

07a65cd8-0

Scott Sawyer

COLLABORATORS

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Chapter 1

07a65cd8-0

1.1 IMANDI Professional 1.0 - Manual 1.0.40

IMANDI Professional 1.0

Reference Manual

Program Version 1.0.559

Manual Version 1.0.40 - Online Manual Version 1.0.37

May 22, 1995

~Introduction~

~Legal~Information~

~Credits~

~Contacting~Egad~International~

~Getting~Started~

~Reference~

~Tutorial~

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1.2 Introduction

Introduction

IMANDI Professional is a complete Inventory Management AND Invoicing (hence the name...) system exclusively for the Amiga. No other invoicing and inventory management system on the Amiga compares with its ease of use, flexibility, and features. Although it is very complex, it is extremely easy to use because of its powerful, yet simple interface.

This manual shows how to use IMANDI Professional and explains how each feature works. It has been split into sections that parallel the individual editors that make up IMANDI Professional.

Egad International is 100% committed to the Amiga market, and to providing Amiga only products. If there is a feature that you feel would enhance IMANDI Professional, please feel free to contact us. Egad International welcomes your constructive suggestions.

We are confident IMANDI Professional will meet your expectations.

Sincerely,

Scott Sawyer
President,
Egad International

1.3 Legal Information

IMANDI Pro Legal Information

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1.4 Credits

Credits

Programming : Scott Sawyer
Manual : Scott Sawyer
Beta-Testers : Janet Sosnicki
 J. Scott Ressler
 Kevin Brown
Egad Logo : Keith Edwards

Comments

A special thanks to:

Janet, for putting up with the limitless versions of this program over the years and yet to come...

Kevin, for making me do things the hard way...

Jeannine, for listening to me babble on about my program and other crazy ideas I have... (The Manuel is done.)

My father, for proofreading (So if there are mistakes, you know who to blame...)

Keith, for... Ummm... Oh well, can't think of anything. :-)

1.5 Contacting Egad International

Contacting Egad International

By Mail:

Egad International
 P.O. Box 444
 Tolland, CT 06084

By Internet:

egad@cicbbs.com

By GENie:

Egad International Product and Technical Support Category Amiga Roundtable
 (page 555) -- Amiga Bulletin Board -- Category 29 -- Topic 2

How to get there:

Type "Amiga" at any prompt, or type "move 555" to go to the Amiga Roundtable. Press "1" for the Amiga Bulletin Board. Type "set" and when prompted for the category number, enter "29". Type "rea" then "2" when prompted for the desired topic.

1.6 Getting Started

Getting Started

~What~You~Should~Have~::~:
 ~The~Registration~Card~::~:
 ~IMANDI~Professional~System~Requirements~::~:
 ~Backup~Copies~::~:
 ~Invoice~Forms~::~:
 ~Installation~::~:
 ~Starting~IMANDI~Professional~::~:

1.7 Reference

Reference

~The~Main~Screen~::~:
 ~The~Customer~Editor~::~:
 ~The~Inventory~Editor~::~:

~The~Preferences~Editor~~~
~The~Header~Editor~~~~~
~The~Invoice~Editor~~~~~
~The~New~Invoice~Button~~~
~The~Print~Button~~~~~
~The~Open~Button~~~~~
~The~Quit~Button~~~~~

1.8 Tutorial

Tutorial

~Tutorial~Explanation~~~

~Tutorial~~~~~

1.9 What You Should Have

What You Should Have

In the IMANDI Professional package, you should find:

- This manual
- The IMANDI Professional Program Disk
- The Registration card

1.10 The Registration Card

The Registration Card

Please fill out the Registration Card and send it to us. This will allow us to notify you when there are updates and new versions of IMANDI Professional available.

1.11 IMANDI Professional System Requirements

IMANDI Professional System Requirements

IMANDI Professional will work on any Amiga computer with at least 1.5 megabytes of RAM and Amiga OS 2.04 or higher. An accelerated system will greatly enhance performance. A hard drive is recommended, but not required.

1.12 Backup Copies

Backup Copies

Before you use IMANDI Professional, it is a good idea to make a backup copy of the original disk. Use this copy, and keep the original in a safe place.

1.13 Invoice Forms

Invoice Forms

One copy of each of the three varieties of invoice forms is included in the IMANDI Professional package, as well as PageStream files for the corresponding invoice forms. It is recommended that the original copies of these invoice forms be kept in a safe place where they will not be lost or damaged. Use copies of these invoice forms, or have a printing service print copies for you. Individual replacements for the invoice forms are available from Egad International at a reasonable price. Contact Egad International for more information.

