

Workshop Tutorial 1

How to Create a Customer Entry:

1. Go to <http://waveaccounting.com/>
2. Sign in using email address: vida.martin@waldenu.edu; and password: waldenu
3. Once you have signed in, you will be on the company's dashboard.
4. Scroll down to the lower left corner of the screen to select 'Add Customers' under 'Settings'.
5. Then scroll to the right of the next screen and click on 'Add a customer'.
6. Decide upon a customer name and address, and simply fill in the information as prompted.
7. Once you have filled in the required data, you will then select the 'Save customer' tab at the bottom of the screen.

Workshop Tutorial 2

How to Add a Product:

1. From the dashboard, select 'View all settings' on the lower left of the screen.
2. The screen will list a number of options along the left side. Select 'Products'.
3. Scroll to the right and select, 'Add a product'.
4. Simply fill in the name and description of the product along with any additional information as prompted and save.

Workshop Tutorial 3

How to create an Invoice:

1. From the dashboard, select the heading entitled 'Income'.
2. Scroll to the right and select, 'Create an invoice'.
3. Select your customer's name from the dropdown tab next to 'Customer name'.
4. Assign an invoice number and scroll down to select your 'Terms of Payment' from the dropdown tab.
5. Continue to scroll down and select your product from the dropdown tab.
6. Tab over and the fill in the 'product details', adjust the quantity of units being sold, and enter the unit price.
7. You have the option to save your invoice, save and email the invoice immediately to your client, or save the invoice and instantly create another. Please save your invoice.
8. Your assessment activity is now complete.
9. Please advise the facilitator upon completion so that everyone may view the final products simultaneously.
10. Your activity will be reviewed according to the rubric in your handouts.

