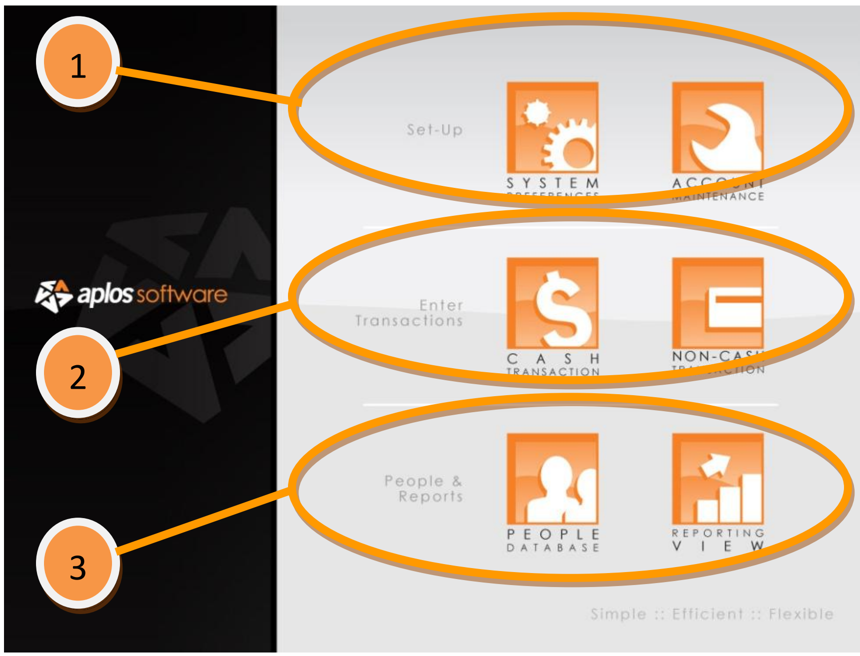
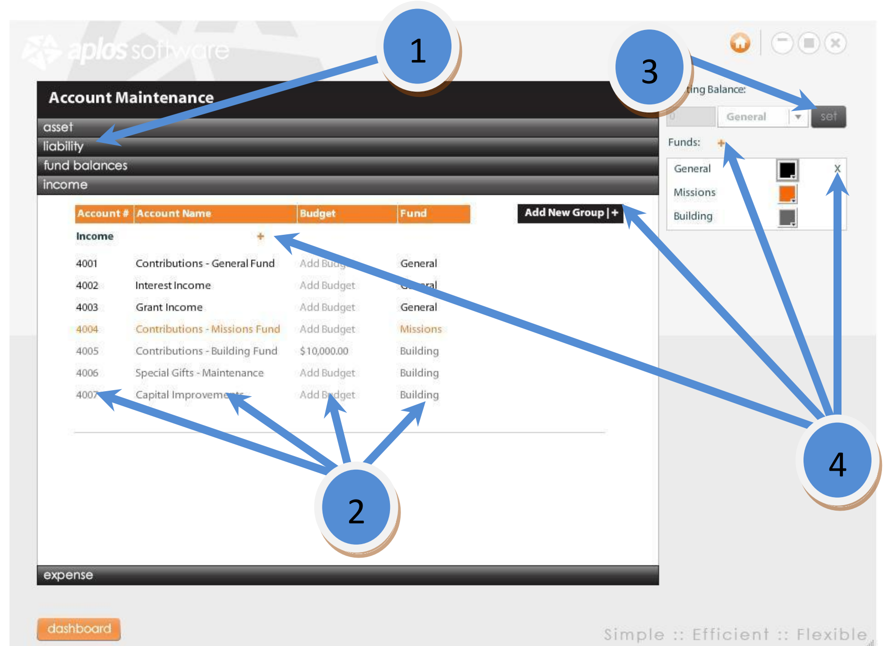
Welcome to Aplos Software's Quick Start Guide. This guide will help you get started. Please allow 30-45 minutes to get familiar with Aplos Software. If you need additional help visit www.aplossoftware.com for the latest in screen shots, help videos, and frequently asked questions.



1. Set-Up Section:: Should be done first and will be used rarely after you have completed your Set-Up
2. Enter Transactions Section:: You will spend most of your time in the Cash Transactions Screen
3. People & Reports Sections:: Manage your contacts and create custom reports

General Tips

Feel free to explore by clicking on different items.



