Business Center

Description:

The CATalyst Business Center provides methods for creating invoices, tracking expenses and getting paid. The Business Center is integrated with Apex to provide a process that intuitively starts with the Apex job details and aligns with services ordered on the job worksheet.

The Business Center contains:

- **Statistics** - Displays the totals for the the dollar amounts you've invoices, dollar amounts you've been paid on those invoices, total amount outstanding on invoices and more.
- **Customers** - Allows you to manage customer details, such as, the Apex agencies, and clients you want to directly invoice for jobs.
- **Invoices** - Allows for the preparation and sending of invoices to your customers.
- **Vendors** - Allows you to manage vendor details for the expenses you've paid.
- **Expenses** - Allows you to track your expenses.
- **Reports** - Allows you to generate reports for invoices and expenses.

How to Use it:

To open Business Center, do the following:

1. From Manage Jobs, click **Function**, **Business Center**.

Or

1. Click the Business Center icon on the Function Toolbar.
    a. If the Business Center icon is not displaying on the Function Toolbar by default, you may modify the Function Toolbar by doing the following:
        i. Click the down arrow to the right of the Function Toolbar.
        ii. Hovering over Add or Remove Buttons.
        iii. Hover over Function Bar.
        iv. Click Business Center, to select it for the Function Toolbar.

The Business Center screen shows as a Tab. You may switch between the Business Center tab by clicking on the tab you would like to display or by using the Window menu to switch between the currently open tabs.

If at any point you would like to close the Business Center tab, you may do either of the following:

1. Right Click on the Business Center tab, and then click Close.

Or

1. Double Click on the Business Center tab.

Additional Information:

You do not need to be logged in to Apex to open the Business Center. However, many of the actions available in Business Center do require you to be logged in to your Apex account.

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Statistics

Description:

The Statistics in Business Center is a pane that shows running totals for major business center categories.

The Statistics pane contains information for the following categories:

- **INVOICED** - shows the total dollar amount you have invoiced to agencies and clients.
- **PAID** - show the total dollar amount you have collected from the dollar amounts invoiced.
- **TOTAL DUE** - shows the dollar amount that is outstanding from invoices.

How to Use it:

The Statistics pane displays when the Business Center is showing.

Changing the Statistics Pane View

The Statistics pane is pinned to the top of the Business Center screen by default. You may choose to change the location of the Statistics pane by doing the following:

1. Click and drag from he top of the Statistics pane.
2. As you drag, screen position icons will appear.
3. Hover the mouse pointer over the desired screen position icon.
4. Release the mouse button to reposition the Statistics pane.

You may also toggle between hidden and anchored views for the Statistics pane. To toggle between hidden and anchored views, do the following:

1. Click the "Push Pin" icon on the upper right of the Statistics pane.

When the Statistics pane is hidden, you may hover the mouse pointer over the Statistics pane tab to display the Statistics pane information. When you move the mouse away, the Statistics pane will hide again.

Additional Information:

You do not need to be logged in to Apex for the Statistics pane to display in the Business Center. However, many of the actions available in Business Center do require you to be logged in to your Apex account.

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Customers

Description:

The Customers tab in Business Center gives you the ability to add, view, modify, and delete your customer contacts. In-Network Apex Agency customers will automatically appear as customers in the Business Center. However, the Business Center also provides you the ability to create non-agency customers. For example, attorneys and other reporters who you may want to invoice for services.

How to Use it:

By default, the Customers tab is selected when Business Center is first opened. To select the Customers tab, do the following:

1. Click the Customers tab.

You may take the following actions:

- **Add** - lets you add new customers to the Business Center.
- **Details** - lets you view / modify details about the currently selected customer. For example, a customer's company may have multiple "users." You may use the Details button to view the details of those "users."
- **Delete** - lets you delete (remove) a customer from your Business Center. If the customer is an "In-Network" Apex Agency, the agency will no longer be considered "In-Network" once it is deleted.

