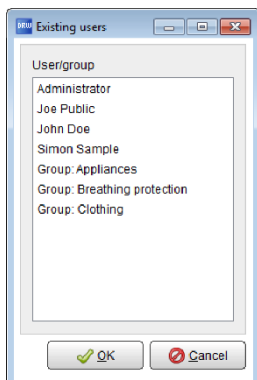


Notes tab

2.1.3.1 Create note

Click on the  **Create note** button to open a new window in which a message can be written.

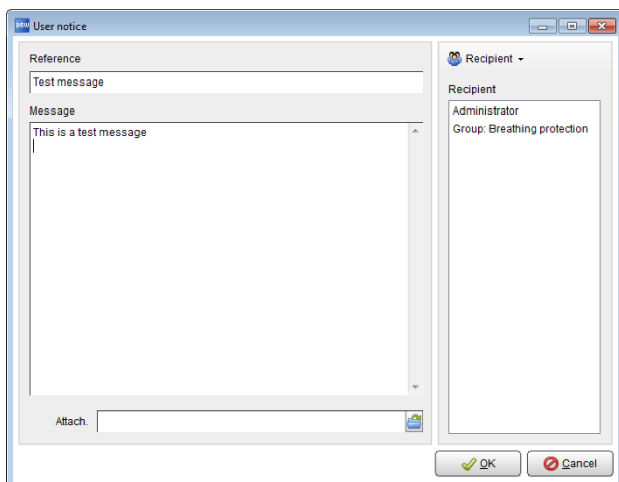
The user to be notified can be selected with the  **Recipient** button.




Receiver selection

This window also shows the available user groups from the user management, which makes it quick and easy to send messages to multiple users. Multiple selection to select multiple receivers simultaneously can take place with the default Windows functions.

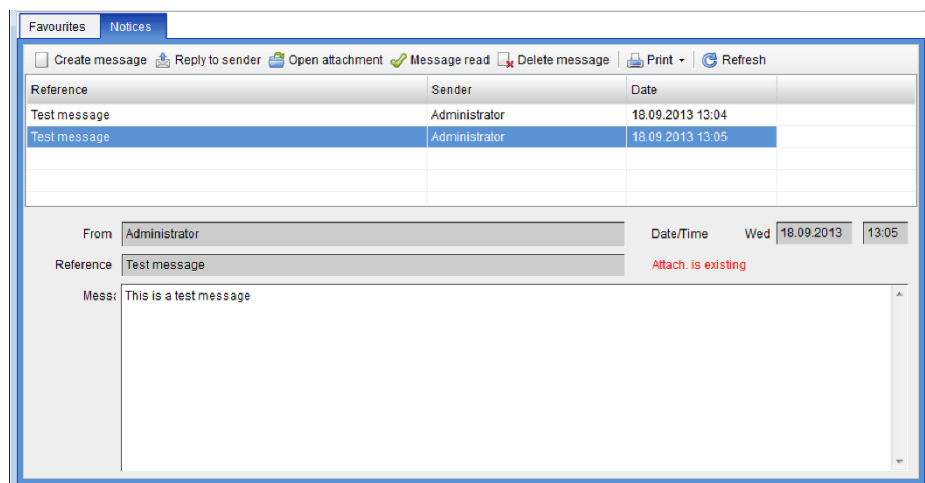
Of course, it is also possible to create a note for oneself as a reminder.




Notes tab - create new note

In addition to the **Subject** field and the **Note** field, an attachment in PDF format can also be included. Use the  button for this.

2.1.3.2 Edit note



Notes tab

If a new message is present, it is displayed with the  icon before the subject. Drägerware.Workshop programs also automatically start in the **Notes tab** if there is a new message pending.

The message can be answered directly with the  **Reply to sender** button.


If a note has an attachment, it can be opened with the  **Open attachment** button.




NOTICE

A PDF viewer (e.g. Acrobat Reader) is required to open the attachment.

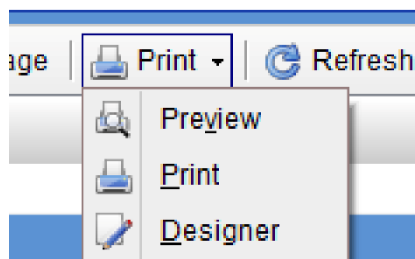
The message is marked as read with the  **Note read** button and the icon disappears.

The  **Delete note** button is used to delete the message after confirmation of the security prompt.

The view is refreshed and notes are called again with the  **Refresh** button.

2.1.3.3 Print note

The Print button opens a context menu.



Print context menu

Preview

Clicking preview opens a preview window in which the marked note can be printed.

Print

Click print to send the message directly to the default Windows printer for printing.

Designer

This opens the list designer, which can be used to edit the layout of the list.



NOTICE

The list designer is a component integrated into Drägerware and supplied by combit GmbH. Existing lists can be edited to meet user requirements with the list designer. Dräger Service does not support this program. Modification of the lists prepared by Dräger requires very good IT skills and background knowledge of the functions of the list designer. A help tool for the list designer can be opened by pressing the <F1> key. Dräger Service also offers an economical option for creating your required print layout.

3 File menu

The application can be closed with the  **Exit** menu item.

4 Delivery note menu

4.1 Create delivery note

When **Create delivery note** is opened, the input mask of the new delivery note is opened. The **Delivery note number** is automatically numerically incremented from the last entered delivery note number, but can also be set manually.




NOTICE

Users are recommended to define the number groups beforehand to build up long-term structures. The delivery note number could start with the year for structured document management, e.g. 2012-001.

Create delivery note

Delivery date

The **Delivery date** field is automatically populated with the current date. Press the  button to open a calendar in which a different date can be selected.



NOTICE

The field functions of the date fields can also be used in the Drägerware.Delivery Note/Invoice application (see the User menu chapter in the user manual).

Lock delivery note

After saving, the created delivery note is locked and can then only be changed with administrator authorisations.

Single invoice

An invoice can be created directly from this delivery note.

Delivery note profile

The delivery note profile can create a profile for the user or work area in which the contents of the fields listed below are populated to simplify the daily work.

There are three buttons beside the **Description** field:

Save

Saves the current delivery note profile.

Delete

Deletes the current delivery note profile.

