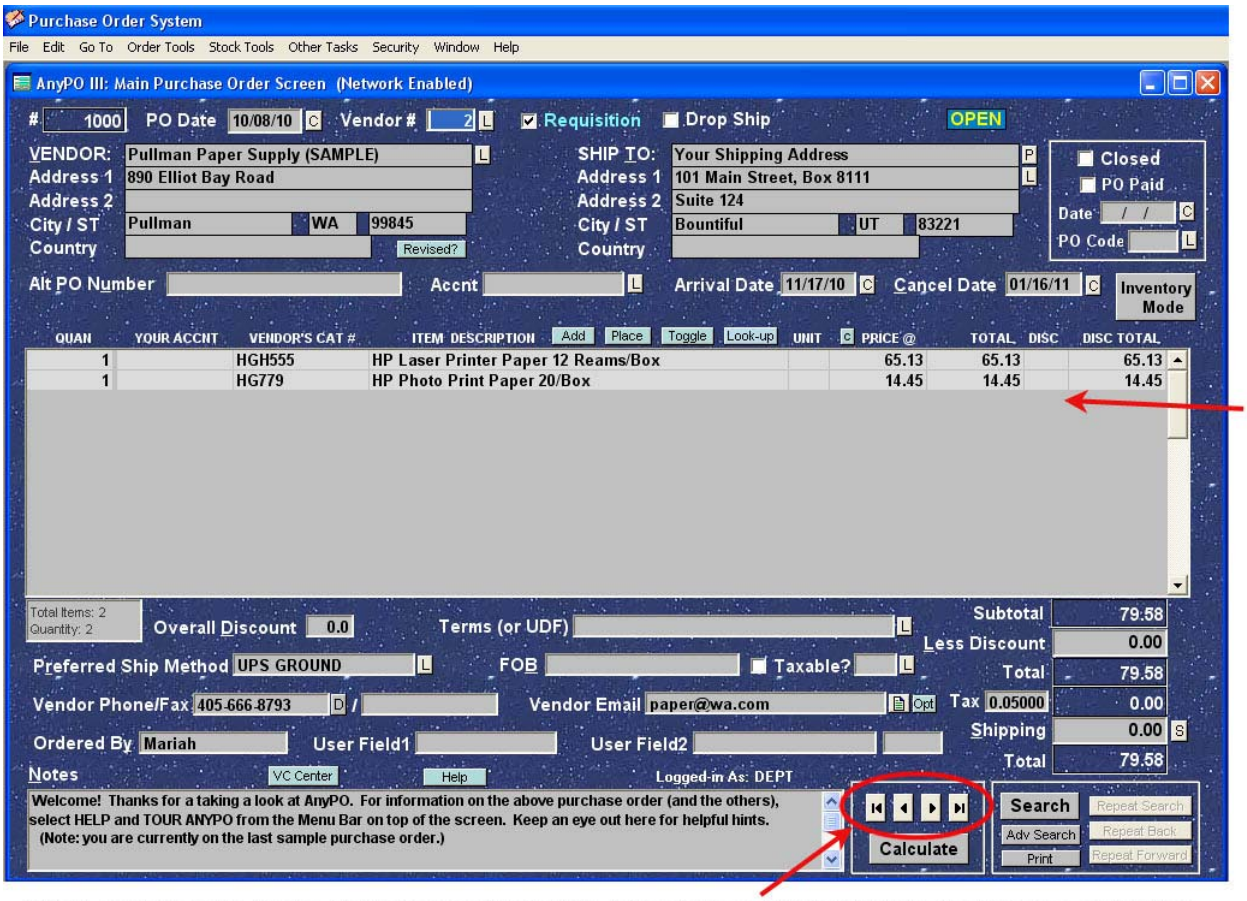
Getting Started with AnyPO

Where Everything Starts: The Main Purchase Order Screen

After you log into the program, the Main Purchase Order Screen appears. The main screen is basically an electronic purchase order 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.



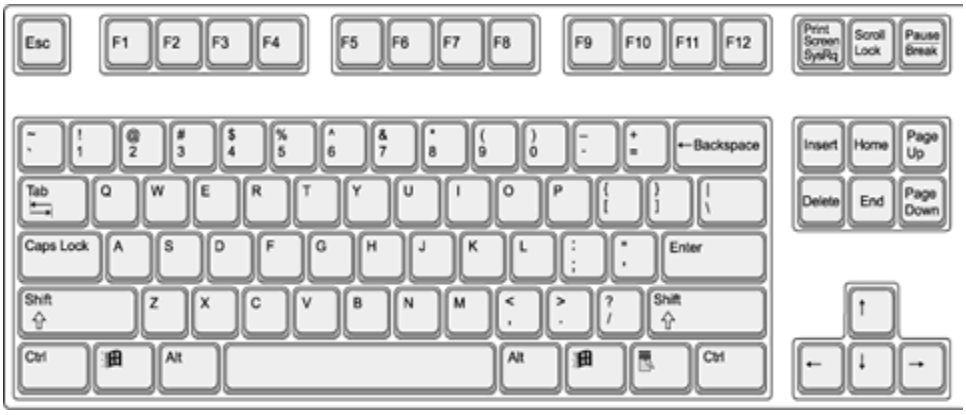
This is the "Item Area" where you enter the products or items you are ordering.