Viewing Customers

Any existing In-Network Apex Agency customers will automatically be listed as Customers. The following information is visible for each customer:

- Date Added
- Company
- Phone
- Email
- Location
- Customer Type

Additional Information:

You must be logged in to Apex to perform actions in the Business Center Customers tab.

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Add Customers

Description:

Clicking the Add button from the Customers tab in Business Center will open the Add Customer dialog. The Add Customer dialog gives you the ability to add, customer contacts. For example, attorneys and other reporters who you may want to invoice for services.

How to Use it:

From the Customers tab in Business Center, do the following:

1. Click the **Add** button. The *Add Customer* dialog will appear. The *Add Customer dialog* contains a series of dialog for adding a new customers to Business Center.

At any point in Add Customer process, you may use the **< Back** button (*Alt* + *b*) to go back to the previous dialog, or use the **Cancel** button [ESC] to exit the Add Customer process.

Add Customer

In the *Add Customer* dialog do the following:

1. Use the *Customer Type:* field to select the customer type for the new customer. Click the down arrow to display the *Customer Type* drop-down list. Select the appropriate selection for the new customer: Agency, Client, Reporter.
2. Type the email address for the new customer into the *E-mail:* field.
3. Click **Next >** (*Alt* + *n*) to move to the *Add Customer - Company Information* dialog.

Add Customer - Company Information

If the email address provided for the new customer is already being used by an existing Apex account, the *Add Customer - Company Information* dialog will populate automatically with the Apex account information. If the new customer does not have an existing Apex Account, you will need to fill in each field of the *Add Customer - Company Information* dialog.

1. You may click into each field to type the information, or you may use [TAB] to move to each field.
2. When finished, Click **Next >** (*Alt* + *n*) to move to the *Add Customer - Contact Information* dialog.

Add Customer - Contact Information

If needed, fill in each field of the *Add Customer - Contact Information* dialog.

1. You may click into each field to type the information, or you may use [TAB] to move to each field.
2. When finished, Click **Next >** (*Alt* + *n*) to add the new customer. The *Please Wait* dialog appear while the new customer is being added.
3. When the *"Successfully added a customer!"* message displays, click **Finish**.

Additional Information:

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Adding a customer that does not have an existing Apex account will create an Apex account for that customer. An email with Apex login credentials will be sent to the email address of the new customer. The email will include a temporary password they can use to access their Apex account. They will be able to change this password during their first Apex login.

You must be logged in to Apex to add customers in Business Center.

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View Customer Details

Description:

Clicking the Details button from the Customers tab in Business Center, with a customer line selected, will open the Customer Details dialog. The Customer Details dialog gives you the ability to view / modify the information for the currently selected customer. This includes the multiple "users" that may be a part of the same company.

How to Use it:

From the Customers tab in Business Center, do either of the following:

1. Click (select) the customer line you'd like to view the details of, and then Click the **Details** button. The *Customer Details* dialog will appear.

or

1. Double click the customer line you'd like to view the details of. The *Customer Details* dialog will appear.

At any point in Add Customer process, you may use the **< Back** button (*Alt* + *b*) to go back to the previous dialog, or use the **Cancel** button [ESC] to exit the Add Customer process.

Viewing Customer Info

The *Customer Details* dialog lists the Customer Information in a row by row format.

If there are multiple "users" for the customer, each is listed separately in a "User Info" section. You may collapse or expand each "User Info" section by clicking the '-' / '+' icon respectively.

When finished you may click **OK** [ENTER] or **Cancel** [ESC], to close the *Customer Details* dialog.

Modifying Customer Info

You may find the need to modify the customer information. For example, a customer's address and/or phone number may change. You can update that information inside of the *Customer Details* dialog for that customer.

The Email and Role information for each User of a Customer may not be modified.

