

# Creating Proxies

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If you decide not to sync inventory, Order Time will create a non-inventory item called OT Proxy. This item is used for bills and invoices in QuickBooks so it's income and expense account will be reflected in your P & L. You can create any number of proxies with different income and expense accounts so that you can control which P & L accounts are affected.

Step 1 is to create a non-inventory item. This can be done in either QuickBooks or Order Time. In this example we are creating a non-inventory item called Wood which will be used as the proxy for all the wood inventory item in Order Time.

The screenshot shows the 'New Item' window in QuickBooks Pro 2014. The window title is 'KGI - QuickBooks Pro 2014 - [New Item]'. The left sidebar contains navigation options like 'Home', 'My Company', 'Income Tracker', 'Calendar', 'Snapshots', and 'My Shortcuts'. The main area is divided into sections for item creation. The 'TYPE' dropdown is set to 'Non-inventory Part', with a description: 'Use for goods you buy but don't track, like office supplies, or materials for a specific job that you charge back to the customer.' The 'Item Name/Number' field contains 'Wood'. The checkbox 'This item is used in assemblies or is purchased for a specific customer/job' is checked. The 'PURCHASE INFORMATION' section shows 'Cost' as 0.00, 'Expense Account' as 'Wood COGS', and 'Preferred Vendor' as an empty dropdown. The 'SALES INFORMATION' section shows 'Sales Price' as 0.00, 'Tax Code' as 'Tax', and 'Income Account' as 'Wood Sales'. The 'Item is inactive' checkbox is unchecked. The right side of the window has buttons for 'OK', 'Cancel', 'Next', 'Notes', 'Custom Fields', and 'Spelling'.

Once you have your proxies set up you will assign them to the items you create in Order Time.

Home > Items > Item

Item - [Next Item No.](#) Save Reset

General	Other
Group: Parts Group Name: U00005 UOM Set: Each-K	Active <input checked="" type="checkbox"/> <div> <input checked="" type="checkbox"/> Proxy Wood </div> <input type="checkbox"/> Sub of

General	Purchasing	Notes	Custom
Description: Wood product Price: 25.00 Weight: Volume:	Income Account: 47900-Sales [Income] COGS Account: 50000-Cost of Goods Sold [Cost of Goods] Asset Account: 12100-Inventory Asset [Other Current Asset] Bin: Track lots or serial numbers: Tax Code: Class:		

You can also create a new Item Group that by default sets the correct proxy.

Admin > Profile Lists > Item Group

Item Group

Active Status
<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both

Records
Assembly Group
Jobs Group
Kits Group
Non-inv Group
Other Charge Group
Parts Group
Services Group

Name	Wood Product
Short Name	Wood
Item Type	Part
Is default	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

Default Accounts	
Income Account	Wood Sales [Income]
Asset Account	12100-Inventory Asset [Other Current Asset]
COGS Account	Wood COGS [Cost of Goods]

UOM Set	Each-K
Is Sold	<input checked="" type="checkbox"/>
Is Used	<input checked="" type="checkbox"/>
Is Purchased	<input checked="" type="checkbox"/>
Item Cost Type	Cost As Entered
Default Proxy	Wood

Click on this link to find out more about [Proxies and Accounts](#).