Reset

Resets the fields to the actual profile settings after editing.

use on other workstations

If this checkmark is set, the saved delivery note profile is also available for other workstations.

release for other users

If this checkmark is set, other users can use this delivery note profile.

Delivery note menu

The following fields and areas are saved in the profile:

General

- Number of copies in the delivery note printout
- Consider/print checkboxes for the delivery note

Delivery note header tab

Delivery type, comment, sender, title/header, my reference, direct dial, fax number

Delivery note footer tab

Footers, comment

4.1.1 Address tab


Address tab

The left section of the **Address tab** can be used to record the invoice address and the right section can be used to record the customer's delivery address.



NOTICE

If Drägerware address management is used, the applicable address can be selected from the address management by entering a customer number or with the arrow buttons beside the customer number.

If the invoice address and delivery address are identical but both are required on the delivery note, the address can be imported directly with the  **From invoice address** button.

4.1.2 Delivery note header/footer tab

Delivery note header/footer tab

Various fields that can be exported to the delivery note header or footer are available here. Many fields in these tabs also have user menus, which can be populated with text blocks for a uniform printout of delivery notes.

These fields can also be saved with the delivery note profile.

4.1.3 Tests tab

Lieferscheinnummer: 2
Lieferdatum: 31.01.2020
Lieferschein sperren

Bezeichnung: Dräger

Identifikation / Kundenreferenz: MA-11000-8101 /
Gerätetyp: FPS 7000 ESA
Datum: 31.01.2020
Uhrzeit: 09:05:08
Prüfanlass: Wechsel alle Ersatzteile

Lieferscheindruck: Anzahl Kopien: 1
In Lieferschein berücksichtigen/drucken:
 Prüfungen Tätigkeiten
 Ersatzteile Geräte

Letzte Änderung: 17.03.2020 13:55 Administrator

Tests tab

Tests can be added and deleted here. Click on the  **Add** button to open the **Test selection** mask.

Suchbegriff

Selektionsfelder

Modul, Art, Typ
Besitzer/Nutzer
Eigentümer
Kategorie für Statistik
Standort 1
Standort 2
Standort 3
ID/Barcode
Aktueller Standort: Alle

Standort vor letzter Rückgabe

Zeitraum von bis
Verleihnummer
Kostenstelle Kostenstelle Text

Suchen Abbrechen

Test selection

Tests can be added to the delivery note according to specified selection criteria.

Location before last return

If this button is set, the location fields during the selection refer to the location before the last return that took place via the **Location change** application. This means that tests that took place after the return can be invoiced to the user of the equipment before the return.

**NOTICE**

A test can only be allocated once to a delivery note, i.e. if no more tests are displayed (after clicking on the **Search** button), all tests have already been allocated to delivery notes.

4.1.4 Equipment tab

Only one entry is made in the **Equipment tab** if a test was added in the **Tests tab**. Otherwise this tab remains empty. If multiple tests have been selected for one device, the device only appears once.

4.1.5 Spare parts tab

Spare parts tab

If spare parts were allocated during testing of a device, they are displayed here. The spare parts can also be edited or additional spare parts added with the following buttons. The optional warehouse management module must be installed to use this function.

**Add**

A spare part can be added from a selection list with this function.

**Delete**

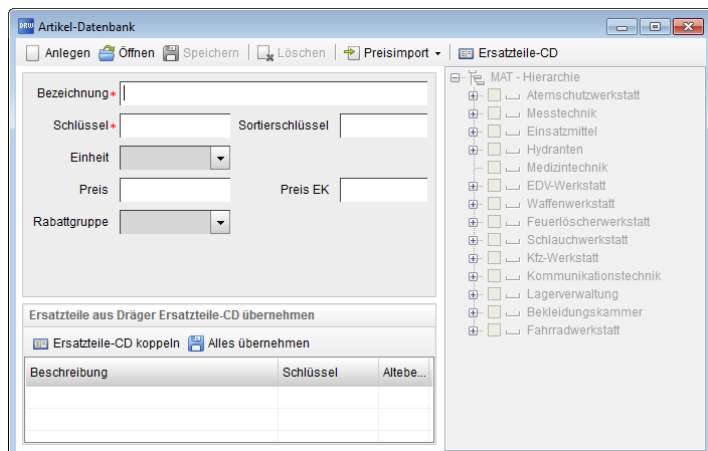
A spare part can be deleted from the list here.

**New/change**

A spare part can be edited in the list here. If no spare part is marked, the spare part can be created directly in the database.

Spare parts...

If a spare part is not in the database, a new spare part can be added to the database here.



Item database



NOTICE




If a Dräger spare parts CD is available, it can be linked here. Spare parts can be imported directly from the CD.

Fast selection

A spare part can be added directly to the test with the barcode or by entering identification 1. If a spare part is already available in the list, the number of the spare part is automatically incremented by one.

Coloured markings

If changes are made to the spare parts when editing the delivery note, the changes are highlighted by coloured symbols.

Symbol	Meaning
	Spare part was imported from the test and changed in the delivery note.
	Spare part was imported from the test and deleted in the delivery note.
	The spare part was added manually to the delivery note.

4.1.6 Services tab

Services tab

If services were allocated during testing of a device, they are displayed here. The services can also be edited or additional services added with the following buttons.

Add

A service can be added from a selection list with this function.

Delete

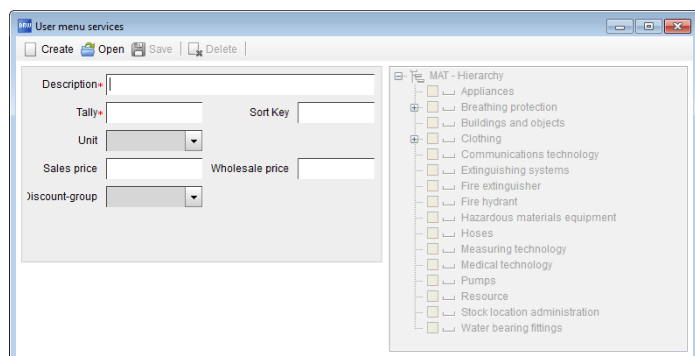
A service can be deleted from the list here.

New/change

A service can be edited in the list here.

Services...

If a service is not in the database, a new service can be created in the database with this function.



Services user menu

Fast selection

A service can be added directly to the test with the barcode or by entering identification 1. If a task is already available in the list, the number of the task is automatically incremented by one.

