

Add Large Inventory

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CDT

Use this section to track vehicles and other large purchases for tax purposes

To manage all **Large Inventory**:

1. From the menu to the left click **Accounting**, then **Expenses**.
2. The **Expenses** screen opens.
3. Click the **Large Inventory** tab towards the top right of the page.
4. The Large Inventory screen opens.
5. From here you can search or filter through your current list of Large Inventory items.
 - **Search:** Start entering in any data found on the invoice(s) you're looking for to automatically filter the search results.
 - **Filters:**
 - Date or Date Range the item was added
 - Item: A drop down of all added items
 - Purchase Price: The amount the item was purchased for
 - **Export:** Export data to an Excel or CSV File. Only the data currently being populated based on the selected filters and columns will be exported

Add Large Inventory Item

1. From the menu to the left click **Accounting**, then **Expenses**.
2. The **Expenses** screen opens.
3. Click the **Large Inventory** tab towards the top right of the page.
4. The Large Inventory screen opens.
5. Click **+ Add Large Inventory** in the top right corner.
6. Select the type of Large Inventory the new item is.



The image shows a modal dialog box with a title bar that says "Choose Large Inventory Type" and a close button (X) in the top right corner. Inside the dialog, there are two buttons stacked vertically: "Vehicle" and "Other Large Expense".

7. If you select **Vehicle**, complete the fields in the **Add Vehicle** screen. If you selected **Other Large Expense**, skip to **Step 9**.

- **Date:** Date you purchased the vehicle.
- **Vehicle Name:** Nickname to identify vehicle.
- **Make/Model:** What kind of vehicle is it.
- **Purchase Price:** The price you purchased the vehicle for.
- **Fair Market Value:** The price the market would value the vehicle at.
- **Mileage History:**
 - Odometer Start Date: The date you start driving the vehicle for work.
 - Odometer Reading at Start:: The odometer reading when you start driving vehicle for work.
 - Odometer End Date: The date you stop driving the vehicle for work.
 - Odometer Reading at End: The odometer reading when you stop driving the vehicle for work.

8. Click **Save** and return to the **Expenses** screen, or click **Save & Add New Vehicle** to save this vehicle and add another one.

9. If you select **Other Large Expense**, complete the fields in the **Add Large Expense** screen.

- **Date:** Date item was purchased.
- **Item Name:** Nickname to easily identify item.
- **Item:** What type of item is it.
- **Purchase Price:** Price item was purchased at.
- **Fair Market Value:** The price the market would value the item at.

10. If you have more than one Large Inventory item to enter, click **+ Add Line Item** to add multiple items at one time.

11. Click **Save** and return to the **Expenses** screen, or click **Save & Add New Large Expense** to save this vehicle and add another one.