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Cards Overview

See also Business Contacts Overview

In MYOB AccountEdge, cards are the records of every person and company you do business with. There are four types of cards: customer, vendor, employee and personal. You'll assign a card to each transaction you enter into the MYOB system. You'll enter information about the customer, vendor, employee and personal contact in the Card Information window that will be automatically entered when you use the card to create transactions throughout AccountEdge.

Creating cards

Step 1: Select the type of card you need and enter card details
Step 2: Enter selling, payroll and buying details (customers, employees and vendors only)
Step 3: Enter payment details (customers)
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Creating the type of card you need

You can create four types of cards. Read the following information carefully, so you're sure you're creating the card you need.

- Customer cards are records of the people and companies to whom you sell your company's items and services. You'll assign customer cards primarily to sales, such as invoices, in the Sales window.
- Vendor cards are records of the people and companies from whom you buy items and services. You'll assign vendor cards primarily to purchases, such as bills, in the Purchases window.

- Employee cards are records of the people who work for your company.
- Personal cards are records of all the other people you do business with. Most likely, you won't perform transactions in AccountEdge with personal cards; however, you may want to keep personal cards to track your business contacts, or you might want to keep your own list of friends and family using personal cards.

You'll create cards in the Card Information window. The window has seven possible views -- Profile, Card Details, Selling/Buying/Payroll Details, Payment Details, Contact Log, Jobs and History. When a card type is chosen you'll be able to enter information in the views that apply to the card type.

Click below for the step-by-step procedure:

Creating cards

Profile and Card Details views

The Profile and Card Details views are available for all types of cards. The information you enter in the two views -- and in other views where applicable -- will be entered automatically when you enter the card on transactions throughout AccountEdge.

To create a card, you must enter a card name. You may enter up to 15 alphanumeric characters for a Card ID. If you choose not to enter a card ID, the Card ID field displays *None. In the Windows view of the Preferences window, you can choose to search a list of cards using either a card name or a card ID. (Choose Preferences under the Setup menu to view Windows preferences.)

While many of your contacts may have one location where all of their business transactions take place, you may have other contacts whose accounting office -- where invoices are paid, for instance -- is located in another building or another town. You may enter up to five locations for each card. You can choose to enter the mailing address -- including country name, telephone number, email address and other contact information for each location. When you create transactions, you'll choose one of the five locations and the information for that particular location will be used on the transaction.

If you wish to sort your cards into a listing of those customers to whom you wish to send your latest mailing, for instance, you can use an identifier to indicate the cards that should be included on the mailing list. Identifiers can be entered on the Card Details view. Use this view to also make Custom Lists and Fields entries for your customers, vendors, employees and personal contacts. For information about using identifiers and custom lists and fields, see Using identifiers and Using custom lists and fields.

If you wish to add a picture of each of your employees or if you wish to display a picture that shows the progress of the project your working on for the customer, for instance, you can link a graphic on the Card Details tab. For more information about linking a graphic, see Linking a picture to an item or card record.

Assigning a currency to customer, vendor and employee cards

If you're using the Multicurrency feature, you can assign a currency other than your home currency to the customer or vendor card if you conduct business together in a currency other than your home currency. The currency field is located on the Profile tab of the Card Information window. Be careful in your selection, however, once you begin recording transactions for the customer or vendor, you won't be able to change the selection you've made in the Currency field.

If you assign a foreign currency to the customer, the sales to the customer will appear in the customer's currency. For example, if you indicate that a particular customer uses British pounds, all sales invoices for that customer will be recorded in British pounds. Payments received from the customer also must be in the customer's currency. In the same way, if you assign a foreign currency to the vendor, the purchase orders for the vendor will appear in the vendor's currency. For example, if you indicate that a particular vendor uses British pounds, all purchases from that vendor will be recorded in British pounds. Payments to the vendor also must be in the vendor's currency.

You can assign a currency other than your home currency to an employee if you like -- but **only** if you don't plan to record payroll checks for the employee using AccountEdge. If you plan to record payroll checks for the employee using AccountEdge, you must select your home currency for the individual.

Selecting a foreign currency may be useful if the employee is a salesperson who makes all of his or her sales in another currency -- British pounds, for example -- and you don't plan to use AccountEdge to pay the employee. When you print reports that show individual salespeople's sales amounts, the amount will be displayed in whatever currency has been assigned to the salespeople.

Since only one currency can be assigned to an employee, we recommend that you use your home currency for any employees who may make sales in more than one currency. You'll be able to assign these employees to any transactions you like. If you assign a foreign currency to an employee, however, you'll be able to include the employee **only** in transactions that use that currency. For more information, see Multicurrency Overview.

