



Accountant



Department Leader



Employee



Supplier



Customer



Director and Administrator



Project Manager



To Add New GL Account in Chart of Accounts

Go To Add New > GL Account > New GL Account

or

Go To Chart of Accounts Section > New Account > New GL Account



To Add Sales Quote

Go To Add New > Sales Quote > New Sales Quote

or

Go To SalesQuotes Section > New Sales Quote



To Approve/Reject Sales Quote

Go To Sales Quotes Section > Choose Sales Quote > Approve or Reject



To Add New Sales Invoice

Go To Add New > Sales Invoice > New Sales Invoice

or

Go To Sales Invoice Section > New Sales Invoice



To Add Purchase Order

Go To Add New > Purchase Order > New Purchase Order

or

Go To SalesQuotes Section > New Purchase Order



To Approve Purchase Order

Go To Purchase Orders Section > Choose Purchase Order > Approve or Reject



To Add New Purchase Invoice

Go To Add New > Purchase Invoice > New Purchase Invoice

or

Go To Purchase Invoice Section > New Purchase Invoice



 Accountant

 Department Leader

 Employee

 Supplier

 Client

 Director and Administrator

 Project Manager

   **To Add New Expense Claim/Report**

Go To Add New > Expense Claim/Report > New Expense Claim/Report

or

Go To Expense Claims Section > New Expense Claim/Report

  **To Add New Bank Account**

Go To Add New > Bank Account > New Bank Account

or

Go To Bank Accounts Section > New Bank Account

  **To Add New Tax Rate**

Go To Add New > Tax Rate > New Tax Rate

or

Go To Tax Rates Section > New Tax Rate

  **To Add New Product**

Go To Add New > Product > New Product

or

Go To Products/ Services Section > Add New Product