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

Moving From Purchase Order to Purchase Order

To move back or forward through the purchase orders, 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 purchase order, and the left arrow button (<) goes the previous. The right arrow with a line (>|) goes to the last purchase order, and the left arrow with a line (|<) goes to the first purchase order.

Or, even easier, you can press PageUp on the keyboard. (PageUp moves you backwards through older PO's). Or you can press PageDown on the keyboard. (PageDown goes to newer purchase orders.)



Use the Page Up and Page Down keys on your keyboard to move forward & backwards through the purchase orders.
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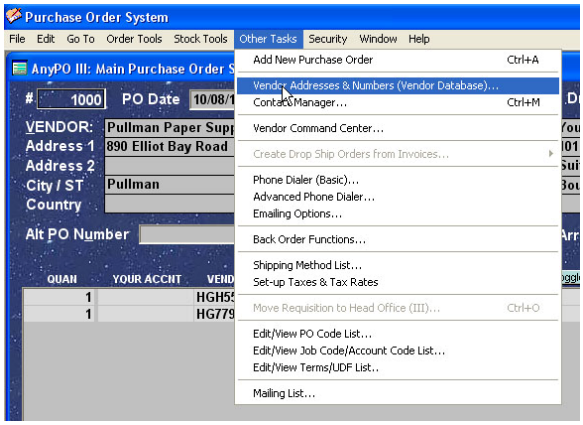
Using Page Down is also a way of starting a new PO. Make sure you are on the last PO (you can press CTRL+Page Down to get to the last requisition). Then press Page Down, and AnyPO will ask if you like to start a new purchase order.

Creating a New Purchase Order

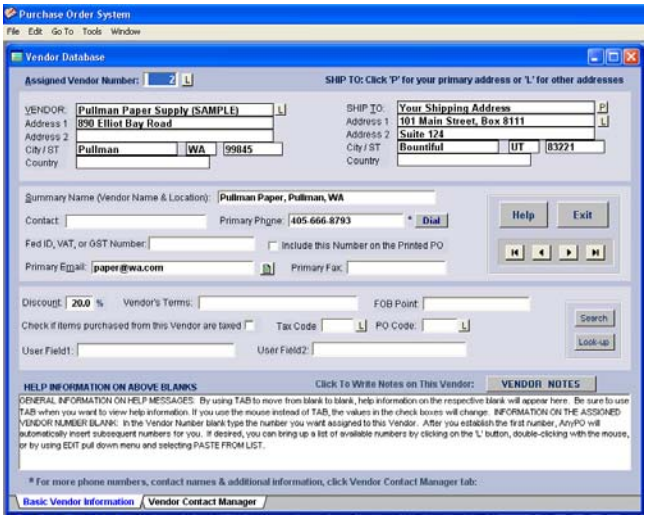
To create a new PO, select **Other Tasks >> Add New Purchase Order** from the menu on top of the Main Screen. Or go to the last PO and press PageDown on your keyboard. This will bring up a new blank purchase order form. When creating a new purchase order, you always want to start with a blank form on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

Filling in the Vendor's Name & Address.



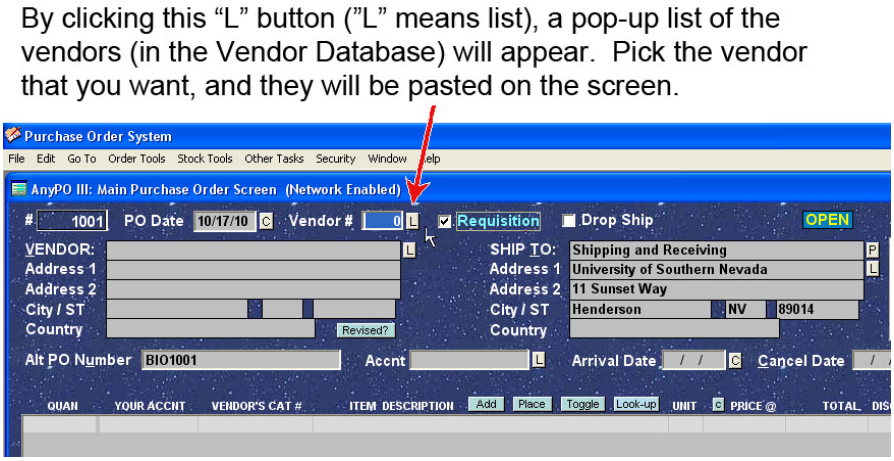
You can fill in the vendor's name and address manually. Or if it's a vendor that you order from on a regular basis, you can put them in the Vendor Database. The Vendor Database is reached by selecting **Other Tasks >> Vendor Addresses and Numbers** (shown to the right)

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 purchase orders 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)

