# GETTING STARTED WITH THE ALMYTA CONTROL SYSTEM

## Starting Up

Welcome to the Almyta Control System!  This tutorial will show you the basics of using Almyta Control System to run a small business.  As our example, let us pretend that we are setting up the database for a small coffee wholesaler.

This is the situation of Tutorial Coffee Co., our small coffee wholesaler:  It has one warehouse with one bin location, and stores there two different brands of coffee—Folgers and Yuban Colombian—in bags.  It purchases this coffee from the Acme Supply Company for six dollars a pound and sells it to the Coffee Retail Company for eight dollars a pound.  Purchasing is done through purchase orders, shipping through shipping orders.  The inventory currently in stock comprises three twenty-pound bags of Folgers and three fifteen-pound bags of Yuban Colombian.

Let us input this data into the Almyta Control System.  We will use *italics* for instructions and normal font for commentary.

*Go ahead and open up the Almyta Control System by clicking the Almyta icon on the Desktop. The Almyta Control System Company Selector will appear.*
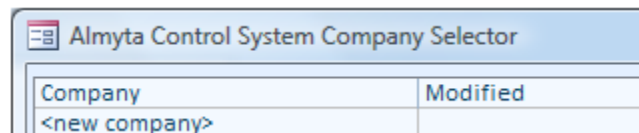


*Double-click on <new company>,  select New Company C*lean *Data, and click OK.*
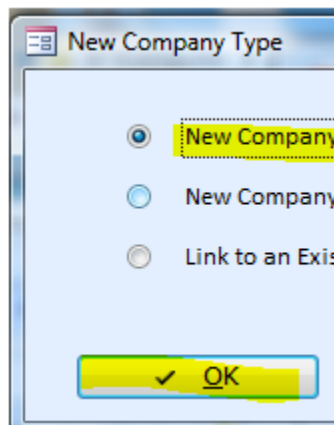


 *Enter "Tutorial Coffee Co." as the company name and press Enter key.  (Here and elsewhere, enter data without the quotes used in this guide.)  When the next screen pops up, click Yes to open the new database.*

*Click the Exit button to close the Initialize Data screen that has appeared.  Instead, select Inventory menu tab and click on Item Master.*

## Populating the Item Master List
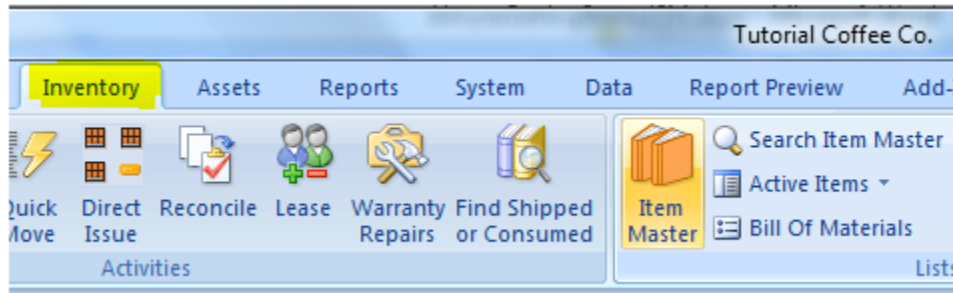


*The blank Inventory Item Master List screen appears.*

Almyta Control System sports a large number of functions, buttons, menus, and screens. However, nearly everything you are going to find yourself using often can be accessed through just one screen—the Item Master List.  We will use this keystone screen to populate the Master List with inventory items, to enter database-wide information that will let us work with these items, and to direct receive and direct issue items.
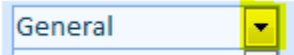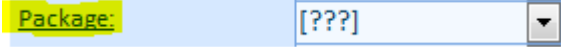
*First, let us create our two inventory items—the two different brands of coffee.  We will create just one item, then copy it over with an appropriate modification.*

*Click the yellow plus sign near the top of the Item Master List.  You will see a blank Item ID field. Type in "Folgers" and click OK or hit Enter. ( Note: you should generally use short Item Ids—and if you wish to provide more detail, use the Description fields.)*
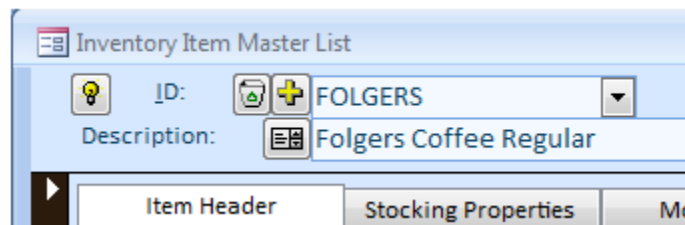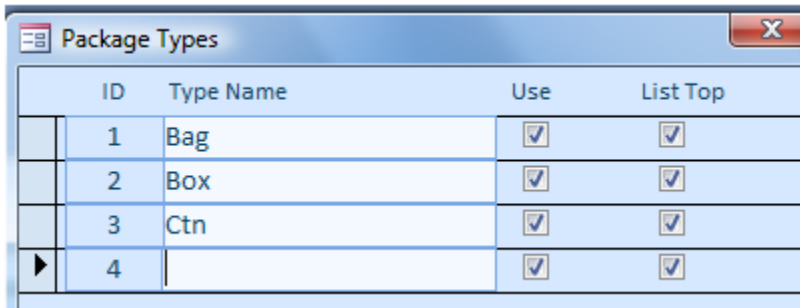
## Populating dropdown lists

Notice that there is a down-turned black triangle to the right of some of them.
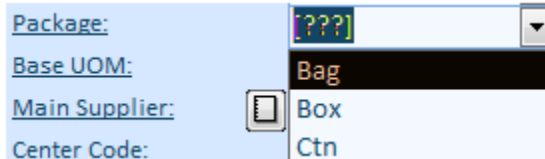
General ▼    The triangle means that this field has to be filled in with a selection from a list—accessed by clicking on the triangle.  This is known as a "dropdown list".  All dropdown lists are empty at the moment.  We use the underlined labels to the left of these lists

to populate them with options.  Package: [???] ▼

*Go ahead and click the Package label. You are now looking at the Package Types screen.  Our one kind of packaging is bags, so type "Bag" into the field next to the number 1.  A second blank field automatically appears below—use it if you want to add another package type.*

| ID | Type Name | Use | List Top |
|----|-----------|-----|----------|
| 1  | Bag       | ☑   | ☑        |
| 2  | Box       | ☑   | ☑        |
| 3  | Ctn       | ☑   | ☑        |
| 4  |           | ☑   | ☑        |

*When finished, hit the Exit button near the bottom of the screen.  Back at the Item Master List screen.  Open the Package Types field dropdown list.  Notice that it now lists the option you just entered.  Select it.*

Package: [???] ▼
Base UOM: Bag
Main Supplier: Box
Center Code: Ctn

There are some configurations and procedures when the lists are not getting updated automatically or immediately. If you notice absence of any changes on a screen, press F5 key on your keyboard or use the Refresh icon in the Home menu tab.

