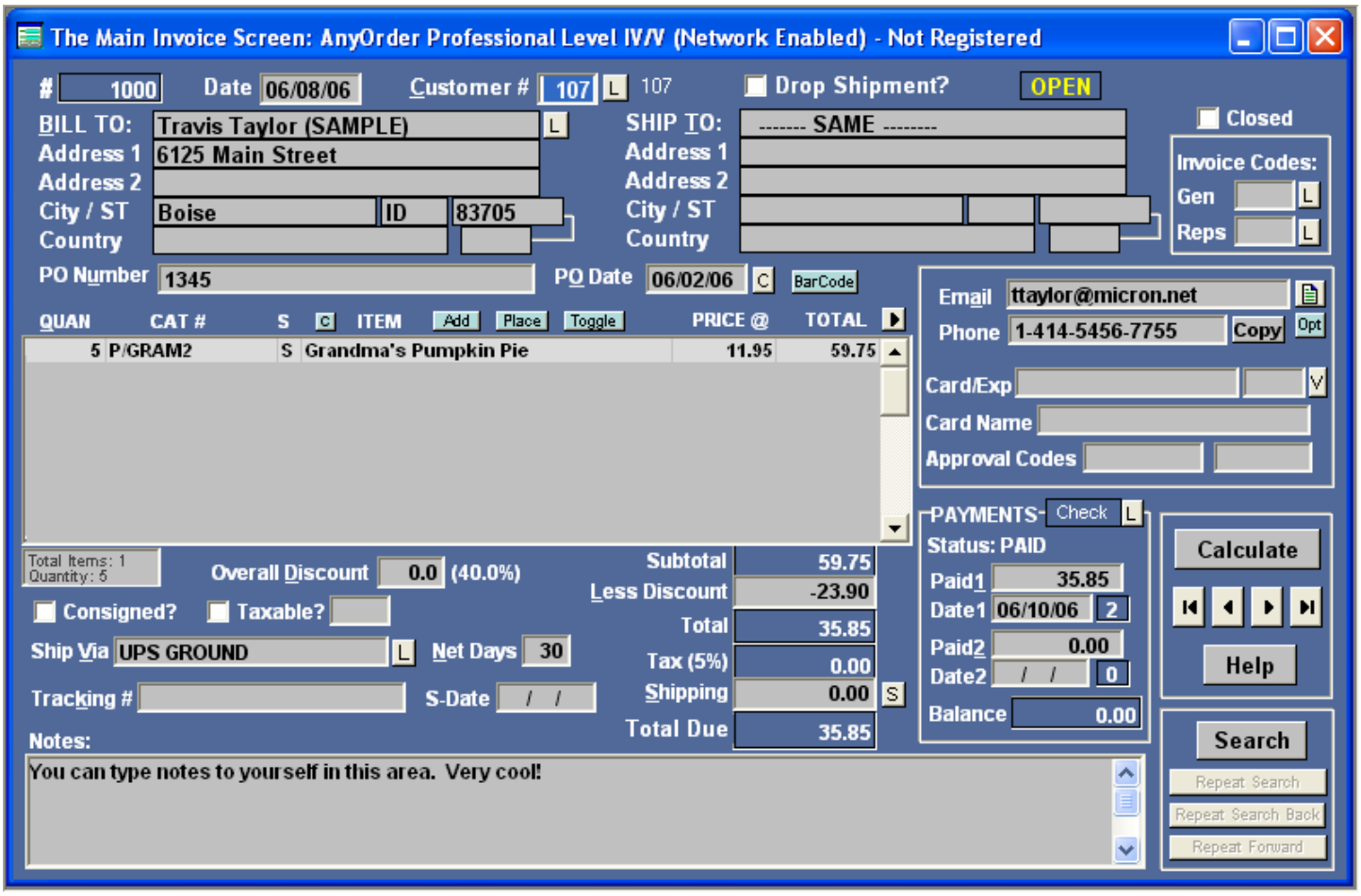
Getting Started with AnyOrder

Where Everything Starts: The Main Invoice Screen

When you first start the program, the Main Invoice Screen appears. AnyOrder has many different functions, but since invoicing is such an important part of any business, it serves as the starting point of the rest of the program. This same screen stays visible throughout the program. It is basically an electronic invoice form on which you enter the billing name, address, shipping address (if it is different than the billing address), your customer's purchase order number, date, items, etc. Once all the information is entered on an invoice, you can select FILE and PRINT INVOICE from the Menu Bar printed across on top of your screen. (The Menu Bar is discussed next).

You can move from blank to blank by using tab or your mouse. You can also move by holding down the Alt key and pressing the underlined letter. For an example, pressing Alt+S will move your cursor to the "shipping" blank.