Click below for the step-by-step procedure:

Select the type of card you need and enter card details

To create identifiers

To assign identifiers to a card

To enter a label for a custom list

To create list entries on a custom list

To change a list entry on a custom list

To delete a list entry on a custom list

To display a picture (or change the picture you display)

To remove a link to a picture

Selling Details view (customer cards)

The selling information you enter will be used when entering sales for customers. Enter the sales layout you use for each customer and that layout will display when you enter the customer's name in the sales window. Similarly, by making an entry in the Printed Form field, that form will be used when printing the sale for the customer. If you use a service layout for your customers and use the same account number when you enter sales for this customer, you can choose to enter the account in this view and the account number will be automatically entered when you enter line items on the sale. You can change the automatic customer entries if you wish.

If the rate you charge for time billing activities depends upon the customer you've performed the activity for, you can assign an activity rate to your customer cards.

If you've set up multiple price levels for the items you sell using the Pricing Information tab of the Item Information window, you can select the appropriate price level for each customer. When you make sales, the prices that appear in the Sales window will be based on the selection you've made here.

If you're required to collect taxes from the customer, or pay taxes to the vendor, you can specify a tax code for the customer or vendor. When you enter the customer card on a sale or the vendor card on a purchase, the tax code you enter in the Selling Details or Buying Details view will be entered automatically.

Assigning credit terms to your customers

The *credit terms* you assign to your customers -- and those your vendors assign to you -- are rules that govern the number of days between delivery and payment, discounts for early payment and penalties for late payment. You can set specific credit terms for each customer using the Customer Terms Information section of the Selling Details view; you can set specific credit terms for vendors using the Vendor Terms Information section of the Buying Details view.

After you set up credit terms, discounts based on the terms are automatically calculated when you enter sales and purchases. (You can change the terms and discount amounts for individual sales or purchases, if you need to.)

Similarly, after you set up credit terms, finance charges based on those terms are automatically calculated beginning the day after a transaction's balance due date. Your customers' finance charges can be printed on their monthly statements, if you want.

Click below for the step-by-step procedure:

To enter selling details (customers only)

Buying Details view (vendor cards)

The buying information you enter here will be used when entering bills for a vendor. Enter the purchase layout for each vendor and the layout you choose will display when you enter the vendor's name in the purchases window. Similarly, by making an entry in the Printed Form field, that form will be used when printing the purchase for the vendor. If you use a service layout for your vendors and use the same account number when you enter purchases for this vendor, you can enter the account in this view and the account number will be automatically entered when you enter line items on the purchase. You can change these automatic vendor entries if you wish.

If the rate you charge for time billing activities depends upon the vendor who performs the activity, you can assign an activity rate to your vendor cards. You can also track the cost of performing activities by entering an estimated cost per hour for your vendors.

You'll use the Vendor Terms Information section to enter credit terms and to indicate how discounts should be calculated for the purchases you enter. Using the Tax Code field, choose a tax code for the vendor if you are required to collect tax on purchases made from the vendor. See Assigning credit terms to your customers for more information.

Assigning credit terms to your vendors

The *credit terms* you assign to your customers -- and those your vendors assign to you -- are rules that govern the number of days between delivery and payment, discounts for early payment and penalties for late payment. You can set specific credit terms for each customer using the Customer Terms Information section of the Selling Details view; you can set specific credit terms for vendors using the Vendor Terms Information section of the Buying Details view.

After you set up credit terms, discounts based on the terms are automatically calculated when you enter sales and purchases. (You can change the terms and discount amounts for individual sales or purchases, if you need to.)

Click below for the step-by-step procedure:

To enter buying details (vendors only)

Payroll Details view (employee cards)

If you're creating an employee card, it's very important that you fully set up the employee's payroll information before you begin writing paychecks to the employee. Also, before you enter payroll information about an employee, be sure your payroll linked accounts and payroll categories are properly set up. See Payroll Categories Overview to learn about payroll categories.

Choose a work code and residence code that will be used when calculating amounts on a paycheck and enter other employment information for your employees using this view. A work and residence code must be selected in order to use an employee card on a paycheck. Use the Payroll Details view to access the Employee Payroll Information, Pay History, Accrual Balances and Time Billing Employee Setup windows.

When you click the Info button to open the Employee Payroll Information window, you can assign wages, deductions and employer expenses.

