

QuickBooks 2013 for Windows

Length: 1 Day

Summary: The student will be introduced to QuickBooks primary features as well as the new features and functionality of this version.

At course completions, students will be able to:

- Set up a company
- Work with lists
- Set up inventory
- Sell your product
- Invoice for services
- Process payments
- Work with bank accounts
- Enter and pay bills
- Use the EasyStep Interview

COURSE CONTENT

GETTING STARTED

- Starting QuickBooks
- Setting QuickBooks Preferences
- Identifying Components of the QuickBooks Operating Environment
- Using QuickBooks Help
- Identifying Common Business Terms
- Setting Up QuickBooks in Multi-User Mode
- Updating QuickBooks
- Backing Up and Restoring a Company File
- Exiting QuickBooks
- Review

SETTING UP A COMPANY

- Creating a QuickBooks Company
- Using the Chart of Accounts
- Setting Up a Password
- Setting a Closing Date
- Review

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 Items List
- Working with Other Lists
- Managing Lists
- Review

SETTING UP INVENTORY

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

SELLING YOUR PRODUCT

- Creating Product Invoices
- Applying Credit to Invoices
- E-mailing Invoices
- Setting Price Levels
- Making Cash Sales
- Review

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

PROCESSING PAYMENTS

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

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

ENTERING AND PAYING BILLS

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

USING THE EASYSTEP INTERVIEW

- Using the EasyStep Interview
- Review