1. Click on a bar to expand a section
2. Click directly on an item you would like to edit
3. Buttons will be grayed out if you are missing something required for a function to work and the text will turn white when you can execute
4. To add an item (account, group, person, etc) click on a "+" and to delete, roll your mouse over an item and click on the "x" that appears

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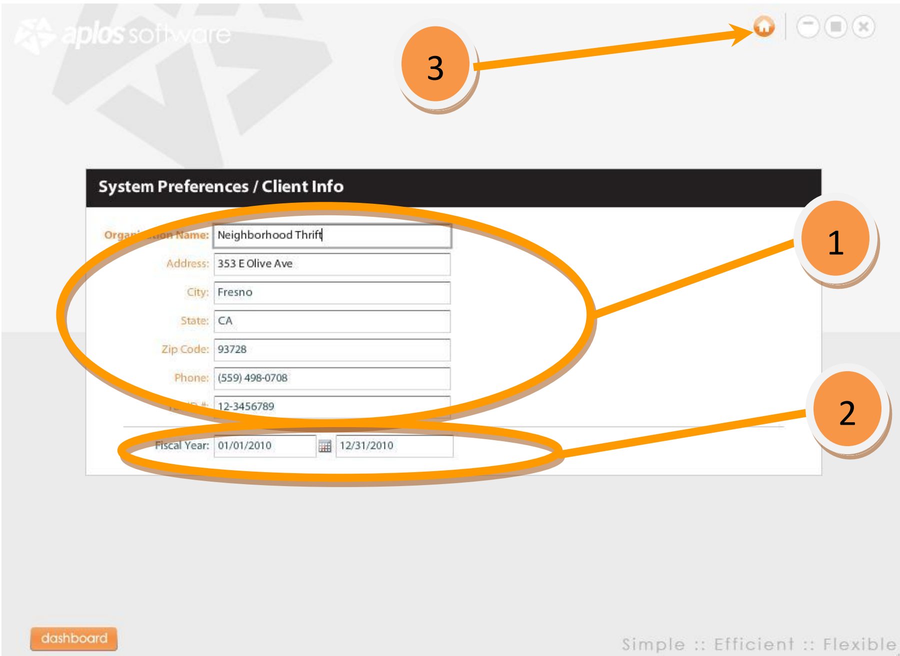
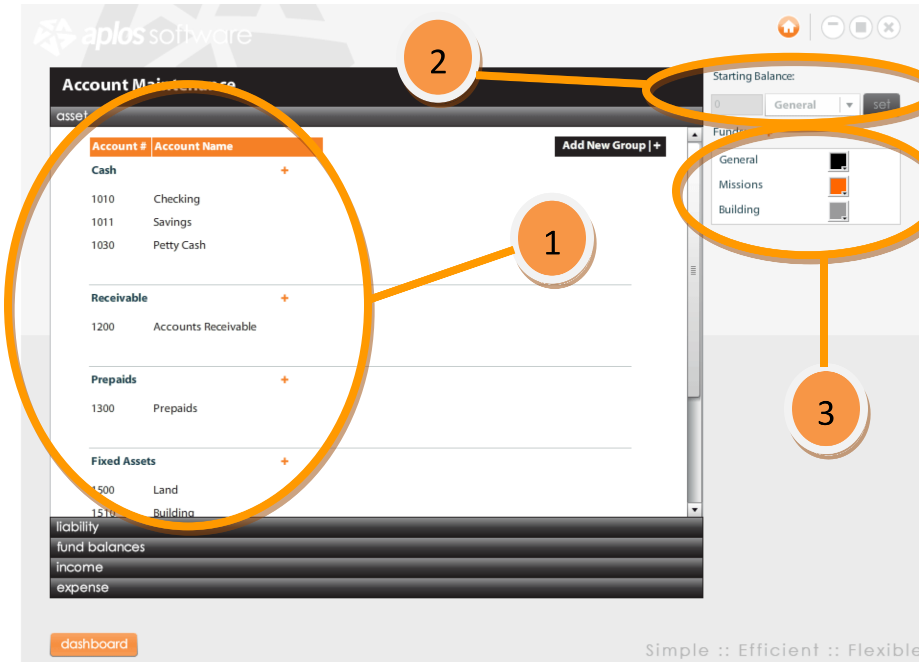
System Preferences



Account Maintenance



1. Enter your organization's data
2. Enter your fiscal year
3. Go back to home screen when finished

1. Use preloaded accounts or add and delete accounts as needed
2. Set beginning balances for accounts as required
3. Rename, add or delete funds