Click the History button to open the Pay History window. Use the window to enter pay history for the pay periods that occurred before you started using AccountEdge. When you start recording paychecks using AccountEdge the amounts of the paychecks are automatically added to this window and are displayed on some reports.

When you click the Accruals button accrual balances will be displayed. Carry-over amounts can be changed, if necessary.

If the rate you charge for time billing activities depends upon the employee who performs the activity, you can assign an activity rate to your employee cards by choosing the Time Billing button. You can also track the cost of performing activities by entering an estimated cost per hour for your employees.

Click below for the step-by-step procedure:

To enter payroll details (employees only)

Payment Details view (customer cards)

Use this view to enter details about the usual method that this customer uses when paying for items and services. The method and related information you enter will appear on payment transactions for the customer. You may change the payment information on individual transactions before you record the transaction.

Click below for the step-by-step procedure:

Enter payment details (customers)

To add or edit Sales Information

To delete Sales Information (including Payment Method entries)

Contact Log view

You can keep track of contacts for all cards using the Contact Log view. You can choose the name of the contact -- you may have up to five contacts since you can enter a contact for each location -- and track the amount of time you spend with each one. Use the last contact date information you enter here to locate card information using the Advance button on the Cards List window. For more information, see the Business Contacts Overview.

Click below for the step-by-step procedure:

Make a Contact Log entry

Jobs view (customer cards)

The Jobs view will show the jobs that are linked to the card. You may want to view your jobs in this way if you have many jobs, but want to view a complete view for one customer. For more information about jobs, see Jobs Overview.

Click below for the step-by-step procedure:

Enter Jobs (customers)

History view (customer, vendor and emplyee cards)

When you record sales and purchases, AccountEdge automatically tracks the history of the transactions for your customers, vendors and salespeople; this information can be valuable in analyzing your sales and purchases, and spotting trends that may need to be addressed. Sales and purchasing history is kept for the current year, next year and up to five previous years. These monthly amounts are used in the Analyze Sales and Analyze Purchases reports.

If you wish, you can enter your monthly sales and purchasing history for each of your customers, vendors and salespeople for the months before you started using AccountEdge. Enter this information in the History tab of the Card Information window if you want to be able to print reports comparing your monthly sales and purchases from each customer, vendor and salesperson with last year's sales and purchases.

If you want to track sales history for an employee, be sure to enter the employee's name in the Salesperson field of the Sales window whenever you enter sales in which the employee participated.

Click below for the step-by-step procedure:

Enter history for customers, vendors and salespeople

An important procedure to perform after creating customer and vendor cards

After you create your customer and vendor cards, to ensure your accounting records are accurate, you must enter all your customers' *historical sales* and your vendors' *historical purchases*. Historical sales and purchases are the sales and purchases that had a current balance due on the first day of the month in which you began using AccountEdge. (This month is known as your *conversion month.* To learn your conversion month, choose Company Information from the Setup menu.) The total balance of your historical sales is considered your *receivable balance*. The total balance of your historical purchases is considered your *payable balance*.

During the setup of your customer card or vendor card -- in Step 6 -- you may have entered monthly sales totals for your customers and vendors for the months that occurred before you began using AccountEdge; that information is useful for reporting purposes, but is optional. The historical sales and purchases you enter after the customer or vendor card is created are different -- they're sales and purchases that your customers and vendors made before you began using AccountEdge but haven't fully paid off yet. Because your customers still owe you money for their purchases and you still owe vendors for your purchases, it's important that you record these sales and purchases in AccountEdge. This step isn't optional.

In the Historical Sale window, you'll enter all of the information that applies to the historical sale or purchase. When you reach the Total Including Tax, be sure to enter the remaining amount of the sale or purchase, not the original amount. Also select the tax code from the Select from List; the tax portion of the total amount remaining will display. The tax amount will be reflected on sales tax reports.

Click below for the step-by-step procedure:

Enter historical sales for customers

Enter historical purchases for vendors

Changing, removing or inactivating cards

You can easily change information about a customer, vendor, employee or personal card. A card can be removed only if no transactions or recurring templates are assigned to it.

If you have cards that you create for a one-time sale or purchase, for example, inactivating them after their one-time use will remove them from the selection windows. Your list of cards will be shorter, and selecting the card you need will be easier.

If a card is marked as an inactive card, however, you may still use the card in transactions by manually entering the card name. Inactive cards will still appear in the Cards List window. You can also return the status of the card to active so that it will appear again in the selection windows. No matter what the status of a card -- active or inactive, transactions recorded using the card will still affect all of your financial records. Use the Card File (Summary) and Card File (Detail) to display and print card information with or without inactive cards.

