

QuickBooks® 2009, Level 2

This course will provide you with skills that will help you manage some of the advanced tasks available in QuickBooks® Pro 2007. In this course, you will familiarize yourself with customizing forms, modifying reports, tracking payroll information and paying sales tax.

PREREQUISITES: QuickBooks® 2009, Level 1 or instructor permission.

DELIVERY METHOD: Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

OBJECTIVES:

- Customize forms
- Use the other QuickBooks accounts
- Create reports
- Create graphs
- Track and pay sales tax
- Do payroll with QuickBooks
- Estimate, time track, and job cost
- Write letters
- Synchronize with contact management software

COURSE CONTENT

Lesson 1: Customizing Forms

Creating a Custom Template
Modifying a Template
Printing Forms

Lesson 2: Using QuickBooks Accounts

Other QuickBooks Account Types
Tracking Credit Card Transactions
Working with Asset Accounts
Working with Liability Accounts
Understanding Equity Accounts

Lesson 3: Creating Reports

Creating QuickReports
Modifying QuickReports
Memorizing QuickReports
Running Preset Reports
Modifying Preset Reports
Exporting Reports to Microsoft Excel
Printing Reports

Lesson 4: Creating Graphs

- Creating QuickInsight Graphs
- Using QuickZoom with Graphs
- Working with Sales Graphs
- Customizing Graphs
- Printing Graphs

Lesson 5: 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

Lesson 6: Doing Payroll with QuickBooks

- Using Payroll Tracking
- Setting Up for Payroll
- Setting Up Employee Payroll Information
- Writing a Payroll Check
- Printing Paycheck Stubs
- Tracking Your Tax Liabilities
- Paying Payroll Taxes
- Printing Forms 940 and 941

Lesson 7: Estimating, Time Tracking, and Job Costing

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

Lesson 8: Writing Letters

- Writing a QuickBooks Check
- Using Bank Account Registers

Lesson 9: Synchronizing with Contact Management Software

- Categorizing Contact Names in Microsoft Outlook
- Synchronizing with Microsoft Outlook
- Changing Synchronization Settings