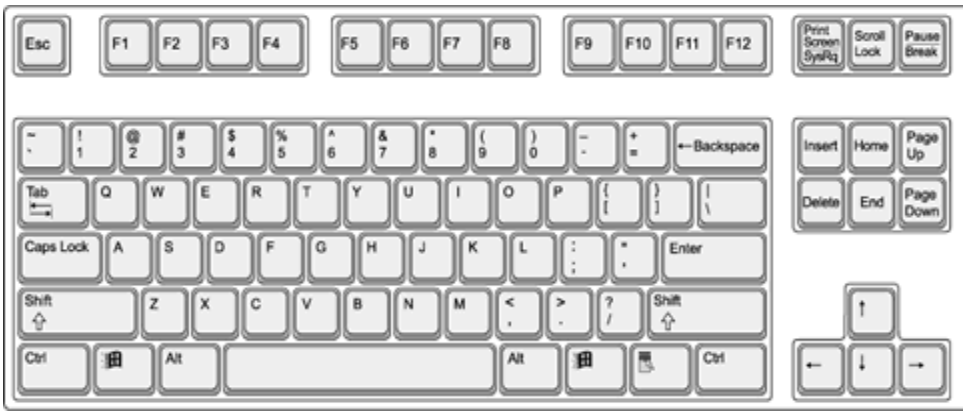


The Menu Bar on Top of the Invoice Screen

The Menu Bar consists of FILE...GO TO...INVOICE TOOLS...PRODUCT TOOLS…MAIN TASKS...WINDOW...HELP which runs across the top of the Invoice Screen. You select menu items by clicking them with the mouse or by pressing Alt on the keyboard and the first letter of the menu item, i.e. pressing Alt+F opens the FILE menu.

Moving From Invoice to Invoice

You can move from invoice to invoice by pressing Page Up or Page Down on your keyboard. To go to the first invoice, press Ctrl+Page Up on your keyboard. To go to the last invoice, press Ctrl+Page Down. You can also move from invoice to invoice by clicking on one of the navigation buttons on the bottom right of the screen. The navigation buttons resemble the buttons on a VCR or CD. The right arrow button (>) goes to the next invoice, and the left arrow button (<) goes the previous invoice. The right arrow with a line (>|) goes to the last invoice, and the left arrow with a line (|<) goes to the first invoice.



Use the Page Up and Page Down keys on your keyboard to move forward & backwards through the invoices.

Using Page Down is also a way of starting a new invoice. Make sure you are on the last invoice (you can press CTRL+Page Down to get to the last invoice). Then press Page Down, and AnyOrder will ask if you like to start a new invoice.

Getting Help

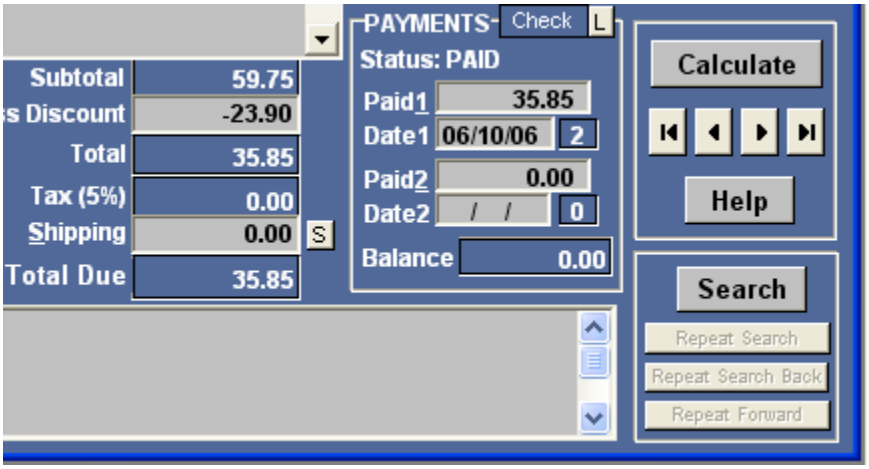
An extensive help system has been developed and is available throughout the program. To access it, select HELP from the Menu Bar on top of the screen, or click on the HELP button found on most of the dialog boxes. The function key F1 is the quick access key to the help system, and pressing it always brings up the most relevant help information. You can also hold the mouse cursor over the parts of the screen and a short description will appear.

Searching

As your list of invoices grows, you'll probably want to use the Search feature. It is reached by selecting GO TO from the Menu Bar and choosing SEARCH. Or you can click on the "Search" button on the lower right-hand corner of the screen. In the Search dialog box you can enter the invoice number of the invoice you are looking for. Or you can enter part or all of billing name. You can even enter a state or city. The search dialog box always searches for words first (and disregards the invoice number). If there are no words entered, it will search for the indicated invoice number.

To continue searching, click on "Repeat Search" on the bottom of the Invoice Screen (or you can select SEARCH > REPEAT SEARCH from the Menu Bar).

For specialized searches, such as searching for a certain Purchase Order number or certain product or catalog number, select GO TO > ADVANCED SEARCH.



For quick searches, click on the "Search" button on the lower right hand corner of the screen. AnyOrder will search from the most recent to older invoices. If the invoice is not the one you need, click on "Repeat Search" ←

For specialized searches, such as searching for a particular product or payment amount, select GO TO > ADVANCED SEARCH from the menu bar.

Opening a New Invoice

To start a new invoice, go to your last completed invoice and press Page Down. OR select GOTO from the Menu Bar and choose NEW INVOICE (New Blank Invoice).

Saving Invoices

The program automatically saves information as you enter it. It is not necessary specifically to save invoices. However, you should always properly exit the program by pressing FILE and EXIT. This assures that all the files are closed properly and brought up to date.

When you exit, a message will appear which enables you to back-up your data files. You should always do a back-up. It's critically important. Within a short time of starting to use AnyOrder, you'll accumulate a great amount of data on your business. Having a back-up is your assurance that you'll never loose that data if something goes wrong with your computer.