1.14 Installation

Installation

Hard Drive Users:

Run the IMANDI Professional HD_Install program. You need at least 1/2 of a megabyte of hard drive space free.

Follow the installation program's instructions.

Floppy Users:

Rename your copy of the IMANDI program disk to "IMANDI_Pro" with no spaces.

The IMANDI Professional disk is not bootable. The following assigns are

suggested, but not required:

```
Assign Customers: IMANDI_Pro:Customers
Assign Inventory: IMANDI_Pro:Inventory
Assign Invoice_Forms: IMANDI_Pro:Invoice_Forms
```

Please view the readme file on the IMANDI Professional Program disk for changes, modifications, and other information.

1.15 Starting IMANDI Professional

Starting IMANDI Professional

Double-click on the IMANDI Professional icon to start IMANDI Professional. After a moment, IMANDI Professional will be ready to use. If there were no major problems during startup, there will be an "IMANDI Professional 1.0 is now online" message at the bottom of the main screen in the status bar.

1.16 The Main Control Panel

The Main Control Panel

The main control panel of IMANDI Professional is where all of the editors are started from. On the main control panel, there are seven buttons: New, Open, Customer, Inventory, Prefs, Print, and Quit. The following chapters will describe each of these in detail.

1.17 The Customer Editor

The Customer Editor

The Customer Editor is the portion of IMANDI Professional that allows for the entry of customers. Once a customer file has been created, invoices can be entered for that customer.

The Customer Editor can be accessed by clicking on the Customer Editor Button on the main panel or by pressing F3 on the keyboard. The Customer Editor screen can be shrunk or expanded by using F9 and F10, respectively.

1.18 The Customer Editor Menus

The Customer Editor Menus

The following are descriptions of menu functions available from the Customer menu.

New <Amiga N>

Erases the current customer on the screen, allowing a new customer to be entered. Be sure to save the current customer before using this function.

Open... <Amiga O>

Brings up a file open requester allowing a previously saved file to be opened for viewing or editing.

Save <Amiga V>

Saves changes to the customer currently open.

Save As... <Amiga S>

Brings up a file save requester allowing the current customer to be saved to disk.

Print... <Amiga P>

Opens the Customer Print Requester.

The Customer Print Requester

The Customer Print Requester allows the selection of formfeeds and the option to clear the discount information of the customers to be printed.

Print

Opens a requester allowing one or more customers to be printed. To print more than one customer, hold down the Shift key and click on the desired customers.

Form Feed

Adds form feeds when printing to the PRT: device (Printer). Three customers will be printed per page, then a form feed.

Clear Discount Info

Sets the List Total, Earned Discount, and Lost Discount fields of the printed customers to 0.00.

Cancel

Closes the Print Requester.

1.19 The Customer Editor Information Fields

The Customer Editor Information Fields

The following are descriptions of the information fields in the Customer Editor.

Sold To - Line 1

This field contains the first line of the Sold To portion of the customer file that will be printed in the Sold To area on the invoice.

Sold To - Line 2

This field contains the second line of the Sold To portion of the customer file that will be printed in the Sold To area on the invoice.

Sold To - Line 3

This field contains the third line of the Sold To portion of the customer file that will be printed in the Sold To area on the invoice.

Sold To - Line 4

This field contains the fourth line of the Sold To portion of the customer file that will be printed in the Sold To area on the invoice.

Ship To - Line 1

This field contains the first line of the Ship To portion of the customer file that will be printed in the Sold To area on the invoice.

Ship To - Line 2

This field contains the second line of the Ship To portion of the customer file that will be printed in the Sold To area on the invoice.

Ship To - Line 3

This field contains the third line of the Ship To portion of the customer file that will be printed in the Sold To area on the invoice.

Ship To - Line 4

This field contains the fourth line of the Ship To portion of the customer file that will be printed in the Sold To area on the invoice.

The arrow buttons to the right of the Ship To fields will copy the information contained in the corresponding Sold To fields on the left.

YTD List Total

This field contains the year to date total purchases of the customer before discounts, taxes, shipping, etc. Leave this field blank when entering a new customer. IMANDI Professional will keep an accumulating total that can be automatically cleared when the customer is printed.

YTD Earned Discount

This field contains the year to date earned discounts of the customer. Leave this field blank when entering a new customer. IMANDI Professional will keep an accumulating total that can be automatically cleared when the customer is printed.