Coloured markings

The coloured markings correspond to those in the **Spare parts tab**.

4.2 Open delivery note

The delivery notes can be opened and changed from this menu item, if the user has the corresponding authorisations.



NOTICE


If a delivery note has been locked, it can only be opened with administrator authorisations.

The screenshot shows a software window titled "Procedure selection Delivery note". It features a "Selection fields" section with two columns: "Invoice address" and "Delivery address". Each column contains dropdown menus for "Customer No.", "Name 1", "Name 2", "Street", and "Country/ZIP/City", along with an "Address" button. Below these are fields for "Event Number", "Time Period" (with "Creation date of" and "Delivery from" sub-fields and calendar icons), "Your signature", and "My signature". A table with columns "Process", "Produced", "Completed", "Customer No.", and "Name" is located at the bottom. A "Search" button with a magnifying glass icon is positioned above the table. At the bottom left, there is a "Count" label, and at the bottom right, there is an "OK" button with a green checkmark icon.

Delivery note selection process

Users can search for the applicable delivery note according to the selection criteria displayed here by clicking on the **Search** button. A delivery note can be opened by double-clicking it or after selecting it then clicking the **OK** button.

4.3 Delete delivery note

This can be used to delete delivery notes. After selecting the menu item, the same selection window as for **Open delivery note** opens. After the applicable delivery note has been selected, it is imported with the  **OK** button.

The delivery notes are deleted from the system after confirmation of the security prompt.



Security prompt - delete delivery note

The corresponding reference for the allocated tests can also be deleted when the delivery note is deleted. The tests are then available for allocation to new delivery notes.



NOTICE

Only a few users should be authorised to delete delivery notes.


5 Invoice menu

5.1 Create invoice


Opening **Create invoice** opens the input mask of the new invoice. The **invoice number** is automatically numerically incremented from the last entered invoice number, but can also be set manually.

Create invoice

Invoice date

The **Invoice date** field is automatically populated with the current date. Press the  button to open a calendar in which a different date can be selected.

Delivery date

If a delivery note is added to the invoice, the delivery date is automatically populated with this date. Press the  button to open a calendar in which a different date can be selected.

Booking symbols

An additional booking symbol can be entered here.

Lock invoice

After processing, the invoice is locked and can then only be changed with administrator authorisations.

Status

The status of an invoice can be changed with these option fields.

Tracking

The process and the history of the invoice can be tracked in these date fields.

Invoice profile

The user or work area can create a profile with the invoice profile in which the contents of the fields listed below are populated to simplify the daily work.

There are three buttons beside the **Description** field:



Save

Saves the current invoice profile.



Delete

Deletes the current invoice profile.



Reset

Resets the fields to the initial profile settings after processing.

use on other workstations

If this checkmark is set, the saved invoice profile is also available for other workstations.

release for other users

If this checkmark is set, other users can use this invoice profile.

The following fields and areas are saved in the profile:

General

- Number of copies in the invoice printout
- Checkboxes for **Consider/print**

Header tab

Sender, title/position, my reference, direct dial, fax number, payment type, comment

Footer tab

Footers, comment, rows for general items

5.1.1 Address tab

The screenshot shows the 'Rechnung' (Invoice) software interface. The 'Anschritt' (Address) tab is active, displaying the following fields and options:

- Rechnungsnummer:** 1
- Buchungszeichen:** 1
- Rechnungsdatum:** 08.05.2019
- Lieferdatum:** 18.05.2018
- Status:** nicht gebucht (selected), gebucht, storniert
- Rechnung sperren:**
- Rechnungs-Profil:** Bezeichnung (dropdown), Speichern, Löschen, Rücksetzen buttons. Options: auch auf anderen Arbeitsplätzen verwenden, für andere Benutzer freigeben.
- Verfolgung:** Erstellt am: 08.05.2019; 1. Mahnung, 2. Mahnung, 3. Mahnung, Gutschrift, Zahlungseingang (all with dropdown arrows).
- Rechnungsanschrift:** Kundennummer (dropdown), Name 1: Testfeuerwehr, Name 2, Name 3, Straße/Postf.: Musterstraße, Land/PLZ/Ort: D, 12345, Musterstadt, Ansprechpartner.
- Druck:** Original drucken (checked), Duplikat drucken (checked), Anzahl: 1, Text: DUPLIKAT.
- Berücksichtigen/drucken:** Prüfungen, Ersatzteile, Tätigkeiten, Minimal (dropdown).
- Footer:** Letzte Änderung: 17.03.2020 | 13:37 | Administrator

Address tab

The invoice address of the customer can be recorded in the **Address tab**.



NOTICE

If **Drägerware.Address Management** is used, the applicable address can be selected from the address management by entering a customer number or with the arrow buttons beside the customer number.

5.1.2 Footer/Header tab

The screenshot shows the 'Rechnung' window with the following sections:

- Header/Status:** Rechnungsnr: 1, Buchungszeichen: 1, Rechnungsdatum: 08.05.2019, Lieferdatum: 18.05.2018, Status: nicht gebucht.
- Verfolgung:** Erstellt am: 08.05.2019, 1. Mahnung, 2. Mahnung, 3. Mahnung, Gutschrift, Zahlungseingang.
- Rechnungs-Profil:** Bezeichnung (dropdown), Speichern, Löschen, Zurücksetzen buttons, and checkboxes for 'auch auf anderen Arbeitsplätzen verwenden' and 'für andere Benutzer freigeben'.
- Kopfzeile:** Absender, Titel, Überschrift, Ihre Auftragsnummer, Ihr Auftragsdatum, Ihre Kostenstelle, Ihre Zeichen, Weitere Angaben, Ihre USt-Id-Nr., Ihre Steuer-Nr., Meine Zeichen, Durchwahl, FAX-Nummer, USt-Id-Nr., Steuer-Nr.
- Druck:** Original drucken (Anzahl: 1), Duplikat drucken (Anzahl: 1, Text: DUPLIKAT), Berücksichtigen/drucken (Prüfungen, Ersatzteile, Tätigkeiten, Minimal).

Footer/Header tab

Various fields that can be output to the invoice header or footer are available here. Many fields in these tabs also have user menus, which can be populated with text blocks for a uniform printout of invoices.

