



Keep Going With QuickBooks 2021 for Windows

Course ID #: 7000-665-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:

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 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



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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

Using the EasyStep Interview

- Using the EasyStep Interview

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

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

Estimating, Time Tracking, and Job Costing

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

Writing Letters

- Using the Letters and Envelopes Wizard
- Customizing Letter Templates