



Get Going With QuickBooks 2021 for Windows

Course ID #: 7000-664-ZZ-Z

Hours: 7

Course Content

Course Description:

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 2021.

Prerequisites:

You can successfully complete this course without any prior software knowledge or computer experience. A basic understanding of the computer operating system you are using is recommended.

Topics:

Getting Started

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

Setting Up a Company

- Creating a QuickBooks Company
- Using the Chart of Accounts

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

Setting Up Inventory

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

Selling Your Product

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

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
- Automated Send Statements



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Processing Payments

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

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

Entering and Paying Bills

- Using QuickBooks for Accounts Payable
- Using the Bill Tracker
- Entering Bills
- Paying Bills
- Entering Vendor Credit
- Handling Expenses
- Managing Receipts

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

Customizing Forms

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

Using the EasyStep Interview

- Using the EasyStep Interview

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

Creating Reports

- Working with QuickReports
- Working with Preset Reports
- Sharing 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

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