Home    O

Refresh    Save    Find
All ▼

Refresh All
Refresh

We are now on our way to computerizing the Tutorial Coffee Co.  As of this point, Almyta Control System knows very little: just that inventory is packaged in Bags—and that there exists one inventory item labeled "Folgers".  Let us go to it and fill in the other fields one by one, in each case using the underlined label next to the field to create an appropriate option for the list.

*1) Enter "lbs" into the Base UOM field (on the Units of Measure screen, you can leave the Contains and Base Unit of Measure fields as they are—these extra fields are there for the purposes of Almyta's automatic unit conversion function).*
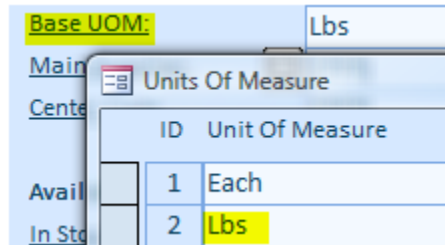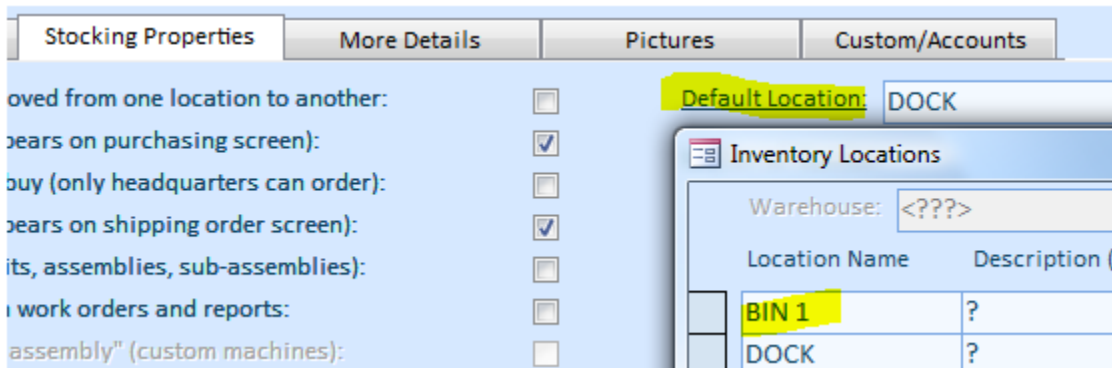


*2) Enter "Acme Supply Company" into the Main Supplier field (add a new supplier on the Suppliers screen)*
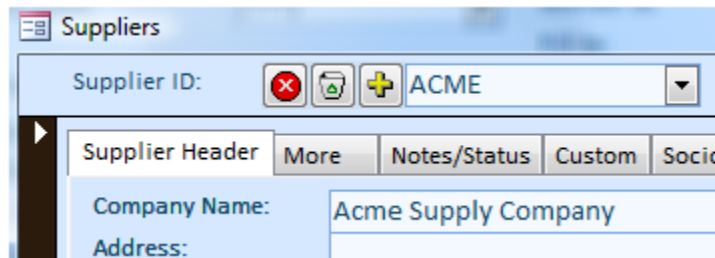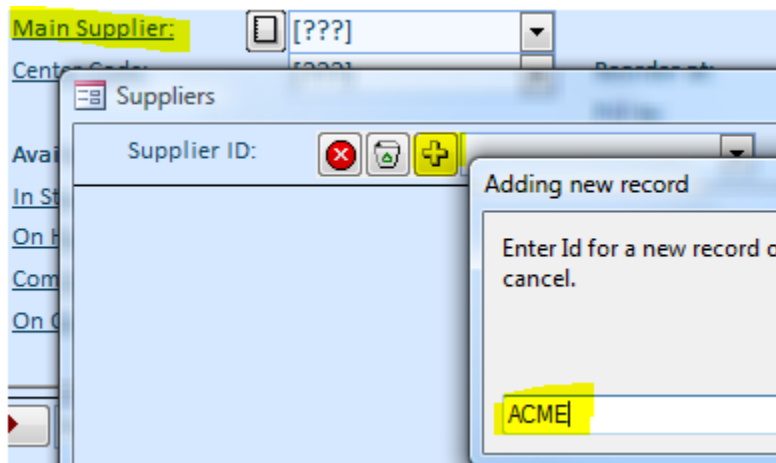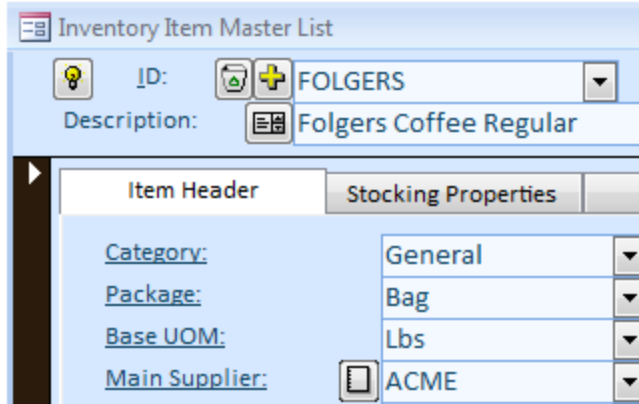
*3) Click on the Stocking Properties tab that you can see right above the Category field and spot the Location field, the one that currently says DOCK. Go ahead and fill it with "BIN #1" instead. Then go back to the Item Header tab we were on before.*



The last four fields we are going to complete do not need to be selected from lists. Simply type the data into them:

