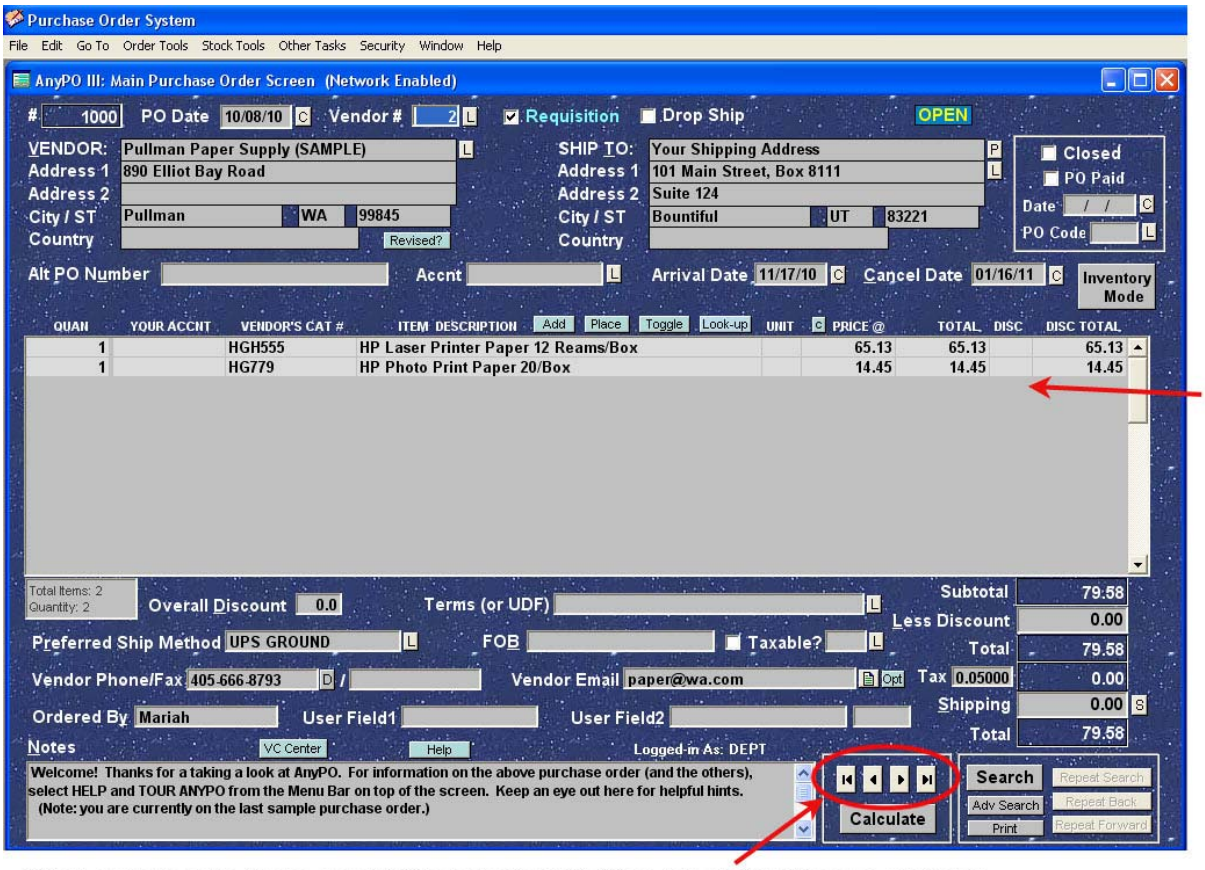
Department Set-up: Getting Started with AnyPO

Where Everything Starts: The Main Purchase Order Screen

After you log into the program, the Main Purchase Order Screen appears. Even though it's called the "Purchase Order Screen," you'll probably be using it for requisitions. *(Depending on your business, some departments may also create PO's. For the purposes of this instructional guide, we'll assume that you are creating requisitions, but the program may be used either way.)* The main screen is basically an electronic requisition form on which you enter the vendor's name and address and the items you are ordering. You can move from blank to blank by using tab or your mouse.