YTD Lost Discount

This field contains the year to date lost discounts of the customer. Leave this field blank when entering a new customer. IMANDI Professional will keep an accumulating total that can be automatically cleared when the customer is printed.

Contact

This field contains the contact's name.

Phone

This field contains the customer's phone number. If there is more than one number, put the alternate numbers in the Other Customer Info" link "3-4" 0} area.

FAX

This field contains the customer's FAX number. If there is more than one FAX number, put the alternate numbers in the Other Customer Info" link "3-4" 0} area.

Parts Tax Rate

This field contains the parts tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Labor Tax Rate

This field contains the labor tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Travel Tax Rate

This field contains the travel tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Mileage Tax Rate

This field contains the mileage tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

1.20 The Discount Type Buttons

The Discount Type Buttons

There are several types of customers that can be set in IMANDI Professional. A customer can be any one of the five types listed below. Each has a different item discount rate associated with it. The discount rates can be set in the Preferences Editor.

Blanket

This button will set the customer to the Blanket discount rate that is set in the Preferences Editor. The default discount is 10%. This is usually used for your best customers, or ones that have a full service contract or similar status.

As Needed

This button will set the customer to the As Needed discount rate that is set in the Preferences Editor. The default discount is 5%. This is usually used for your less active customers, who may have a lesser service contract, or lesser status than a Blanket customer.

Non-User

This button will set the customer to the Non-User discount rate that is set in the Preferences Editor. The discount is 0%. This is usually used for your customers who do not have a service contract, or do not have a preferred customer status.

NLD As Needed

This button will set the customer to the As Needed discount rate that is set in the Preferences Editor. This customer will get a discount, but it will not be recorded in the YTD Earned Discount and YTD Lost Discount fields.

NLD Non-User

This button will set the customer to the Non-User discount rate that is set in the Preferences Editor. This customer will not get a discount, and it will not be recorded in the YTD Earned Discount and YTD Lost Discount fields.

1.21 The Other Customer Info Area

The Other Customer Info Area

Any extra information can be stored in the Other Customer Info area: Notes, alternate phone and FAX numbers, BBS numbers, etc. There is no size limit on this area.

1.22 The Inventory Editor

The Inventory Editor

The Inventory Editor is the part of IMANDI Professional that manages the inventory databases. The inventory databases store information about different items such as: part names, descriptions, quantities, prices, suppliers, and weights. There is no limit on the size or number of databases.

The Inventory Editor can be accessed by clicking on the Inventory Editor Button on the main panel or by pressing F4 on the keyboard.

1.23 The Inventory Editor Menus

The Inventory Editor Menus

The following are descriptions of menu functions available from the Inventory menu.

New Database <Amiga N>

Clears the current database from memory, and starts a new one. Make sure the current database has been saved before using this function.

Open... <Amiga O>

Brings up a file open requester allowing a previously saved database to be opened for viewing or editing.

Save <Amiga V>

Saves changes to the currently open database.

Save As... <Amiga S>

Brings up a file save requester allowing the current database to be saved to disk.

The following are descriptions of the menu options available from the Reports menu.

Inventory Report <Amiga I>

Generates a report from the database currently open. This report includes all information contained within the fields on the Inventory Editor window, with exception to the sales record document. A print requester will be opened, allowing the selection of print parameters.

Page Report <Amiga P>

Generates a report from the current item displayed. This report includes all information contained within the fields on the Inventory Editor window, including to the sales record document. A print requester will be opened, allowing the selection of print parameters.

Value Report <Amiga L>

Generates a report from the database currently open. This report includes: Item Name, Quantity, Quantity Sold, Cost, Price In Stock Value, and Sold Values, as well as Total In Stock Values for the entire database. A print requester will be opened, allowing the selection of form feeds and the print destination.

Clear Sold <Amiga C>

Sets all Sold fields in the current database to 0.

1.24 The Inventory Editor Information Fields

The Inventory Editor Information Fields

The following are descriptions of the information fields in the Invoice Editor.

Part Name

This field contains the name of the item.

Description - Line 1

This field contains the first line of description.

Description - Line 2

This field contains the second line of description.

Description - Line 3

This field contains the third line of description.

Quantity

This field contains the current quantity of the item in stock.

Recommended Quantity

This field contains the recommended quantity of the item to have in stock.

Quantity Sold

This field contains the number of items sold.

Quantity Description

This field contains the description of the quantity (ie. each, set, box).