Note: You can't remove a card with transactions assigned to it.

Click below for the step-by-step procedure:

To find a card

To inactivate (or reactivate) a card

To remove a card

Cards Overview

Idea: You can set up credit terms for all new customers and vendors If you wish to establish a set of credit terms for your new customers and your new vendors, you can use the Preferences window to do so. To do this, use the To change the default credit terms for new customers or To change the default credit terms for new vendors procedure.

The terms you set in these windows will be applied only to *new* customer and vendor cards you create. For customer cards already created, credit terms can be assigned in the Selling Details view of the Card Information window; for vendor cards already created, credit terms can be assigned in the Buying Details of the Card Information window. **Note: To report payments on a 1099** In order to report vendor payments on a 1099, choose how you wish to report the payments by using the Report Payments on 1099 as field of the Buying Details view of the Card Information window.

In order for the Report Payments on 1099 as field to be available, the setup of payroll must be complete. Click Setup on the menu bar and choose Load Payroll Tax Tables to load payroll tax tables; choose Setup and choose General Payroll Information to enter your payroll information. **Idea: You can set up credit terms for all new customers and vendors** If you wish to establish a set of credit terms for your new customers and your new vendors, you can use the Preferences window to do so. To do this, use the To change the default credit terms for new customers or To change the default credit terms for new vendors procedure.

The terms you set in these windows will be applied only to *new* customer and vendor cards you create. For customer cards already created, credit terms can be assigned in the Selling Details view of the Card Information window; for vendor cards already created, credit terms can be assigned in the Buying Details of the Card Information window. **Warning: If you change a card's pay history** AccountEdge uses the figures displayed in the Pay History window on some reports. If you change a card's pay history in this window, keep in mind that the change you make may not accurately reflect your actual totals.

Use care when making changes to the amounts displayed in this window. If you make a change and then want to use the previous amount, AccountEdge can't automatically reconstruct the monthly totals. **Warning: If you change a card's history** AccountEdge uses the figures displayed in the History tab on some reports. If you change a card's history in this window, keep in mind that the change you make may not accurately reflect your actual totals.

Use care when making changes to the amounts displayed in this window. If you make a change and then want to use the previous amount, AccountEdge can't automatically reconstruct the monthly totals.

Step 1: Select the type of card you need and enter card details

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see Creating cards and Profile and Card Details views for more information.

The Card File Command Center should be displayed.

1. Click Cards List.
2. Click the New button.
3. Choose the type of card you want to use from the Card Type list and make other appropriate entries in the Profile view of the Card Information window.
4. Click the Card Details tab and enter the information you wish to add to the card.
5. At this point, you've entered the basic information about the customer, vendor, employee or personal contact.

- If you've created a customer, vendor or employee card, continue to Step 2, Enter Selling, Buying and Payroll Details. Depending upon the type of card you selected, choose to enter the corresponding details:

To enter selling details (customers only)

To enter buying details (vendors only)

To enter payroll details (employees only)

- If you've entered a personal card, continue to Make a Contact Log entry.

Step 2: Enter selling, payroll and buying details (customers, employees and vendors only)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

To enter selling details (customers only)

To enter buying details (vendors only)

To enter payroll details (employees only)

To enter selling details (customers only)

If you haven't already read the Cards Overview, see Selling Details view (customer cards) for more information.

The Selling Details view of the Card Information window of the customer for whom you wish to enter selling details should be displayed.

1. Click the Selling Details tab, if you haven't already.
2. Enter detail information about the customer including tax code and credit terms information; this information will be entered automatically when the card is entered on a sale.
3. Continue to Enter payment details (customers).

To enter buying details (vendors only)

If you haven't already read the Cards Overview, see Buying Details view (vendor cards) for more information.

The Card Information window of the vendor for whom you wish to enter buying details should be displayed.

1. Click the Buying Details tab, if you haven't already.
2. Enter detail information about the vendor including tax code and credit terms information; this information will be entered automatically when the card is entered on a purchase.
3. Continue to Make a Contact Log entry.

To enter payroll details (employees only)

If you haven't already read the Cards Overview, see Payroll Details view (employee cards) for more information.

The Card Information window of the employee for whom you wish to enter payroll details should be displayed.

1. Click the Payroll Details tab, if you haven't already.
2. Select the Residence Code and Work Code that apply to the employee. This information must be entered before the card can be used in the Write Paychecks window.
3. Click the Info button to open the Employee Payroll Information window. Make entries and selections from the left side of the window.