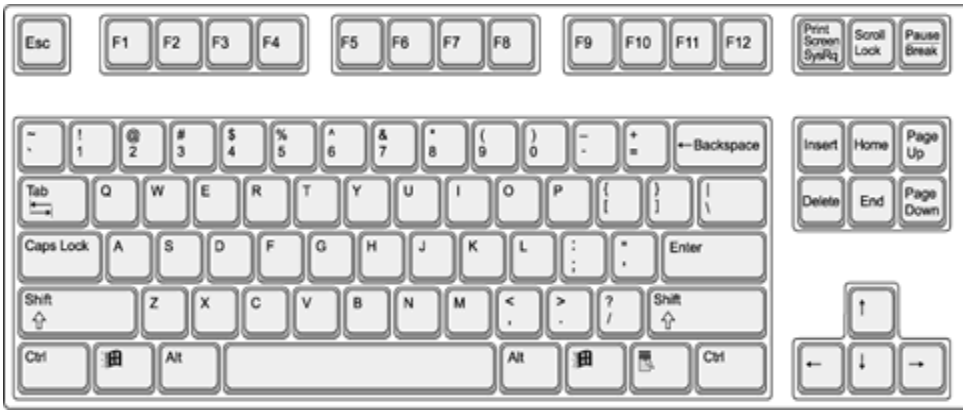
This is the "Item Area" where you enter the products or items you are ordering.

You can move from requisition to requisition by using these arrrows, but it is easier to use PageUp and PageDown on your keyboard

Moving From Requisition to Requisition

To move back or forward through the requisitions, you can click on the navigation buttons on the bottom right of the Main Purchase Order Screen. The navigation buttons resemble the buttons on a VCR. The right arrow button (>) goes to the next requisition, and the left arrow button (<) goes the previous. The right arrow with a line (>|) goes to the last requisition, and the left arrow with a line (|<) goes to the first requisition.

Or, even easier, you can press PageUp on the keyboard. (PageUp moves you backwards through older requisitions). Or you can press PageDown on the keyboard. (PageDown goes to newer requisitions.)



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

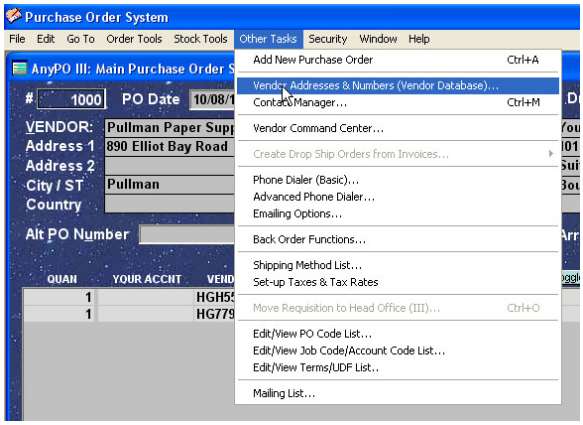
←

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

Creating a New Requisition

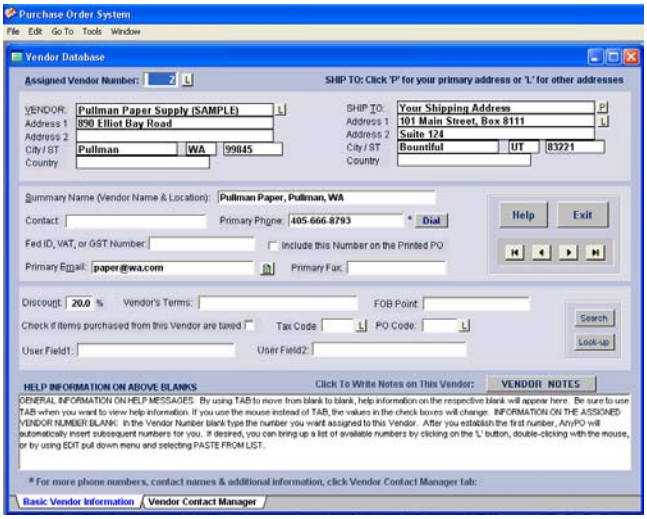
To create a new requisition, select **Other Tasks >> Add New Purchase Order** from the menu on top of the Main Screen. Or go to the last requisition and press PageDown on your keyboard. This will bring up a new blank requisition. When creating a new requisition, you always want to start with a blank form on the screen, and then fill in the vendor's name and address and other needed information.