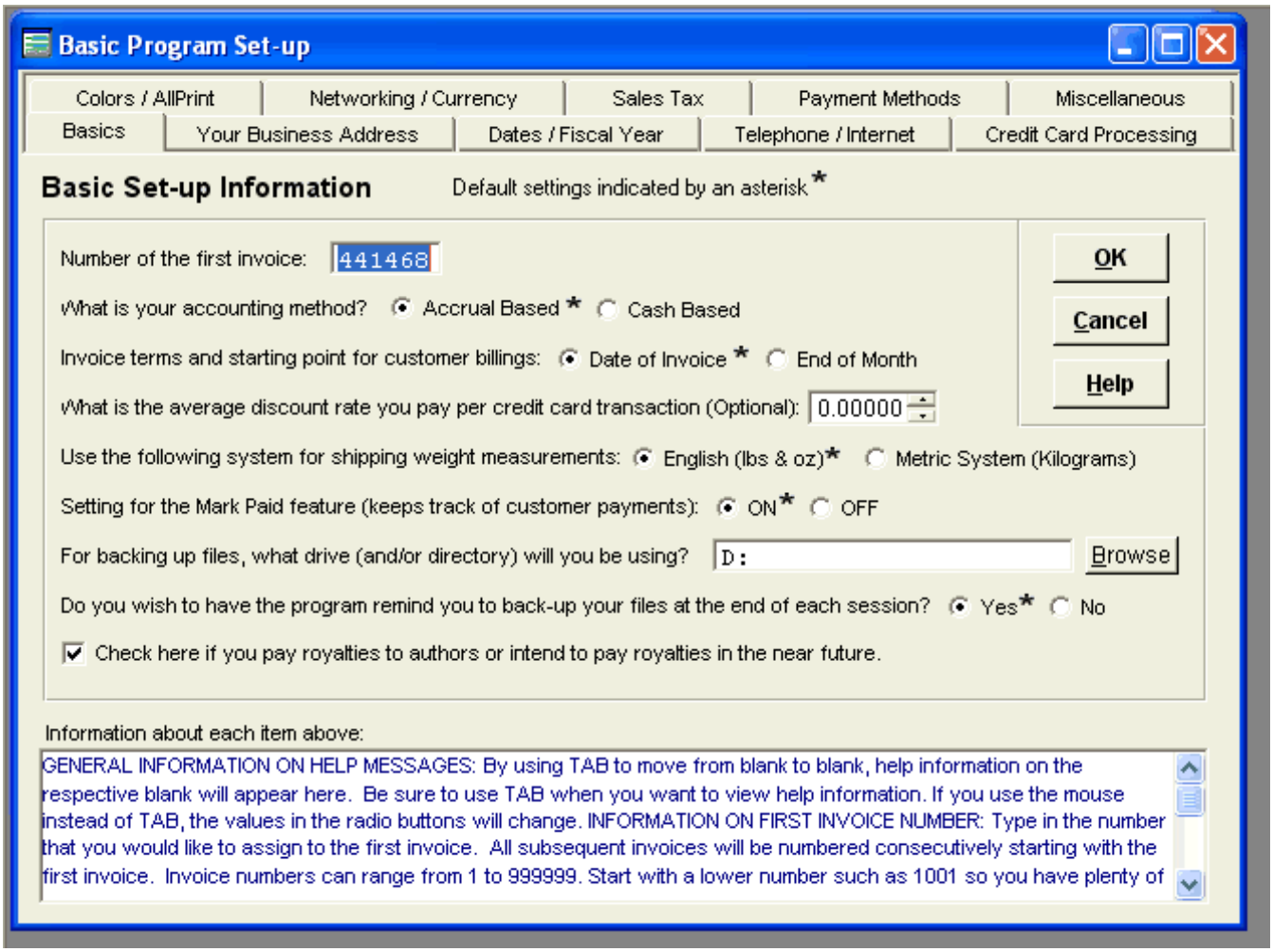
Basic Program Set Up

Before you start entering information in AnyOrder, you'll want set-up the program for your business environment. The program needs to know your address for printing out invoices. It needs to know if your state or local government charges sales tax and how much, etc. All this information is entered in Basic Setup.

To reach it, select FILE > BASIC PROGRAM SET UP & PREFERENCES from the Menu Bar. A screen will appear with a series of questions and blanks. Fill in each of the blanks. To assist you, a help system has been

built into the dialog box. If you use TAB to move from question to question, helpful information will appear in the box at the bottom of the screen. More help is available by pressing the HELP button.

Be sure to click on the "Business Address" tab on the top the Basic Set-up Screen. This allows you to enter your business name and address. When your address has been entered and other parts of Basic information are complete, click on FILE > SAVE & CLOSE from the menu bar. You will be returned to the Main Invoice Screen.