On the right side of the window, assign all the payroll categories (wages, deductions, employer expenses and payroll taxes) that apply to the employee.

Your selections in this step are *very* important, because they are the key components in determining the employee's net pay amount. Be sure you carefully select all the payroll categories that apply to this employee.

Once you've made all the entries you need to make, click the OK button in the Employee Payroll Information window to assign the payroll information to the employee.

4. Click the History button to enter payroll amounts for the pay periods before you started using

AccountEdge.

5. Click the Accruals button to enter carry-over amounts from the pay periods before you started using AccountEdge.
6. Click the Time Billing button to open the Time Billing Card Setup window.

In the Hourly Billing Rate field, enter the hourly rate you want to assign to this card.

For employee and vendor cards, enter the cost of an hour of the employee's or vendor's time in the Cost Per Hour field. This information will be used to calculate sales history for time billing activities. Click OK.

7. Continue to Make a Contact Log entry.

Creating cards - Step 2

Warning: If you change a card's pay history MYOB AccountEdge uses the figures displayed in the Pay History window on some reports. If you change a card's pay history in this window, keep in mind that the change you make may not accurately reflect your actual totals.

Use care when making changes to the amounts displayed in this window. If you make a change and then want to use the previous amount, AccountEdge can't automatically reconstruct the monthly totals.

To change the default credit terms for new customers

1. Choose Preferences from the Setup menu.
2. Click the Sales tab to display the Sales view, then click the Terms button.
3. In the Credit Terms window, enter the terms that you want all of your new customers to have.
4. Click OK.

To change the default credit terms for new vendors

1. Choose Preferences from the Setup menu.
2. Click the Sales tab to display the Purchases view, then click the Terms button.
3. In the Credit Terms window, enter the terms that generally are extended to you by new vendors.
4. Click OK.

Step 3: Enter payment details (customers)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see Payment Details view (customer cards) for more information.

The Card Information window of the customer for whom you wish to enter payment method details should be displayed.

1. Click the Payment Details tab.
2. Select the method of payment. Depending on the method chosen you may wish to enter other relevant information.
3. Continue to Make a Contact Log entry.

Step 4: Make a Contact Log entry

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see Contact Log view for more information.

The Card Information window of the card for whom you wish to make a contact log entry should be displayed.

1. Click the Contact Log tab, if you haven't already.
2. Click the New Log Entry button.
3. Select a contact name and then enter the information you want to keep track of concerning the contact.
4. Click Record.
5. The next step depends upon the type of card you're creating:

- If you're creating a vendor card or an employee card (for an employee who is a salesperson), continue to Enter history for customers, vendors and salespeople
- If you're creating a customer card, continue to Enter Jobs (customers).
- If you're creating an employee card (for an employee who is not a salesperson), you're done. Continue to Add the card to your records.

Step 5: Enter Jobs (customers)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see Jobs view (customer cards) for more information.

The Card Information window for whom you wish to enter a job should be displayed.

1. Click the Jobs tab.
2. Click the New Job button.
3. Enter information about the job. (For a step-by-step procedure, see Creating jobs.) Click OK.
4. Repeat steps 2 and 3 until you've enter all the jobs for the customer.
5. Continue to Enter historical sales for customers

Step 6: Enter history for customers, vendors and salespeople

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see History view (customer, vendor and emplyee cards) for more information.

The Card Information window of the card for whom you wish to enter sales or purchases history should be displayed.

1. Click the History tab, if you haven't already.
2. Enter the sales amounts for customers and salepeople and purchases amounts for vendors for the months that occurred before you began using AccountEdge. Click the white arrow to change the view from one fiscal year to another.
3. Click OK.
4. You're finished creating the card, continue to Add the card to your records

Step 7: Add the card to your records

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

Be sure the card you want to add to your records is displayed in the Card Information window.

Simply click the OK button to add the card to your records and close the Card Information window. The Cards List window will appear; the new card will be displayed in the list.

If you've just added a customer or vendor card, we suggest you read An important procedure to perform after creating customer and vendor cards in the Cards Overview to continue setting up your customer and vendor information.

Step 8: Enter historical sales for customers

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see An important procedure to perform after creating customer and vendor cards for more information.