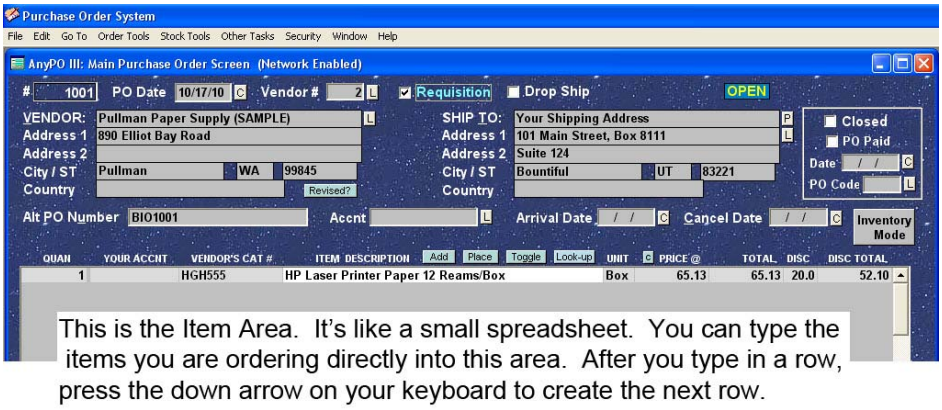
To use the Vendor Database, first start a new, blank purchase order. On the Main Purchase Order Screen, click the "L" button beside the Vendor # field at the top left of the screen.



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.

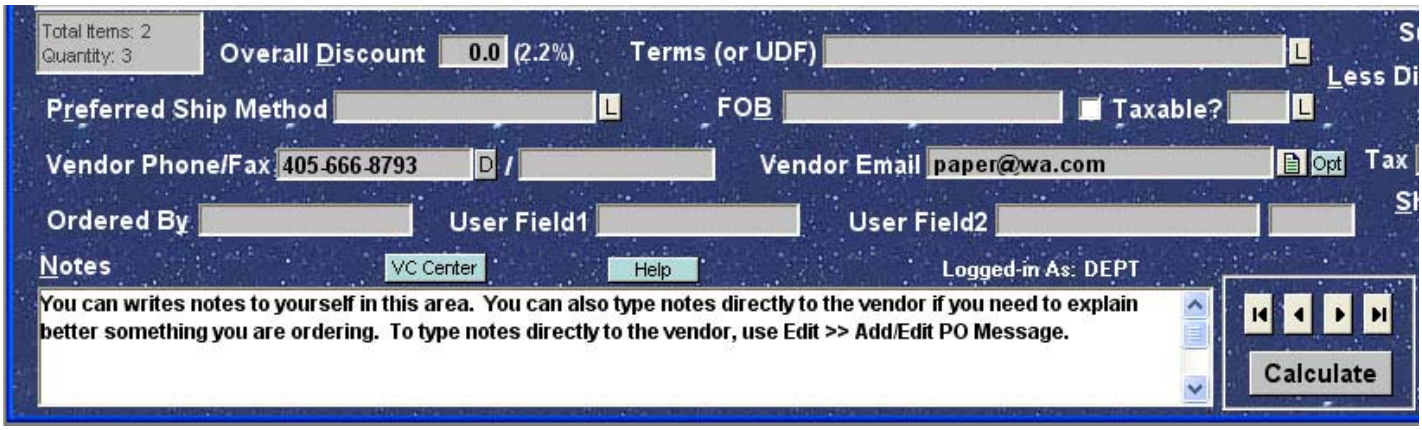


If you order certain items on a regular basis, you can put them in the Stock Ordering Database. The Stock Ordering Database is reached by selecting **Stock Tools >>Stock Ordering Database**. Once an item is in the database, you can access it from the Main Purchase Order Screen by clicking the "Add" (light 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.



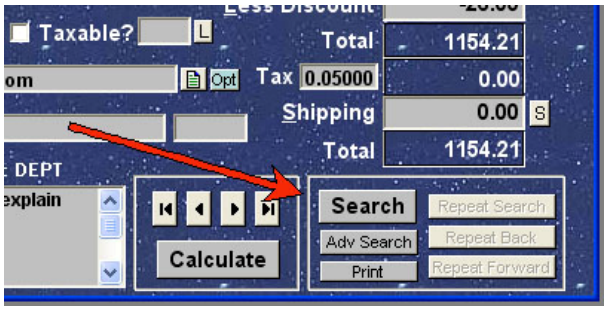
Saving Purchase Order Information

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

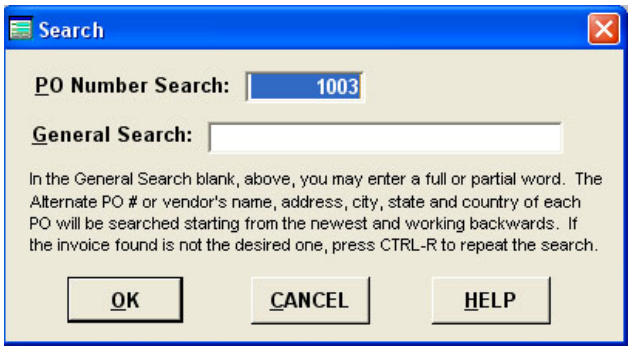
When you exit, a message will appear which enables you to back-up your data files. You should always do a back-up.