## Populating the Item Master List (continued)

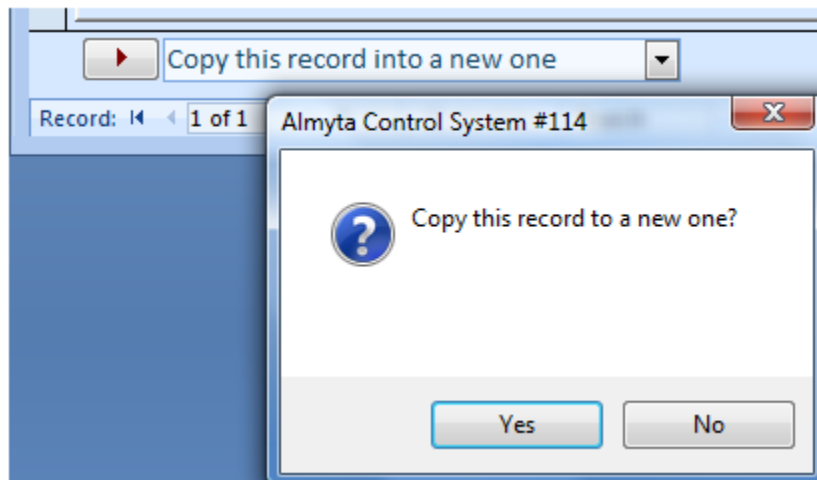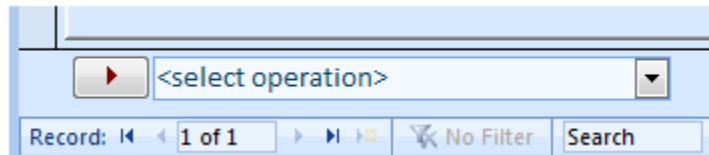*4) Type "20" into the Units Per Pack field—meaning that a bag of Folgers coffee weighs 20 pounds.*
*5) Change Unit Gross Wht to "1.05"—let us say that the bag itself weighs approximately one-twentieth the weight of the coffee inside it.*
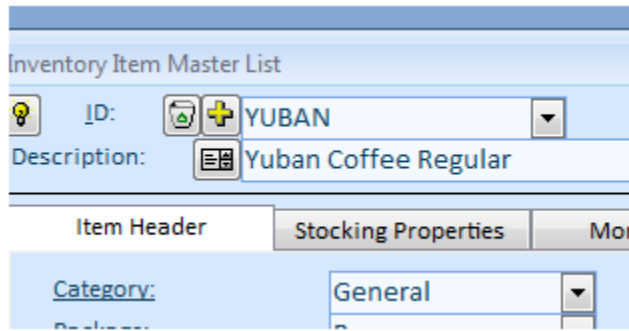*6) Type "6" into the Unit Cost field and "8" into the Unit Price field.*

|  |  | Units Per Pack.: | | 20 |
|---|---|---|---|---|
| Reorder at: | 0 | Pallet Ti/Hi: | 1 | 1 |
| Fill to: | 0 | Unit Net Wht: | | 1.00 |
|  |  | Unit Gross Wht: | | 1.05 |
|  |  | Lead Days: | | 0 |
| Unit Cost: | $6.00 | Economic Order: | | 1 |
| Unit Price: | $8.00 | Monthly Demand: | | 0 |

Remember that there are two items we wish to create, not just one—that we must add the Yuban Colombian item.

**Copying existing items to create new ones**. *You will notice that there is a field, near the bottom of the screen, that says <select operation>.  This is another dropdown list.  Open it and select "Copy this record into a new one", then click the Yes button.  Type in "Yuban" and click OK.  A new inventory item, identical to the first one you entered but labeled Yuban instead of Folgers, now exists.*

> ▶ | <select operation> ▼
>
> Record: ◄ ◄ 1 of 1 ► ►l ►⊡ | ✖ No Filter | Search

> ▶ | Copy this record into a new one ▼
>
> Record: ◄ ◄ 1 of 1
>
> **Almyta Control System #114**                           ✖
>
> ❓  Copy this record to a new one?
>
> Yes          No

There are now these two items, identical in everything but their ID, in the Inventory Item Master List. We want to differentiate the Yuban item from the Folgers, however—the Yuban comes in fifteen pound bags as opposed to the twenty-pound Folgers bags.

*To this end, making sure that Yuban is still the Item ID selected, go to the right of the screen and change the Units Per Pack field to "15".*
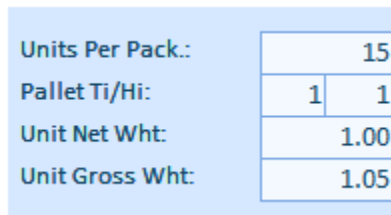


We have now created both items we set out to, and are done creating inventory items for Tutorial Coffee Co. Two brand items are in existence, as you may verify by opening the Item ID dropdown list in the upper left hand corner of the Item Master List screen,
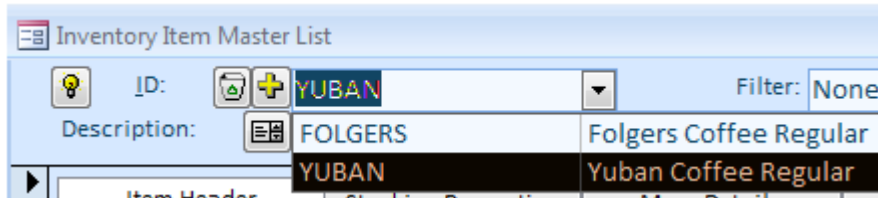


 or by going through the top-of-program menus to Inventory menu tab, Lists, Active Items.
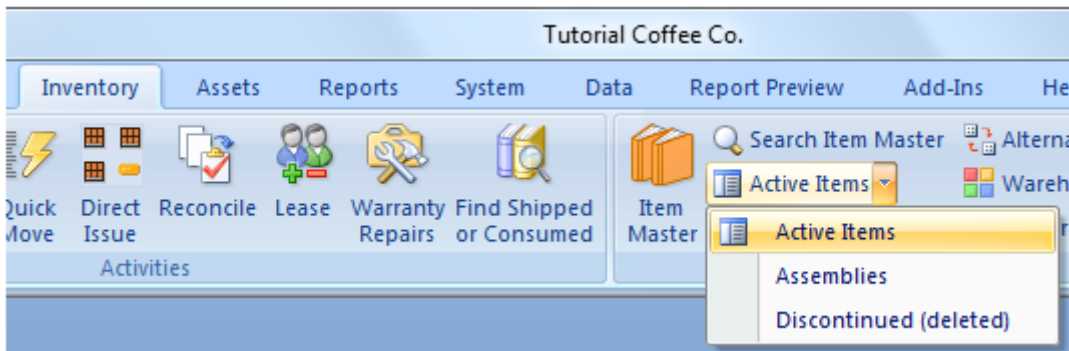
You will notice if you do this last, however, that although two inventory items now exist, there is no inventory actually in stock. To get inventory into stock we must perform an Inventory Positive Adjustment.
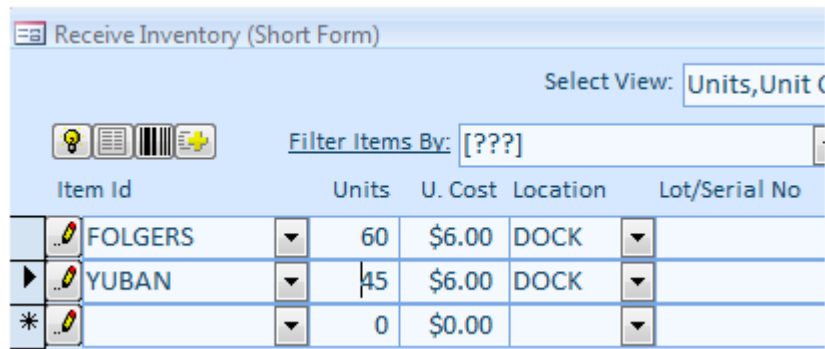
## Direct Receiving

