

To Open an Account For a New Customer

1. Click on the menu bar at the top of the screen **Customers > Customer Centre**.
2. At the top of the box, click **New Customer & Job > New Customer**.

3. Complete the boxes with the information relating to the new customer (with no opening balance).
(The last name of the customer should be entered in the box **Customer Name** at the top of the box. This is then recorded on the list of customers. The details completed in the other fields are required so that they can be shown on the documents when the name of the customer is accessed from the drop-down list.) In the **Bill to** box, press **Enter** at the end of each line to move to the new line of address.
4. Click **OK**.

To Record A New Stock Line

1. Click **Lists > Item list** from the menu bar at the top of the screen.
2. At the bottom of the box, click **Item > New**.

The screenshot shows a 'New Item' dialog box with the following fields and values:

- Type:** Inventory Part (Use for goods you purchase, track as inventory, and resell.)
- Item Name/Number:** [Empty] Subitem of [Empty] **Manufacturer's Part Number:** [Empty]
- Unit of Measure:** U/M Set [Empty]
- Purchase Information:**
 - Description on Purchase Transactions: [Empty]
 - Cost: 0.00
 - Purch Tax Code: [Empty]
 - COGS Account: Cost of Goods Sold
 - Preferred Supplier: [Empty]
- Sales Information:**
 - Description on Sales Transactions: [Empty]
 - Sales Price: 0.00
 - Tax Code: [Empty]
 - Income Account: [Empty]
 - Amt's Inc Tax
- Inventory Information:**

Asset Account	Reorder Point	On Hand	Total Value	As of
Inventory Asset	[Empty]	0.00	0.00	04/01/2008

3. Select **Inventory part** from the list of types of items.
4. Type the details of the new stock item.
5. Select **Sales** from the drop-down list of income accounts.
6. Select **NCG** for Purchase tax code and **GST** for sales tax code.
7. Click **OK**.