



Atlas MX - Getting Started

1. Installation

From the links on the Email you have received from Atlas Products, please download the Atlas MX Software and save the files to the desktop of the machine on which you wish to run the EDI software. Initially run the **Setup.exe** file followed by the "**your company name.exe**" file, this program will populate the Atlas MX software with your Company details.

2. Registering

Please email your User ID Number 2 to activations@atlasproducts.com. You will receive an activation code to unlock the software.

3. Trading Partners

Additional trading partners can be added to your package by selecting the "**Company > My Trading Partners**" option from the menu system. On the "**Advanced**" tab you can click the "**Add**" button to select the new partner. You can also import additional trading partners from a CSV file – please contact us if you require help with this.

4. Product Lists

Before creating a new order or invoice it is advisable to set up the trading products. To add new products to your product list please access "**Company > Products**" option from the product maintenance screen via the menu. From here you can click the "**New**" button and enter new or additional product information. You can also import an existing product database from a CSV file - please contact us if you require help with this.

5. Creating New Orders

To create a new order simply select "**Order**" from the "**New**" icon on the toolbar or via the menu system select "**File > New > Order**". From here you will be guided by the wizard through the process of creating an order. If you missed out step 3 above you can still add new products whilst creating the new order.

6. Creating New Invoice & Turning Incoming Orders into Invoices

To create a new invoice select "**Invoice**" from the "**New**" icon on the toolbar or via the menu system select "**File > New > Invoice**". From here you can create a new invoice. If you would like to convert an incoming order into an invoice then simply highlight the order in the **Inbox** and click the "**Invoice**" icon on the toolbar. Your new invoice will then be pre formatted with much of the information from the original order.

7. Sending & Receiving Documents

If you have created new orders or invoices and would like to transmit them to your trading partner/s simply click the "**Send/Receive**" icon on the toolbar. Clicking this icon will also receive any new documents sent to you by your trading partner/s which are currently being held in your EDI mailbox.

8. Additional Help

Atlas MX has a context sensitive help system. Pressing F1 at any time will provide you with help on any topic you are currently working with. Additionally, there is a fully comprehensive user manual which can be accessed by selecting the "**Atlas MX**" section from the Windows start menu.

If you are unable to locate the help information you require please call our Help Desk Team on **08700 501 007**.