Searching

As your list of purchase orders grows, you'll probably want to use the Search feature. It is reached by clicking on the "Search" button on the lower right-hand corner of the screen (illustrated to the right). You can also access it by selecting **Go To >> Search** from the Menu Bar.

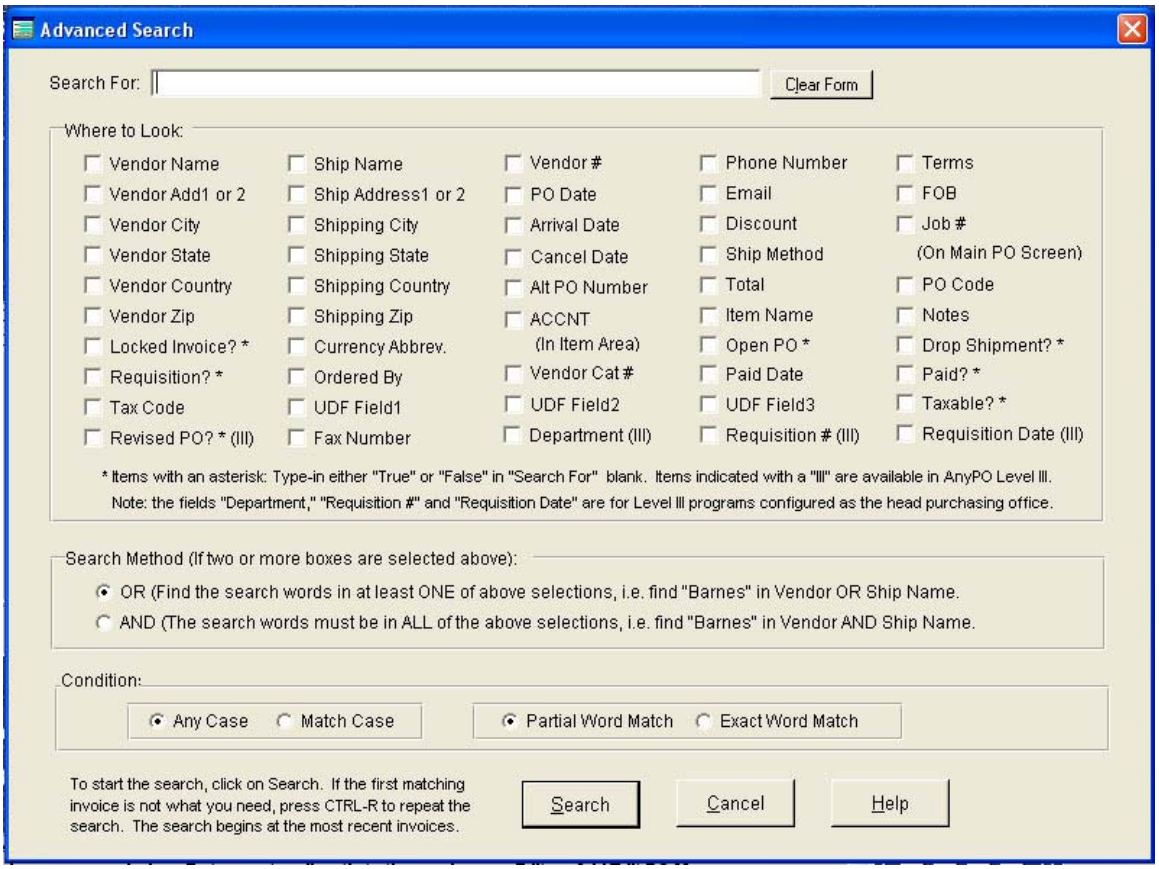


In the Search dialog box that appears you can enter the PO number of the purchase order in the top blank: "PO Number Search." (The Search dialog box is illustrated to the lower right). Or in the "General Search" blank, you can enter part or all of the vendor's name. (If you use Alternative PO numbers, this is the place to enter them). The Search dialog box always searches for the "General Search" blank first (and disregards the PO Number). If there's nothing in the General blank, then it will search for the indicated purchase order number.



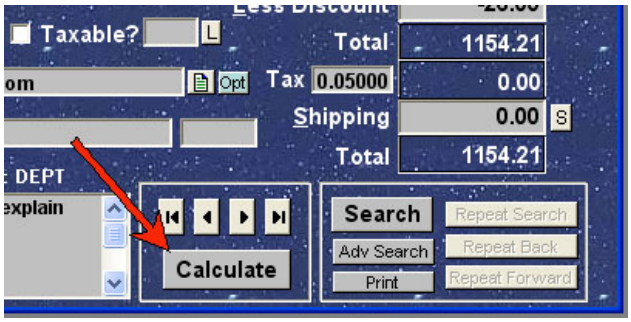
To continue searching, click on "Repeat Search" on the bottom of the Invoice Screen (or you can select **Search > Repeat Search** from the Menu Bar).

You can also conduct specialized searches. For example, you may wish to search for a particular vendor's catalog number, or an order's arrival date, or the name of the individual who placed the order, or many other different possibilities. That's done by clicking the "Adv Search" button just under the "Search" button. The Advanced Search dialog box is shown below:



Calculating Totals

The program automatically calculates the total of the Purchase Order. Sometimes, however, if you make a price or quantity 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.