Let us take *three* packages of each item—that is, three bags of each brand—into stock, by receiving 60 lbs of Folgers and 45 of Yuban.

*Click on the Direct Receive in the Inventory menu tab, the Activities group .*
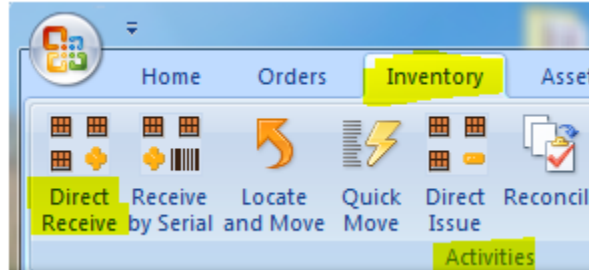


*The Receive Inventory screen appears. Open the Item ID field dropdown list and select "Folgers" Notice that the system by default assumes that you wish to receive one bag or twenty pounds of Folgers. Since we want to receive three bags, change the 20 in the Units field to 60. A second record, empty, has appeared below Folgers. Enter "Yuban" into the Item ID field of this second record and change its Units field to 45—three bags of Yuban.*



We must now tell the System why these items are to be received into inventory. Let us say it was because of the 2002 Inventory Cycle Count, which uncovered the six bags of coffee. The System does not know what a Cycle Count is yet, so we must simply apply again the procedure we used to create options for drop-down lists in the Inventory Item Master List screen:

*Click on the Adjustment Code label in the top-right of the screen. Type "2002 Cycle Count" into the screen that pops up,*
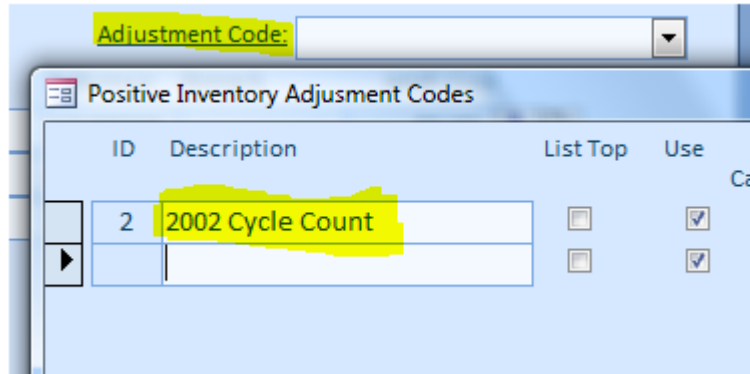
*and exit.  Back on the Receive Inventory screen, select the new option from the Adjustment Code drop-down list.  This adjustment code is automatically applied to both records about to be received.  Click the Receive button at the bottom of the screen.*
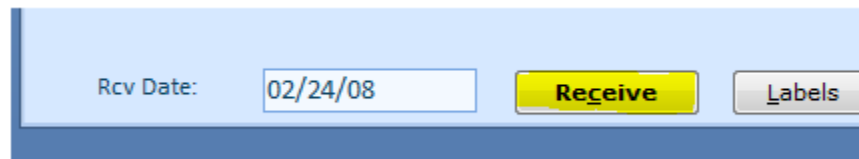


*Both disappear.  When they do, exit the Receive Inventory screen.*

Sixty pounds or three bags of Folgers and forty-five pounds or three bags of Yuban are now in stock.  You can go up to the Inventory menu tab, Lists, Active Items, then on Active Items to see the total poundage of Folgers—60 lbs—and the total poundage of Yuban—45 lbs.
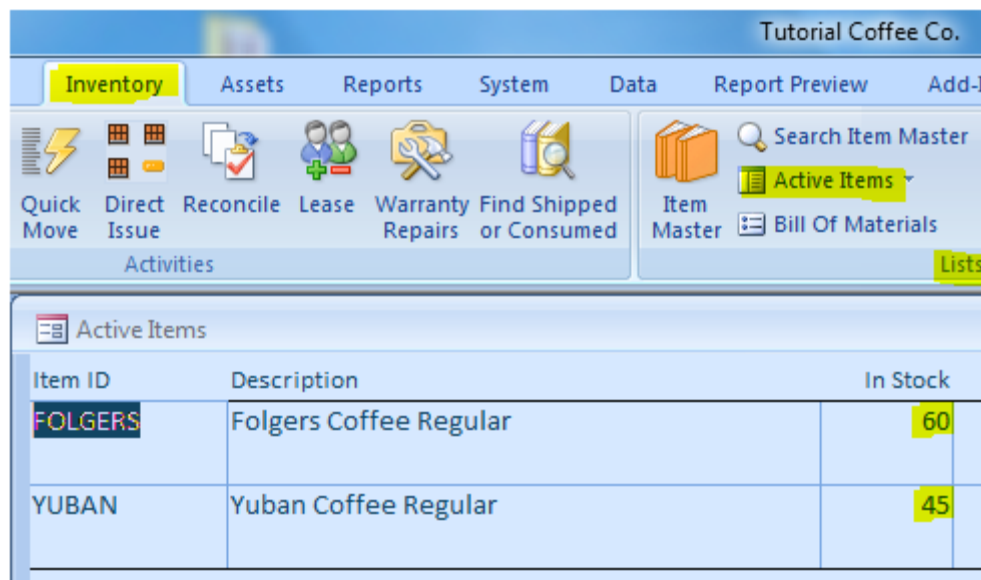


Or you can check out a Report.

# Reports

*Go to Reports menu tab, Inventory, In Stock.  This pops up a screen where you can pick from many different kinds of Items in Stock Report.  Go ahead and enter "Acme Coffee Company" into the Supplied By field, then click the Print button at the bottom of the screen.*



*This pops up a report that shows information for all inventory items in stock that were supplied by the Acme Coffee Company, in our case—all of them.*

To close any report, click Close Print Preview in the Report Preview menu tab.

