



LIVE SEMINAR

## How to Use QuickBooks®



### THIS SEMINAR AT A GLANCE:

- Generate professional invoices, purchase orders, receipts and more
- Produce detailed financial reports to track your company's progress
- Keep close tabs on all your accounts payables and receivables
- Simplify your yearly tax preparation
- Master shortcuts for navigating through
- QuickBooks menus, features and functions
- Save money by keeping track of every dollar that comes in and goes out of your business

# How to Use QuickBooks®

S E M I N A R S U M M A R Y



## Discover the most effective and efficient ways to improve data accuracy and reduce financial frustrations

QuickBooks is one of today's business accounting lifesavers. This simple-to-use software can help you manage your inventory, track the costs of your business, generate professional invoices and purchase orders. It can also assist with staying on top of accounts payables and receivables and ensuring that your yearly tax preparation is accurate, timely and frustration-free.

### Master QuickBooks in just one day of focused, information-packed training

In this seminar, you'll become familiar with QuickBooks' many features, tools, and menus; explore the easiest, most efficient ways to put this software to work for you; and drill down into more advanced functions. You'll be surprised at how swiftly you'll gain the knowledge and confidence you need to take full advantage of this powerful program.

### Who should attend?

- Sole Proprietors
- Part-time business owners
- Operators of smaller service businesses
- Freelancers and contract workers
- Those new to QuickBooks or looking to utilize its capabilities more fully

## PROGRAM AGENDA

### QuickBooks basics to get you up and running with confidence

- Choose the method for accessing QuickBooks features that best suits how you use your computer
- Use the Easy-Step Interview to get your company financials started
- Learn to customize the built-in lists to suit your company's specific needs
- Understand QuickBooks workflows to ensure related transactions are entered correctly
- Use QuickBooks' Coach Mode to work and learn at the same time

### Your Chart of Accounts: Spend time setting it up now, and you'll save time in the future!

- Learn how to set up your chart of accounts so your reports are accurate
- Discover how QuickBooks sorts accounts
- Identify when to use subaccounts to get an even more accurate picture of where your money goes
- Learn to merge accounts when you have several that need to be integrated

### QuickBooks Tracking: built-in features to easily run highly detailed reports

- Learn to accurately track and bill for the cost of mileage
- Find out how QuickBooks can help you track your time and make billing easier
- Use classes to track trends and performance within your business
- Track invoices by customer only or by customer and job
- Utilize the Items tracking feature to keep track of everything you buy and sell
- Set up your 1099 contractors and prepare 1099 forms with QuickBooks

### Payables and Receivables: keeping track of your income and expenditures

- Create professional-looking invoices in a snap
- Print invoices via the Invoice Printer
- Send invoices through e-mail
- Void, delete and correct errors on invoices
- Record payments and generate receipts
- Identify the differences between manual and online recording
- Pay and record bills; write, print and mail checks

### Save hours of time with QuickBooks' many customizable report options

- Navigate through QuickBooks' various report categories
- Customize reports so that they provide the information you want, presented the way you want it
- Gain access to additional reports online
- Print reports as documents
- Create reports as PDF files and e-mail them to other users
- Use QuickBooks reports to display a snapshot of the financial health of your company



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