

Get Going with QuickBooks

Price
\$790.00

Duration
2 Days

Delivery Methods
VILT, Private Group

This course is an introduction to QuickBooks. Students will be introduced to the basic features and functionality in QuickBooks and will learn how to use QuickBooks to effectively track and manage their company's financial data and determine the health of the business. QuickBooks users will quickly learn the new features and functionality of QuickBooks 2015, 2016, 2018 or 2020.

Who Should Attend

First-time QuickBooks users will learn the basic features of the software. Experienced QuickBooks users will quickly learn the new features and functionality of QuickBooks 2015, 2016, 2018 or 2020.

Course Objectives

Upon completion of this course, students will be able to identify the types of information often tracked in business, understand common business terms, enter information into forms and lists, work with the Chart of Accounts, work with inventory and service items, and work with invoices, payments, bills, and bank accounts.

Agenda

1 - GETTING STARTED

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

2 - SETTING UP A COMPANY



Upcoming Class Dates and Times

[Click Here to View Course Online and Enroll](#)

May 16, 17

\$790.00

8:00 AM - 4:00 PM

Guaranteed to Run

Virtual: Online - CST

- Creating a QuickBooks Company
- Using the Chart of Accounts

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

4 - SETTING UP INVENTORY

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

5 - SELLING YOUR PRODUCT

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

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

7 - PROCESSING PAYMENTS

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

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

9 - ENTERING AND PAYING BILLS

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

10 - USING THE EASYSTEP INTERVIEW

- Using the EasyStep Interview