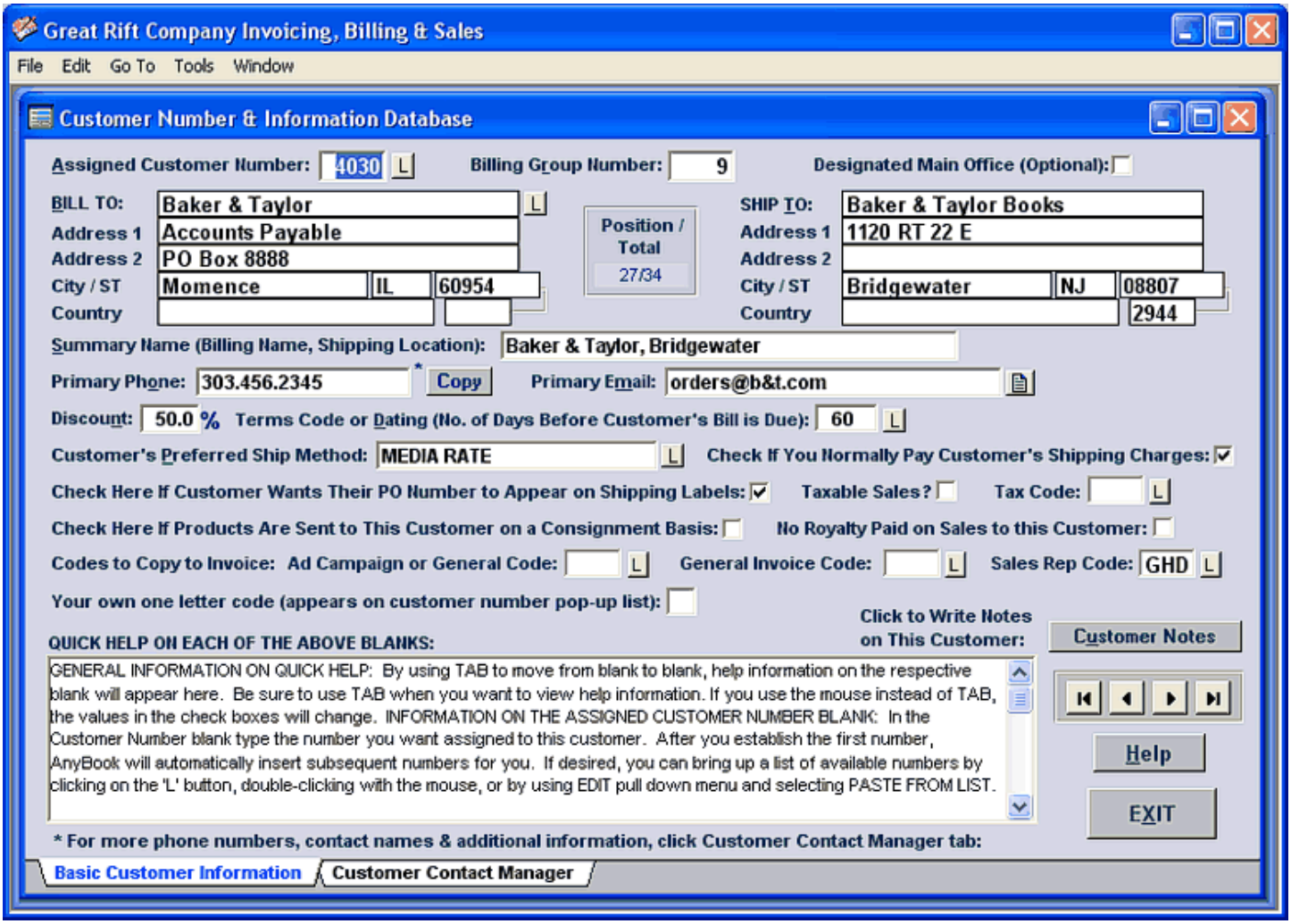
Printing

To print an invoice, make sure that the invoice you want printed appears on the screen. You can Page-Up or Page-Down to get to it. When you get to the proper invoice, select FILE and PRINT INVOICE from the Menu Bar.

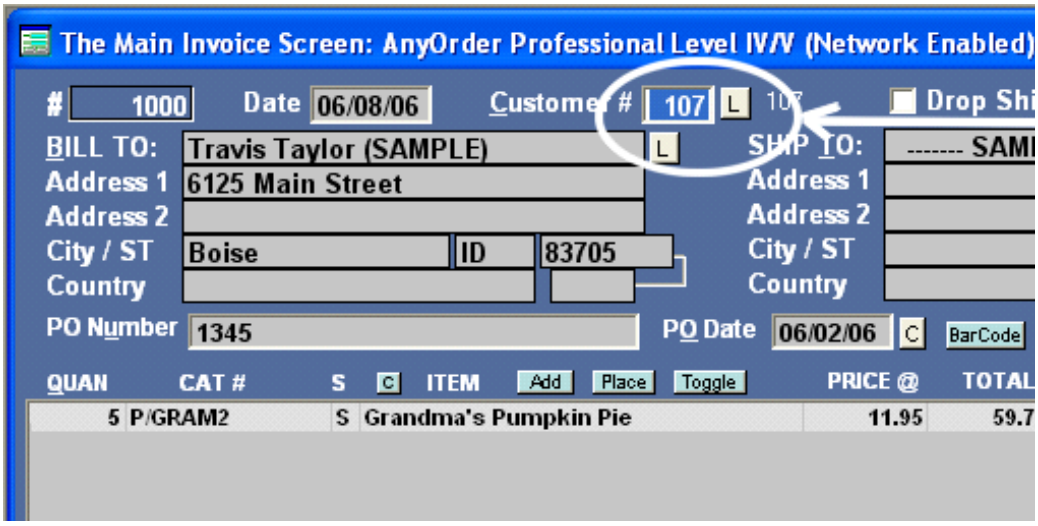
The Print dialog box will appear. You can select from several different options on the top of the screen (packing list only, original and one copy, etc). Or you can set the numbers of packing slips, copies and originals in the bottom half of the box.

