
Accounting & Finance: QuickBooks Pro

Professional Development Center

QuickBooks Course Includes::

- SBDC eAdviser
- Interactive video learning modules
- Certificate of Achievement upon the successful completion of each course
- Transcript of CE hours of courses completed

QuickBooks Pro 2017 Certificate | \$99 | CE Hours 3.5

Learn QuickBooks Pro 2017 Online

Course Video Modules

1. Getting Started with QuickBooks | 54 minutes
2. Interface and Company Settings | 43 minutes
3. Employees, Banking, and Reports | 47 minutes
4. Vendors, Bills, Customers, and Income | 48 minutes

Course Module Description

Module 1: Getting Started with QuickBooks Pro 2017

Overview

The QuickBooks Pro 2017 interface unlocks the door to a powerful accounting system for businesses of all sizes. At face value it's deceptively simple, but it holds the ability to manage all day-to-day financial transactions from invoicing to banking. In this course, you'll be introduced to the QuickBooks Pro 2017 interface, and you'll learn how to get started with QuickBooks by setting up a new company and working with basic transactions. You'll also discover how to protect your data and recover from unexpected issues, as well as how to setup QuickBooks so it can be accessed by multiple users.

Learning Objectives

Getting Started with QuickBooks

- setting up your business
 - difference between QuickBooks Online and QuickBooks Desktop
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- describe QuickBooks Pro 2017 and basic accounting concepts
- perform a QuickBooks Pro 2017 and QuickBooks Server Manager installation
- describe how to keep QuickBooks up-to-date
- perform QuickBooks configuration using application preferences

Multiple QuickBooks Users

- configure and work with the QuickBooks Server Manager
- describe how to use QuickBooks company files located on a network computer

Working with QuickBooks Files

- describe how to set up a new company and choose initial settings
- enter customers, sales items, and bank accounts in QuickBooks after the creation of a new company file
- describe how to backup and restore company files in QuickBooks
- perform a scan and recovery of a QuickBooks company file using the File Doctor tool

A Quick Tour of QuickBooks

- describe the QuickBooks interface and its various aspects
- describe the QuickBooks Home page

Module 2: QuickBooks Pro 2017: Interface and Company Settings

Overview

The QuickBooks Pro 2017 interface allows you to effect precise detail on your company information, account settings, items and services, and sales tax and assets. In this course, you'll explore in greater depth the QuickBooks Pro 2017 interface, and you'll learn how to get started with QuickBooks by using the company pane, tweaking your company settings, tracking accounts, items, and services, and setting up sales taxes and fixed assets.

Learning Objectives

The QuickBooks Interface

- demonstrate how to work with the QuickBooks Shortcuts panel
- demonstrate use of the menu system and describe how it complements the main interface
- describe how to turn on payroll, order checks and supplies, add more users, and accept credit cards
- describe the QuickBooks Community and how it can be used to search for information and enhance the user experience

The Company Pane

- describe the QuickBooks Chart of Accounts and how it relates to your business accounting
- demonstrate how to modify accounts in the QuickBooks Chart of Accounts
- describe how products and services can be added as separate income accounts
- demonstrate how to add and remove items and services in QuickBooks

- describe the QuickBooks calendar and how it can assist you in tracking important financial information

Setting Up Your Company

- describe how to set up sales tax items
- describe how to set up your company to receive inventory
- describe how to use the document center and attach documents to transactions and items

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Module 3: QuickBooks Pro 2017: Employees, Banking, and Reports

Overview

QuickBooks Pro 2017 is far more than accounts receivable and accounts payable. In fact, QuickBooks offers sophisticated tools for managing business accounting regardless of scope. In this course, you'll discover how to work with employees and payroll, banking (including online banking), and reporting.

Learning Objectives

Working with Employees

- demonstrate the various features of the Employee Center
- demonstrate how to manage employee information
- describe how to enter employee timesheets
- describe how to enter vehicles and mileage

Banking

- describe how to add bank accounts
- describe how to write cheques
- describe how to access and use the QuickBooks Register to review and enter transactions
- describe how to manage credit card information
- describe how to reconcile QuickBooks transactions with your bank account

Working with Reports

- describe how to access and use the Report Center
- describe how to use preset reports
- describe how to generate your own custom reports

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Module 4: QuickBooks Pro 2017: Vendors, Bills, Customers, and Income

Overview

Once you've mastered the QuickBooks Pro 2017 interface and set up your company file, you can begin to enter information and record transactions. In this course, you'll discover how to enter new vendors and customers, enter bills and invoices, and track and reconcile transactions.

Learning Objectives

Working with Vendors

- describe how to create vendor profiles
- demonstrate how to enter purchase orders and receive inventory items

Entering and Paying Bills

- demonstrate how to enter bills
- demonstrate how to pay bills
- demonstrate how to file sales tax

Working with Customers

- describe how to create customer profiles
- demonstrate how to create customer jobs and assign them to customers
- describe how to create estimates

Invoicing and Payments

- demonstrate how to create invoices
- demonstrate how to create sales receipts
- demonstrate how to create refunds and credits
- demonstrate how to receive payments and record deposits

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