Filling in the Vendor's Name & Address.



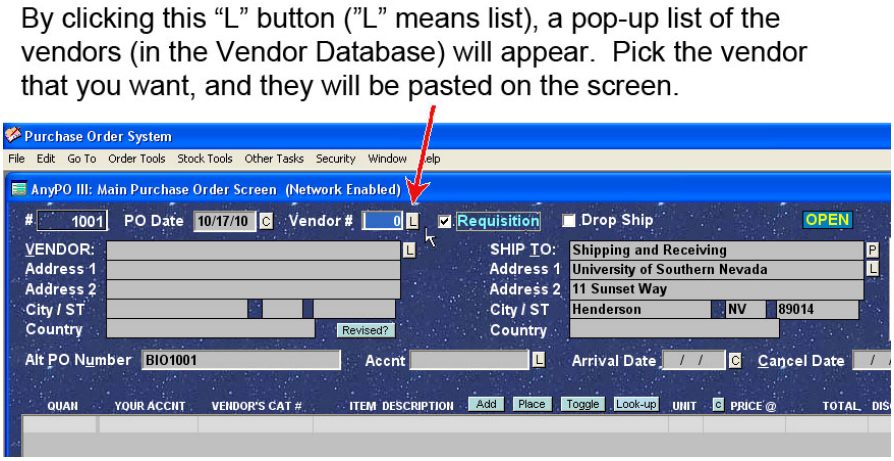
You can fill in the vendor's name and address manually. Or if it's a vendor that you order from on a regular basis, you can put them in the Vendor Database. The Vendor Database is reached by selecting **Other Tasks >> Vendor Addresses and Numbers** (shown to the right)

Below is what the Vendor Database Screen looks like. You don't have to fill in all of the blanks on the screen. However, be sure to fill in the "Summary Name" blank. That's important for the pop-up list.



Use the Vendor Database for vendors to which you write requisitions on a frequent basis. If you just order from a vendor once, you don't have to put them in the database; just type them directly on the Main Purchase Order Screen. (In fact, you don't even have to use the Vendor Database if you don't want to, but it does make things a bit easier for you)

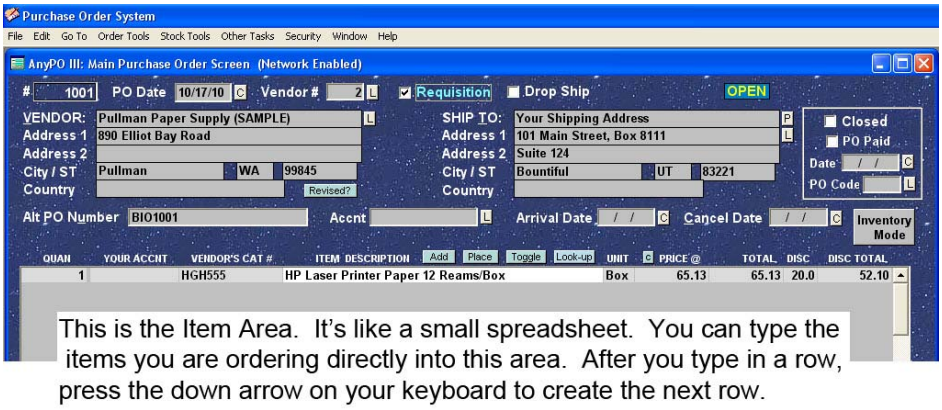
To use the Vendor Database, first start a new, blank requisition. On the Main Purchase Order Screen, click the "L" button beside the Vendor # field at the top left of the screen.



Select the vendor from the list that appears, and click on "Paste" button to enter the vendor's name and address on the Main Screen. Remember that you need to start with a blank screen when you click on the "L" button.

Items that You are Ordering

The items that you are ordering are entered in the "Item Area" which occupies in the middle of the Main Screen.