To modify Customer Info, do the following:

1. Click on the text you'd like to modify. only text in the right-side column of the dialog can be modified.
2. Make the necessary modification to the text.
3. When finished, either click off of that field, or press [ENTER]. You may modify multiple fields.

The line that was modified will turn pink. This indicates that the change to the information will updated in Apex and Business Center after you click OK.

Rates

The Rates field is a drop down selection that allows you to specify which rate card should be used when creating invoices for this customer. Clicking in the Rates field will make a drop-down arrow appear. You may use this drop-down arrow to select from any of your available rate cards.

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When you are finished making modifications, Click **OK**. When the *"Are you sure you want to save?"* dialog appears, click **Yes** [ENTER] to update the Customer Information, or click **No** [ESC] to not update the Customer Information. The *Customer Details* dialog will close.

Additional Information:

You must be logged in to Apex to view details in Business Center.

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Delete Customers

Description:

Clicking the Delete button from the Customers tab in Business Center, with a customer line selected, will remove that Customer from Business Center. If that customer is an "In-Network" agency, the agency will be removed from your list of "In-Network" agencies.

How to Use it:

From the Customers tab in Business Center, do the following:

1. Click (select) the customer line you'd like to delete (remove) from Business Center.
2. Click the **Delete** button.
3. When the *"Are you sure you want to delete the selected item"* message displays, click **Yes** [ENTER] to remove the customer from Business Center, or click **No** [ESC] to not remove the customer from Business Center.

Additional Information:

Deleting (removing) a customer from Business Center does not delete their Apex account. You may add the customer back to Business Center.

You must be logged in to Apex to Delete customers in Business Center.

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Invoices

Description:

The Customers tab in Business Center gives you the ability to create and send invoices to customers and view existing invoices. Existing invoices could have been made through Business Center, the Prepare Invoice action, or though the Apex website.

How to Use it:

By default, the Customers tab is selected when Business Center is first opened. To select the Invoices tab, do the following:

1. Click the Invoices tab.

You may take the following actions:

- **New** - lets you add new customers to the Business Center.
- **View** - lets you view / modify details about the currently selected customer. For example, a customer's company may have multiple "users." You may use the Details button to view the details of those "users."

Viewing Invoices

Any existing invoice will be listed in the Business Center Invoice tab. The following information is visible for each invoice:

- **Date** - shows the date the invoice was created.
- **Job Name** - shows the job name of the invoice.
- **Invoice Number** - shows the Apex assigned invoice number for the invoice.
- **Total Due** - shows the amount, in USD, that is remaining to be paid on the invoice.
- **Amount Paid** - shows the amount, in USD, that has been paid on the invoice.
- **Status** - shows the current payment status of the invoice. The following statuses may show:
  - UNPAID - the invoice has had no payments made.
  - PARTIAL PAYMENT - the invoice has received payment, but not the full amount invoiced.
  - REJECTED - the invoiced customer rejected the invoice without making any payment. A customer can reject an invoice through Apex. When this happens, you will receive an email at the email address you used to create you Apex account. You may then need to contact the customer, make any corrections necessary to the invoice and resubmit the invoice.
  - PAID - the invoice has been paid in full.
- **Customer** - shows the Business Center Customer invoiced.

Additional Information:

You must be logged in to Apex to perform actions in the Business Center Invoices tab.

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New Invoice

Description:

Using the New button from the Invoices tab in Business Center gives you the ability to create and send an invoice for any services you provide to any customer. Your invoice does not have to be connected to an Apex job or sent only to an Apex Agency. Clicking the New button from the Invoices tab in Business Center will open the Create Invoice dialog. The Create Invoice dialog will display a series of screens to step you through creating the invoice.

How to Use it:

From the Invoices tab in Business Center, do the following:

1. Click the **New** button. The *Create Invoice - Bill To* dialog will appear.

At any point in Create Invoice process, you may use the **< Back** button (*Alt + b*) to go back to the previous dialog, or use the **Cancel** button [ESC] to exit the Create Invoice process.

