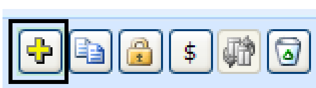
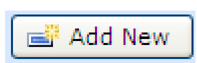
Quick Start Manual

How To:

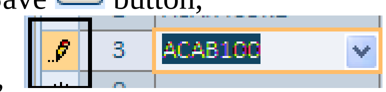
1. To add new orders, customers, suppliers, invoices, items, click the Plus  button.



2. To add new record to a list, click 

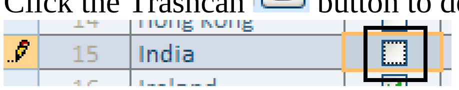
button or scroll to the bottom of the list.

3. To save changes, click the Save  button,

   or click on a record selector, 

   or go to a different record, or just close the screen.

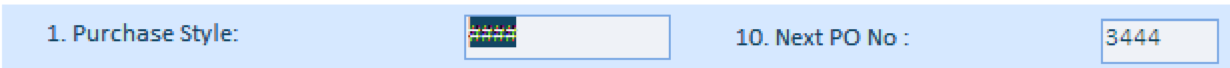
4. Click the Trashcan  button to deactivate or turn off the Use switch

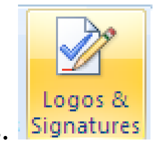


5. To delete an order, customer, supplier, invoice, item permanently, go to the deactivated record and click the Trashcan  button.

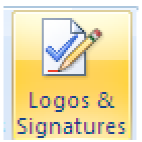
6. To increase or decrease font size, use the buttons where available. Use the Grid button to add or remove datasheet columns.

7. To set order number style, go to the Configuration menu tab, the Configuration group, the Options screen, Numbers (Tab 2).
   Set style on the left and next number on the right (for manual numbering set to -1).

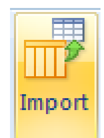


8. To add a new logo, go to Configuration tab, Information & lists group, Logos & Signatures. 

   For the new logo click button and type in logo name. Paste your logo. Click button to save.

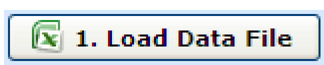
9. To add a signature, go to the Configuration tab, the Information & Lists group, the Logos & Signatures. 

   screen. Select a user name and paste signature. Click the Save button.

10. To import data, go to the Configuration tab, the Data group, the Import. 

   screen.

   To import from file:

   a. Click on 

   button. Navigate to the file and open it.

   b. Select Type of data 

   .

   c. Click the Map Data button and pick field names (from 0 record).
   d. Click the Save Imported Data when finished. Verify number of records added with the Ok button.

To use manual data entry:

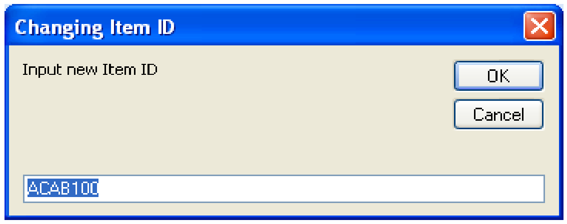
   a. Select Type of data 

   .

   b. Click the Map Data button and pick field names (from 0 record).
   c. Type in data.

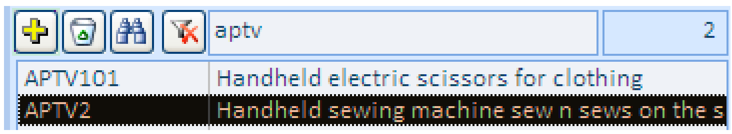
d. Click the Save Imported Data when finished. Verify number of records added with the Ok button

11. To rename Item ID, go to the Inventory Item screen. Double-click an Item ID in the list on the left.



Rename Item ID and click OK button.

12. To filter items, customers, or suppliers, start typing a phrase into the Search field. The filtering occurs on the fly.



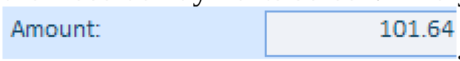
Click the button to clean filter.

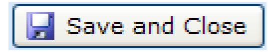
13. To receive inventory (adjust up), go to the Activities menu tab, the Inventory group, the Adjust Up. Adjust Up screen. Pick an Item ID from the drop down list. Fill out all other necessary fields. Click on button to change quantities. Use the Save Receipt button on the top right of the screen to save the adjustment.

14. To adjust inventory down, go to the Activities menu tab, the Inventory Group, the Adjust Down Adjust Down screen. Pick an Item ID from the drop down list. Click on the Plus button to change the quantities. Use the Save Issue button on the top right of the screen to save the adjustment.

15. To post a payment against a purchase order, go to the Activities menu tab, the Purchase Orders & RFQs group, the Manage POs screen. Find your PO. Click the Send Payment Send Payment button on the bottom right of the screen. Type in the amount Amount: 101.64. Click Save & Close Save and Close button to post transaction.

16. To return product to supplier, go to the Activities menu tab, the Purchase Orders & RFQs group, the Manage POs screen. Change Status filter to "Closed" and find a purchase order. Click the Return Authorization button to input supplier return authorization number (RAN). For each product, adjust quantities to be returned in the Auth Qty field. Click the Return Product button. On the next screen, turn on the Return checkbox for each product you are returning and pick the location. Click the Save Return button to save the adjustment.

17. To post payment against invoice, go to the Activities menu tab, the Sales Orders & Quotations group, the Receive Payments screen. Find your Invoice number. Input the amount 

. Click the Save and Close 

button to post transaction.

18. To deal with customer returns, go to the Activities menu tab, the Sales Orders & Quotations group, the Manage Sales screen. Set the Status filter to "Closed" and find a sales order. Click the Return Authorization  button to allocate new customer return authorization number (RAN). For each product, adjust returning quantities in the Auth Qty field. Click the Return Product button. On the next screen, turn on the Return checkbox for each product you are returning and pick the location you are stocking the unit to. Click the Save Return button to save the adjustment.