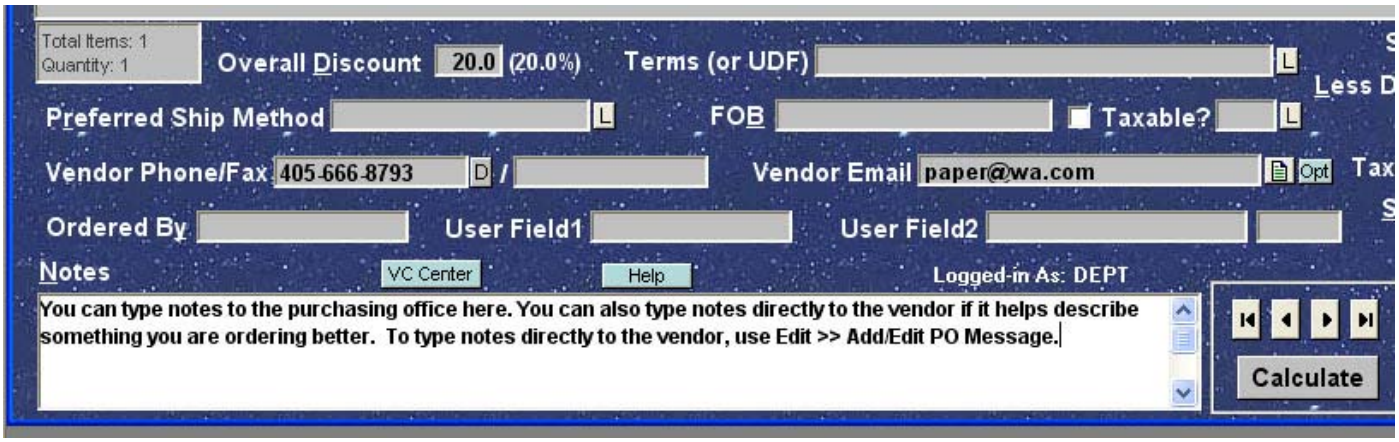


If you order certain items on a regular basis, you can put them in the Stock Ordering Database. The Stock Ordering Database is reached by selecting **Stock Tools >>Stock Ordering Database**. Once an item is in the database, you can access it from the Main Purchase Order Screen by clicking the "Add" (light blue) button in the middle of the screen. Select the product you want, click "Paste" and it the product and its price will be entered for you.

Extra Notes

You can include extra notes about the items ordered – or notes to the head office in the "Notes" area at the bottom of the Main PO Screen.

The "Notes" area of the Main Purchase Order Screen is shown below. You can write notes to the purchasing office. Or, if you want a note to appear on the Purchase Order, select **Edit >> Add/Edit PO Message**. This allows you to include an extra note to the vendor which is printed right on the bottom of the printed PO.



Saving Requisition Information

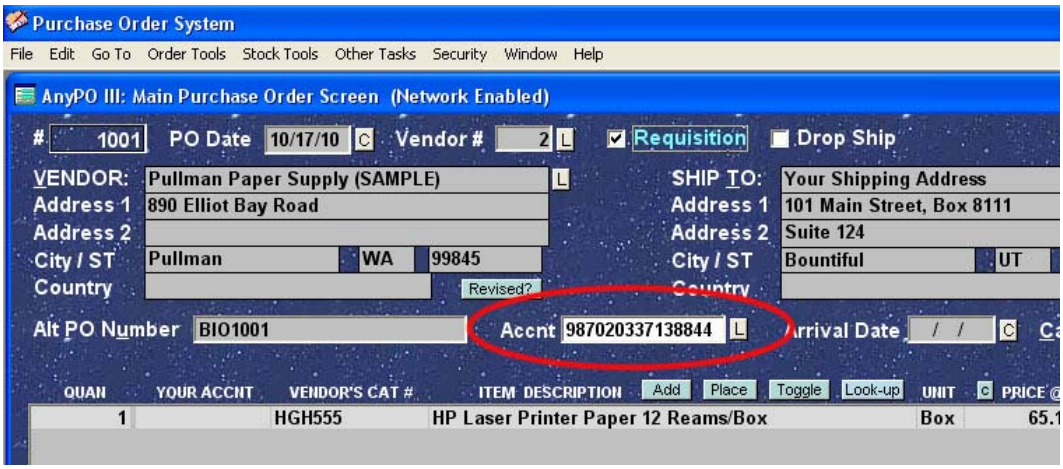
The program automatically saves information as you enter it. It is not necessary specifically to save requisitions. However, you should always properly exit the program by selecting **File >> Exit**. This assures that all the files are closed properly and brought up to date.

When you exit, a message will appear which enables you to back-up your data files. You should always do a back-up.