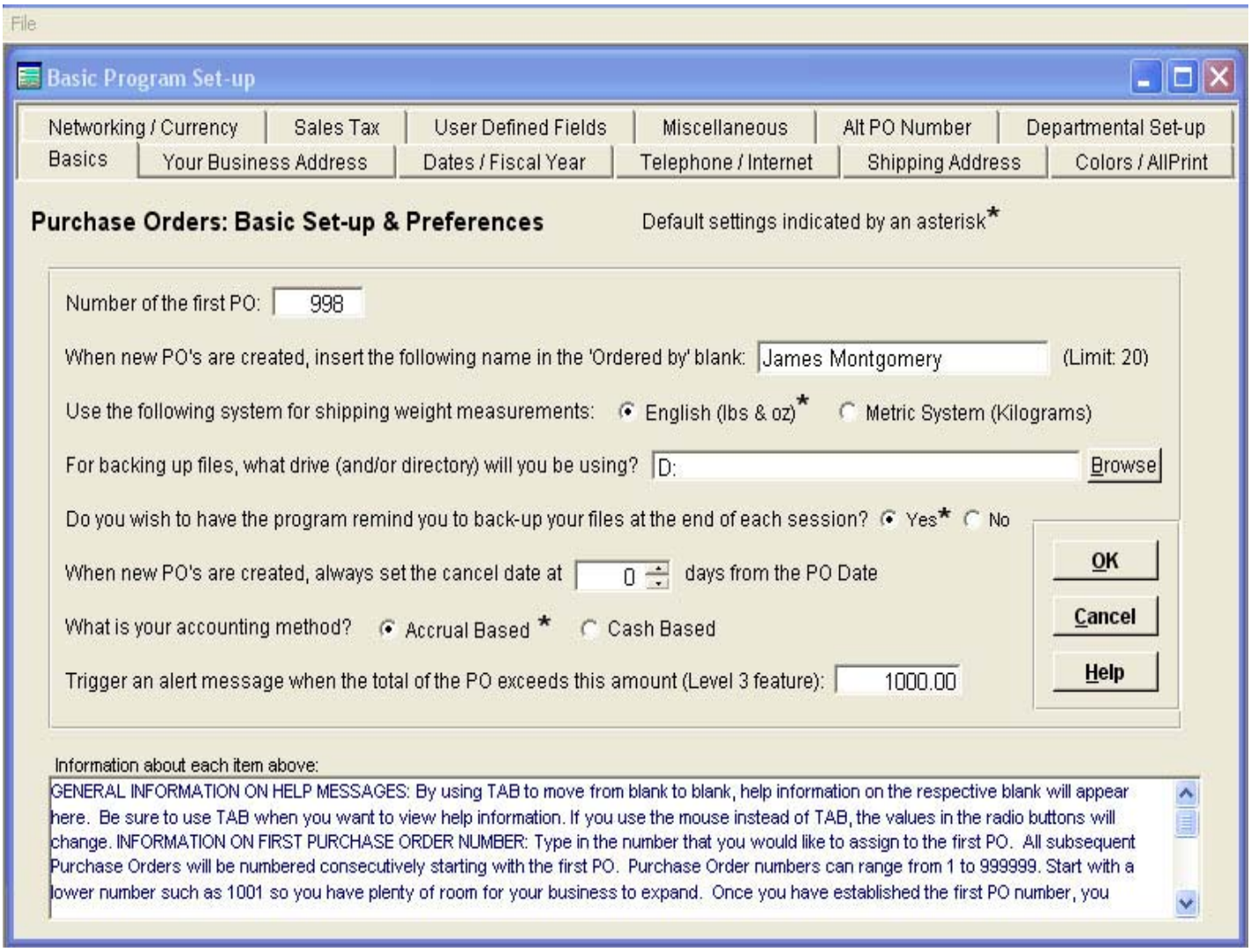


Basic Program Set Up

Before you start entering information in AnyPO, you'll want set-up the program for your business environment. The program needs to know your business address. It needs to know your shipping address (or shipping addresses if you have several receiving locations). You may want to change the numbering system. All this information, and more, is entered in Basic Setup.