Create Invoice - Bill To

The *Create Invoice - Bill To* dialog is the first screen of invoice creation.

If the customer you are invoicing is not an existing Business Center customer, use the **Add Customer** button to create the new customer. Do the following:

1. Click the **Add Customer** button. The *Add Customer* dialog will appear. The process for creating a new customer while creating a new invoice is the same as creating a new customer in the Customer tab of Business Center.
2. After creating the new customer, you may use the drop-down field on the *Create Invoice - Bill To* dialog to select the customer.

If the customer you are invoicing is an existing Business Center customer, use the drop-down field on the *Create Invoice - Bill To* dialog to select the customer.

- **Customer Details** - the Customer Details button will display the Customer Details dialog. You may view / modify the customer information for the customer you are invoicing.

To proceed with the invoice creation process, click the **Next >** button (*Alt + n*) or [ENTER]. The *Create Invoice - Job Info* dialog will appear.

Create Invoice - Job Info

The *Create Invoice - Job Info* dialog allows you to create the job details for the invoice. Fields marked with an asterisk (*) are mandatory. You may click to move between fields and/or use [TAB]. The mandatory fields are:

- **Job Start Date** - use the calendar drop-down selection to ope the calendar and select the start date for the job.
- **Job Start Time** - use the up and down arrows to set the start time for the job. You may click and type to set the time for HH:MM:SS and use the arrow keys to set the time and toggle between AM/PM.
- **Job Name** - type the job name into the job name field.
- **City** - type the city location for the job.
- **State** - use the drop-down selection to select the state location for the job.

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To proceed with the invoice creation process, click the **Next >** button (*Alt + n*) or [ENTER]. The *Create Invoice - Line Items* dialog will appear.

Create Invoice - Line Items

The *Create Invoice - Line Items* dialog is where you will create the line items and pricing for the invoice. To create line items for the invoice, do the following:

Ratecard:

Use the *Ratecard:* field to select the appropriate service rates for the invoice. You may access the *Ratecard:* field by clicking the drop-down arrow to the right of the field or by pressing (*Alt + r*).

Transcript Name:

If there is a transcript name you'd like to include for the invoice information, use the *Transcript Name:* field to type the transcript name. You may access the *Transcript Name:* field by clicking or by pressing (*Alt + t*).

Services:

Use the *Services:* field to select the appropriate services to add to the invoice. To add services, do the following:

1. Select the service from the *Services:* drop-down list. Click the drop-down arrow to the right of the *Services*: field to show the list of services. The services shown match your currently available services.
2. Select the service you'd like to add to the invoice from the list.
3. Click the **Add Line Item** button, to add the selected service to the invoice.

   <Create New Service>

   The <Create New Service> entry on the Services drop-down list is a special selection that lets you create a new service during the invoice creation. This will add the newly created service to the current invoice. To create a new service, do the following:

   1. Select <Create New Service> from the Services drop-down list. The Add New Service dialog will display. In the Add New Services dialog, do the following:
      a. Type a name for the new service into the *Service Name:* field.
      b. Use the Unit Type: drop-down list to select the type of fee for the new service. For example, Per Page, Flat Fee...
      c. Provide the price for the new service in the *Price Per Unit (USD):* field.
      d. Click the Add Service button.
4. Continue using the Services drop-down field and the Add Line Item button to add as many services as required for the invoice.

Removing a previously selected service

If you need to remove a selected service, you may right-click on the service in the list of selected services on the Create Invoice - Line Items dialog and then click **Remove**.

When Finished Adding Services

When you are finished adding services to the invoice, click the **Next >** button (*Alt + n*). The *Create Invoice - Review* dialog will appear.
To exit the invoice creation process, click the 'x' icon in the upper right of the dialog, or press [ESC].

