

Get Going with QuickBooks

Overview

Target Audience

Course Outline

1 - Getting Started

- Starting QuickBooks
- Setting QuickBooks Preferences
- Identifying Components of the QuickBooks Operating Environment
- Using QuickBooks Help
- Identifying Common Business Terms
- Exiting QuickBooks
- Review

2 - Setting Up A Company

- Creating a QuickBooks Company
- Using the Chart of Accounts
- Review

3 - Working with Lists

- Creating Company Lists
- Working with the Customers & Jobs List
- Working with the Employees List
- Working with the Vendors List
- Working with the Item List
- Working with Other Lists
- Managing Lists
- Review

4 - Setting Up Inventory

- Entering Inventory
- Ordering Inventory
- Receiving Inventory
- Paying for Inventory
- Manually Adjusting Inventory
- Review

5 - Selling Your Product

- Creating Product Invoices
- Applying Credit to Invoices
- Emailing Invoices
- Setting Price Levels
- Creating Sales Receipts
- Review

6 - Invoicing for Services

- Setting Up a Service Item
- Changing the Invoice Format
- Creating a Service Invoice
- Editing an Invoice
- Voiding an Invoice
- Deleting an Invoice
- Entering Statement Charges
- Creating Billing Statements
- Review

7 - Processing Payments

- Displaying the Open Invoices Report
- Using the Income Tracker
- Receiving Payments for Invoices
- Making Deposits
- Handling Bounced Checks
- Review

8 - Working with Bank Accounts

- Writing a QuickBooks Check
- Voiding a QuickBooks Check
- Using Bank Account Registers
- Entering a Handwritten Check
- Transferring Funds Between Accounts
- Reconciling Checking Accounts
- Review

9 - Entering and Paying Bills

Handling Expenses
Using QuickBooks for Accounts Payable
Entering Bills
Paying Bills
Entering Vendor Credit
Review

10 - Using the EasyStep Interview

Using the EasyStep Interview
Review