5.1.3 Delivery note tab

The screenshot shows the 'Rechnung' window with the 'Lieferschein' tab selected. The 'Lieferschein' section contains a table:

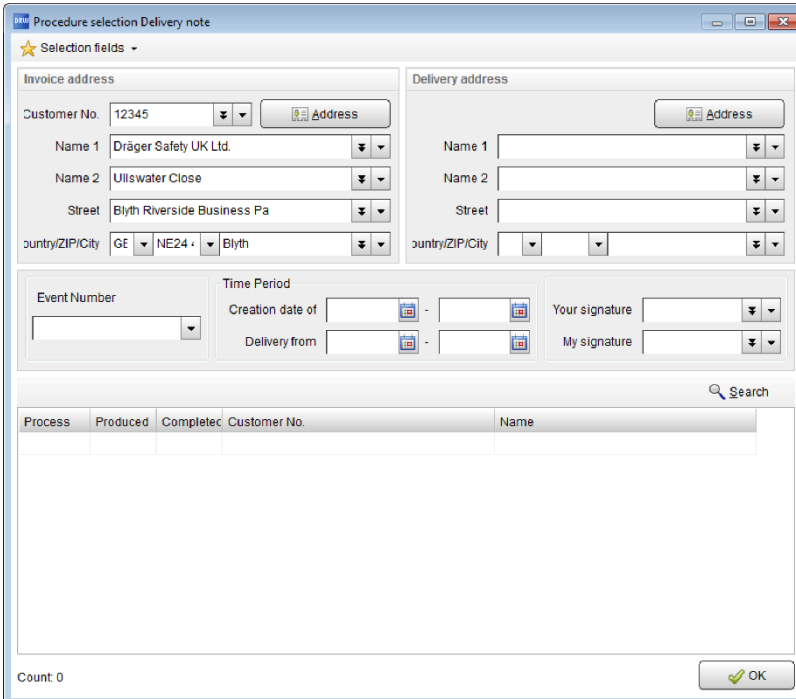
Lieferschein...	Erstelldatum	Auftrag
1	18.05.2018	

Buttons for 'Hinzufügen' and 'Löschen' are visible below the table. The rest of the interface (Header, Verfolgung, Rechnungs-Profil, Kopfzeile, Druck) remains the same as in the previous screenshot.

Delivery note tab

 **Add**


Delivery notes are added to the invoice with this button. It is opened by clicking the **Delivery note selection** mask.



Delivery note selection

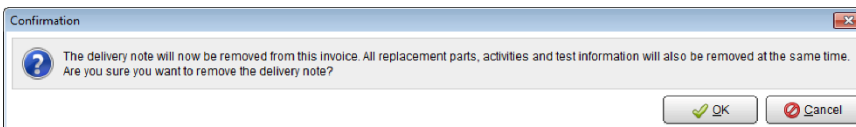
Delivery notes can be added to the invoice according to specified selection criteria.

**NOTICE**

A delivery note can only be allocated to an invoice once, i.e. if no more delivery notes are displayed (after clicking on the  **Search** button), all delivery notes have already been allocated to invoices.

 **Delete**

An accidentally added delivery note can be deleted with this button.

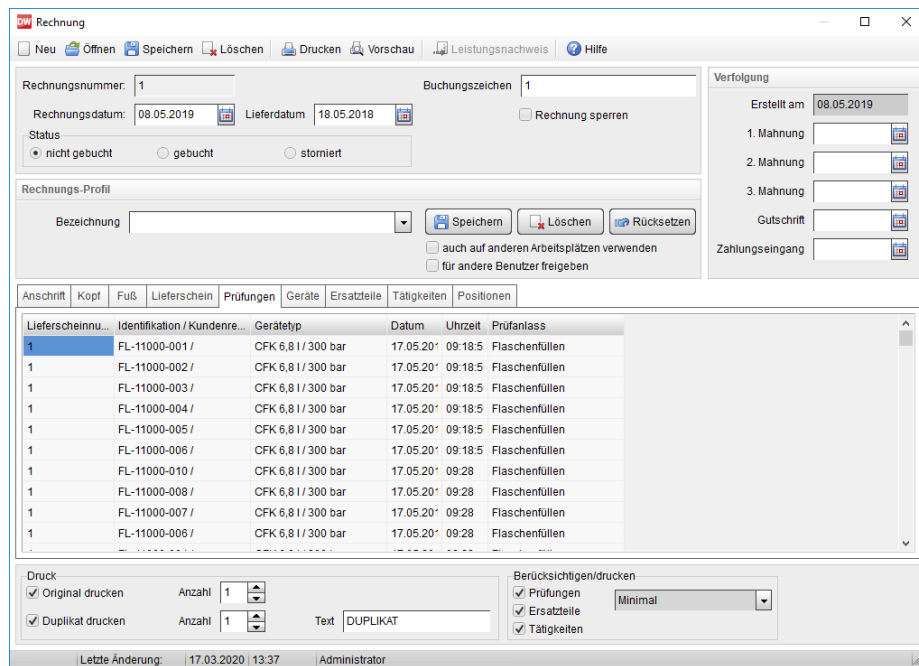


Confirmation of deletion of delivery note

**NOTICE**

Deleting the delivery note also removes all spare parts, services and test information from the invoice.

5.1.4 Tests tab



Tests tab

The tests allocated to the delivery notes are displayed here.

5.1.5 Equipment tab

The equipment allocated to the tests from the delivery notes is displayed here.

5.1.6 Spare parts tab

The screenshot shows the 'Rechnung' (Invoice) window with the 'Spare parts' tab selected. The main table contains one item:

Lieferscheinnr.	Ger...	Datum	Uhrzeit	Prüfanlass	Men...	Einheit	Bezeichnung	Meng...	Preis ...	Sum...	Schlü...	Kostenstelle
Manuell		Manu			1		Test	1	14,8	14,8	TEST	

Below the table, there are buttons for 'Hinzufügen', 'Löschen', 'Neu/Ändern', and 'Ersatzteile...'. The summary section shows 'MWST (%)' as 0, 'MWST' as 0,00, and 'Zwischensumme' as 14,80. The footer includes 'Druck' options (Original and Duplikat), 'Berücksichtigen/drucken' options (Prüfungen, Ersatzteile, Tätigkeiten), and user information: 'Geändert | Letzte Änderung: 17.03.2020 13:37 | Administrator'.