Create Invoice - Review

The *Create Invoice - Review* dialog provides one more opportunity to make sure the invoice is correct before submitting the invoice.

Submitting the Invoice

If the invoice is correct, click the **Submit** button. The "*Are you sure you want to submit this invoice? A PDF of the invoice will be emailed to the entity you are billing.*" message will display. Do one of the following:

1. Click **Yes** [ENTER] to submit the invoice. The invoiced party will receive an email with a PDF copy of the invoice.

or

1. Click **No** [ESC] to return to the *Create Invoice - Review* dialog without sending the invoice.

If you need to go back to the previous screen to fix any of the invoice items, you may click the **<Back** button (*Alt + b*) to return to the previous Create Invoice screen.

Additional Information:

Adding a customer that does not have an existing Apex account will create an Apex account for that customer. An email with Apex login credentials will be sent to the email address of the new customer. The email will include a temporary password they can use to access their Apex account. They will be able to change this password during their first Apex login.

You must be logged in to Apex to create invoices in Business Center.

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View Invoice

Description:

Using the View button from the Invoices tab in Business Center gives you the ability to view an already created invoice. You may use the View button to update and resubmit invoices with a "Rejected" status.

How to Use it:

From the Invoices tab in Business Center, do either of the following:

1. Click (select) the invoice line you'd like to view, and then Click the **View** button.

or

1. Double click the invoice line you'd like to view.

Invoice - View

Selecting **View** for invoices with a statuses of UNPAID, PAID, and PARTIAL PAYMENT will cause the *Invoice - View* dialog to display. You may use this dialog to view the details of the invoice. You may also use the **Download Invoice** button to download a copy of the invoice PDF file that was sent to the invoiced party.

Download Invoice

To download a copy of the invoice PDF file, do the following:

1. Click the **Download Invoice** button (*Alt + d*). The Save As dialog will display.
2. In the Save As dialog, browse to the location you'd like to save the invoice PDF. The default location is the Windows Documents folder.
3. Click Save.

When you are finished downloading / viewing the invoice, click Close [ESC] to exit the *Invoice - View* dialog.

Create Invoice - Line Items

Selecting **View** for invoices with a status of REJECTED will cause the *Create Invoice - Line Items* dialog to display. You may use this dialog to, if necessary, modify the invoice and resubmit the invoice. To modify and resubmit an invoice, do the following:

Ratecard:

Use the *Ratecard:* field to select the appropriate service rates for the invoice. You may access the *Ratecard:* field by clicking the drop-down arrow to the right of the field or by pressing (*Alt + r*).

Transcript Name:

If there is a transcript name you'd like to include for the invoice information, use the *Transcript Name:* field to type the transcript name. You may access the *Transcript Name:* field by clicking or by pressing (*Alt + t*).

Services:

Use the *Services:* field to select the appropriate services to add to the invoice. To add services, do the following:

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1. Select the service from the *Services:* drop-down list. Click the drop-down arrow to the right of the *Services*: field to show the list of services. The services shown match your currently available services.
2. Select the service you'd like to add to the invoice from the list.
3. Click the **Add Line Item** button, to add the selected service to the invoice.

   <Create New Service>

   The <Create New Service> entry on the Services drop-down list is a special selection that lets you create a new service during the invoice creation. This will add the newly created service to the current invoice. To create a new service, do the following:

   1. Select <Create New Service> from the Services drop-down list. The Add New Service dialog will display. In the Add New Services dialog, do the following:
      a. Type a name for the new service into the *Service Name:* field.
      b. Use the Unit Type: drop-down list to select the type of fee for the new service. For example, Per Page, Flat Fee...
      c. Provide the price for the new service in the *Price Per Unit (USD):* field.
      d. Click the Add Service button.
4. Continue using the Services drop-down field and the Add Line Item button to add as many services as required for the invoice.

Removing a previously selected service

If you need to remove a selected service, you may right-click on the service in the list of selected services on the Create Invoice - Line Items dialog and then click **Remove**.