Cost

This field contains the cost of the item.

Price

This field contains the price of the item.

Supplier

This field contains the name of the supplier of the item.

Weight

This field contains the weight of the item.

Discount?

This field contains either "y" for yes, if it is discountable, or "n" for no, if the item is not discountable.

Taxable?

This field contains either "y" for yes, if it is taxable, or "n" for no, if the item is not taxable.

1.25 The Inventory Editor Utility Fields

The Inventory Editor Utility Fields

The following is a description of the utility field in the Inventory Editor. This field produces an immediate action.

Search for Part

Enter an item name to search for, and the closest match to the name that you enter will be found.

1.26 The Inventory Editor Buttons

The Inventory Editor Buttons

Left Arrow

Displays the previous database item.

Right Arrow

Displays the next database item.

Add

Adds a new item to the current database. The Part Name field will be automatically selected. Begin entering the appropriate information there. After the third description line has been entered, the Restock Editor will

open. See
 The~Restock~Editor
 for more information about the Restock
Editor.

Delete

Deletes the displayed item in the current database.

Restock

Opens the Restock Editor. See Section
 The~Restock~Editor
 for more
information.

1.27 The Restock Editor

The Restock Editor

The Restock Editor is used when entering a new item, replenishing an existing item, or removing a number of items from a database.

Date of Change

This field contains the date when the change to the item's quantity took place. This field's default is the current day if your Amiga has a clock.

Purchase Order

This field contains the purchase order number, if any.

Description

This field contains the action description. If you are adding to the item's quantity, use the description of "Restock" or something similar. "Restock" is default. If you are taking away from an item's quantity, an appropriate description might be "Reduction."

Quantity Change

This field contains the quantity change. For example if you are adding 10 to the item, put in 10. If you are removing 10, then put in -10.

1.28 The Inventory Editor Document

The Inventory Editor Document

The Inventory Editor Document contains all modifications to the item. The information recorded is the Quantity, Purchase Order #, Action Description,

Quantity Change, and the Date of Change.

1.29 The Preferences Editor

The Preferences Editor

The Preferences Editor allows the modification of most global values that are used throughout IMANDI Professional.

The Preferences Editor can be accessed by clicking on the Preferences Editor Button on the main panel or by pressing F5 on the keyboard.

1.30 The Preferences Editor Information Fields

The Preferences Editor Information Fields

The following are descriptions of the information fields in the Preferences Editor.

IYP Labor

This field contains the In Your Plant Labor rate. This is the price charged for services performed at your customer's location.

AOP Labor

This field contains the At Our Plant Labor rate. The is the price charged price charged for services performed at your location.

Mileage

This field contains the rate charged per mile of driving to the customer's location.

Travel

This field contains the rate charged for the time traveling to the customer's location to provide service work.

Parts Tax Rate

This field contains the default parts tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Labor Tax Rate

This field contains the default labor tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Travel Tax Rate

This field contains the default travel tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Mileage Tax Rate

This field contains the default mileage tax rate. You must enter the tax rate as a decimal for percentages (ie: .06 for 6% tax. 6 would be 600% tax).

Blanket Discount - In Your Plant Labor

This field contains the default Blanket customer discount for services performed at the customer's location.

As Needed Discount - In Your Plant Labor

This field contains the default As Needed customer discount for services performed at the customer's location.

Blanket Discount - At Our Plant Labor

This field contains the default Blanket customer discount for services performed at your location.

As Needed Discount - At Our Plant Labor

This field contains the default As Needed customer discount for services performed at your location.

Blanket Discount - Parts

This field contains the default Blanket customer discount on items in the inventory database. This value must be a percentage (ie. .10 for 10%).

As Needed Discount - Parts

This field contains the default As Needed customer discount on items in the inventory database. This value must be a percentage (ie. .10 for 10%).

Blanket Discount - Mileage

This field contains the default Blanket customer discount on mileage. This value must be a percentage (ie. .10 for 10%).

As Needed Discount - Mileage

This field contains the default As Needed customer discount on mileage. This value must be a percentage (ie. .10 for 10%).

Blanket Discount - Travel Time

This field contains the default Blanket customer discount on travel time. This value must be a percentage (ie. .10 for 10%).

As Needed Discount - Travel Time

This field contains the default As Needed customer discount on travel time. This value must be a percentage (ie. .10 for 10%).

Header Info - Invoice #

This field contains the current invoice number.

Header Info - FOB

This field contains the shipping point.