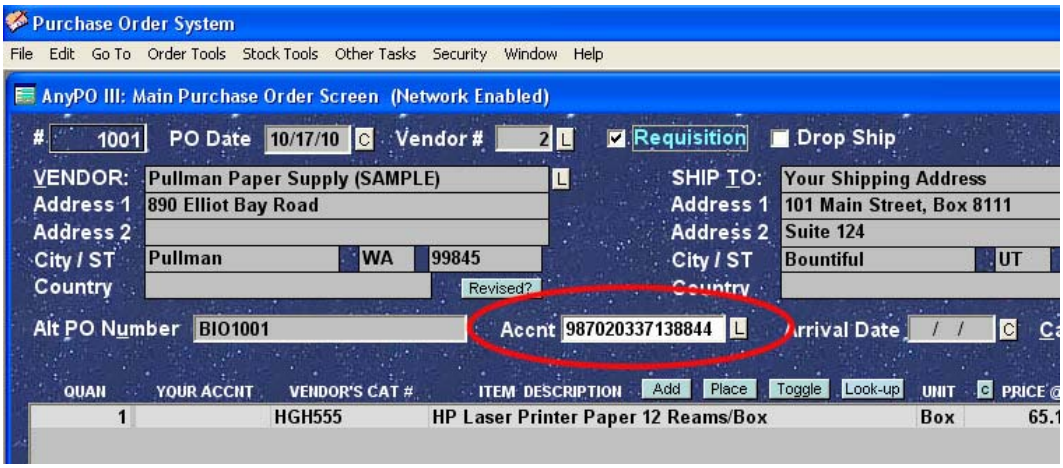
To reach it, select **File > Basic Program Set Up & Preferences** from the Menu Bar. A screen will appear with a series of questions and blanks. Fill in each of the appropriate blanks. To assist you, a help system has been built into the dialog box. If you use TAB to move from question to question, helpful information will appear in the box at the bottom of the screen. Even more help is available by pressing the HELP button.

Be sure to click on the "You 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 Purchase Order Screen.



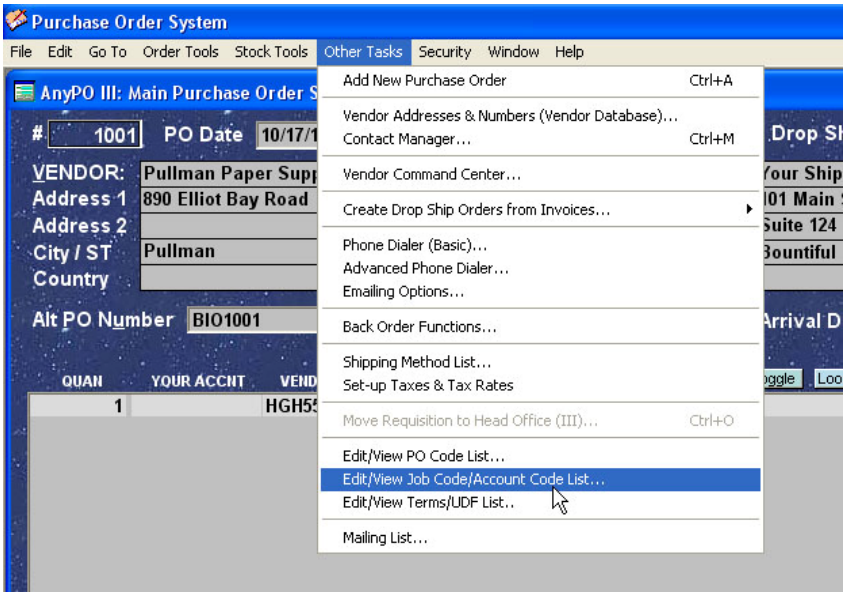
Account Codes

It depends on your business, but you may or may not need to enter account codes on a purchase order. *(If you don't need account codes, you can skip this section.)* The program can be configured so that you can enter an account code for the PO. Also, if need be, it can be configured so that you can enter an account code for each item ordered. We've included information on how configure the program for account codes in the "Appendix" at the end of this manual. Once it's been configured, you'll have an "Accnt" field (circled in the illustration below). This is where you enter account codes.



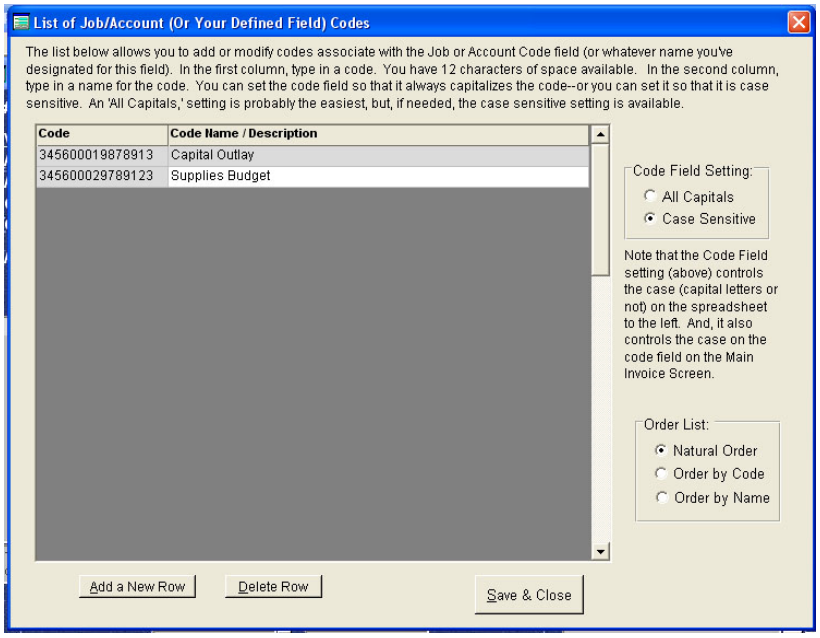
You can type the account code, but it's easier to use a pop-up list. To select from a pop-up list of your account codes, click on the "L" button just to the right of the "Accnt" field. But before you can use the pop-up list, you'll need to get the account codes entered first. We'll do that next.

