

Keep Going with QuickBooks

Overview

Target Audience

Course Outline

1 - Memorizing Transactions

- Entering a New Memorized Transaction
- Editing a Memorized Transaction
- Deleting a Memorized Transaction
- Grouping Memorized Transactions
- Using a Memorized Transaction
- Printing the Memorized Transaction List
- Review

2 - Customizing Forms

- Creating a Custom Template
- Modifying a Template
- Printing Forms
- Review

3 - Using Other QuickBooks Accounts

- Other QuickBooks Account Types
- Working with Credit Card Transactions
- Working with Fixed Assets
- Working with Long-Term Liability Accounts
- Using the Loan Manager
- Review

4 - Creating Reports

- Working with QuickReports
- Working with Preset Reports
- Sharing Reports
- Exporting Reports to Microsoft Excel
- Printing Reports
- Review

5 - Creating Graphs

- Creating QuickInsight Graphs
- Using QuickZoom with Graphs
- Working with the Sales Graph
- Customizing Graphs
- Printing Graphs
- Review

6 - Tracking and Paying Sales Tax

- Using Sales Tax in QuickBooks
- Setting Up Tax Rates and Agencies
- Indicating Who and What Gets Taxed
- Applying Tax to Each Sale
- Determining What You Owe
- Paying Your Tax Agencies
- Review

7 - Preparing Payroll with QuickBooks

- Using Payroll Tracking
- Setting Up for Payroll
- Setting Up Employee Payroll Information
- Setting Up a Payroll Schedule
- Writing a Payroll Check
- Printing Paycheck Stubs
- Tracking Your Tax Liabilities
- Paying Payroll Taxes
- Preparing Payroll Tax Forms
- Review

8 - Using Online Banking

- Setting Up an Internet Connection
- Setting Up Bank Feeds for Accounts
- Viewing, Downloading, and Adding Online Transactions
- Creating Online Payments
- Transferring Funds Online
- Canceling Online Payments
- Review

9 - Managing Company Files

- Using QuickBooks in Multi-User Mode
- Setting Up Users and Passwords
- Setting a Closing Date
- Sharing Files with an Accountant
- Updating QuickBooks
- Backing Up and Restoring a Company File
- Condensing a Company File
- Review