Spare parts tab

If spare parts were allocated to the delivery notes, they are displayed here. The spare parts can also be edited or additional spare parts added with the following buttons. The optional warehouse management module must be installed to use this function.

Add

A spare part can be added from a selection list with this function.

Delete

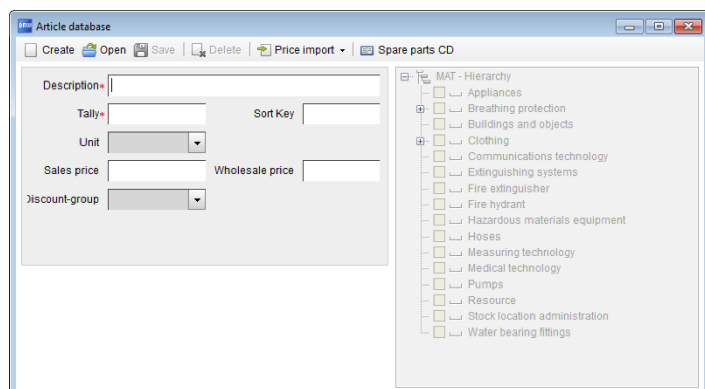
A spare part can be deleted from the list here.

New/change

A spare part can be edited in the list here.

 **Spare parts...**

If a spare part is not in the database, a new spare part can be added to the database here.



Item database



NOTICE




If a Dräger spare parts CD is available, it can also be linked here and spare parts can be imported directly from the CD.

Fast selection

A spare part can be added directly to the test with the **barcode** or by entering **identification 1**. If a spare part is already available in the list, the number of the spare part is automatically incremented by one.

Coloured markings

If changes to the spare parts are made when editing the invoice, the changes are highlighted by coloured symbols.

Symbol	Meaning
	Spare part was imported from the test and changed in the invoice.
	Spare part was imported from the test and deleted in the invoice.
	The spare part was manually added to the invoice.

VAT (%)

The value added tax rate must be entered here. The value added tax is calculated from the amount.

5.1.7 Services tab

The screenshot shows the 'Rechnung' (Invoice) window with the 'Services tab' selected. The interface includes a menu bar with options like 'Neu', 'Öffnen', 'Speichern', 'Löschen', 'Drucken', 'Vorschau', 'Leistungsnachweis', and 'Hilfe'. The main area is divided into several sections:

- Rechnungsnummer:** 1
- Buchungszeichen:** 1
- Rechnungsdatum:** 08.05.2019
- Lieferdatum:** 18.05.2018
- Status:** nicht gebucht (selected), gebucht, storniert
- Rechnungs-Profil:** Includes a 'Bezeichnung' dropdown, 'Speichern', 'Löschen', and 'Rücksetzen' buttons, and checkboxes for 'auch auf anderen Arbeitsplätzen verwenden' and 'für andere Benutzer freigeben'.
- Verfolgung:** Includes 'Erstellt am' (08.05.2019), '1. Mahnung', '2. Mahnung', '3. Mahnung', 'Gutschrift', and 'Zahlungseingang' fields.
- Services List:** A table with columns: Lieferscheinnr., Gerätenummer, Datum, Uhrzeit, Prüfanlass, Men..., Einheit, Bezeichnung, Meng..., Preis. One row is visible: Lieferscheinnr. 1, Gerätenummer Manuell, Men... 45, Einheit, Bezeichnung GEPRUEFTE_METER, Meng... 45, Preis 8,00.
- Buttons:** 'Hinzufügen', 'Löschen', 'Neu/Ändern', 'Tätigkeiten...'.
- Summary:** MWST (%) 0, MWST: 0,00, Zwischensumme 382,50.
- Druck (Print):** 'Original drucken' (checked), 'Duplikat drucken' (checked), 'Anzahl' 1, 'Text' DUPLIKAT.
- Berücksichtigen/drucken (Consider/print):** 'Prüfungen' (checked), 'Ersatzteile' (checked), 'Tätigkeiten' (checked), 'Minimal' dropdown.
- Footer:** Geändert, Letzte Änderung: 17.03.2020 13:37, Administrator.

Services tab

If spare parts were allocated to the delivery note, they are displayed here. The services can also be edited or additional services added with the following buttons.

Add

A service can be added from a selection list with this function.

Delete

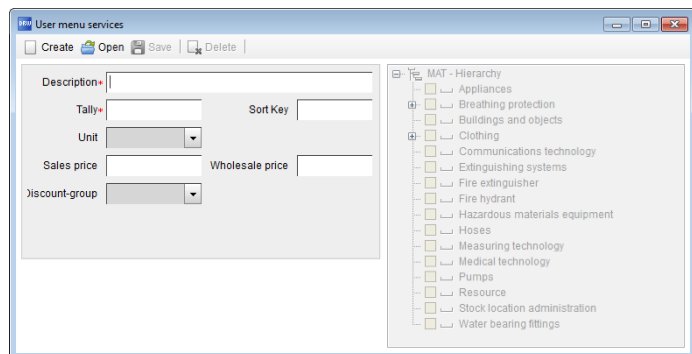
A service can be deleted from the list here.

New/change

A service can be edited in the list here.

Services...

If a service is not in the database, a new service can be created in the database with this function.



Services user menu

Fast selection

A service can be added directly to the test with the barcode or by entering identification 1. If a task is already available in the list, the number of the task is automatically incremented by one.

VAT (%)

The value added tax rate must be entered here. The value added tax is calculated from the amount.

Coloured markings

The coloured markings correspond to those in the **Spare parts tab**.

5.1.8 Items tab

Invoice items can be generated in this tab.

Items tab

Generate

The invoice items are generated from the spare parts and services on the invoice. The type of generation can be selected at the bottom right in the **Consider/print** selection box.

The following options are available: **Minimum**, **Detailed** and **Grouped**.

The individually generated items can be edited with the **<F2>** function key.

Delete generation

The previous generation can be deleted with this button. A new generation can then be executed.

Add item/ Add subitem

New items or subitems for the invoice can be added with these buttons.



NOTICE

Adding an item or subitem and entering a negative price also allows credit notes to be created.

Delete

An item or subitem can be deleted from the invoice here.

An itemised invoice print-out takes place via the **Default invoice** print layout. This print layout is preselected.