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



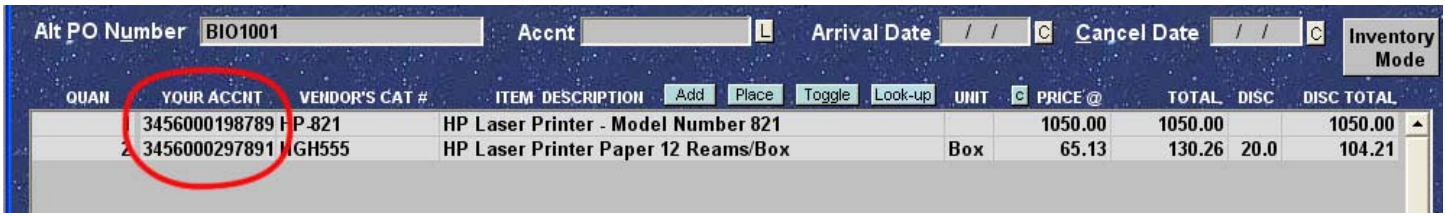
The Job/Account Code list will appear (shown to the right). Type in the account code in the "Code" column and a description of the code in the "Code Name" Column.

(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.)



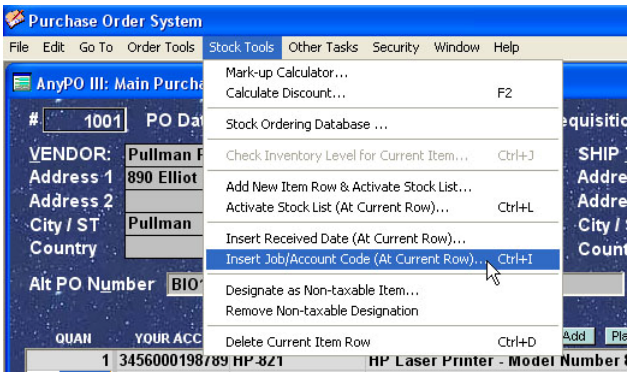
In the report area of the program (**File >> Export and Report Generator**), you'll be able move account codes and amounts to an Excel spreadsheet (or another type of spreadsheet such as Calc) which will allow you to calculate totals spent under each account.

Many businesses will write PO's so that all of the items on a single PO belong under one account code. However, if you have a situation where two or more account codes might be used on a single PO, you'll want to configure the program so that you can enter account codes in the Item Area (see the "Appendix for configuration information). When the program has been configured in this way, you'll see that one of the columns in the Item Area has the heading: "Your Accnt" (circled in the illustration below). That's where you enter account codes when they are different.



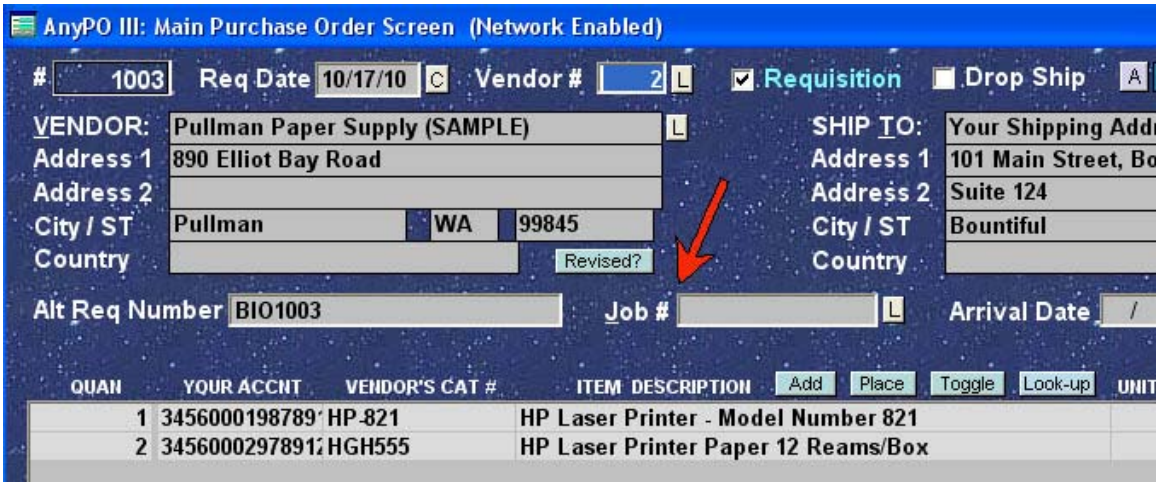
You can type the code in the "Your Accnt" column, but there's an easier way. Place your cursor there, and then select **Stock Tools >> Insert Job/Account Code (At Current Row)…** (Illustrated to the right)

After you make the menu selection, a pop-up list with your account codes appears. Select the code from and the account code will be entered in the Item Area for you.



Job Codes

Some businesses may group PO's together by a job or a project code. This allows them to calculate the total cost of a job or a project. Job codes are entered in the job code field shown below.



