

Course Overview

In this 1-day course, you will learn the more advanced features of QuickBooks. You will learn how to customize forms using templates, how to use QuickBooks accounts, track credit card transactions, work with asset accounts, work with liability accounts and understand equity accounts. You will also learn how to create reports using QuickReports as well as preset reports and how to export reports to Excel. You will learn how to create graphs using QuickInsight and how to customize and print graphs. You will also learn how to do payroll, including payroll tracking, setting up payroll, writing payroll checks, tracking tax liabilities and paying payroll taxes. You will learn how to keep track of jobs including estimating, time tracking, and job costing. Finally, you will learn how to use the letters and envelope wizard and how to synchronize with contact management software.

Courses in the QuickBooks Series

QuickBooks Level 1
- 1 day -

QuickBooks Level 2
- 1 day -

Course Preparation

Prerequisite: QuickBooks Level 1 or equivalent experience.

Course Topics

Customizing Forms

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

Using Other QuickBooks Accounts

- Other QuickBooks Account Types
- Tracking Credit Card Transactions
- Working with Asset Accounts
- Working with Liability Accounts
- Understanding Equity Accounts

Creating Reports

- Creating QuickReports
- Modifying QuickReports
- Memorizing QuickReports
- Running Preset Reports
- Modifying Preset Reports
- Exporting Reports to Microsoft Excel
- Printing Reports

Creating Graphs

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

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

Doing Payroll with QuickBooks

- Using Payroll Tracking
- Setting Up for Payroll
- Setting Up Employee Payroll Information
- Writing a Payroll Check
- Tracking Tax Liabilities
- Paying Payroll Taxes

Estimating, Time Tracking, and Job Costing

- Creating Job Estimates
- Creating an Invoice from an Estimate
- Displaying Project Reports for Estimates
- Updating the Job Status
- Tracking Time
- Displaying Project Reports for Time Tracking
- Displaying Other Project Reports

Writing Letters

- Using the Letters and Envelope Wizard
- Customizing Letter Templates

Synchronizing with Contact Management Software

- Categorizing Contact Names in Microsoft Outlook
- Synchronizing with Microsoft Outlook
- Changing Synchronization Settings

Rev 7/10/10