## Direct Issuing

The counterpart of receiving is, of course, issuing—and issuing in the context of Almyta Control System means to take items out of active inventory. Say the 200*3* Cycle Count has revealed that one of the Folgers bags is missing. We must take it out of active inventory—we must Issue it. This process corresponds in every respect to the Receiving process we just went through.

*To Issue the 20 pounds that correspond to one missing Folgers bag out of inventory, first go to the Inventory menu tab, Activities, Direct Receive. In the Item ID field select "Folgers" and type 20 in the Units field next to it. Now click the Adjustment Code label, type in "2003 Cycle Count" and exit the popup screen. Select this new option from the Adjustment Code list.*
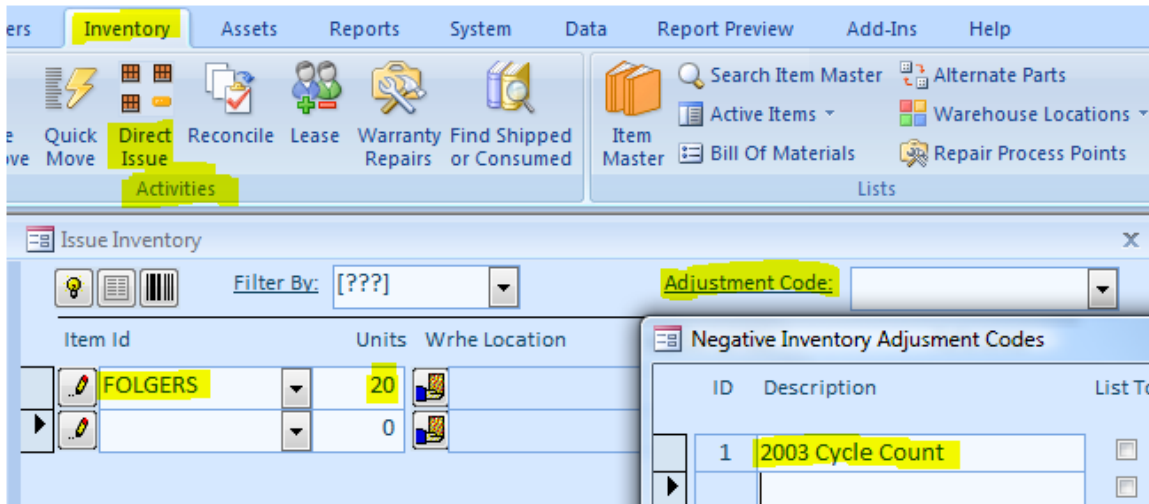


*Click the hand icon under "Wrhe Location", select Bin #1 from the list and press the Select button or just double-click the BIN 1 row.*
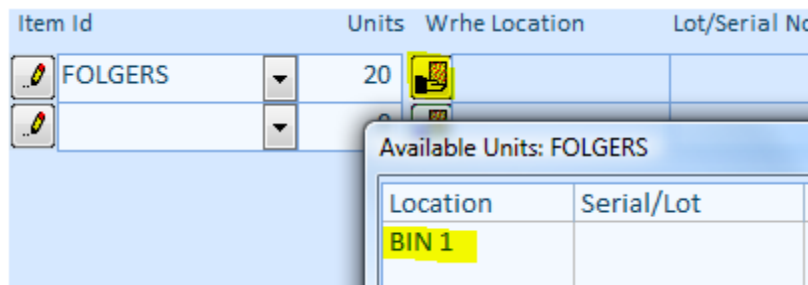


*Back at the Issue Inventory screen, click the Issue button.*

Twenty pounds of Folgers have been removed from inventory stock. If you go to the Inventory menu tab, Lists, Active Items, you will see that the Folgers item now shows only 40 units in stock, as opposed to 60 before.

## Using Purchase Orders

Now for something else—suppose that, instead of finding inventory during a Cycle Count, we buy it from Acme Supply Co—say, eighty pounds of Folgers.

*To create a Purchase Order, go to the Orders menu tab, Purchasing, Order Details.  Then click the small yellow plus sign at the top left of the screen.  Click Yes.*
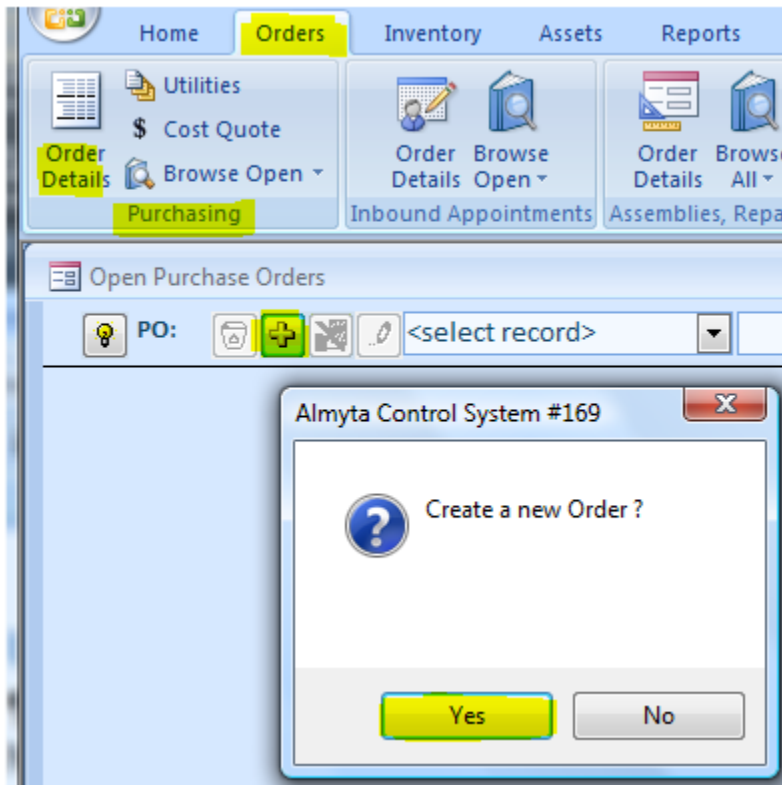


*Back on the P.O. screen, now filled with fields, you have to fill in at least the Supplier.  Once that is wrapped up, head on over to the Inventory Items tab.  Put "Folgers" in the Product field and "80" into the Std. Units field.  Click somewhere on the blank record below the one we are working with.  Above, the program automatically fills in the total price of 80 pounds of Folgers.*

