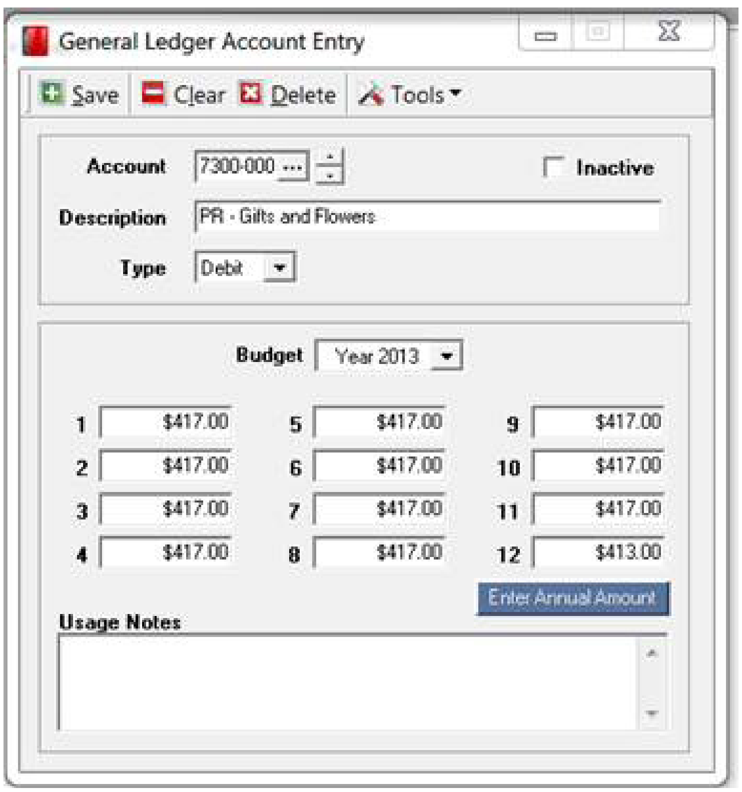
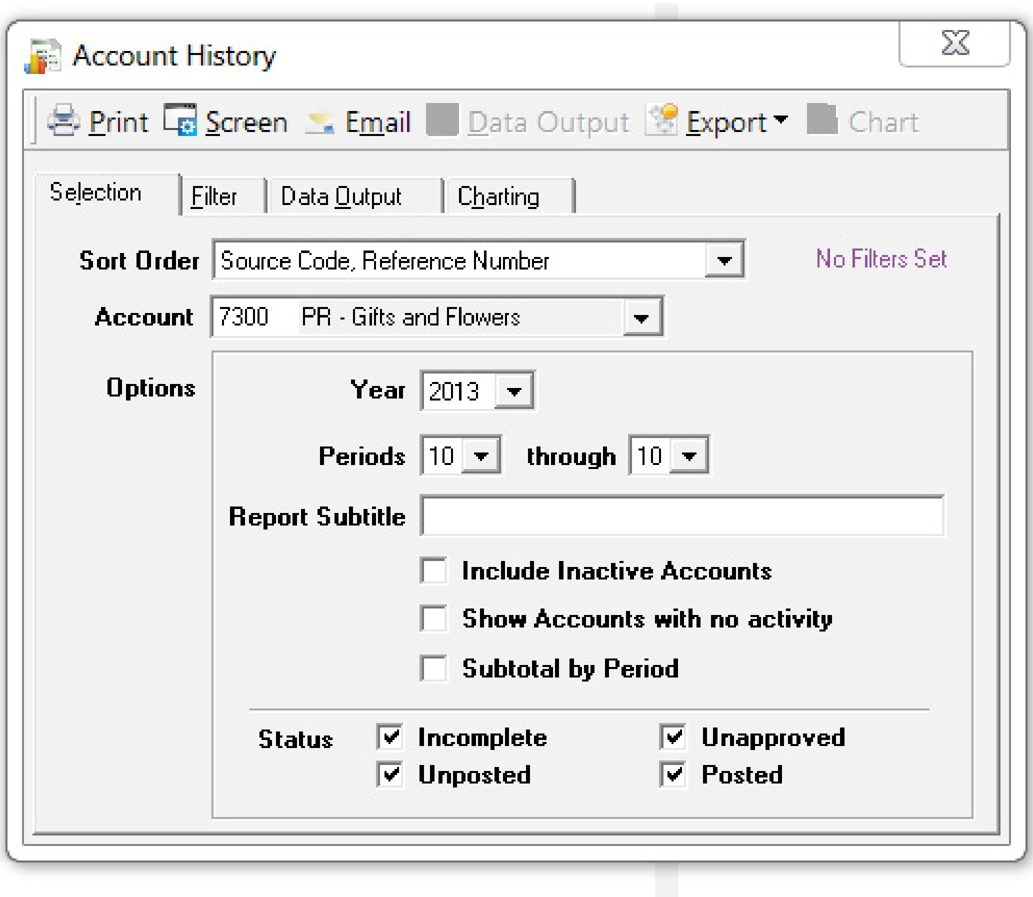
How do I keep track of what my firm spends on mailings for holiday cards and gifts?

Chances are your firm will be sending out some sort of mailing, either Christmas cards or other holiday gifts. Have you thought about tracking your expenses and keeping record of how much you spend on these activities? This short tutorial will show you the easiest way to manage what is spent on your holiday mailings.

The first step is to create a General Ledger Expense Account for your gifts or mailing expenses. You could name this “Client Gifts” or “PR - Gifts”, whatever works best for your situation.



When gifts/mailings are sent out (or purchased), the distribution line for the Voucher will be the GL Expense Account created for these activities. When entering the Voucher, you can enter as much or as little detail in regards to the purchase in the Description field. You can also run an Account History just for that GL Expense Account at any time to see what purchases have been recorded. This report can be found under General Ledger Reports. (See next page)



Further Questions? Have a Support Tip idea? Let us know, at support@orionlaw.com