Header Info - Terms

This field contains the terms of the invoice (ie. Net/25).

1.31 The Preferences Editor Buttons

The Preferences Editor Buttons

Basic Bottom

This option will set the default invoice printing type to basic bottom. Basic bottom means that the discounting information and list totals will not be printed on the invoice.

No Bottom

This option sets the default invoice printing type to be the same as a normal bottom, but without the earned and lost discount information.

Shipping Tax

This option turns shipping taxation on. All shipping charges will be taxed.

Customer Save

This option will set customer saving as default. When an invoice is closed, a file save requester will automatically open to save the customer changes. This option is highly recommended for keeping track of sales and customer discounts.

Database Save

This option will set database saving as default. When an invoice is closed, a file save requester will automatically open to save the inventory database. This option is also highly recommended to keep track of the inventory levels.

Invoice Save

This option will set invoice form saving as default. When an invoice is closed, a file save requester will automatically open to save the invoice

items as a file that can be opened for reference at a later time.

1.32 The Shipper List

The Shipper List

The Shipper List is a document at the bottom of the Preferences Editor window that contains the list of shippers. This list is unlimited, and can contain whatever shippers desired.

1.33 The Header Editor

The Header Editor

The Header Editor allows general invoice information to be entered: the Invoice Number, Salesperson, Date, P.O. Number, Part Number, Date Shipped, Shipper, FOB, and Terms. Since this editor is only accessed when using the New Invoice Function, you may want to skip this section of the manual until you have read about the

New~Invoice~Function

.

1.34 The Header Editor Information Fields

The Header Editor Information Fields

The following are descriptions of the information fields in the Header Editor.

Invoice #

This field contains the invoice number that will be used for the new invoice.

Salesperson

This field contains the name or initials of the sales representative, if any, for the customer that the invoice is being made for.

Date

This field contains the date that the invoice is being created on. This field is automatically filled with the current date if your Amiga has a clock.

P.O. Number

This field contains the customer's purchase order number, if any.

Part Number

This field contains the part number if the invoice is being created with only one item in the body.

Date Shipped

This field contains the date that the items on the invoice will be shipped. This field is automatically filled with the same date in the Date field.

Shipped VIA

This field will automatically open a requester in which you can double click on the desired shipper from a list that has been set in the Preferences

Editor

. The arrow to the right of this field will re-open the requester ↔ if you wish to change your selection.

FOB

This field contains the shipping point for the order.

Terms

This field contains the terms of the invoice (ie. Net/25).

1.35 The Invoice Editor

The Invoice Editor

The Invoice Editor is the heart of IMANDI Professional. This is where the body of the invoice is created and where the invoice is generated. Since this editor can only be accessed through the New Invoice Function, you may want to skip this chapter for now and go on to the section about the New

Invoice~Function

.

1.36 The Invoice Editor Mode Menu

The Invoice Editor Mode Menu

To use the Invoice Editor, it must be put into one of six modes: Parts, Labor, Travel Time, Miles, Pass Thru, or Babble. Each mode will cause the Invoice Editor to behave differently. The default mode is Parts mode.

Parts <Amiga 1>

This menu option puts the Invoice Editor into Parts Mode. When Parts Mode is activated, any part name entered into the Part Name field will be searched for in the database currently open in the Inventory Editor.

Labor <Amiga 2>

This menu option puts the Invoice Editor into Labor Mode. When Labor Mode is activated, you have the option of pressing either the At Our Plant button or In Your Plant button.

Travel Time <Amiga 3>

This menu option puts the Invoice Editor into Travel Time Mode, allowing the entry of a travel time item.

Miles <Amiga 4>

This menu option puts the Invoice Editor into Miles Mode, allowing the entry of a mileage item.

Pass-Thru <Amiga 5>

This menu option puts the Invoice Editor into Pass-Thru Mode allowing the entry of any undefined item.

Babble <Amiga 6>

This menu option puts the Invoice Editor into Babble Mode allowing for the entry of single lines of text in the body of the invoice.

1.37 The Invoice Editor Action and Information Fields

The Invoice Editor Action and Information Fields

The following are descriptions of the utility and information fields in the Invoice Editor.

Part Name

This field allows the entry of an item name, which will be searched for in the currently open inventory database. If found, the information will be automatically entered into the fields in the Invoice Editor.

Description 1

This field allows the entry of one line of description that will be printed below the information in the Part Name field.

Description 2

This field allows the entry of one line of description that will be printed below the information in the Description 1 field.