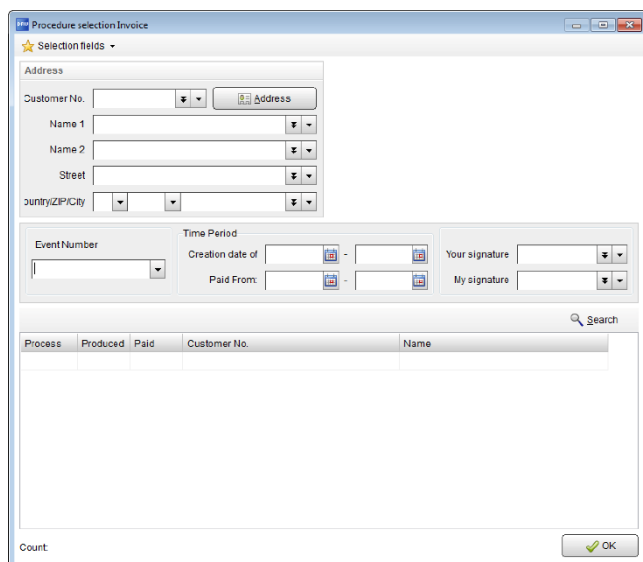
5.2 Open invoice

The invoices can be opened and changed with this menu item, if the user has the corresponding authorisations.





NOTICE


If an invoice has been locked, it can only be opened with administrator authorisations.



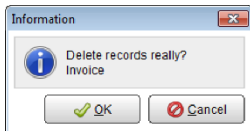
Invoice procedure selection

Users can search for the applicable invoices by the selection criteria displayed here by clicking on the  **Search** button. An invoice can be opened by double-clicking it or by selecting it then clicking the  **OK** button.

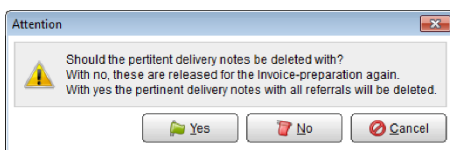
5.3 Delete invoices

This can be used to delete invoices. After selecting the menu item, the same selection window as for **Open invoice** opens. After the applicable invoices have been selected, they are imported with the  **OK** button.

The invoices are deleted from the system after confirmation of the security prompt.



Delete invoices



Security prompt - delete delivery note

The corresponding reference for the allocated tests can also be deleted when the delivery note is deleted. The tests are then available for allocation to new delivery notes.



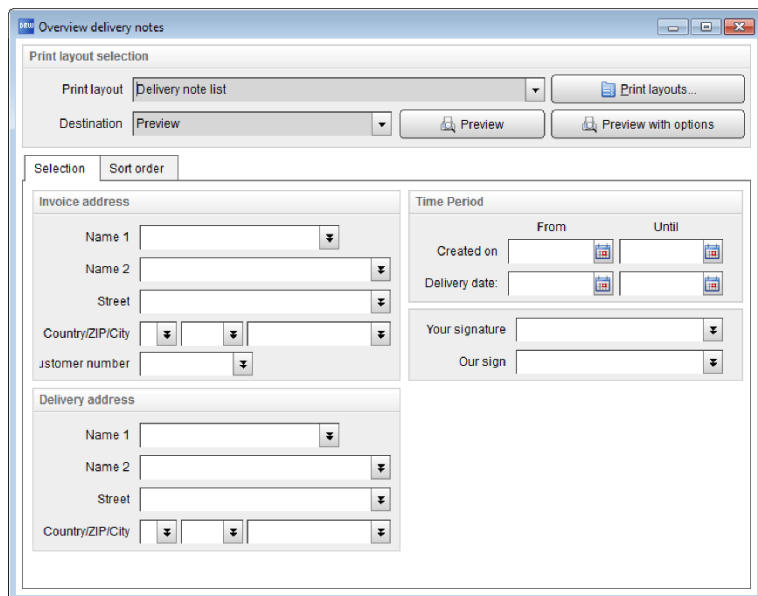
NOTICE

Only a few users should be authorised to delete invoices.

6 Lists menu


Various lists can be generated from the application with the lists menu. As the lists for delivery notes and invoices are similar, they are described together.

After selecting the list, a selection window opens. As the selection criteria are also similar, only one example is used to describe a selection window of this type.



Lists selection window

Selection of print layout

The print layout can be selected here. The included layouts can be revised and edited to meet your own need with the  **Print layouts...** button. This section is described in more detail in the **Editing lists** chapter in the **user manual**.



NOTICE

The list designer is a component integrated into Drägerware and supplied by combit GmbH. Existing lists can be edited to meet user requirements with the list designer. Dräger Service does not support this program. Modification of the lists prepared by Dräger requires very good IT skills and background knowledge of the functions of the list designer. A help tool for the list designer can be opened by pressing the **<F1>** key. Dräger Service also offers an economical option for creating your required print layout.

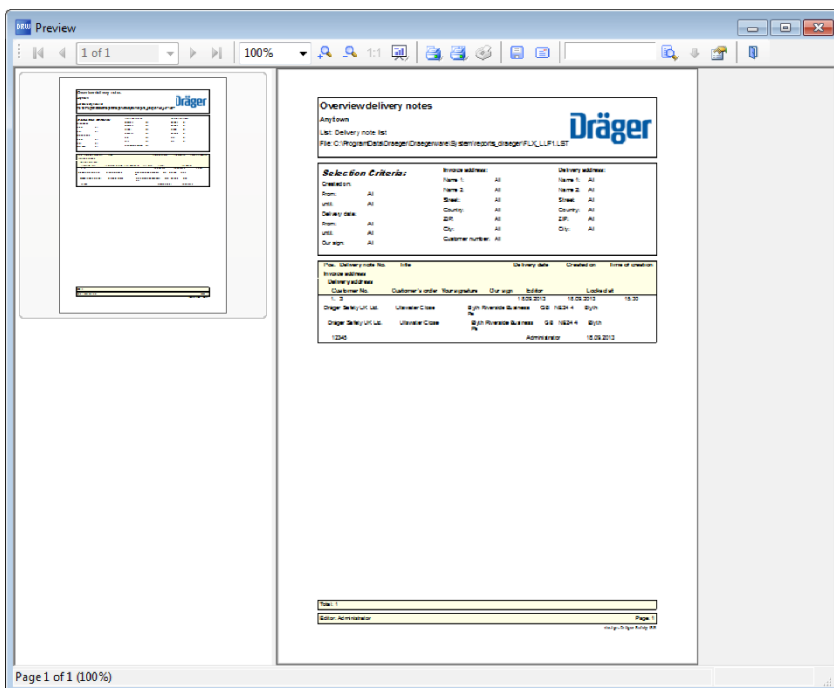
Output destination

The list output destination can be selected here. The adjacent buttons change to **Preview**, **Print** or **Export**, depending on the selection.