*Click on the Totals tab and fill out any additional charges and/or discount, then close the P.O. screen.*



You are done filling out this Purchase Order.  If you go to the Orders menu tab, Purchasing, Browse Open, you will see the new purchase order there.
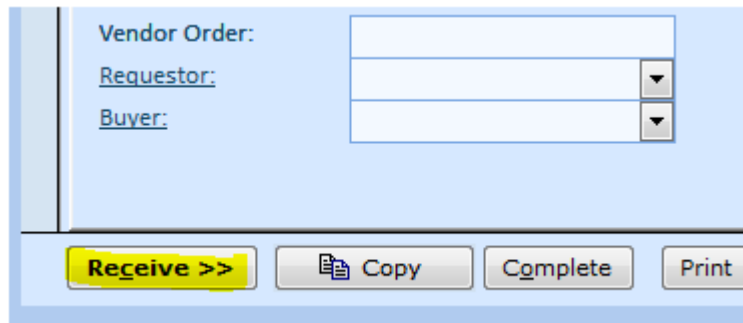


Now suppose the time until the shipment is due has passed, and the shipment is here.  We must receive it into our own inventory:
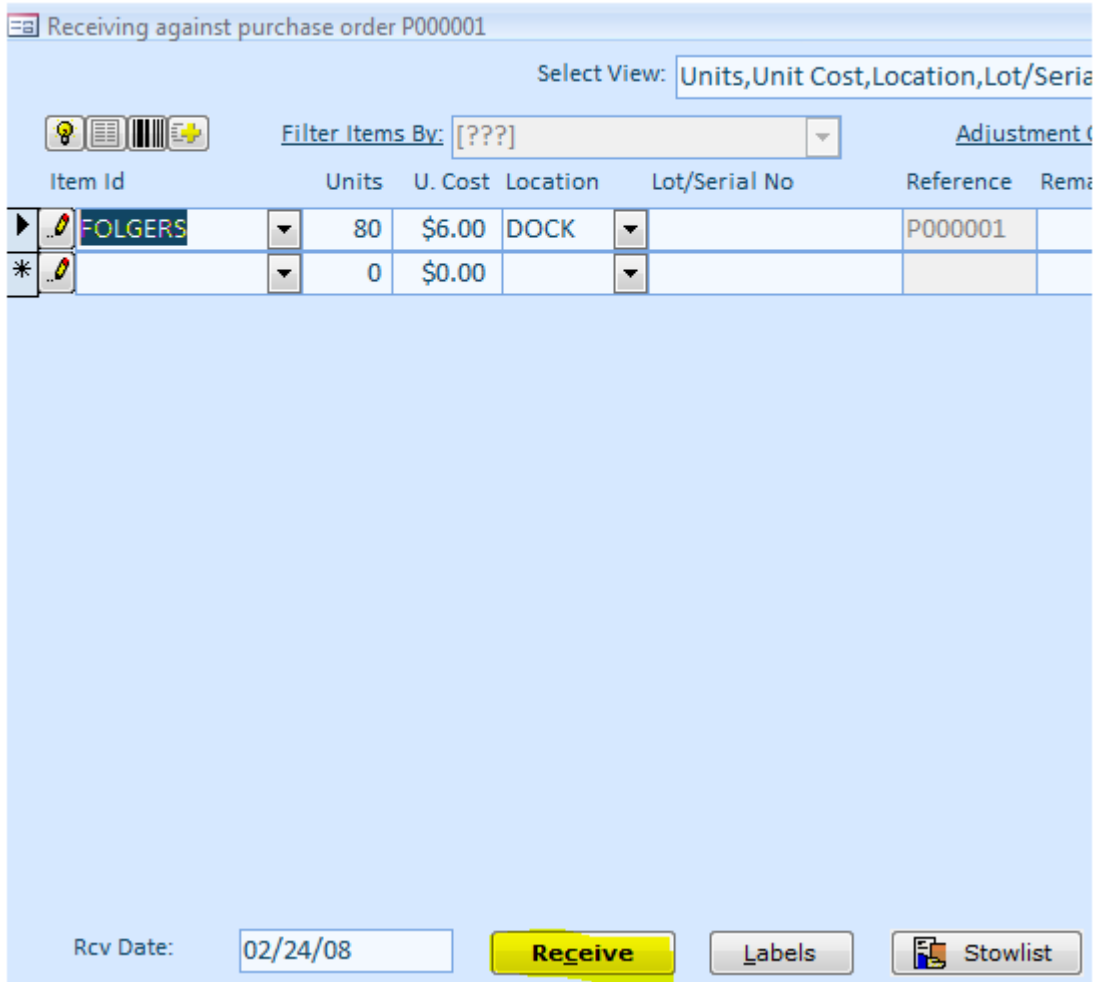
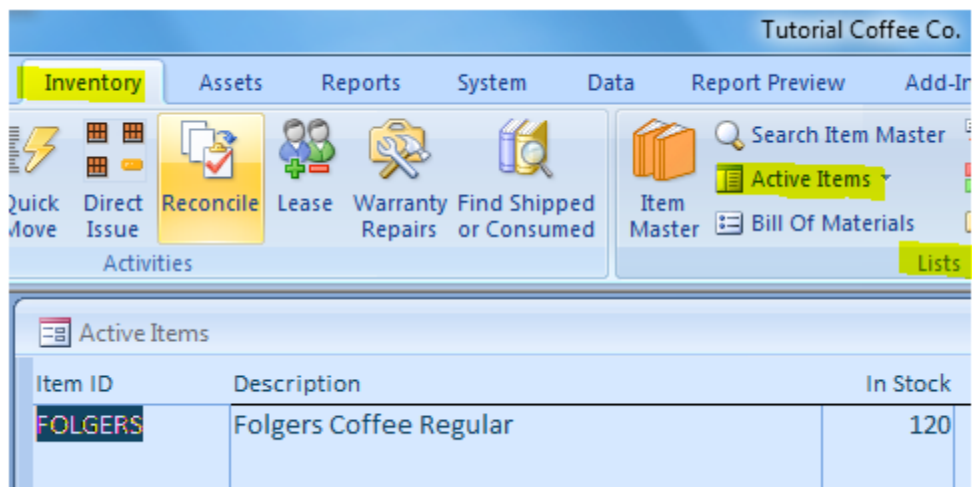*Go to the Orders menu tab, Purchasing, Order Details. Open the dropdown list with the orders and select one.*
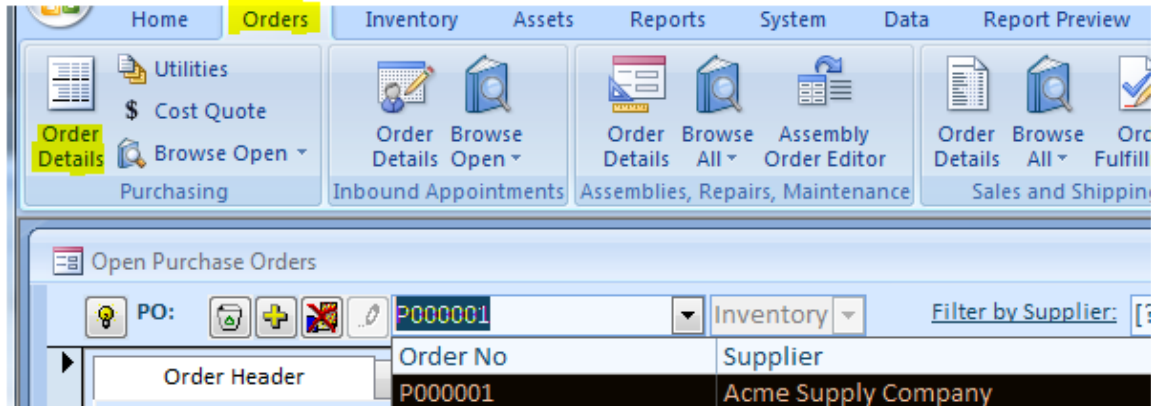
*Click the Receive button at the bottom of the Open Purchase Orders screen.*