Description 3

This field allows the entry of one line of description that will be printed below the information in the Description 2 field.

Quantity

This field allows the entry of the current quantity of the current item.

Quantity Description

This field allows the entry of the description of the quantity (ie. each, set, box).

Unit Price

This field allows the entry of the unit price for the current item.

Amount

This field allows the entry of the amount price for the current item.

Discount %

This field allows the entry of a percentage discount on the current item. The percentage must be in decimal form.

Discount \$

This field allows the entry of a monetary discount on the current item.

Tax Rate %

This field contains the tax rate for the current item. This percentage must be in decimal form.

1.38 The Invoice Editor Buttons

The Invoice Editor Buttons

Item -

This button decreases the item number by one.

Item +

This button increases the item number by one.

Search

This button, when checked, allows for database searching when in Parts Mode.

1.39 The New Invoice Button

The New Invoice Function

The New Invoice Button starts a new invoice. IMANDI Pro will open the

Customer~Editor
 , the
 Header~Editor
 , the
 Invoice~Editor
 , and the
 Inventory

Editor

-- all at the same time. Each of these will be utilized in the creation of a new invoice.

1.40 Creating a New Invoice

Creating a New invoice

Step 1

Press the New Invoice button on the main panel and wait for all four editors to open. The Customer Editor window and the Header Editor window will appear in front of the other editors.

Step 2

Click in the Customer Editor window. If the desired customer is already saved to disk, select Open from the menu and load that customer. If the customer does not exist on disk, select New from the menu, and proceed to fill in the fields appropriately. When either is completed, press F9 to shrink the window, click on the window back button, and go on to Step 3. If you are unsure about any function in the Customer Editor, refer to the section on the

Customer~Editor
 .

Step 3

Click in the Invoice # field in the Header Editor. Fill in each field appropriately. When done, send the Header Editor to the back of the screen by pressing the window back button. If you are unsure about any function in the Header Editor, refer to the section on the

Header~Editor
 .

Step 4

If you will be utilizing an inventory database for the invoice, click in the Inventory Editor and open an existing inventory database by selecting Open from the menu or create a new database by adding items to the currently empty inventory database. Once this is completed, click in the Invoice Editor window. If you are not using an inventory database for the invoice, click in the Invoice Editor window.

Step 5

Select the desired mode from the menu, and enter in the appropriate information. If you are unsure about any function in the Invoice Editor, refer to the section on the

Invoice~Editor

. When you are finished entering items, go on to Step 6.

Step 6

To print the invoice, click on Print in the main panel. The invoice may be modified even after it has been printed. For more information about the Print function refer to the section on the

Print~Function

.

Step 7

When the invoice has been completed and printed, click on the Invoice Editor's close buttons. This will shut down the current invoice and return you to the main panel shutting down all editors. If your preferences are set to customer, inventory, or invoice form saving, save requesters will open requesting save file names. When everything is saved, the editors will close. If you do not wish to save the files, select cancel on the save requesters.

1.41 The Print Requester

The Print Function

The Print Function is only available when a new invoice is open. Click on the Print button when finished entering items in the Invoice Editor to open the Invoice Print Requester. In this requester, the shipping charges, type of invoice, formfeeds, and print destination are set.

The Print Requester can be opened by clicking on the Print Button on the main panel or by pressing F6 on the keyboard.

1.42 The Print Requester Fields

The Print Requester Fields

Shipping

This field contains the amount to be charged for shipping.

Print Destination

This field contains the print destination. PRT: will print to the printer. File save paths may also be entered, or can be chosen by clicking on the arrow button to the right of the Print Destination field.

1.43 The Print Requester Buttons

The Print Requester's Buttons

Basic Bottom

This option will set the default invoice printing type to basic bottom. Basic bottom means that the discounting information and list totals will not be printed on the invoice.

No Discount Print

This option will set the default invoice printing type to be the same as a normal bottom, but without the earned and lost discount information.

Shipping Tax

This option will enable shipping taxation.

Formfeed

This option will enable form feeds at the end of each page.

1.44 The Open Function

The Open Function

The Open function does the same thing as the New function. The only difference is that it will open a saved invoice and insert the contents of that invoice into the items of a new invoice. This means that it will start a new invoice, and put the items of the old invoice into the items of the new invoice in the Invoice Editor" link "Sub_7" 0}.

1.45 The Quit Function

The Quit Function

Pressing the Quit button on the main panel will quit IMANDI Professional.