1. From the Setup menu, choose Balances/Receivable Balances to open the Receivable Balances window.
2. Note the amount that appears in the Linked Receivables Account Balance field at the bottom half of the Receivable Balances window. You should enter historical sales that, when totaled, equal this amount.
3. Click the zoom arrow in the scrolling list next to the name of a customer to whom you've made historical sales. The scrolling list changes to show all the historical sales that exist for the customer. (If you're just starting out, no sales appear in the scrolling list.)
4. To enter a historical sale, click the Add Sale button. The Historical Sale window appears.
5. Enter all information that applies to the historical sale. When you reach the Total Including Tax, be sure to enter the remaining amount of the sale, not the original amount. Also select the tax code from the Select from List; the tax portion of the amount entered in the Total Including Tax will display. When you're finished entering the historical sale, click Record.
6. Continue entering historical sales for all customers until the amount that appears in the Out of Balance Amount field of the Receivable Balances window is zero (or as close to zero as you can get it). When you're finished, click the Close button in the Receivable Balances window.

Note: Historical sales are different from the sales history you may have entered earlier! If you completed step 6, you entered monthly sales totals for your customers and employees for the months that occurred before you began using MYOB AccountEdge; that information is useful for reporting purposes, but is optional.

The historical sales you enter in *this* step are different -- they're sales that your customers made before you began using AccountEdge but haven't fully paid off yet. Because your customers still owe you money for their purchases, it's important that you record these sales in AccountEdge. This step isn't optional.

Step 9: Enter historical purchases for vendors

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

If you haven't already read the Cards Overview, see An important procedure to perform after creating customer and vendor cards for more information.

1. From the Setup menu, choose Balances/Payable Balances to open the Payable Balances window.
2. Note the amount that appears in the Linked Payables Account Balance field at the bottom half of the Payable Balances window. You should enter historical purchases that, when totaled, equal this amount.
3. Click the zoom arrow in the scrolling list next to the name of a vendor from whom you've made historical purchases. The scrolling list changes to show all the historical purchases that exist for the vendor. (If you're just starting out, no purchases appear in the scrolling list.)
4. To enter a historical purchase, click the Add Purchase button. The Historical Purchase window appears.
5. Enter all information that applies to the historical purchase. When you reach the Total Including Tax, be sure to enter the remaining amount of the purchase, not the original amount. Also select the tax code from the Select from List; the tax portion of the total amount remaining will display. When you're finished entering the historical purchase, click Record.
6. Continue entering historical purchases for the vendor until the amount that appears in the Out of Balance Amount field of the Payable Balances window is zero (or as close to zero as you can get it). When you're finished, click Close.

Note: Historical purchases are different from the purchasing history you may have entered earlier! If you completed step 6, you entered monthly purchases totals for your vendors for the months that occurred before you began using MYOB AccountEdge; that information is useful for reporting purposes, but is optional.

The historical purchases you enter in *this* step are different -- they're purchases that you made before you began using AccountEdge but haven't fully paid off yet. Because you still owe money to vendors for these purchases, it's important that you record them in AccountEdge. This step isn't optional!

To find a card

If you haven't already read the Cards Overview, see Changing, removing or inactivating cards for more information.

1. Click the Cards List option in the Card File command center.
2. You have three choices:
   - Enter the name of the card in the Search field. (Enter the Card ID in the Search field if you've chosen Select Cards by Card ID, not Card Name in the Windows view of the Preferences window.)
   - Click the tab that displays the card type of the card.
   - Click the Advanced button to search using additional criteria, such as identifiers and zipcode.
3. The card you're looking for should appear in the scrolling list. If you want to view detail about the card, click the zoom arrow next to the card's name.

To find a card

To change a card

If you haven't already read the Cards Overview, see Changing, removing or inactivating cards for more information.

The Cards List window should be displayed.

1. Click the zoom arrow next to the name of the card you want to change.
2. Make changes to the card by entering information as you normally do, then click OK.

To change a card

To inactivate (or reactivate) a card

If you haven't already read the Cards Overview, see Changing, removing or inactivating cards for more information.

The Cards List window should be displayed.

1. Click the zoom arrow next to the name of the card you want to inactivate (or reactivate).
2. Mark the box next to Inactive Card. (To return the card to active status, simply remove the mark.)

To inactivate (or reactivate) a card

To remove a card

If you haven't already read the Cards Overview, see Changing, removing or inactivating cards for more information.

The Cards List window should be displayed.

1. Highlight the card you want to remove.
2. Choose Delete Card from the Edit menu.

To remove a card

Note: You can't remove a card with transactions assigned to it A card can be removed if no transactions are assigned to it. You can review transactions assigned to a card using the Inquiry Register window.

Also, a card which has been used on a quote, order or recurring template can't be removed.