*On the next screen, supply more information if needed, and click the Receive button again.*

*Going to the Active Items screen now would show 120 units of Folgers in stock.*
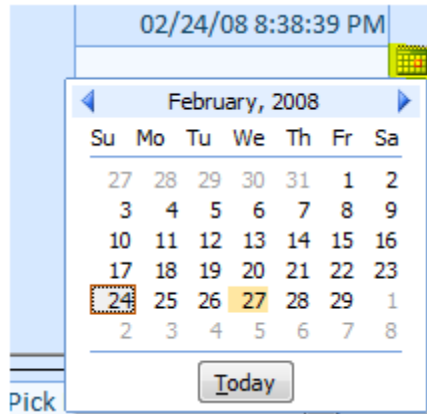
## Using Shipping Orders

The counterpart of a Purchase Order is a Shipping Order.  Say we are to ship 20 pounds of Yuban over to the Coffee Retail Co.  It is done like so:

*Click the little green truck icon in the main icon bar or go to Shipping/Order Processing in the menus.  Use the plus sign to create a new Shipping Order.  Click the pencil icon next to the Bill To field, then click OK.  The Customers screen opens up.  Use the plus sign to create a new Customer—the "CRC" "Coffee Retail Co.", and fill in some Contact and Address information for it, then exit the Customer screen.*
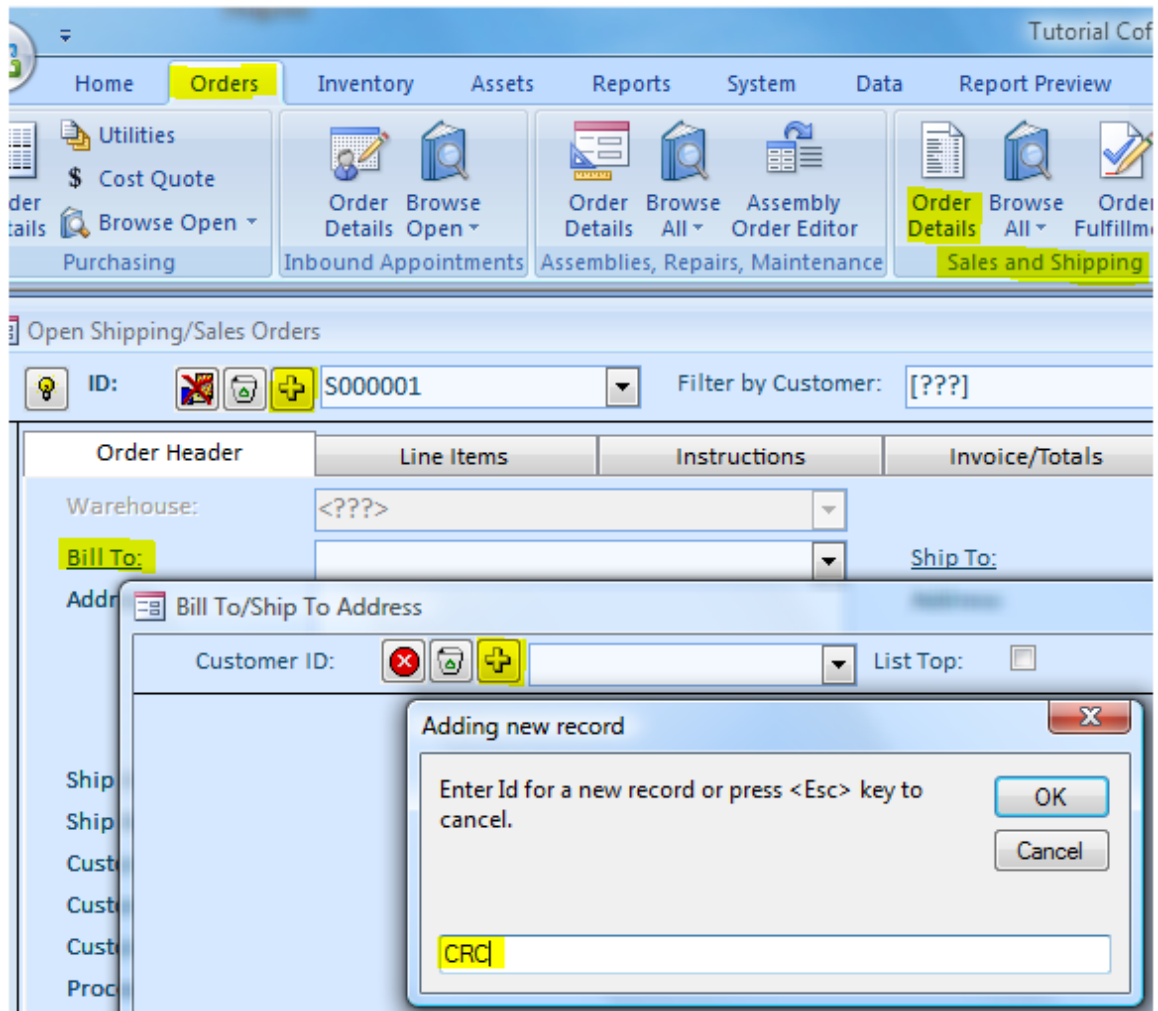