Account Codes

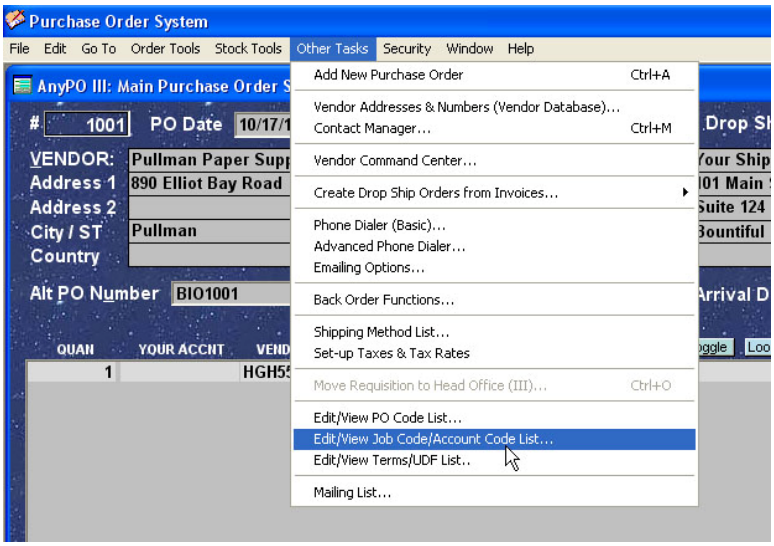
Note: you may or may not be using account codes. If you are not using account codes, then you can skip this section. (If you are using account codes, you'll need to configure the program for account code. The appendix of the following PDF instructional guide will show you how: Getting Started Guide.)

If there is just one account code on your requisition, enter it in the "Accnt" field (in the middle of the Main Screen just below the addresses (as shown below).



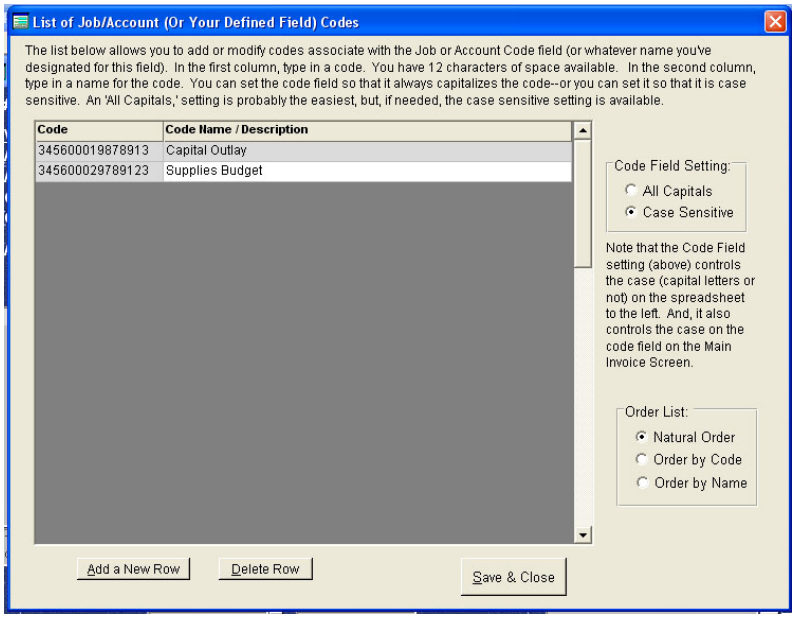
You can type the account code, but it's easier to use a pop-up list. To select from a pop-up list of your account codes, click on the "L" button just to the right of the "Accnt" field. But before you can use the pop-up list, you'll need to get the account codes entered first. We'll do that next.

To enter account codes select **Other Tasks >> Edit/View Job Code / Account Code List…**" from the menu on top of the screen (shown below).