Customer Numbers & The Customer Information Database

If you have regular customers, you'll want to put them into the Customer Information Database. To do so, select MAIN TASKS >> CUSTOMER ADDRESSES AND NUMBERS from the Menu Bar. The Customer Information Screen will appear. On the screen, you can enter the name of the customer, the customer's usual discount, etc. A help system has been built into the dialog box. As you use Tab to move from blank to blank, help information appears in the box on the bottom of the screen.



Once you have one or more customers in the Customer Information database, you can have the program automatically enter the address and other information. From the Main Invoice Screen, click on the "L" button ("L" is for "List") just after the "Customer #" blank. (You can also place your cursor in the Customer # blank and double-click or press CTRL-L.) A pop-up list of all the customers and their numbers will appear. Select the correct customer and all information is entered automatically. It's fast and it saves you typing time.

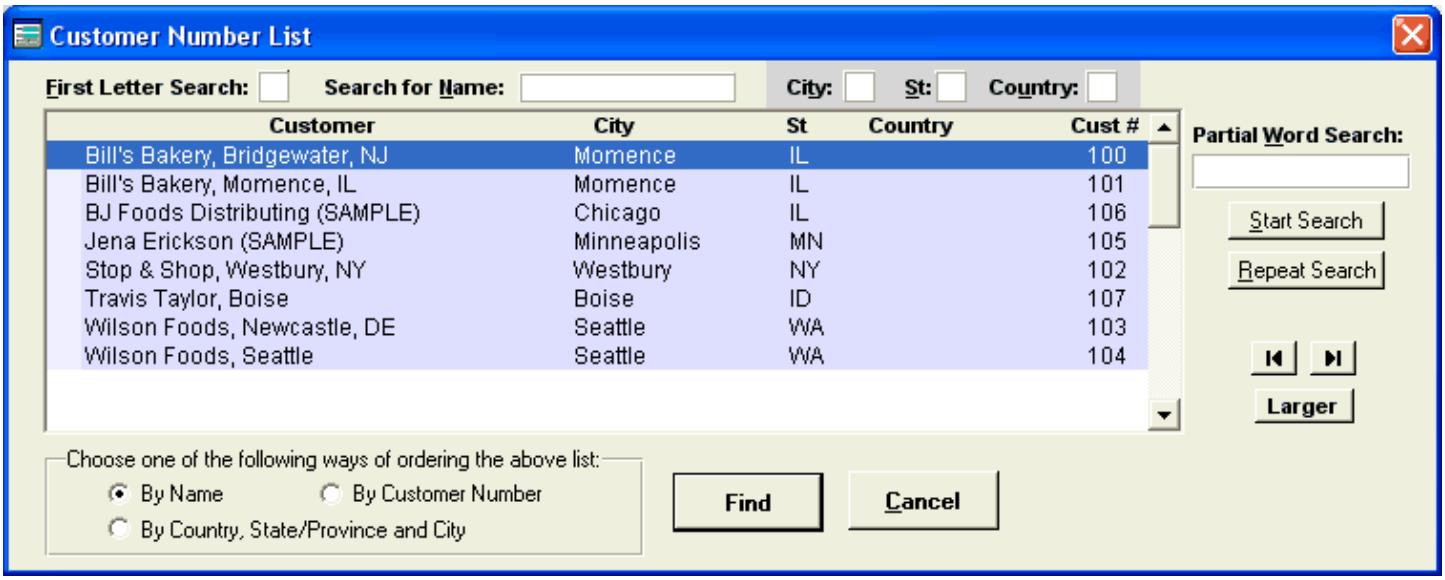


The first "L" Button ("L" is for "List") brings up a pop-up list of the customers you've entered in the Customer Database. Use the Customer Database for your regular customers.

The second "L" Button (beside the "Bill to" blank) brings up a pop-up list of ALL Customers.

Select a customer from either pop-up list and the customer's name, address and other other information will be automatically entered in the blanks. It's quick and easy.

Here's what the pop-up list looks like for the Customer Database. This is what appears when you click on the first "L" described above. Select a customer, and the customer's name, address, and other information is entered on the invoice screen.



Customers without Numbers

You don't have to assign customer numbers to everyone. Many of your customers may be one-time or infrequent buyers. If that's the case, you'll not want to waste time assigning them a number. Just enter their name and address on the Main Invoice Form. No number is needed.