*Back on the shipping Orders screen, select the Coffee Retail Co.  Then find the Shipping Date field and type in some future date or select it from the popup calendar.*

*Go to the Line Items tab. Put "Yuban" in the Item Id field and "20" in the Ordered field. The order is done—at least, those are the basics of creating a Shipping Order.*
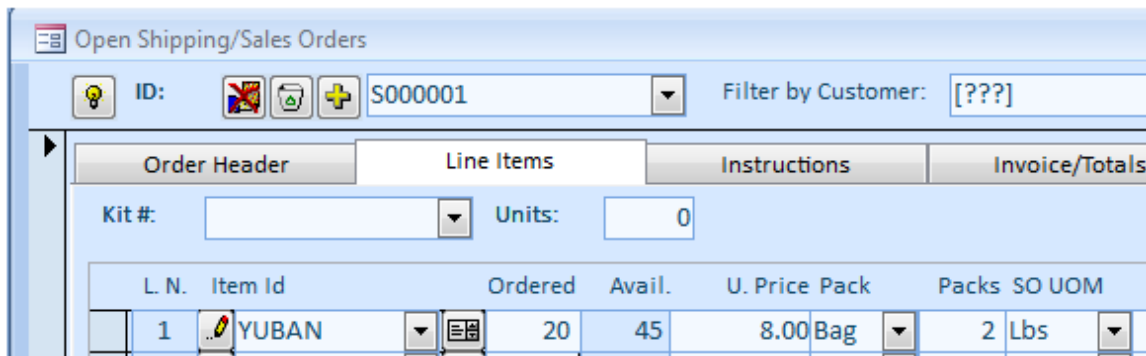


*When the Order is ready to be fulfilled, go back to the Shipping Order screen and click the Issue button,*
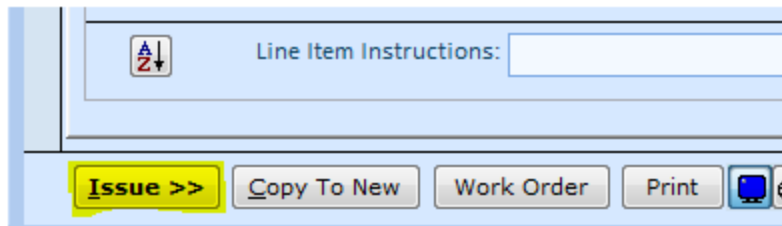


*select "Bin #1" using the little hand icon under Wrhe Location, and click the Issue button. The order is Gone.*

**Issuing against shipping order S000001**

Filter By: [???]

Adjustment Code: Ware

| Item Id | Units | Wrhe Location | Lot/Serial No. |
|---------|-------|---------------|----------------|
| YUBAN | 20 | | |

**Available Units: YUBAN**

| Location | Serial/Lot | Serial 2 | Q |
|----------|-----------|----------|---|
| BIN 1 | | | 4 |

## Moving Units of Inventory Around

The warehouse has expanded.  We need more bins to hold our stock.  So, let us take all twenty-five units of Yuban out of Bin #1 and put them into the Bin #2 we are about to create.

*Go back to the Inventory menu tab, Lists, Inventory Item Master List. Once there, select the Yuban in the Item ID, and click on the In Stock label.*



*On the next screen, click on the row, click the Move button at the bottom of the screen.*



Change the New Location field to "BIN #2" and click Move.
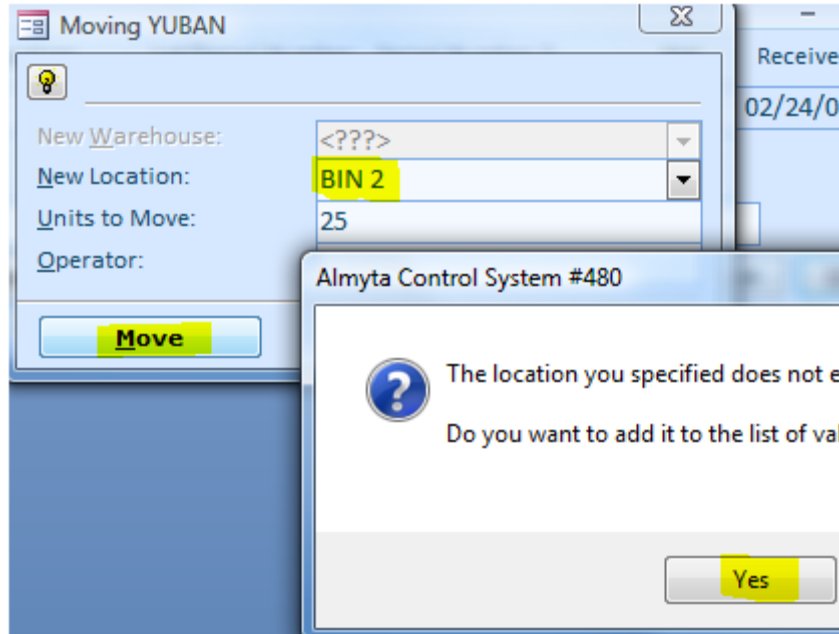
The units are moved to Bin #2.
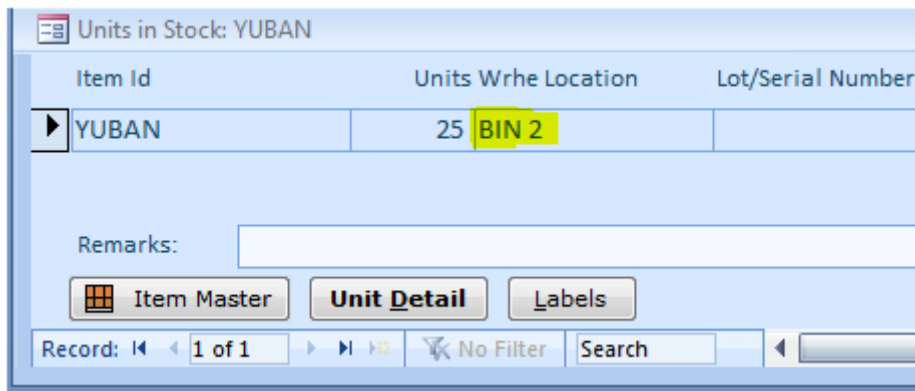


This concludes the Getting Started with the Almyta Control System tutorial