When Finished Adding Services

When you are finished adding services to the invoice, click the **Next >** button (*Alt + n*). The *Create Invoice - Review* dialog will appear.

Create Invoice - Review

The *Create Invoice - Review* dialog provides one more opportunity to make sure the invoice is correct before submitting the invoice.

Submitting the Invoice

If the invoice is correct, click the **Submit** button. The "*Are you sure you want to submit this invoice? A PDF of the invoice will be emailed to the entity you are billing.*" message will display. Do one of the following:

1. Click **Yes** [ENTER] to submit the invoice. The invoiced party will receive an email with a PDF copy of the invoice.

or

1. Click **No** [ESC] to return to the *Create Invoice - Review* dialog without sending the invoice.

If you need to go back to the previous screen to fix any of the invoice items, you may click the **<Back** button (*Alt + b*) to return to the previous Create Invoice screen.

After resubmitting the invoice, the Status of the invoice on the Business Center Invoices tab will change to UNPAID.

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Additional Information:

You must be logged in to Apex to view invoices in Business Center.

Vendors

Description:

The Vendors tab in Business Center gives you the ability to add, view, modify, and delete vendor contacts. Vendors can be businesses and entities you've paid. The Vendors list in Business Center helps you track your expenses.

How to Use it:

By default, the Customers tab is selected when Business Center is first opened. To select the Vendors tab, do the following:

1. Click the Vendors tab.

You may take the following actions:

- **Add** - lets you add new vendors to the Business Center.
- **Details** - lets you view / modify details about the currently selected vendor.
- **Delete** - lets you delete (remove) a vendor from your Business Center.

Viewing Vendors

The following information is visible for each Vendor:

- Company
- Account Number
- Phone
- Email
- Location
- Date Added

Additional Information:

You must be logged in to Apex to perform actions in the Business Center Vendors tab.

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Add Vendors

Description:

Clicking the Add button from the Vendors tab in Business Center will open the Vendor dialog.

How to Use it:

From the Vendors tab in Business Center, do the following:

1. Click the **Add** button. The *Vendor* dialog will appear.
2. Click into each field, or use [TAB] to move to each field in the *Vendor* dialog. Type the appropriate information for the Vendor. Only the "Company" field is required.
3. When finished, click **Save** [ENTER]. The Vendor will be added to list of vendors in Business Center.

To cancel the *Vendor* dialog without saving, click the **Cancel** button [ESC].

Additional Information:

You must be logged in to Apex to add vendors in Business Center.

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View Vendors Details

Description:

Clicking the Details button from the Vendors tab in Business Center, with a vendor line selected, will open the Vendor Details dialog. The Vendor Details dialog gives you the ability to view / modify the information for the currently selected vendor.

How to Use it:

From the Vendors tab in Business Center, do either of the following:

1. Click (select) the vendor line you'd like to view the details of, and then Click the **Details** button. The *Vendor Details* dialog will appear.

or

1. Double click the vendor line you'd like to view the details of. The *Vendor Details* dialog will appear.

Viewing Vendor Info

The *Vendor Details* dialog lists the Vendor Information in a row by row format.

When finished you may click **OK** [ENTER] or **Cancel** [ESC], to close the *Vendor Details* dialog.

Modifying Vendor Info

You may find the need to modify the vendor information. For example, a vendor's address and/or phone number may change. You can update that information inside of the *Vendor Details* dialog for that customer.

To modify Vendor Info, do the following:

1. Click on the text you'd like to modify. only text in the right-side column of the dialog can be modified.
2. Make the necessary modification to the text.
3. When finished, either click off of that field, or press [ENTER]. You may modify multiple fields.

The line that was modified will turn pink. This indicates that the information has changed and will be updated in Business Center after you click OK.