To make it easier to use this field, you can create a list of job codes, and then click on the "L" button to select from the list. To do this, follow the same procedure above for Account Codes. (The Job and Account Code field are the same.)

Since the Job and Account Code field is the same. The question naturally arises: What if I have both account codes and job codes? In that case, you can use one of the "User Defined Fields" at the bottom of the screen. The most commonly used field is the "Terms (or UDF)." The name of this field can be changed to Job # or Accnt # (that's done in **File >> Basic Program Set-up >> "User Defined Field**).

You have all of the same advantages as the upper field. You can create a list (by using **Other Tasks >> Edit/View Terms/UDF list**). Then when entering codes, you'll be able to select from the list by clicking on the "L" (for list) button.

No matter what field you use for the job code, you'll be able to obtain the totals spent for each job or project. That's done in the report area of the program (**File >> Export and Report Generator**). The report generator will send the vendor names, job codes, and totals to an Excel where you can calculate the totals of each.

Printing

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

The Print dialog box will appear. From the Print dialog box, you can select the number of copies you want printed. You also have the ability to include graphics or logos on your PO's. If you click on the "More Options" button (found on the Print dialog box), you'll find a great number of supplemental functions. You can create PDF's. You can include a line or two of information that prints on every PO. You have the ability to include a signature line. There's even a feature to translate the printed PO into another language.

End of the Getting Started Section

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

Appendix: Setting up the Program for Account Numbers

Some businesses may need to associate purchase orders with account numbers. If that's necessary in your company, it is possible to the change the "Job #" heading on the Main Purchase Screen to "Acct." This allows you to track the total amount spent *vis a vis* account number.

From the menu at the top of the Main Purchase Order Screen, select **File >> Basic Program Set-up**. Once you are in Basic Program Set-up, click. Click on the "User Defined Fields" tab.

The following will created a field for an overall account number. (We'll call this the "overall account number" field.

- Type in: **Accnt** in the following: "Use the following label (on the screen and printed PO) instead of Job #."

If more than one account number might be used on a single purchase order, then there is one more step. In this step you'll change the name of the column in the Item Area from "Your Cat #" to "Your Accnt." This allows you to enter an account number for each item ordered.

Why can you use the "Your Cat #" (Catalog #) field? Most businesses don't maintain a separate set of catalog numbers of parts or supplies ordered from the vendor. That makes the Catalog # field available for account numbers.

One other note. If you enter an account number in the "overall account number" field (above), then AnyPO will apply that account code to that any product without an account code. (AnyPO does this in the Export/Report Generator portion of the program.) Thus, when it comes to entering account numbers in the Item Area, you only need to enter those numbers that are different from the "overall account number" field.

The following will change the name of the "Your Cat #" column in the Item Area, allowing you to enter account numbers:

- Type in: **Accnt** in the following: "On the Main Purchase Order Screen, replace the word Cat# in the label "Your Cat#" with.

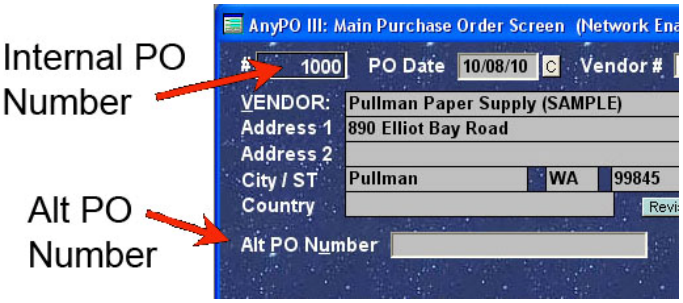
Appendix: Setting up Your Own Purchase Order Numbering System

AnyPO generates an internal PO number. That's the number you see on the upper left hand corner of the Main Purchase Order Screen. If desired, you can control the starting number for your PO's (that's done in the File >> Basic Program Set-up).

As a default, the internal number appears on the printed purchase order, and for many businesses that's exactly what they need. However, you may have special requirements. For instance, you may require a prefix before the number, or you may need to re-start the numbering each time a new fiscal year starts.

AnyPO always maintains an internal number for each PO, but you can, if desired, select your own way of numbering.

When you set-up your own system, the PO number is called an "alternative PO number." The alternative PO number appears in the "Alt PO Number" field on the Main Purchase Order Screen (shown to the right). Whenever a number (or a combination of characters and numbers) is found here, AnyPO will use it for the main number on the printed PO. If the "Alt PO #" is left blank, then AnyPO uses the internal number.



If you wish, you can manually enter your own numbers in the "Alt PO Number" field. AnyPO will use those numbers on printed PO's. But you can also instruct AnyPO to automatically place numbers in the "Alt PO #" field for you.

To set-up your own automatic numbering system, select **File >> Basic Program Set-up** from the menu at the top of the Main Purchase Order Screen. Once you are in Basic Program Set-up, click. "Alt PO Number " tab.

At this point, you can determine how you wish to set-up your numbering system. You can add a prefix or suffix. Or you can combine a prefix of suffix with the various numbering options listed on the Set-up page. After making a selection here, the next new Purchase Order that you create will be numbered according to your choice.