Setting up TBS *Clever*PLUS

Note: *These instructions are at a basic level to get you started quickly with TBS.*

Note: *These instructions are designed for the 'Full' menu of TBS CleverPLUS.*

Step 1: Click button 91 (Maintenance) in the 'GENERAL' column.

Step 2: Click button N (TBS Setup of your Program) on screen 91 (Maintenance). This screen is a step by step way of setting up the program. If you are unsure of a step you may skip it. You can come back any time to change these settings later.

Step 3: Click button 'Install Your Company Logo' on the top left hand side of the screen.

Step 4: Open your company logo in any photo editing program (like MS Paint, Adobe Photoshop etc.), select your logo and click the 'Edit' menu then 'Copy'.

Step 5: *Double* click on the 'Insert Image' box which currently shows a TBS logo. There are now some extra menus at the top of the screen.

Step 6: Click on the 'Image' menu at the top of the screen and then click 'Clear Image'. The current TBS logo will disappear.

Step 7: Click on the 'Edit' menu at the top of the screen and then click 'Paste'. Your logo will be shown. Click the exit button (top right hand corner, a picture of a door with an arrow going through it) TWICE.

Step 8: You are now back to the 'TBS Setup of Program' screen. Click button 2 (System Registrations).

Step 9: Click on the 'Business Name' box and type in your business name – this is used when printing invoices/reports and other items within TBS.

Step 10: Click on the 'Contact Name' box and enter the name of the main contact person.

Step 11: Click on the 'ABN/GST #' box and type in your company ABN.

Step 12: In the bottom half of this screen you will see a white box with a series of tabs along it's top edge. The first is 'Contact Info'. Enter your: street address, city, postcode, telephone number, fax (facsimile number) and email address. If any of these don't apply to you leave them blank.

Step 13: Underneath the text 'Invoice Option' there is a button with a pair of glasses. Click it to view the available invoice layouts. When you have *visually* selected a layout press the exit button (the door with the arrow going into it). Back on the 'Register System Business' screen and to the right of 'Invoice Option' there is a drop down box, choose your preferred layout.

Step 14: Click on the ‘Bank Acc/Assets’ TAB. Find the ‘Bank Account No’ box and enter your bank account details (BSB followed by account number, usually in the form xxx-xxx yyy yyy yyy).

Step 15: Click the ‘Bank Account Opening Balances’ button on the right hand side of the screen.

Step 16: On the ‘Bank Accounts Opening Balances’ screen select your bank account on the left (usually ‘Main’) then enter your ‘Opening Balance’ in the next box to the right and the current date after that. Click ‘Save’ at the top of the screen and then ‘Exit’.

Step 17: Back on the ‘Register System Business’ screen click on the ‘Std Messages’ TAB. Here you can change the messages that get printed on Invoices and Quotes. Change them if you wish.

Step 18: Optionally you may click on the ‘Terms & Conditions’ TAB to enter in any terms and conditions you want shown on invoices.

All done! You can click ‘Save’ and then ‘Exit’ at the top of the screen. You are now back on the ‘TBS Setup of Program’ screen. You can continue on to enter creditors (suppliers) and product groups etc – those items are covered in other documents.