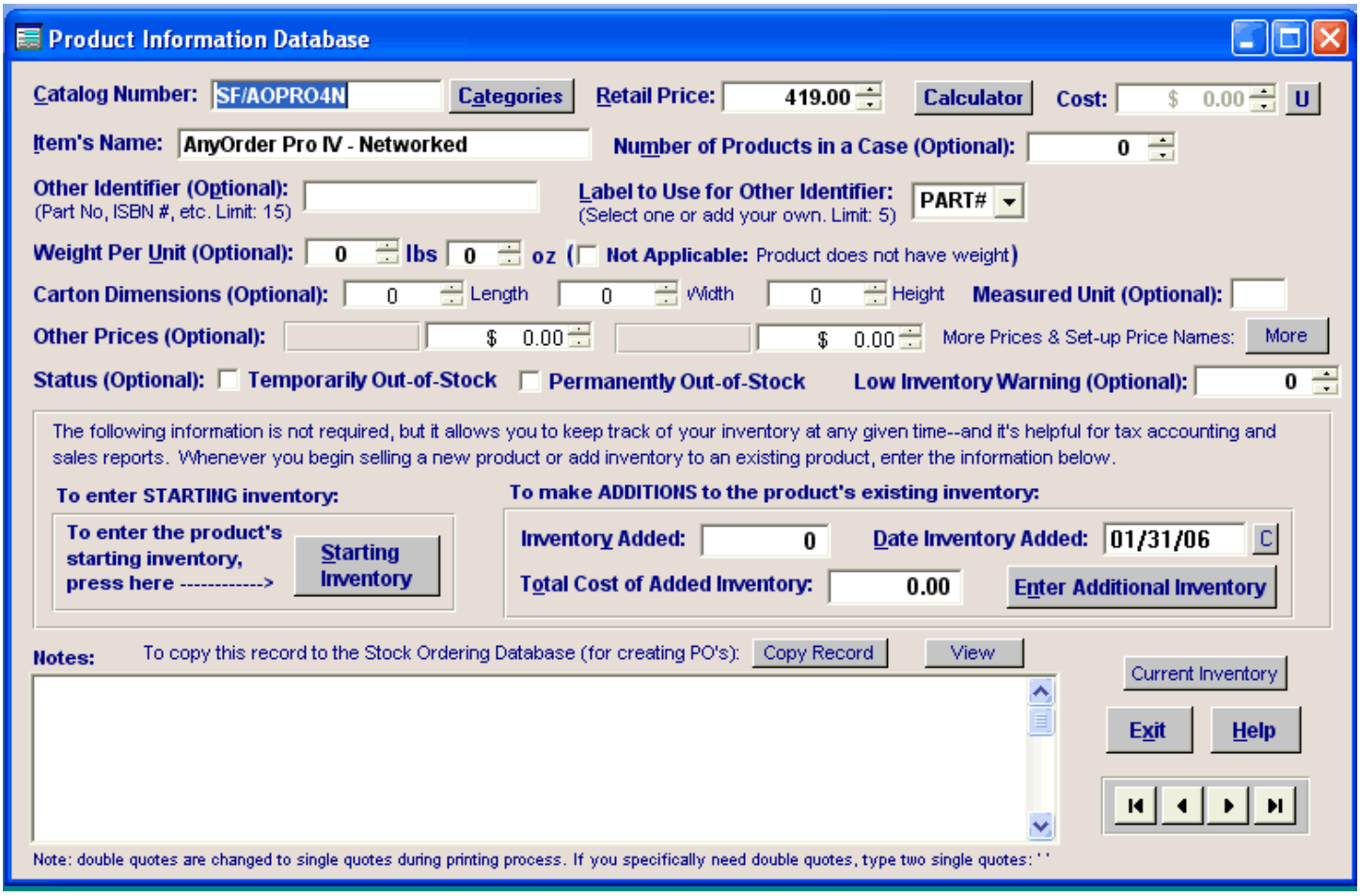
If one of your infrequent customers happens to buy at a later time, you won't have to re-type their address. You can bring up their name by clicking the "L" button just after the "Bill To" blank. (You can also place the cursor in the "Bill-to" blank of the invoice and press Ctrl+L or double-click the mouse). A pop-up list of all past customers will come up. Press the first letter of the customer's name and you can move through the list until you find it. Click on OK and the program will automatically enter the address and other information directly on the invoice.

Important Note

It's always important to use the pop-up lists, as described above, when entering customer names and addresses. That way you always have consistent name spelling for record keeping, and you'll find it particularly helpful when it comes to creating billing statement or customer reports. It's really no problem to make sure the names are the same. The pop-up lists make it easy. They're far faster and more efficient than re-typing the name.

Product Items & Catalog Numbers

To get to the Product Information Database, select PRODUCT TOOLS > PRODUCT INFORMATION AND CATALOG NUMBERS. The following screen appears:



The Product Information Database is used for your products. You don't necessarily need to use the Product Information Database. You can type in product names and prices directly on the invoice and get by fine. But if you enter products in the Product Information Database, you'll be able to take advantage of a number of helpful features built into AnyOrder. One feature enables you to have product information entered on the Main Invoice Form without having to type it. Another is the ability to check inventory levels of your products whenever desired.