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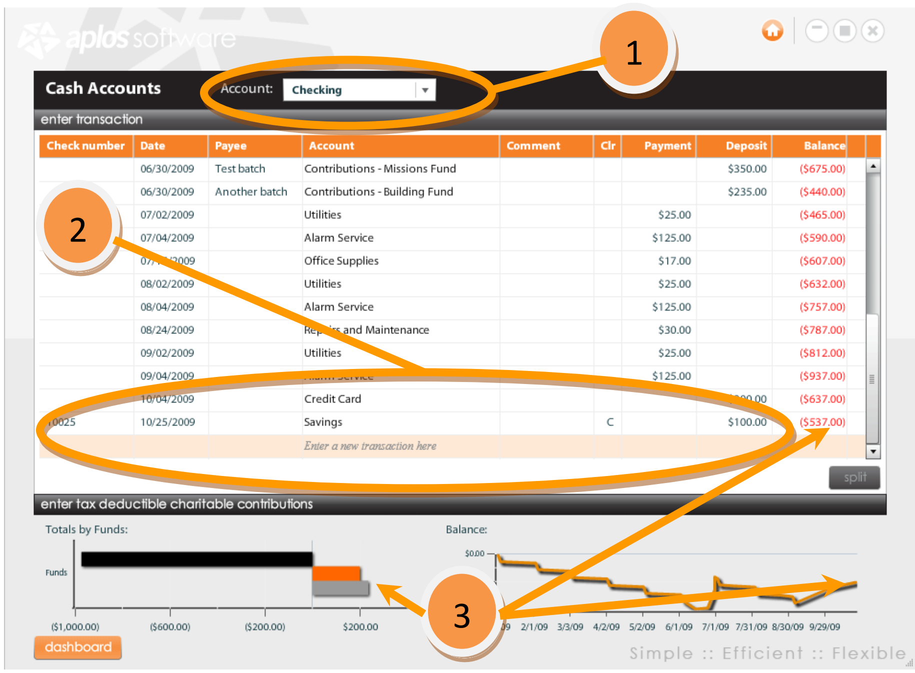
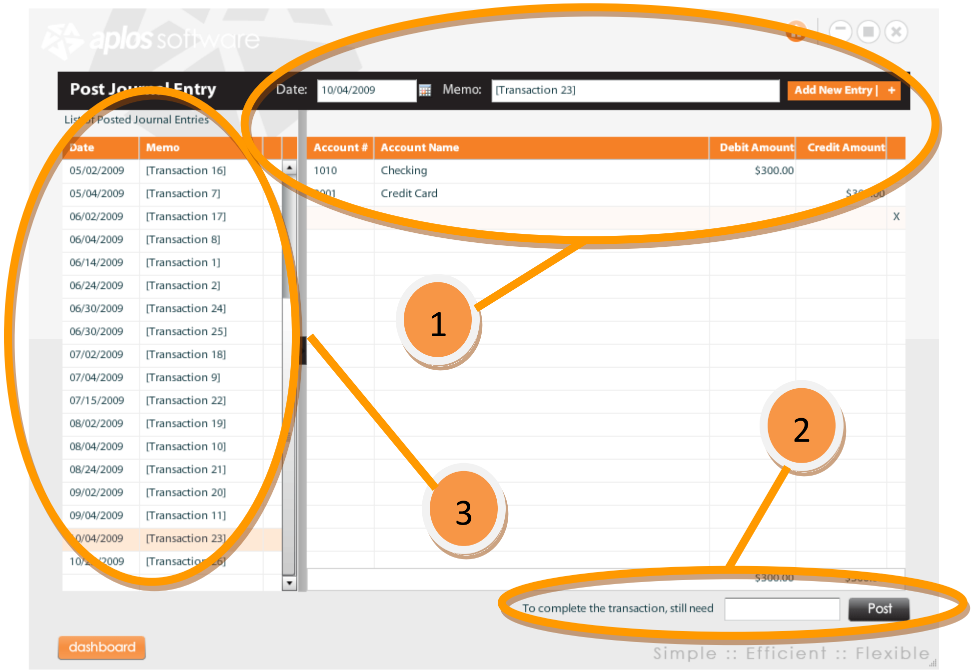
Cash Transactions



Non-Cash Transactions



1. Choose the account you want to work in
2. Enter transactions as you would in a check book including:
   a. Date, Payee, Account & either Payment or Deposit
3. Check the balance of your checking account and your funds

1. Enter journal entry including:
   a. Date, Memo, Account #'s, Account Name's & Amounts
2. Confirm entries are in balance before you post
3. See list of posted transactions