When you are finished making modifications, Click **OK**. When the *"Are you sure you want to save?"* dialog appears, click **Yes** [ENTER] to update the Vendor Information, or click **No** [ESC] to not update the Vendor Information. The *Vendor Details* dialog will close.

Additional Information:

You must be logged in to Apex to view / modify vendor details in Business Center.

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Delete Vendors

Description:

Clicking the Delete button from the Vendors tab in Business Center, with a vendor line selected, will remove that vendor from Business Center.

How to Use it:

From the Vendors tab in Business Center, do the following:

1. Click (select) the vendor line you'd like to delete (remove) from Business Center.
2. Click the **Delete** button.
3. When the *"Are you sure you want to delete the selected item"* message displays, click **Yes** [ENTER] to remove the vendor from Business Center, or click **No** [ESC] to not remove the vendor from Business Center.

Additional Information:

You may add the vendor back to Business Center in the future if needed.

You must be logged in to Apex to Delete vendors in Business Center.

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Expenses

Description:

The Expenses tab in Business Center gives you the ability to add, view, modify, and delete information about your expenses.

How to Use it:

By default, the Customers tab is selected when Business Center is first opened. To select the Expenses tab, do the following:

1. Click the Expenses tab.

You may take the following actions:

- **Add** - lets you add new expenses to the Business Center.
- **Details** - lets you view / modify details about the currently selected expenses
- **Delete** - lets you delete (remove) expenses from your Business Center.

Viewing Expenses

The following information is visible for each expense:

- **Date** - shows the date of the expense.
- **Invoice Number** - shows the invoice number given for the expense.
- **Amount** - shows the amount USD for the expense.
- **Vendor** - shows who the vendor was for the expense.
- **Category** - shows the type of expense.

Expenses CSV Export

You may generate a CSV file of your expenses. A CSV (comma separated value) file format can be opened by spreadsheet software, such as Microsoft Excel. To Export a CSV file of expenses do the following:

1. Use the Date Range *From* and *To* fields to select a date range for the CSV export. You may choose to unselect the *From* field by unchecking the selection box for the field. A *To* date is required. For example, if you wanted to export a CSV file containing all of your expenses, you would uncheck the *From field*, and select today's date for the *To* field.
2. Click the **Export** button.
3. Use the Save As dialog to browse to the location you'd like to save the Expense.csv file. The Windows Documents folder is the default Save As location. You may also choose to change the file name before clicking **Save**.

Additional Information:

You must be logged in to Apex to perform actions in the Business Center Expenses tab.

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Add Expenses

Description:

Clicking the Add button from the Expenses tab in Business Center will open the Expense dialog.

How to Use it:

From the Expenses tab in Business Center, do the following:

1. Click the **Add** button. The *Expense* dialog will appear.
2. Click into each field, or use [TAB] to move to each field in the *Expense* dialog. Type the appropriate information for the expense. Date, Amount, and Expense Type are required fields.
3. When finished, click **Save** [ENTER]. The expense will be added to list of Expenses in Business Center.

To cancel the *Expense* dialog without saving, click the **Cancel** button [ESC].

Expense Type

The Expense Type field is a drop-down selection to pick if the expense was an Official or Private expense.

Payment Type

The Payment Type field lets you specify how the expense was paid. You may select from the default Cash, Check, or Online Payment types. You may also create your own type.

Creating a Payment Type

To create your own payment type, do the following:

1. Click the drop-down arrow for the Payment Type field.
2. Select **<Create Payment Type>**. The Payment Type dialog will appear.
3. Type a name for the new payment type into the *Name* field.
4. Click **Save** [ENTER].

The new payment type will now be selectable as a Payment Type for this expense and future expenses.

Deleting a Payment Type

You may delete payment types you've created. The default Cash, Check, and Online Payment types cannot be deleted. To delete a payment type you've created, do the following:

1. Click the drop-down arrow for the Payment Type field.
2. Select the payment type you'd like to delete.
3. Click the **Delete** button to the right of the Payment Type field.
4. When the *"Are you sure you want to delete the selected item*" message appears, click **Yes** [ENTER] to delete the payment type, or click **No** [ESC] to not delete the payment type.

