

Get Going With QuickBooks® 2013 for Windows

Course Specifications

Course number: TLR0811

Course length: 1 day

Course Description

This training guide is dedicated to providing you with a flexible, high-performance learning system. This dedication has resulted in a unique and progressive training method. Unlike other training methods that focus on theory or high-tech training products that overwhelm you, this training method provides a simple approach to learning computer software. Each guide is written to assume the user has no prior computer skills. If you are using the software for the first time, you will be introduced to its primary features. If you are familiar with the software, you will quickly learn the new features and functionality of this version. Regardless of your skill level, you will learn with the greatest of ease.

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

Performance-Based Objectives

- 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

Lesson 1: Getting Started

- Topic 1A: Starting QuickBooks
- Topic 1B: Setting QuickBooks Preferences
- Topic 1C: Identifying Components of the QuickBooks Operating Environment
- Topic 1D: Using QuickBooks Help
- Topic 1G: Identifying Common Business Terms
- Topic 1H: Setting Up QuickBooks in Multi-User Mode
- Topic 1I: Updating QuickBooks
- Topic 1J: Backing Up and Restoring a Company File
- Topic 1K: Exiting QuickBooks
- Topic 1L: Review

Lesson 2: Setting Up a Company

- Topic 2A: Creating a QuickBooks Company
- Topic 2B: Using the Chart of Accounts
- Topic 2C: Setting Up a Password
- Topic 2D: Setting a Closing Date
- Topic 2E: Review

Lesson 3: Working with Lists

- Topic 3A: Creating Company Lists
- Topic 3B: Working with the Customers & Jobs List
- Topic 3C: Working with the Employees List
- Topic 3D: Working with the Vendors List
- Topic 3E: Working with the Items List
- Topic 3F: Working with Other Lists
- Topic 3G: Managing Lists



Lesson 4: Setting Up Inventory

Topic 4A: Entering Products into Inventory

Topic 4B: Ordering Products

Topic 4C: Receiving Inventory

Topic 4D: Paying for Inventory

Topic 4E: Manually Adjusting Inventory

Topic 4F: Review

Lesson 5: Selling Your Product

Topic 5A: Creating Product Invoices

Topic 5B: Applying Credit to Invoices

Topic 5C: E-mailing Invoices

Topic 5D: Setting Price Levels

Topic 5E: Making Cash Sales

Topic 5F: Review

Lesson 6: Invoicing for Services

Topic 6A: Setting Up a Service Item

Topic 6B: Changing the Invoice Format

Topic 6C: Creating a Service Invoice

Topic 6D: Editing an Invoice

Topic 6E: Voiding an Invoice

Topic 6F: Deleting an Invoice

Topic 6G: Entering Statement Charges

Topic 6H: Creating Billing Statements

Topic 6I: Review

Lesson 7: Processing Payments

Topic 7A: Displaying the Open Invoices Report

Topic 7B: Using the Collections Center



Topic 7C: Receiving Payments for Invoices

Topic 7D: Making Deposits

Topic 7E: Handling Bounced Checks

Topic 7F: Review

Lesson 8: Working with Bank Accounts

Topic 8A: Writing a QuickBooks Check

Topic 8B: Voiding a QuickBooks Check

Topic 8C: Using Bank Account Registers

Topic 8D: Entering a Handwritten Check

Topic 8E: Transferring Funds Between Accounts

Topic 8F: Reconciling Checking Accounts

Topic 8G: Review

Lesson 9: Entering and Paying Bills

Topic 9A: Handling Expenses

Topic 9B: Using QuickBooks for Accounts Payable

Topic 9C: Entering Bills

Topic 9D: Paying Bills

Topic 9E: Entering Vendor Credit

Topic 9F: Review

Appendix A: Using the EasyStep Interview

Using the EasyStep Interview Review