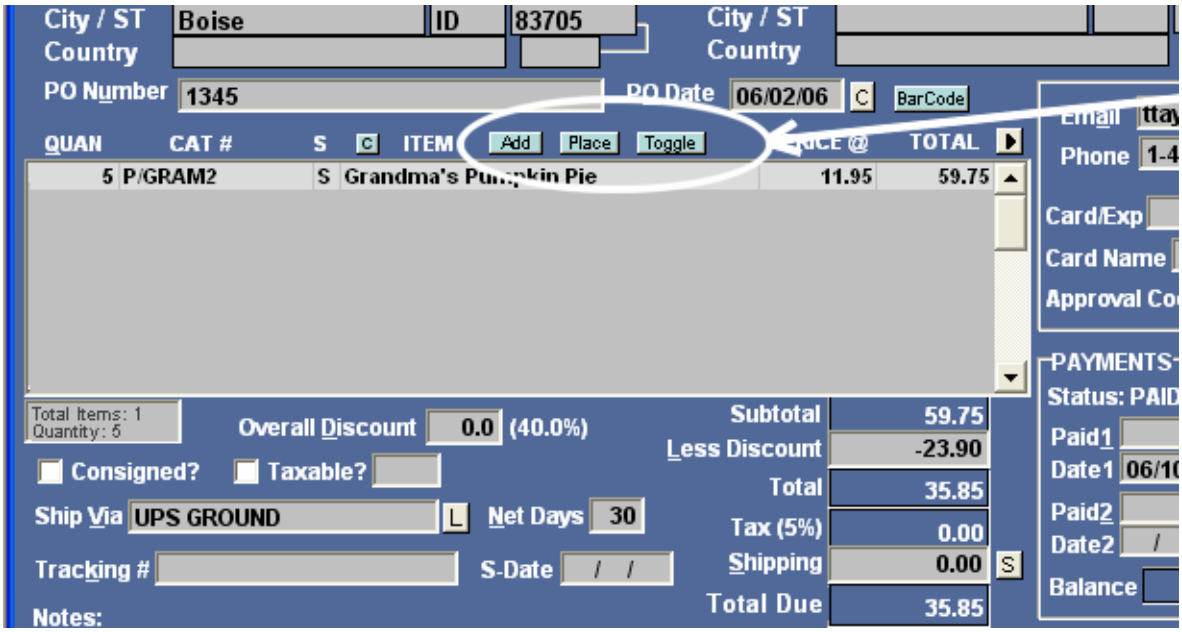
You don't have to fill in all the blanks on the Product Information Database Screen. Many are optional, and it's up to you whether you want to use them. All you really need to enter is information in the first three blanks: catalog number, retail price and item's name.

Choose a catalog number that is easy for you to remember. This is a number for your own use which will be entered on the Main Invoice Form. You can use up to fifteen letters or numbers.

The bottom half of the Product Information Screen can be used to enter information about inventory and the cost of the item. This information is not required, but if you'd like the program to keep track of your inventory, you'll want to enter it.

The products that you sell to a customer are entered in the Item Area in the middle of the Main Invoice Form. There are a number of different of different ways of entering catalog numbers and other product information. One of the easiest is to click the small, light blue "Add" button (just above the Item Area). A new row will be added to the Item Area and a pop-up list of products will appear.

The pop-up list will show all the products that you've entered into the Product Information Database. Once a product is selected from the list (and the quantity entered), it will be placed in the newly created row in the Item Area.



Once you've entered one or more products in the Product Information Database (see previous page), you can easily enter them on the invoice.

To add a product, click the "Add" button.

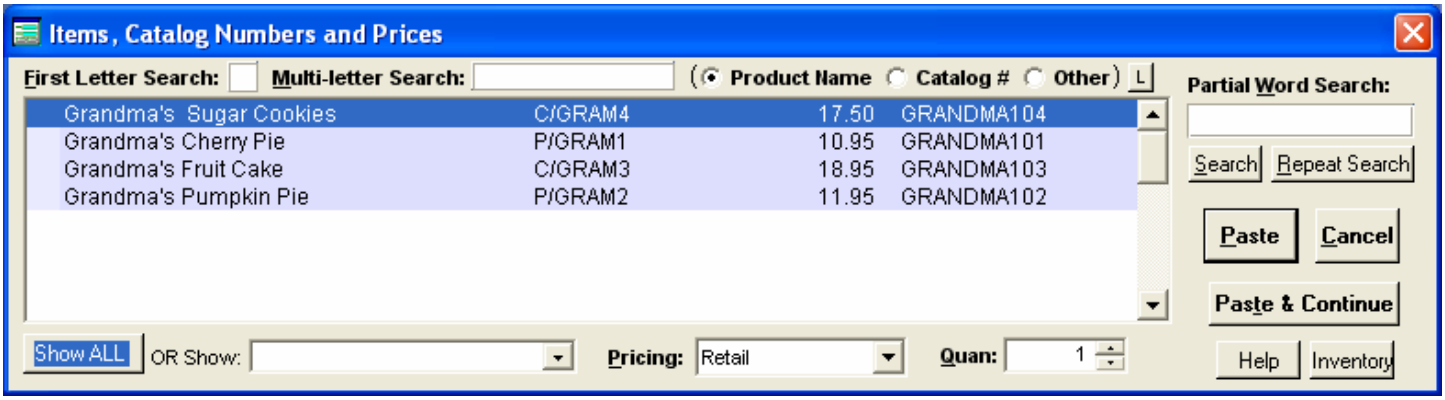
A pop-up list will appear with your products. Select the product and its catalog number, name and price will be entered for you.

You're probably wondering what the "Place" and "Toggle" buttons are for (they are circled on the previous page). Use the Place button to paste a product over an existing product on the list. For example, if you accidentally entered "Grandma's Pumpkin Pie" but wanted "Grandma's Sugar Cookies" instead, you would place your cursor on "Grandma's Pumpkin Pie," click on the "Place" button. The product pop-up list would

appear. Select "Grandma's Sugar Cookies" on the pop-up list and it will replace "Grandma's Pumpkin Pie" in the Item Area.

The "Toggle" button brings up Alternative Product entry mode. It's for your convenience, providing you with an entirely different way of entering products. From the two, you can pick the entry method you like the best.

Here's a look at what the Product pop-up list looks like. To add a product to the Item Area on the invoice, select the one you want and click on "Paste."



