

Keep Going With QuickBooks® 2013 for Windows

Course Specifications

Course number: TLR0810
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.

Performance-Based Objectives

After completing this training guide, you should be able to:

- Memorize transactions
- Customize forms
- Use other QuickBooks accounts
- Create reports
- Create graphs
- Track and pay sales tax
- Prepare payroll with QuickBooks
- Use online banking
- Share files with an accountant
- Estimate, time track, and job cost
- Write letters



Course Content

Lesson 1: Memorizing Transactions

- Topic 1A: Entering a New Memorized Transaction
- Topic 1B: Editing a Memorized Transaction
- Topic 1C: Deleting a Memorized Transaction
- Topic 1D: Grouping a Memorized Transaction
- Topic 1E: Using a Memorized Transaction
- Topic 1F: Printing the Memorized Transaction List
- Topic 1G: Review

Lesson 2: Customizing Forms

- Topic 2A: Creating a Custom Template
- Topic 2B: Modifying a Template
- Topic 2C: Printing Forms
- Topic 2D: Review

Lesson 3: Using Other QuickBooks Accounts

- Topic 3A: Other QuickBooks Account Types
- Topic 3B: Working with Credit Card Transactions
- Topic 3C: Working with Fixed Assets
- Topic 3D: Working with Long-Term Liability Accounts
- Topic 3E: Using the Loan Manager
- Topic 3F: Review

Lesson 4: Creating Reports

- Topic 4A: Creating QuickReports
- Topic 4B: Customizing QuickReports
- Topic 4C: Memorizing QuickReports
- Topic 4D: Running Preset Reports



Topic 4E: Customizing Preset Reports

Topic 4F: Sharing Reports

Topic 4G: Exporting Reports to Microsoft Excel

Topic 4H: Printing Reports

Topic 4I: Review

Lesson 5: Creating Graphs

Topic 5A: Creating QuickInsight Graphs

Topic 5B: Using QuickZoom with Graphs

Topic 5C: Working with the Sales Graph

Topic 5D: Customizing Graphs

Topic 5E: Printing Graphs

Topic 5F: Review

Lesson 6: Tracking and Paying Sales Tax

Topic 6A: Using Sales Tax in QuickBooks

Topic 6B: Setting Up Tax Rates and Agencies

Topic 6C: Indicating Who and What Gets Taxed

Topic 6D: Applying Tax to Each Sale

Topic 6E: Determining What You Owe

Topic 6F: Paying Your Tax Agencies

Topic 6G: Review

Lesson 7: Preparing Payroll with QuickBooks

Topic 7A: Using Payroll Tracking

Topic 7B: Setting Up for Payroll

Topic 7C: Setting Up Employee Payroll Information

Topic 7D: Setting Up a Payroll Schedule

Topic 7E: Writing a Payroll Check

Topic 7F: Printing Paycheck Stubs



Topic 7G: Tracking Your Tax Liabilities

Topic 7H: Paying Payroll Taxes

Topic 7I: Preparing Payroll Tax Forms

Topic 7J: Review

Appendix A: Using Online Banking

Setting Up an Internet Connection

Activating Online Services

Viewing, Downloading, and Matching Online Transactions

Creating Online Payments

Transferring Funds Online

Canceling Online Payments

Review

Appendix B: Sharing Files with an Accountant

Saving an Accountant's Copy

Importing an Accountant's Changes

Removing Accountant's Copy Restrictions

Using the Accountant's Copy File Transfer Service

Review

Appendix C: 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

Review

Appendix D: Writing Letters

Using the Letters and Envelopes Wizard

Customizing Letter Templates Review