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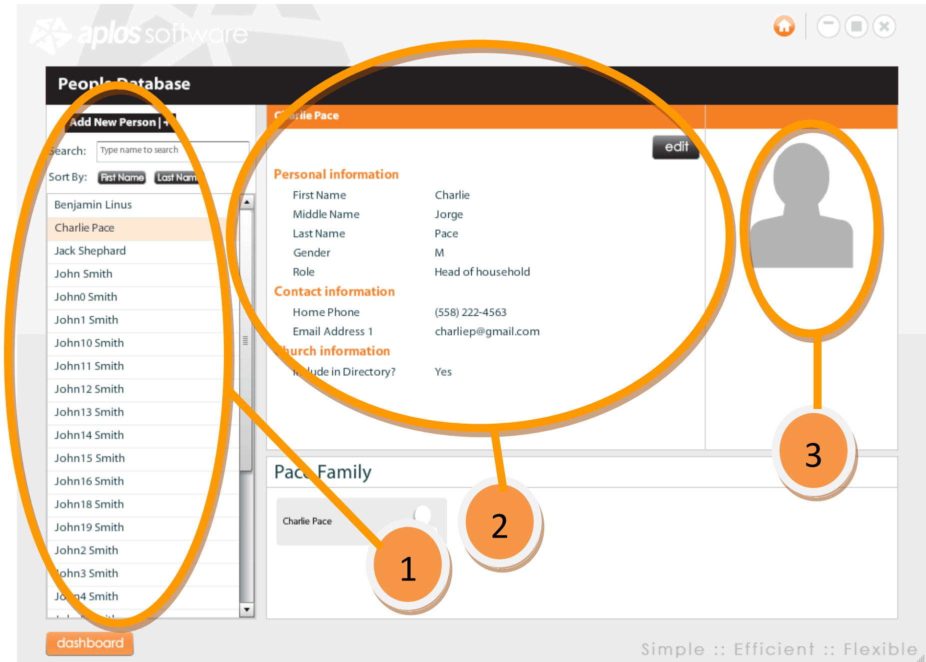
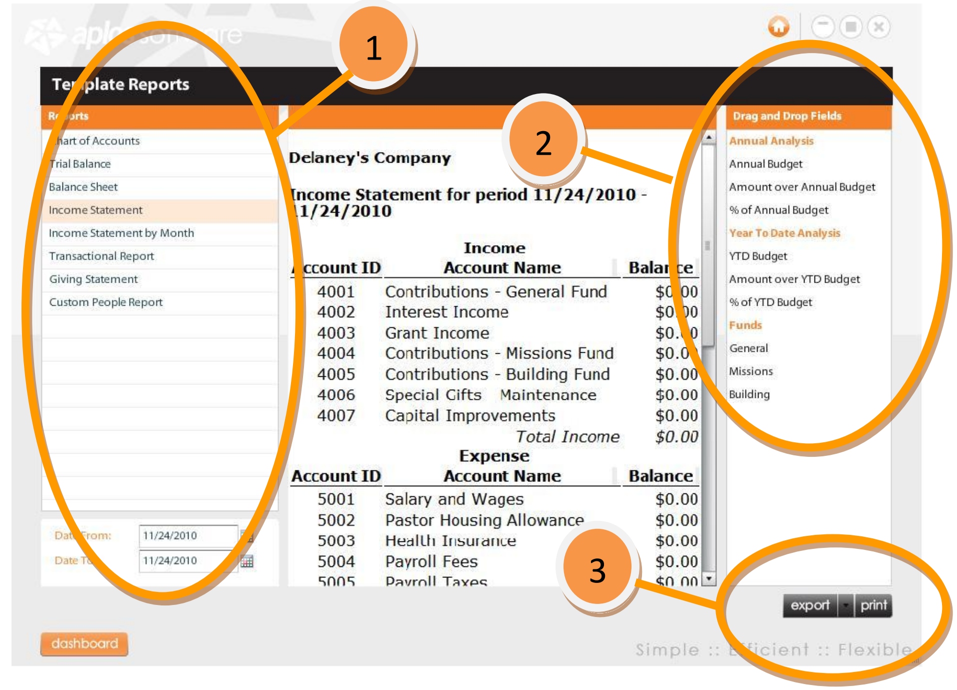
People Database



1. Add new person or sort/find existing person
2. Edit information about a person
3. Upload a photo of a person

View Reports



1. Select report and date range for that report
2. Modify by dragging a field and dropping it directly into your report
3. Export to spreadsheet or pdf or print

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