Description

Course Specifications

Item Number: GSS2022
ISBN #: 978-1-942020-24-0
Hours of instruction based on user's skill-set: 16-24

This course covers features that are in QuickBooks Pro and Premier 2022. QuickBooks software is sold separately.

System Requirements

You must have QuickBooks Desktop 2022 software and a Windows Server 2012 (or R2), 2016, or 2019. Windows 8.1 Update 1, or Windows 10 update/version operating system. Refer to the QuickBooks software installation instructions for specific hardware requirements.

Course Description

- **Prerequisites:** You can successfully complete this course without any prior software knowledge or computer experience. A basic understanding of the computer operating system you are using is recommended.
- **Delivery Method:** Instructor-led, self-paced, classroom-delivery learning model with structured hands-on activities.
- **Benefits:** First-time QuickBooks users will learn the basic features of the software. Experienced QuickBooks users will quickly learn the new features and functionality of QuickBooks 2022.

What's New and Improved In This Guide?

- Enhanced computing power (64-bit compliant)
- Ability to upload vendor invoices with any mobile device & automatically create bills
- Pay bills online with Melio
- Automated Payment Reminders
- New & Improved Payroll Setup wizard
- Subscription-based pricing

Course Objectives

Getting Started
Starting QuickBooks
Setting QuickBooks Preferences
Components of the QuickBooks Operating Environment
Using QuickBooks Help
Identifying Common Business Terms
Exiting QuickBooks

Setting Up a Company
Creating a QuickBooks Company
Using the Chart of Accounts

Working with Lists
Creating Company Lists

Working with the Customers & Jobs List
Working with the Employees List
Working with the Vendors List
Working with the Item List
Working with Other Lists
Managing Lists

Setting Up Inventory
Entering Inventory
Ordering Inventory
Receiving Inventory
Paying for Inventory
Manually Adjusting Inventory

Selling Your Product
Creating Product Invoices
Applying Credit to Invoices
Emailing Invoices
Setting Price Levels
Creating Sales Receipts

Invoicing for Services
Setting Up a Service Item
Changing the Invoice Format
Creating a Service Invoice
Editing an Invoice
Voiding an Invoice
Deleting an Invoice
Entering Statement Charges
Creating Billing Statements
Automated Send Statements

Processing Payments
Displaying the Open Invoices Report
Using the Income Tracker
Receiving Payments for Invoices
Making Deposits
Handling Bounced Checks

Working with Bank Accounts
Writing a QuickBooks Check
Voiding a QuickBooks Check
Using Bank Account Registers
Entering a Handwritten Check
Transferring Funds Between Accounts
Reconciling Checking Accounts

Entering and Paying Bills
Using QuickBooks for Accounts Payable
Using the Bill Tracker
Entering Bills
Paying Bills
Entering Vendor Credit

Handling Expenses
Managing Receipts

Memorizing Transactions
Entering a New Memorized Transaction
Editing a Memorized Transaction
Deleting a Memorized Transaction
Grouping Memorized Transactions
Using a Memorized Transaction
Printing the Memorized Transaction List

Customizing Forms
Creating a Custom Template
Modifying a Template
Printing Forms

Using Other QuickBooks Accounts
Other QuickBooks Account Types
Working with Credit Card Transactions
Working with Fixed Assets
Working with Long-Term Liability Accounts
Using the Loan Manager

Creating Reports
Working with QuickReports
Working with Preset Reports
Sharing Reports
Exporting Reports to Microsoft Excel
Printing Reports

Creating Graphs
Creating QuickInsight Graphs
Using QuickZoom with Graphs
Working with the Sales Graph
Customizing Graphs
Printing Graphs

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

Preparing Payroll with QuickBooks
Using Payroll Tracking
Setting Up for Payroll
Setting Up Employee Payroll Information
Setting Up a Payroll Schedule
Writing a Payroll Check
Printing Paycheck Stubs
Tracking Your Tax Liabilities

Paying Payroll Taxes
Preparing Payroll Tax Forms

Using the EasyStep Interview
Using the EasyStep Interview

Using Online Banking
Setting Up an Internet Connection
Setting Up Bank Feeds for Accounts
Viewing, Downloading, and Adding Online Transactions
Creating Online Payments
Transferring Funds Online
Canceling Online Payments

Managing Company Files
Using QuickBooks in Multi-user Mode
Setting Up Users and Passwords
Setting a Closing Date
Sharing Files with an Accountant
Updating QuickBooks
Backing Up and Restoring a Company File
Condensing a Company File

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

Writing Letters
Using the Letters and Envelopes Wizard
Customizing Letter Templates