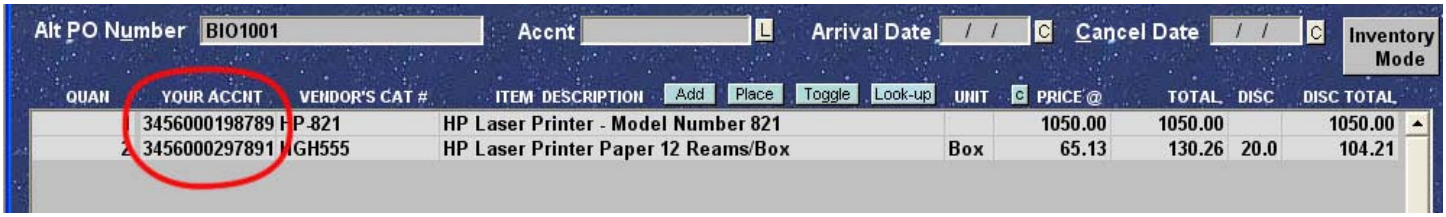


The Job/Account Code list will appear (shown to the right). Type in the account code (without dashes) in the "Code" column and a description of the code in the "Code Name" Column.

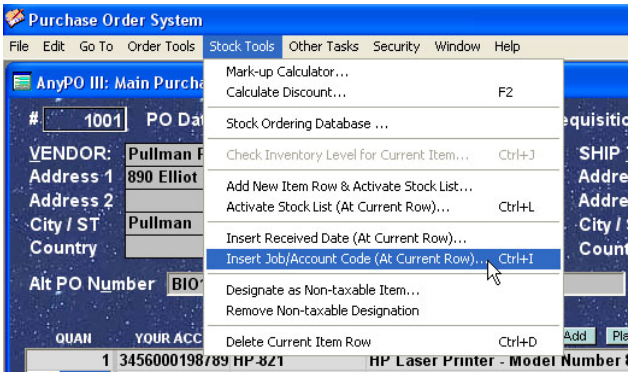
(You probably find a couple of samples when you first bring up this dialog box. You can delete them by clicking in the row with your mouse and clicking the "Delete Row" button.)



On some occasions, you may need to enter two or more account codes on a PO. In that case, you'll enter the account code in the Item Area. You'll see that one of the columns in the Item Area is "Your Accnt." That where you enter account codes when they are different (illustrated below).



You can type the code in the "Your Accnt" column, but there's an easier way. Place your cursor there, and then select **Stock Tools >> Insert Job/Account Code (At Current Row)…**"



A pop-up list with your account codes appears. Select the code from and the account code will be entered for you.

Approving Requisitions

When all of the information on the screen is satisfactory, the PO needs to be approved. Have the department manager log-in and look at the PO.

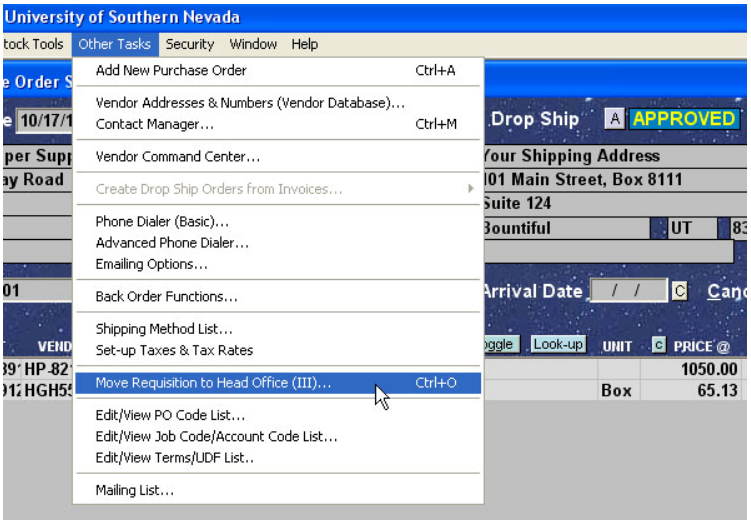
Note that the manager can log-in to AnyPO from his/her own computer to approve it. Or the manager can log-in from the secretary's computer. The manager can even log-in while AnyPO is running on the secretary's computer. If the program is running, select **Security >> Set-up Program Administrator and Other Tasks**. This allows the manager to log-in, overriding the user's log-in, and the manager now has ability to approve the requisition without leaving the program.

The department manager approves the requisition by clicking the "Approve" button on the upper right of the Main Purchase Order Screen (shown below).

