EZ Small Business Software Quick Start Guide

Getting Started

After you install the software, it's a good idea to read through the help in EZ. This will speed up your understanding of how EZ Small Business works. The following topics are listed under the Help Menu:
- Getting Started, Frequently Asked Questions, Lines, Styles, and Items

Set Up

1. Select Company Information from the Update Menu to enter information about your company.

2. Select Products and Services from the Update Menu to add your Lines, Styles and Items. Lines, Styles and Items are used to define your products and services. You need to add one or more Lines to the database. Each Line can have any number of Styles and each Style can have any number of Items.

3. Select Inventory from the Update Menu to turn on inventory tracking for an item and to add inventory on hand.

4. Select Source of Sales from the Update Menu to enter the sources you want to track. Sources are how the customer heard about your product (i.e. Internet, Friend, Magazine Ad, etc.).

5. Select Order Methods from the Update Menu and decide if you need to enter any additional order methods besides the defaults (Phone, Mail, Internet, Fax). An order method is how the customer ordered.

6. Select Countries from the Update Menu if you need to add any countries besides the US and Canada you might sell to.

7. Select Options from the Tools Menu and set up your Order Entry Defaults, Shipping Charges, Quick Item Buttons and other options.

First Order

8. Select Order Entry from the Update Menu to add your customers and orders.

9. Click Add under the customer list to add a new customer. Enter customer information and click OK.

10. Click Add under the order list to add an order. Default values for payment method, source, and order method are filled in. Change these if needed. To change default vales, select Options from the Tools Menu.

11. Click Add to add an order line to the order. Select the item and click OK. Click Add to add additional items. Click Close when done.

12. Click Receipt to view and print a receipt (or invoice) for the order. To customize the information shown on the receipt, select Options from the Tools Menu.

13. Select Labels from the Tools menu to print a shipping label or envelope. Click Select and then click Print Preview (lower right).

14. Click Piece (lower right) to select label or envelope size. Select Print from the File Menu to print the address.

15. Now that you have added at least one order, click on the Reports menu for a list of available reports on sales and inventory.

EZ Small Business Quick Start

Technical Support

Press F1 on any screen to view detailed help or select Help from the menu.

Go to http://www.allprosoftware.com/technicalsupport where you can:
- Find answers to common questions
- Open a problem using our online Help Desk

Frequently Asked Questions

Are Customer Numbers assigned manually or automatically?
You have the option to choose how you want customer numbers assigned. Click on the Tools Menu and select Options. On this screen you can choose to have customer numbers assigned manually or automatically. Select Manual if you want to enter the customer number.

What is Source of Sale?
Source of Sale is how a customer heard about your product or service (Friend, Internet, Catalog, etc.). Any number can be added to help you track and analyze your sales. You select a source of sale when you add an order. In Options, you can select the default Source of Sale for new orders.

What is Order Method?
Order Method tells how a customer ordered (Phone, Mail, Fax, Internet, etc.). Any number can be added to help you track and analyze your sales. You select an order method when you add an order. In Options you can select the default Order Method for new orders.

How do I add tax for an order?
EZ will automatically calculate tax for an order based on the tax rate you enter by State or Province in Options. However, you can always enter the tax manually or compute the tax on the Update Order screen.

How do I add shipping for an order?
In Options select whether you want to add shipping manually, by order total or by item count. You can also enter the shipping manually when you add an order.

Can I customize my customer receipts, invoices and packing lists?
Yes, click on the Tools Menu, select Options, and click on the Reports Tab. On this screen enter default text for receipts, invoices and packing lists. You can optionally add a graphic or logo and set text colors. When viewing receipts and invoices, click Customize to override the default text and add special notes.