1.46 Tutorial Explanation

Tutorial Explanation

This tutorial is designed to familiarize you with the operations of IMANDI Professional. While it does not utilize every feature available, this tutorial gives you a feel of how most things in IMANDI Professional work. Follow the tutorial exactly the first time through, and later explore and try other features detailed in the reference section of this manual. The tutorial assumes that you have already installed and have just started IMANDI Professional.

1.47 Tutorial

Tutorial

Step 1

First, we will create a new customer for use in IMANDI Professional. For any invoice to be created, there must be a customer file. Click on the Customer Editor button. The Customer Editor will now open its window. Click in the field labeled Sold To Line 1. Enter "Test Customer" into this field. Press return. Enter "123 Somewhere Street" and press return. Enter "Someplace, CT 06066" and press return. Enter "USA" and press return. The Sold To portion of the customer file is now completed. Instead of typing the same thing again for the Ship To portion, click on each four of the arrows pointing left that are next to the Ship To fields. This will copy each line of information from the Ship To fields to the Sold To fields. The next field, Year To Date Customer Info - List Total, will now be activated. Enter "0.00", "0.00", and "0.00" for all three YTD Customer Info fields. This is a new customer, so they have not bought anything and they have not gotten any discounts. Enter "Nobody" into the Contact field and press return. Enter 1-555-555-5555 into the Phone # and FAX # fields and press return. Enter ".06" into all four tax rate fields. Lastly, click on the Blanket Customer Type button, setting this customer to the highest standard discounting.

Step 2

Before exiting the Customer Editor, the customer must be saved to disk. To do this, select Save As... from the Customer menu. Press the save button after you choose the Customer directory, and enter the filename as "Test_Customer." It is suggested that you keep all customer files in one directory, such as the Customer directory. The customer, now having been

saved to disk, is completed. Click on the close button of the Customer Editor. You will now be back at the main panel.

Step 3

Now you need an inventory database. Although an inventory database is not required to use IMANDI Professional, it allows you to keep track of inventory prices, numbers and sales. Click on the Inventory button on the main panel. The Inventory Editor will now open. To create a new item in the current inventory database, press the Add button at the bottom of the window. The Part Name field will now be selected. Enter "Part 1" and press return. Next, enter "Description - Line 1" into the Description 1 field and press return. Press return through the next two fields, Description 2 and Description 3. The Restock Editor will now open its window on top of the Inventory Editor window. Click in the Date of Change field, and press return if the date is correct. If the date is incorrect, your machine does not have a battery backed up clock, and you will have to enter it manually. Enter "1001" into the Purchase Order # field and press return. Enter "New Item" into the Description field and press return. Enter "10" into the Quantity Change field, and again, press return. A requester will appear asking if all of the information you entered is correct. Assuming it all is, select the Yes button. Back in the Inventory Editor, enter "1" into the Recommended Quantity field which is already selected and press return. Enter "0" into the Quantity Sold field and press return. Enter "each" into the Quantity Description field and press return. Enter "100.00" into the Cost field, and press return. Enter "1000.00" into the Price field, and press return. Enter "Egad International" into the Supplier field, and press return. Enter "5" into the Weight field, press return, and press return two more times to accept the current values in the Discount? and Taxable? fields. You have just created a one item inventory database. Unlimited entries may be made using the same procedure, but that's all we will enter for now.

Step 4

Like the customer file, we need to save the new inventory database that has just been created. Select Save As... from the Inventory menu. Press the save button after you choose the Inventory directory, and enter the filename, "Database_##-##-##" with ##-##-## being the current date. It is suggested that you keep all inventory database files in one directory, such as the Inventory directory. It is also highly recommended that you should save a database as a name, plus the current date, and continue to save the current date every time that database is saved. For example, today you might save it as the name "Database_04-14-95", and tomorrow you would save this same modified database as "Database_04-15-95." This is a good practice to follow should something happen to part of the disk or should the file become corrupt. The inventory database, now having been saved to disk, is completed. Click on the close button of the Inventory Editor. You will now be back at the main panel.

Step 5

Finally, it is time to create an invoice. Press the New button on the main panel. Four different windows will open. Click in the Customer Editor window. Select Open... from the Customer menu. Select the file that you

saved earlier, "Test_Customer" in the Customer directory and press the OK button. The customer file is now open, and will be used for this invoice. Since we don't need to modify anything in the Customer Editor, press the F9 key on your keyboard to shrink the window to getting it out of the way.