Example:

Preview

A preview window that displays the list is opened here.

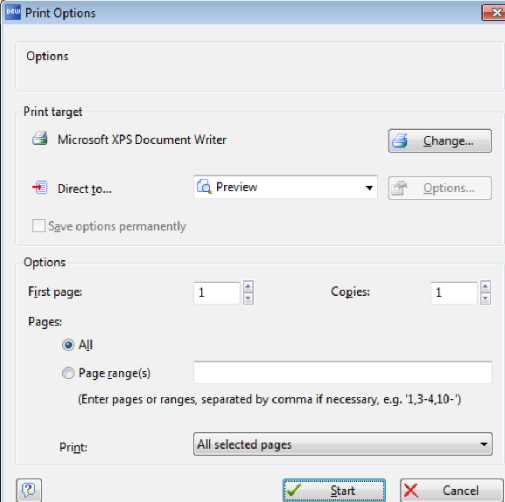


Preview window

Lists menu

Preview with options

This first opens a window in which additional output settings can be made.

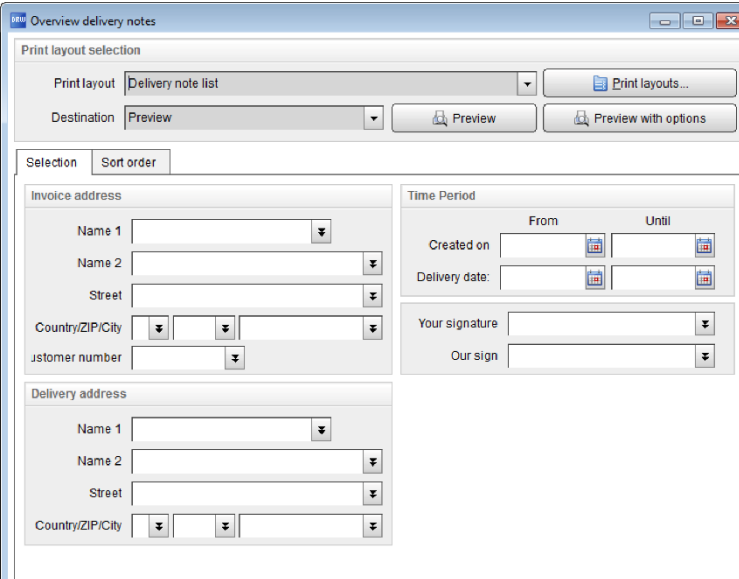


The 'Print Options' dialog box is shown. It has a title bar with 'Print Options' and standard window controls. The main area is divided into sections: 'Options' (empty), 'Print target' (Microsoft XPS Document Writer with a 'Change...' button), 'Direct to...' (Preview dropdown with an 'Options...' button), and a 'Save options permanently' checkbox. Below this is another 'Options' section with 'First page:' (1) and 'Copies:' (1) spinners. The 'Pages:' section has radio buttons for 'All' (selected) and 'Page range(s)', with a text input field and a note '(Enter pages or ranges, separated by comma if necessary, e.g. '1,3-4,10-')'. A 'Print:' dropdown is set to 'All selected pages'. At the bottom are 'Start' and 'Cancel' buttons.

Output settings

Selection tab

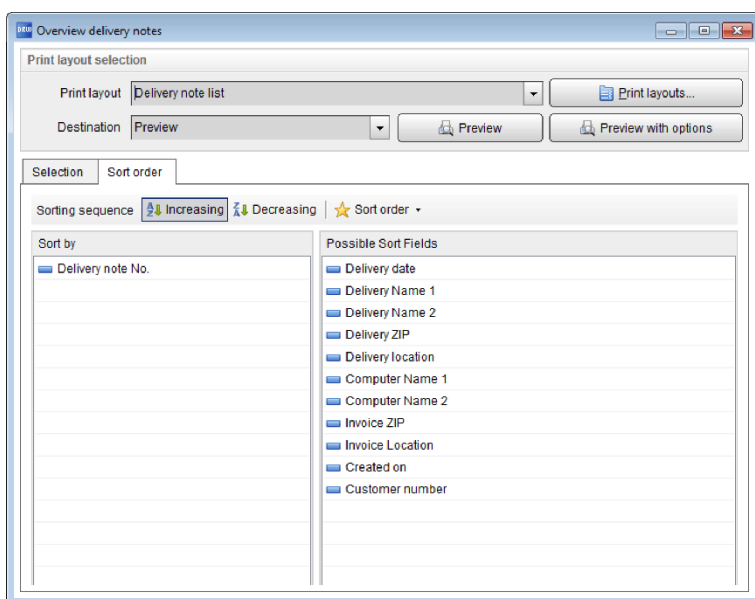
The data sets can be restricted by setting various criteria.



The 'Overview delivery notes' dialog box is shown. It has a title bar with 'Overview delivery notes' and standard window controls. The 'Print layout selection' section at the top has a 'Print layout' dropdown (Delivery note list) with a 'Print layouts...' button, and a 'Destination' dropdown (Preview) with 'Preview' and 'Preview with options' buttons. Below this are two tabs: 'Selection' (active) and 'Sort order'. The 'Selection' tab contains two main sections: 'Invoice address' and 'Delivery address'. Each section has fields for 'Name 1', 'Name 2', 'Street', and 'Country/ZIP/City'. The 'Invoice address' section also has a 'Customer number' field. To the right of these sections is a 'Time Period' section with 'Created on' and 'Delivery date' fields, each with 'From' and 'Until' date pickers. Below the 'Time Period' section are 'Your signature' and 'Our sign' dropdown menus.

Selection tab

Sort tab



Sort tab

The sort order for the list can be defined here. The desired fields can be selected here. The sort order is defined with the **Ascending** and **Descending** buttons.

The settings can be saved, loaded and deleted in the **Sort** drop-down menu.

Save

The previously selected sort order is saved here.

