Tutorial

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Step1- click on Set **Sales Tax** button on main form. Type in tax rate (example if tax rate is 8 1/2% then type in 8.5).

note: the last sales tax rate entered is saved.

Step2- **Enter your inventory**- click on inventory database manager button. Click on add item button, fill in data fields (ie. part number, description, etc..)
click on save entry button to save entry. To add or remove inventory from an existing item use add inventory or remove inventory buttons. click on close button to exit.

reminder: Do not forget to set minimum quantity. When quantity in stock reaches this level or lower the item will be placed on a re-order list. You can print this list or preview it on your screen. **Inventory levels are automatically adjusted** when any chages are made.

Step3- **Enter the sale**- Click on Sales Entry form button. If the customer is not in your database then click on enter new button. You are now in the client database manager. Click on add new customer button. Type information in data fields and click on save record. click on close button. Click on continue button. Choose search criteria (Last Name or Customer number)

1) If you choose customer number then click on ok button then you are prompted to enter the customer number. Enter a valid number then click on ok button. you are now in the sales entry form.

2) If you choose Last Name then click on ok button then you are prompted to enter the last name. Enter the last name and click ok button. You are now shown a customer database grid. The current customer is the first occurence of this last name in the customer database. If there is more than one customer with the last name you will have to use the customer database grid to choose the correct customer. Click on the name in the grid you want, it will become the current customer. (if necessary you can check the address by scrolling to the right part of the grid)

click on ok button to enter sales entry form. (if this is the first sale you will be prompted to enter the first order number. Each sale after this one will create an order number by incrementing the previous one by one.)

Fill in the following data fields:

Pickup/ship(*enter pickup or ship*),

type of sale(*enter cash, credit card, or invoice)*,

credit card number(optional entry) and

credit card type(optional entry).

remember: spell them correctly - this is important...

to add a product you must first find the product you want by clicking on find product button and searching by part number or description. (Searching by description will find the closest one if the item is not deescription you type in is not the exact description in the inventory database. you may have to use the navigation buittons to find the exact product- these buttons have arrows on them).

Once you have found the product, click on add to order button.
Repeat this process until you have completed the order.

Click on print invoice, print reciept, or end of order w/o printing invoice/reciept buttons. (Last button is applicable if the order will be shipped and requires freight charge. invoice/reciept will be printed from billing form after shipping for is filled in. I will discuss this later.)

remember: Inventory levels are adjusted automatically.

Step4- **Changing an order**- click on search/edit order button on main form. click on search to find the order. Use navigation button (buttons with arrows on them). to find the exact item you want. Use the edit buttons to make changes. (change price charged, decrease/increase quantity sold buttons).

remember: Inventory levels and totals are adjusted automatically.

Step5- **Shipping**- click on shipping manager button on main form. Click on check shipping status to find the order you want then click on enter shipping information button. You are then propted to enter the shipping information. enter it then click on ok button.

click on print packaging slip button. You will print out two copies, one for you and one for the customer.

Step6- **Billing**- click on billing manager button on main form. Click on check payment status button to find the order. Click on enter payment status/Date recieved button. You are prompted to enter billing information enter it and click ok button.

remember: Payment status data field - Enter recieved or leave blank if payment not recieved.

At this point you can print invoice or reciept.