Step 6

Now, click in the Header Editor window in the Invoice # field. Enter "1" into this field, and press return. Enter your initials into the Salesperson field, and press return. The date should appear in the Date field, so press return. If it does not appear, then enter the date manually, and press return. Enter "123" into the P.O. Number field, and press return. Enter "123" into the Part Number field and press return. Press return in the Date Shipped field to use the date currently entered there. The Shipping Requester will now open up with your options of shippers. Double-Click on the USPS line to choose standard mail. You will now be sent back to the Header Editor. If the FOB field is blank, enter your town and state, separated by a comma and press return. If the field already contains a town and state, just leave it and press return. Press return in the Terms field to accept the current value. The invoice header information is now complete. Using the window back button, send the Header Editor to the back of the screen.

Step 7

Now, an inventory database must be opened. Click in the Inventory Editor window and select Open... from the Inventory menu. Select the database file that you saved earlier, "Database_##-##-##" in the Inventory directory and press the OK button. The database file is now open, and will be used for this invoice.

Step 8

The body of the invoice will now be created. Click in the Invoice Editor window. Select Parts in the Mode menu. Enter "Part 1" into the Part Name field, and press return. IMANDI Professional will now search the database for the part name, and gather the information on that item. Press return in the next three fields, Description 1, Description 2, and Description 3. Enter "1" into the Quantity field, and press return. The next few fields will automatically be entered for you based on the information provided in the inventory database, so press return through the Quantity Description, Unit Price, Amount, Discount %, and Discount \$. That one item has been completed. You want to add a small comment in the body of the invoice, so select Babble from the Mode menu. Press the space key, and press return to enter a blank line. Type "Thank you for this order." and press return. The body of this invoice is finished.

Step 9

It is time to print the invoice. Turn on your printer if you have not already done so, and set up the printer with an invoice form sheet to print on. Drag the Invoice Editor window down from the top of the screen to reveal the main panel. On the main panel, click on the Print button. The Print Requester will now open, and click in the Shipping field. Enter "5.00" for \$5.00 and press return. Make sure only the form feed button is checked, and press the Print button if you are ready to print the invoice. A requester providing the global invoice information will appear. After you

have examined this requester, press the Thanks button, and the invoice will be printed.

Step 10

The invoice is done, so now click on the Invoice Editor window close button. IMANDI Professional will ask to make sure you want to close the invoice. Choose the Yes button. A customer file save requester will appear. Save the customer file by pressing return to save it as the name that it was opened as. Next, an inventory database save requester will appear. Save the database. You will now be back at the main panel, and are ready to start another invoice.

1.48 The Main Screen

The Main Screen

The~Main~Control~Panel~::~

1.49 The Customer Editor

The Customer Editor

~The~Customer~Editor~::~

~The~Customer~Editor~Menus~::~

~The~Customer~Editor~Information~Fields~::~

~The~Discount~Type~Buttons~::~

~The~Other~Customer~Info~Area~::~

1.50 The Inventory Editor

The Inventory Editor

~The~Inventory~Editor~::~

~The~Inventory~Editor~Menus~::~

~The~Inventory~Editor~Information~Fields~::~

~The~Inventory~Editor~Utility~Fields~::~

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~The~Inventory~Editor~Buttons~::~:~
~The~Restock~Editor~::~:~
~The~Inventory~Editor~Document~::~:~

```

1.51 The Preferences Editor

The Preferences Editor

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~The~Preferences~Editor~::~:~
~The~Preferences~Editor~Information~Fields~::~:~
~The~Preferences~Editor~Buttons~::~:~
~The~Shipper~List~::~:~

```

1.52 The Header Editor

The Header Editor

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~The~Header~Editor~::~:~
~The~Header~Editor~Information~Fields~::~:~

```

1.53 The Invoice Editor

The Invoice Editor

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~The~Invoice~Editor~::~:~
~The~Invoice~Editor~Mode~Menu~::~:~
~The~Invoice~Editor~Action~and~Information~Fields~::~:~
~The~Invoice~Editor~Buttons~::~:~

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1.54 The New Invoice Function

The New Invoice Function

~The~New~Invoice~Function~~~

~Creating~a~New~Invoice~~~~~

1.55 The Print Button

The Print Button

~The~Print~Requester~~~~~

~The~Print~Requester~Fields~~~~

~The~Print~Requester~Buttons~~~~

1.56 The Open Button

The Open Button

~The~Open~Function~~~

1.57 The Quit Button

The Quit Button

~The~Quit~Function~~~