Load

The last saved sort filter is loaded here.

Default sort

Resets the default sort order of the list.

Without sort

Deletes all sort criteria.

6.1 Overview of delivery notes and overview of invoices

Depending on the selection, this list creates an overview of the delivery notes and invoices available in the database.

6.2 Spare parts delivery note/Services and Spare parts invoice/Services

This list creates an overview of the spare parts and services listed in the selected delivery notes and invoices.

6.3 Multiple delivery note and multiple invoice

Multiple delivery notes or invoices can be printed here in one step. For example, multiple delivery notes or invoices can be created and then printed out in the form of a batch print.

7 Settings menu

7.1 System settings

7.1.1 User management

Users, groups and their authorisations are set up in the **User management** menu item. These functions are described in detail in the **Administration Manual**.

7.1.2 System

The screenshot shows a window titled 'System Parameter' with a tree view on the left containing 'Einstellungen' and 'Lieferschein/Rechnung'. The main area is titled 'Rechnung' and contains the following settings:

- Ersatzteile / Tätigkeiten:** Radio buttons for 'Brutto' (selected) and 'Netto'.
- Rechnungsnummer (Gutschrift) automatisch generieren
- Gutschrift gleicher Nummernbereich wie Rechnung
- Erweiteter Rechnungsreport
- Adressverweise für Lieferschein/Rechnung:** Two dropdown menus for 'Adressart für Lieferschein' and 'Adressart für Rechnung'.
- Input fields for 'UST-Id-Nr.' and 'Steuer-Nr.'

Buttons for 'OK' and 'Abbrechen' are at the bottom right.

System settings - System

System-related settings for the delivery note/invoice area can be changed in this tab.



NOTICE

These settings can only be edited with administrator authorisations.

Spare parts/services

Here the user can specify whether the prices entered with the spare parts and services are to be gross or net. If net prices are specified, the invoice automatically includes the statutory value-added tax.

Generate invoice number (credit note) automatically

If the tick is set, the invoice number is automatically incremented by one when an invoice is created.

Credit note same number range as invoice

Here the user can specify whether credit notes are to have a separate number range. If the tick is set, the same number range as for invoices is used when a credit note is created.

Advanced invoice report

If this option is set, only the **Advanced invoice** report is available for the invoices. This provides additional data on delivery notes and invoices. Address fields must be added by the customer themselves.

Address references for delivery note/invoice

Here the user can select the address type with which the delivery and invoice address is populated. For example, if the possessor/user of a device is linked to the address type via the address field, the delivery and invoice address will be automatically completed when the equipment is added, if the address fields are still blank.

VAT no.:

The VAT number of the organisation can be entered here.

Tax ID:

The tax number of the organisation can be entered here.

7.2 User settings

7.2.1 Activate deactivated notes

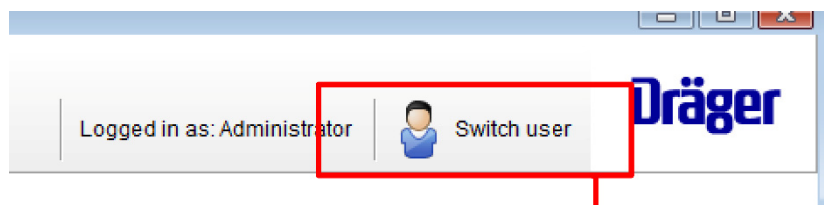
Notices and security prompts that were previously deactivated by the **Stop showing this message any more** checkbox can be re-activated here.

8 User menu

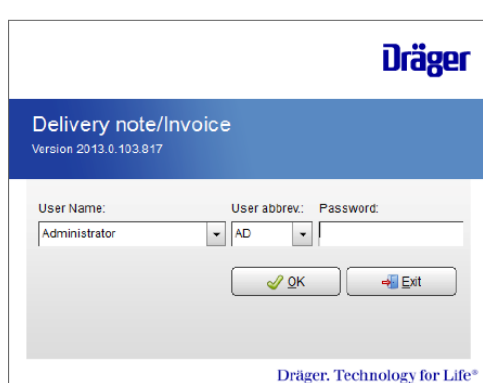
8.1 Change user

This function offers the option of changing users (e.g. when changing workstations) without exiting the program and restarting it.

The user change can also take place with the **Change user** button on the main application screen.



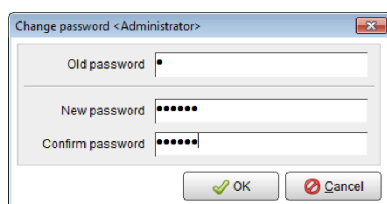
Main window - change user



Log-in window

Click this button to show the log-in window. The most recent user is already entered, allowing this function to be used for fast lockout of the application.

8.2 Change password




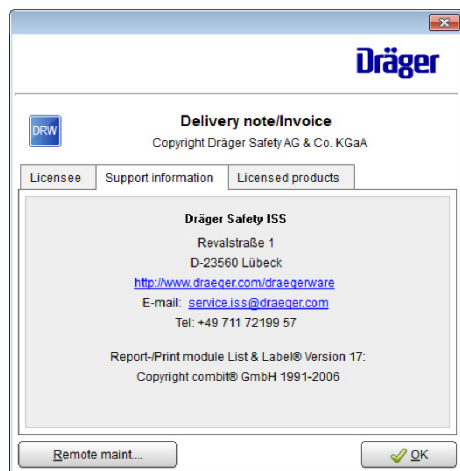
Change password

The personal password can be changed here. First enter the old password and then the new password. For security reasons the password must be confirmed to prevent spelling errors. The password is saved in the database in encrypted form and cannot be viewed by anyone.

9 Help menu

9.1 Info

Press the  button to open the info window, which contains three tabs.



Info window

Licence owner

The licence owner data are displayed here.

Support information

The manufacturer's data are displayed here.

Licensed products

The licensed program modules are displayed here.

Remote maintenance

Click on the arrow to open an application for remote maintenance. This allows Dräger Service to perform maintenance work after prior consultation. This section is described in more detail in the **maintenance chapter** in the **Administration Manual**.



NOTICE

The information shown here is required by Dräger Service.

9.2 Help

Press the  button to open this manual as a PDF document. A PDF viewer is required (e.g. Acrobat Reader).

The help function can also be opened by pressing **<F1>**.

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