Adding a Vendor

You can select an existing vendor for the expense, or you may add a new vendor while in the *Expense* dialog. To add a new vendor, do the following:

1. Click the **Add Vendor** button to the right of the *Vendor* field. The *Vendor* dialog will appear.
2. Click into each field, or use [TAB] to move to each field in the *Vendor* dialog. Type the appropriate information for the Vendor. Only the "Company" field is required.
3. When finished, click **Save** [ENTER]. The Vendor will be added to list of vendors in Business Center and will be available for selection in the *Expense* dialog.

Category

The Category field lets you specify which category the expense belongs. There is an extensive list of default categories built into Business Center. You may add your own categories and delete any of the available categories.

Creating a Category

To create your own category, do the following:

5. Click the drop-down arrow for the Category field.
6. Select **<Create Expense Category>**. The Expense Category dialog will appear.
7. Type a name for the new category into the *Name* field.
8. Type a description (optional) for the new category into the *Description* field.
9. Click **Save** [ENTER].

The new category will appear in the Category field in a "Name - Description" format and will be selectable as a Category for this expense and future expenses.

Deleting a Payment Type

You may delete a category. To delete a category, do the following:

5. Click the drop-down arrow for the Category field.
6. Select the category you'd like to delete.
7. Click the **Delete** button to the right of the Category field.
8. When the *"Are you sure you want to delete the selected item*" message appears, click **Yes** [ENTER] to delete the category, or click **No** [ESC] to not delete the category.

Additional Information:

You must be logged in to Apex to add expenses in Business Center.

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View Expenses Details

Description:

Clicking the Details button from the Expenses tab in Business Center, with an expense line selected, will open the Expense Details dialog. The Expense Details dialog gives you the ability to view / modify the information for the currently selected expense.

How to Use it:

From the Expenses tab in Business Center, do either of the following:

1. Click (select) the expense line you'd like to view the details of, and then Click the **Details** button. The *Expense Details* dialog will appear.

or

1. Double click the expense line you'd like to view the details of. The *Expense Details* dialog will appear.

Viewing Expense Info

The *Expese Details* dialog lists the Expense Information in a row by row format.

When finished you may click **OK** [ENTER] or **Cancel** [ESC], to close the *Expense Details* dialog.

Modifying Expense Info

You may find the need to modify the expense information. You can update that information inside of the *Expense Details* dialog for that expense.

To modify Expense Info, do the following:

1. Click on the text you'd like to modify. only text in the right-side column of the dialog can be modified.
2. Make the necessary modification to the text.
3. When finished, either click off of that field, or press [ENTER]. You may modify multiple fields.

The line that was modified will turn pink. This indicates that the information has changed and will be updated in Business Center after you click OK.

When you are finished making modifications, Click **OK**. When the *"Are you sure you want to save?"* dialog appears, click **Yes** [ENTER] to update the Expense Information, or click **No** [ESC] to not update the Expense Information. The *Expense Details* dialog will close.

Additional Information:

You must be logged in to Apex to view / modify expense details in Business Center.

Delete Expenses

Description:

Clicking the Delete button from the Expenses tab in Business Center, with an expense line selected, will remove that expense from Business Center.

How to Use it:

From the Expenses tab in Business Center, do the following:

1. Click (select) the expense line you'd like to delete (remove) from Business Center.
2. Click the **Delete** button.
3. When the *"Are you sure you want to delete the selected item"* message displays, click **Yes** [ENTER] to remove the expense from Business Center, or click **No** [ESC] to not remove the expense from Business Center.

Additional Information:

You may add the expense back to Business Center in the future if needed.

You must be logged in to Apex to Delete expenses in Business Center.

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