

Hands on Workshop

Hands-on QuickBooks Training- Saturdays

Bring your own laptop with QuickBooks installed If you do not have one, let us know 5 days before the class. We will provide one for you and you may have to share with another student

Register for Both Beg-Interm & Advance and save

Both: \$575.00

9am-5pm Beginner & Intermediate \$297.00 [Click here to Register](#)

Introducing QuickBooks

Getting around in QuickBooks

- All the accounting you need to know
- Exiting QuickBooks
- Moving between company files

Setting up QuickBooks

- Creating a QuickBooks company
- Entering company info
- Customizing QuickBooks for your business
- Setting up your business accounting
- Completing company file setup
- Getting help while using QuickBooks

Working with lists

- Using QuickBooks lists
- Editing the chart of accounts
- Working with the Customers & Jobs list
- Working with the Employee Center
- Working with the Vendor Center

- Adding custom fields

- Managing lists

Working with bank accounts

- Writing a QuickBooks check

- Using bank account registers

- Entering a handwritten check

- Transferring money between accounts

- Reconciling checking accounts

Using other accounts in QuickBooks

- Other account types in QuickBooks

- Tracking credit card transactions

- Working with asset accounts

- Working with liability accounts

- Understanding equity accounts

Entering sales information

- Using sales forms in QuickBooks

- Filling in a sales form

- Memorizing a sale

- Entering a new service item

- Using multiple price levels

- Reminding customers of overdue payments

- Processing sales orders

- Tracking backorders

Receiving payments and making deposits

- Recording customer payments

- Making deposits

Entering and paying bills

- Handling bills in QuickBooks

- Using QuickBooks for accounts payable

- Entering and Paying bills

9am-5pm Advance Class - \$297.00

Analyzing financial data

- Reports and graphs help you understand your business

- Creating QuickReports

- Creating and customizing preset reports

- Saving report settings

- Printing reports
- Exporting reports to Microsoft
- Creating QuickInsight graphs

Setting up inventory

- Turning on the inventory feature
- Entering products into inventory
- Ordering products
- Receiving inventory
- Entering a bill for inventory
- Manually adjusting inventory
- Tracking finished goods
- Tracking and paying sales tax

Overview of sales tax in QuickBooks

- Setting up your tax rates and agencies
- Applying tax to each sale
- Determining what you owe
- Paying your tax agencies

Doing payroll with QuickBooks

- Overview of payroll tracking
- Setting up for payroll
- Setting up employee payroll information
- Writing a paycheck
- Tracking your tax liabilities

- Paying payroll taxes

Creating jobs and estimates

- Estimating and progress invoicing
- Writing an estimate
- Creating multiple estimates
- Creating an invoice from an estimate
- Displaying reports for estimates
- Updating job status
- Tracking time and mileage
- Invoicing a customer for time and mileage
- Displaying project reports for time tracking
- Paying nonemployees for time worked
- Customizing forms and writing

- QuickBooks Letters

- About QuickBooks forms

- Customizing invoices

- Designing custom layouts for forms

Certificate of Completion All Attendees of our classes will receive a Certificate of Completion for the classes attended. Disclaimer: This certificate is not for CPE credits.