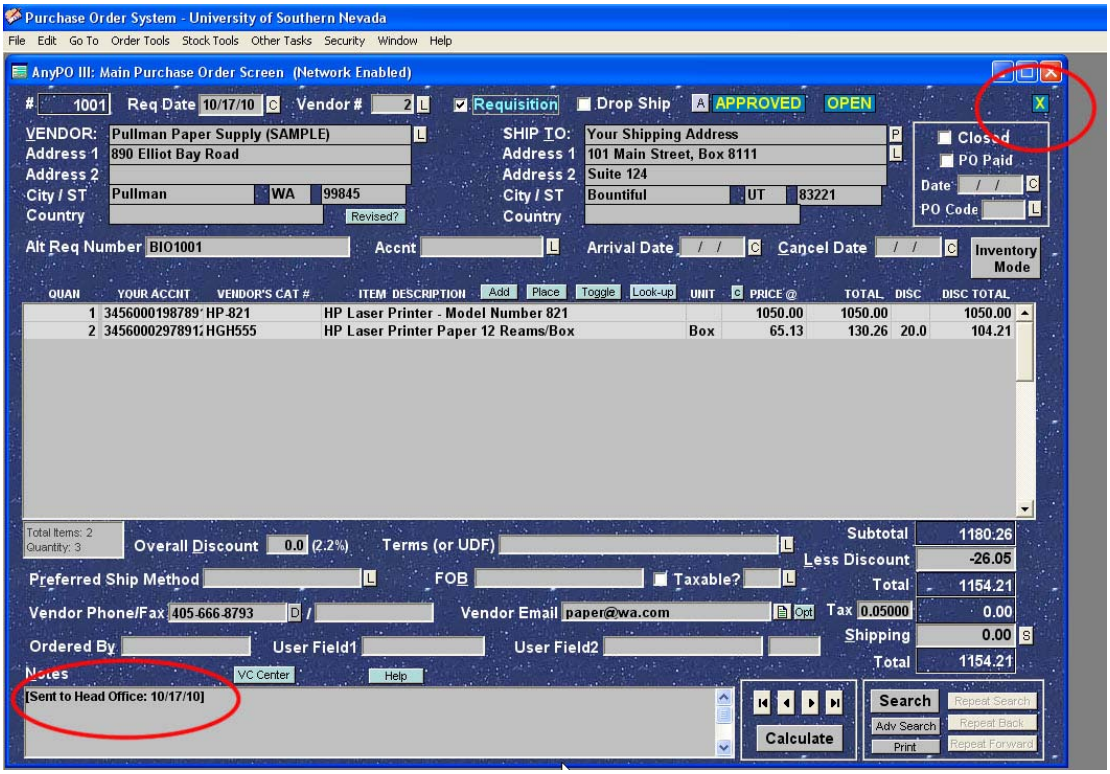
Once they do that, an "Approved" indicator will appear on the upper right of the screen (shown below). It can now be moved to the head purchasing office.

Moving an Approved PO to the Head Office

Once the PO has been approved, it needs to be moved to the head office for processing. To do that, select **Other Tasks >> Move Requisition to Head Office**. As long as it has been approved, the requisition may be moved to the head office by a department user as well as the manager. (The program will not allow the requisition to be moved until it is approved.)



You'll be able to see which requisitions have been moved to the head office. Requisitions which have been successfully moved are indicated by an "X" in the upper right hand corner of the screen. You'll also see the notation: "Sent to head Office" (with the date) in the Notes area. Don't delete the "Sent to the Head Office" notation or otherwise, you'll lose track of which requisitions have been sent.



Just one quick note. If you have just moved the requisition to the head office, in order to see the "X" in the upper right hand corner, you'll need to refresh the screen by pressing PageUp and PageDown on your keyboard. That's only necessary if you want to see the "X" immediately after moving the requisition.

Printing

To print a requisition, make sure that the requisition you want printed appears on the screen. You can Page-Up or Page-Down to get to it. When you get to the proper requisition, select **File >> Print Purchase Order**.

The Print dialog box will appear. Select "1 Original" and click the "Print" button.

End of the Getting Started Section

This has been a quick introduction to some of the basic functions found in AnyPO. You might also want to quickly review Getting Started. While it covers much of the same material as this guide, it does include information on searching and a few other topics not covered here. The most detailed information on any aspect of AnyPO is found in the help documentation that is built into AnyPO.