Business Contacts Overview

Creating business contacts

Finding business contacts

Removing business contacts

Suggestions for using the Contact Log

In addition to being a superior accounting system, MYOB AccountEdge can be an effective business management tool. Using the Contact Log, you can maintain a comprehensive list of *business contacts*-which include sales, purchases, phone calls, mailings and so on-for every person and company that exists in your Card File.

Use your business contacts and the Contact Log as your business "diary." When a customer or vendor calls, you can use the Contact Log as a tool to document a complete history of your business relationship with that contact.

Creating business contacts

You can create entries in your Contact Log manually, or you can set up AccountEdge so entries are made automatically when you perform specific tasks in the program.

The only prerequisite for either method is that a card exists for the person or company for whom you want to make a business contact-and even if a card doesn't exist, you can quickly add one to your records while you're in the process of making the business contact.

To create business contacts for common contact events, such as meetings or telephone calls, you'll need to manually enter those business contacts. To do this, use the Contact Log Entry window.

To create a business contact for each sale, purchase, check or deposit you record, you can set up AccountEdge to create an entry in the Contact Log automatically. You'll do this using the Preferences window.

Click below for the step-by-step procedures:

To manually create a business contact

To automatically create a business contact

Finding business contacts

After you record a business contact, you might want to review the record.

You can use the View Contact Log window to view a summary list of all contacts you've made with a person or company in the Card File, regardless of whether those contacts have a recontact date assigned to them.

If you've entered a recontact date in your business contacts, the To Do List will help you remember when it's time to get in touch with your business contacts again.

Click below for step-by-step procedures:

To find any business contact

To find a list of people you need to recontact

Suggestions for using the Contact Log

You can use the Contact Log to do much more than simply provide a list of business contacts you've made. With a little imagination, your Contact Log can help you perform many important, time-saving tasks:

- Create a computerized list of things to do using the Contact Log.
- A company car can be a substantial business expense that you may be able to track for tax purposes. You can use the Contact Log to track your automobile usage.
- If you want to keep a detailed description of your travel expenses, meetings and other events, the Contact Log may be a good place for you to start.

Click below for step-by-step procedures:

To remind yourself to do a task

To track the usage of a company car

To track business travel

Removing business contacts

To remove entries you've made in the Contact Log, you'll need to clear, or *purge*, your data file of business contacts.

You can purge your data file of business contacts at any time; we suggest that you make this procedure at least a monthly task, especially if you record many business contacts during the course of your business day.

Click below for the step-by-step procedure:

To remove business contacts

Business Contacts Overview

To manually create a business contact

If you haven't already read the Business Contacts Overview, see Creating business contacts for more information.

The View Contact Log window should be displayed.

3. In the Name field, enter or select the name of the person or company you've contacted.

(If you want to make a business contact for a person or company that doesn't exist in your Card File yet, click the search icon next to the Name field to open a search list. At the bottom of the list, click the New button to open the Card File Entry window. Enter the details about the person or company, then click OK. The new card's name will appear in the Name field in the View Contact Log window automatically.)

4. Click the New button to open the Contact Log Entry window.
5. Make entries in the Contact Log Entry window to specify the details of the business contact you made.
   - View a list of people you need to contact in the Contact Alert section of the To Do List
   - Designate which mailing labels you'll print in the Mailing Labels window
   - Choose the cards for which you'll create letters using the Personalized Letters window
6. When you're finished making entries in the Contact Log Entry window, click the Record button.

To manually create a business contact

Idea: Setting recontact dates Use the Recontact Date field in the Contact Log Entry window to note the next time you should contact a card. You can use this date to:

To automatically create a business contact

If you haven't already read the Business Contacts Overview, see Creating business contacts for more information.

1. From the Setup menu, choose Preferences to open the Preferences window.
2. If you want MYOB AccountEdge to make an automatic business contact every time you record a check or deposit, click the Checkbook tab in the Preferences window, then mark the Make a Contact Log Entry for Every Check selection and/or the Make a Contact Log Entry for Every Deposit selection.

If you want AccountEdge to make an automatic business contact every time you record a sale, click the Sales tab and mark the Make a Contact Log Entry for Every Sale: Invoices, Orders, Quotes selection.

If you want AccountEdge to make an automatic business contact every time you record a purchase, click the Purchases tab and mark the Make a Contact Log Entry for Every Purchase: Bills, Orders, Quotes selection.

3. When you're finished making your selections, click OK. From this point on, a business contact will be made automatically for each type of transaction you marked in step 2.

To find any business contact

If you haven't already read the Business Contacts Overview, see Finding business contacts for more information.

The View Contact Log window should be displayed.