People work in different patterns. That's human nature, and, thus, AnyOrder gives you all sorts of ways of entering products. For example, here's another way you can enter products: Enter a number directly in the Quantity (QUAN) column. Then, to enter a catalog number, press CTRL+L ("L" is for "List"). A list of all of your products will appear. Select the proper product and the item's name and price will automatically be entered in the blanks. There are even more ways, but this is plenty for a start.

Calculating Totals

The program automatically calculates totals. Sometimes, however, if you make a price or quantity or discount change and the cursor is not moved, you may need to manually tell the program to do the calculations. To do so, press "Calculate" button on the bottom right of the screen.

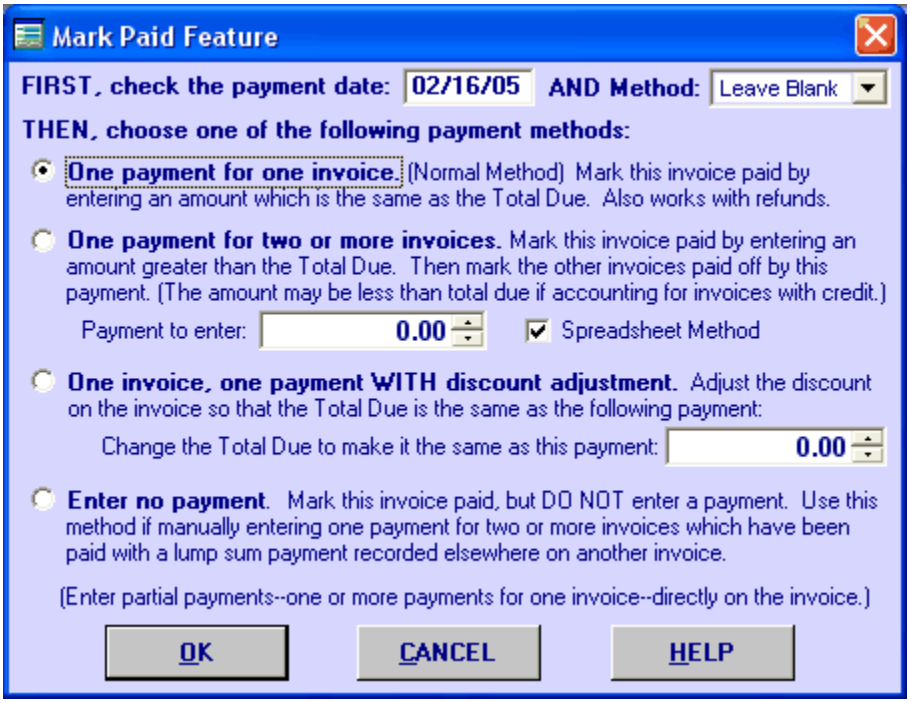
Payments by Customers

When a customer makes a payment, use the Mark Paid feature. To access it, select INVOICE TOOLS and choose MARK INVOICE PAID.

Once the Mark Paid dialog box appears, you'll have several choices. If the customer paid off the invoice, the select the first or default choice. Once you select this option and clear the dialog box, you see that under PAYMENT, it will say STATUS: PAID.

This system makes it easy for you to page through the invoices and spot those that are paid. The use of this feature also works nicely for your billing statements. Any unpaid invoices will be marked with an asterisk (*) making it easy for both you and your customer to keep track of payments.

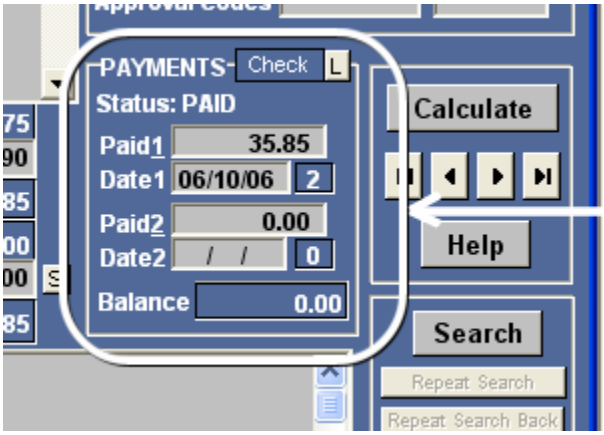
If a customer pays off more than one invoice in a lump sum payment, choose the second option. You can enter the payment amount and then enter each of the invoice numbers which were paid off by the customer's payments. Each of those invoices will have the following in the Payment Box: "PAID (Elsewhere)." That means that the invoice has been paid by a lump sum recorded on another invoice. You'll find the number of that invoice recorded in NOTES on the bottom of the Invoice Screen.



You can enter payments directly on the invoice in the "Payment Box" (see below) or you can use the Mark Paid feature (shown to the left). What's nice about the Mark Paid feature is that it will enter the amount for you.

It is reached by selecting INVOICE TOOLS > MARK INVOICE PAID. Or you can reach it by right-clicking on the invoice screen in most places except the bill or ship name blanks. A small menu will appear from which you can select "Mark Invoice Paid."

Payment Box:



The Payment Box is found on the lower right hand corner of the Main Invoice Screen. You can enter payments directly in the box, or let the Mark Paid feature enter the amount for you.

End of the Getting Started Section

This has been a quick introduction to some of the basic invoicing functions found in AnyOrder. You'll find more details about these features and the many other features of the program in the help documentation that is built into AnyOrder.