

Implementation Training

CUSTOMER DOC
REVISED: 3 MAY 2017

OVERVIEW:

Before we start, a reminder. Internet connectivity is not necessary but will greatly improve your experience during training. Also, desktop computers often do not come Wi-Fi enabled. If you are planning on starting your training from another location besides your storefront, you may need to purchase additional hardware.

There are three basic areas of the Anthology software that you need to be familiar with to open your store.

1. How to sell your merchandise
2. How to order new/replacement merchandise
3. How to receive those orders.

The purpose of this training is to provide instruction on how these processes function. It is provided in three sessions, by appointment, lasting no more than one hour per session. We'll also cover some of the setup options found in the *Tools / Options* screen and some concepts like how to get accurate Cost Of Goods Sold (COGS). Even though we are offering this "basic training" we highly recommend you take advantage of the options below. This training just lays the foundation for your store to grow on.

Anthology offers many training options for their customers as they begin to branch out from the basics.

- A self-paced option called the **Hands on with Anthology** manual along with a, provided, training copy of Anthology to complete the exercises. Along with this is live review of the lessons with Anthology staff. This manual will provide the three basic concepts and introduce you to other features of the software that you may want to take advantage of and may not have even known existed.
- Videos – Anthology's YouTube® Channel has a wide variety of instructional videos that will provide a solid foundation of standard practices. To find it, go to www.youtube.com and enter Anthology Channel in the search.



In the results page find and click the channel listing.



Anthology channel

59 videos

The Anthology Channel provides training and other informative videos on Anthology, the smart software for independent ...

CHANNEL

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- Documentation – Anthology provides for its clients the “Anthology Customer Zone”. This site gives you access to all the material that Anthology staff have created to assist others. These documents are organized by category for easy searches. You’ll find this information at: www.anthologysoftware.com then choose the Support link on the top menu. Videos and documentation do not require a log in but the download section does.
- Support Staff – Anthology’s support staff is always there to help you understand what the documents and video did not provide. We do encourage you to first review these options.

ANTHOLOGY SOFTWARE SETUP:

In this section, we’ll discuss those areas of the software needed to start using Anthology.

1. We’ll discuss Departments, Sections, and Media
2. Discuss COGS (Cost of goods sold) and how it is calculated
3. We’ll discuss Default Discount for costing
4. Go through setting up your tax tables and profiles
5. Go through setting up tenders
6. Talk about Customer Discounts

Recommended Material:

1. We recommend you review the Anthology Help System – **Setup and Configuration** sections. These articles give step by step instruction and complete definitions of screen elements.
 - a. Setting up Taxes – Setting up Tenders – Setting up Departments, Sections, and Media

SELLING MERCHANDISE:

The basis of this discussion will be on use Cash Register. This is discussed extensively in the Hands On manual.

1. Basic sale
2. Multiple “sale types” on a single transaction
3. Editing/deleting items already part of the transaction

4. Choosing tenders/multiple tenders to finish a transaction
5. Using F9 Return Manager
7. Voiding a sale
8. Discuss X and Ztape

Setup Options: Tools | Options | Cash Register – there are many options on this screen regarding sales. We'll touch on these and focus on the ones listed below

1. Scan Mode
2. Warn on last sale
3. Warn on Zero Priced Items

Recommended Material:

1. Review section *Cash Register*, page 4 – 18, in Hands on with Anthology
2. Basic Sale video - https://www.youtube.com/watch?v=Cd8_bgMqpsI (3:01)
3. Features video- <https://www.youtube.com/watch?v=74ErmckTBcQ> (7:39)
4. Multiple Sale Types video - <https://www.youtube.com/watch?v=Lexpj-SZ-Jc> (1:35)
5. Return Manager video - <https://www.youtube.com/watch?v=uifThiu3gPo> (2:41)

ORDERING INVENTORY:

We'll discuss the Purchase Order screen and some of the options you have when placing the order e.g. calling in the order, ordering from on line services, or using Electronic Ordering through Anthology.

Note: The video for Purchasing and Receiving is long but can answer several questions that you may never have asked otherwise. This video is **highly recommended** and an excellent use of 50 minutes.

1. Review ordering process
2. Review the PO screen
3. Discuss the “Warn on last sale” option from Cash Register
4. Using Fetch in the PO screen
5. Discuss the difference between Draft, Open, Shipment, and Complete PO's
6. Discuss Book and Non-book inventory and difference in the way you order
7. Discuss Electronic Ordering
8. Talk about Vendor Discounts

Setup Options:

1. Setting discounts in the Vendor screen
2. Allowing backorders
3. What is cascading orders?

Recommended Material:

1. Review section *Inventory Control*, page 39 – 52, in Hands on with Anthology
2. Purchase order in 3 minutes - https://www.youtube.com/watch?v=D_xh4QbQUYo (2:54)
3. Complete Purchasing & Receiving - <https://www.youtube.com/watch?v=BEfl5IZluuI> (48:52)

RECEIVING INVENTORY:

We'll discuss the Receiving screen and some of the do and do not's when receiving.

1. Review the receiving process
2. Review the Receiving screen
3. Review the difference between Draft, Open, Shipment, and Complete PO's
4. Discuss Receiving History
5. Discuss Cost Of Goods Sold (COGS)
6. Discuss Vendor Invoice.

Setup Options:

1. Both Purchase Order and Receiving options are combined on the same screen. Most all options are set as part of Purchasing

Recommended Material:

1. **Important** Review Help system topic "Vendor Invoice Information" . This is very important for those using the Quickbooks AP accounting links.
2. Review section *Inventory Control*, page 39 – 52, in Hands on with Anthology
3. Quick Purchasing Overview - https://www.youtube.com/watch?v=DmBnQxg7A4U&list=PLKXvYqGMrkT_8MAHBRAOxZh7HMXDpB5vi
4. Complete Purchasing & Receiving - <https://www.youtube.com/watch?v=BEfl5IZluuI> (48:52)

GENERAL INFORMATION:

In this section, we'll discuss topics more general to Anthology and/or to setting up the software. Many of these subjects will be blended into the discussions above – this section will be a review of the topics.

1. We'll discuss the Tools | Options screen
2. How to use Support Log Sender
3. Understanding Quick Backup and backup software
4. Using the Help system
5. Anti-virus programs
6. We'll go over using the Anthology Support Department, hours of operation, etc.