1. In the Name field, enter the name of the card for whom you want to view a summary list of contacts. The list in the middle of the window will display all the contacts assigned to that card.
2. To view details you entered about a contact in the list, such as the length of a call, a description of a meeting or the amount of a transaction, select the contact and then click Edit. The Contact Log Entry window appears, displaying details about the contact.

To find any business contact

To find a list of people you need to recontact

If you haven't already read the Business Contacts Overview, see Finding business contacts for more information.

The To Do List window should be displayed.

1. Click the Contact Alert tab at the right side of the window. A list of people and companies you are scheduled to recontact appears. (These are the people and companies that have recontact dates on or before the recontact date you entered in the Contact Log Entry window when you created their original business contact. Future contacts aren't displayed in the window.)
2. To retrieve the details about a particular business contact, click the zoom arrow at the left side of the entry you want to view. The Contact Log Entry window appears, displaying the entry's information.
3. When you actually recontact the person or company, or if you simply want to delete an overdue contact from the To Do List, mark the Action column next to that particular contact in the To Do List window, then click the Remove button at the bottom of the window.

To find a list of people you need to recontact

To remind yourself to do a task

If you haven't already read the Business Contacts Overview, see Suggestions for using the Contact Log for more information.

1. Use the Card File Entry window to create a personal card called "Reminder."
2. Whenever you want to remind yourself to perform a task, record a business contact in the Contact Log Entry window for the Reminder card. In the Recontact Date field, be sure to enter the date you want to do the task.
3. When you want to see your list of reminders, open the To Do List window and click the Contact Alert tab. All your reminders for today (along with any reminders for previous days that haven't been removed yet) will appear in the list in the window.

To track the usage of a company car

If you haven't already read the Business Contacts Overview, see Suggestions for using the Contact Log for more information.

1. Use the Card File Entry window to create a card called "Company Car."
2. Whenever you use your company car for business purposes, record a business contact in the Contact Log Entry window for the Company Car card. Be sure to provide a detailed description of the use of the car, including the miles you drove and the time you spent driving the car.
3. When you want to see how much you've used the company car for business, enter the Company Car card in the Name field of the View Contact Log window.

To track the usage of a company car

To track business travel

If you haven't already read the Business Contacts Overview, see Suggestions for using the Contact Log for more information.

1. Use the Card File Entry window to create a card called "Travel." (If you want your expenses to be detailed, you might want to create several cards, such as "Travel - Lodging," "Travel - Transportation," "Travel - Meals," and so forth. You might also consider creating a separate card for each trip you take, to get a better picture of each trip.)
2. Whenever you take a business trip, record business contacts in the Contact Log Entry window for the Travel card. You can create contacts that describe all the events you attended, people you met and expenses you incurred. (Keep in mind, however, that you might also want to record your expenses as purchases in the Purchases window.)
3. When you want to see a detailed description of your travel activity, enter the Travel card in the Name field of the View Card File window.

To remove business contacts

If you haven't already read the Business Contacts Overview, see Removing business contacts for more information.

1. Print all the reports that you wish to keep that show the business contacts you'll be purging. You might consider printing a copy of the Contact Log Report, which contains detailed information about all contacts.
2. Make a backup of your data file. Clearly mark this backup and put it in storage as part of your permanent records.
3. Open the Card File Command Center.
4. Choose Purge Contact Logs from the File menu. The Purge Contact Logs window appears.
5. From the Purge Contact Logs BEFORE list, enter the first month from which you ***don't*** want to remove business contacts. All business contacts dated prior to the month you select will be marked for purging.
6. Using the Card Type field, choose to purge business contacts for customers, vendors, employees or personal contacts only, or to purge business contacts for all people and companies in the Card File.
7. If you've assigned identifiers to people and companies in the Card File and wish to purge business contacts for contacts with the same identifier(s), mark the Identifiers option, then enter the identifier(s). We suggest you assign a common identifier (P for "purge" may be fitting) to each person or company whose contact log you routinely purge, so you can enter that identifier in this window.
8. If you don't want to remove business contacts that have recontact dates assigned to them, mark the Do Not Purge if Entry has a Recontact Date option.
9. Click the Continue button. Another Purge Contact Logs window will appear, listing all the people and companies in the Card File that match the criteria you entered in the first Purge Contact Logs window. A mark appears in the X column next to each card name, indicating that the business contacts for that card will be removed.
10. If you want to keep business contact information for any of the cards that are displayed, click in the X column next to the card's name to remove the mark that appears there.
11. Click the Purge Contact Logs button. The business contacts for the time frame you specified and for the people and companies you selected in this window are purged.

To remove business contacts