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QuickBooks Pro 2014 Quick Reference Training Card - Laminated Guide Cheat Sheet (Instructions And Tips)

QuickBooks® Pro 2014
Quick Reference Guide
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The Chart of Accounts

Adding a New Account

1. Select "Chart of Accounts" from the Menus Bar
2. Click the "New" button & choose "New" [New]
3. Choose an account type and click "Continue"
4. Enter the account information and click "Next B. Continue"

Editing an Account

1. Select "Chart of Accounts" from the Menus Bar
2. Click to highlight the account
3. Click the "Edit" button & choose "Edit Account" [Edit]
4. Edit the information and click "Save & Close"

Deleting or Inactivating an Account

1. Select "Chart of Accounts" from the Menus Bar
2. Click to highlight the account
3. Click the "Edit" button & choose "Delete Account" [Delete]
4. Click "OK" to confirm any deleted accounts

Customers, Employees & Vendors

Accessing the Centers

1. Click "Customers," "Employees" or "Vendors" from the Menus Bar and then the Center from the menu

Adding a New Customer

1. Click the "Customers & Jobs" tab in the Customer Center
2. Click "New" [New] from the "New Customer" window
3. Enter customer information on both "New Customer" and "New Customer" windows and click "OK."

Editing or Deleting a Customer

1. Click to highlight the customer in the "Customer & Jobs" list in the Customer Center
2. Select "Edit" [Edit] Customer [Edit] or "Edit" [Edit] Customer [Edit]
3. If editing, make any changes and then click "OK."

Adding a New Employee

1. Click the "New Employees" button in the upper-left corner of the Employee Center [New]
2. Enter all employee information on both of the tabs in the "New Employee" window and click "OK."

Editing or Deleting an Employee

1. Click to highlight the employee in the "Employee" [Edit] [Edit] Employee [Edit] or "Edit" [Edit] Employee from the Menus Bar
2. If editing, make any changes and then click "OK."

Adding a New Vendor

1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center [New]
2. Enter all vendor information on both of the tabs in the "New Vendor" window and click "OK."

Editing or Deleting a Vendor

1. Click to highlight the vendor in the "Vendor" tab in the Vendor Center
2. Select "Edit" [Edit] Vendor [Edit] or "Edit" [Edit] Vendor from the Menus Bar
3. If editing, make any changes and then click "OK."

Creating Custom Fields

1. Click the "Customer Center" or "Employee Center"
2. Click the "Define Fields" button on the "Additional Info" tab of the "New [List Item]" or "Edit [List Item]" window (List Item = Vendor, Company or Employee)
3. Enter custom field names and select lists to include
4. Click "OK."
5. Enter any "Custom Fields" values and click "OK."

Managing List Items

Creating Item List Custom Fields

1. Select "List Item" from the Menus Bar
2. Click the "New" button and then either "New" [New] or "Edit" [Edit]
3. Click the "Custom Fields" button and then the "Define Fields" button [Define Fields]
4. Enter the "Custom Fields" name and click "OK."
5. If order values, select "List Item List" from the Menus Bar and click to select the item to edit
6. Click the "Item" button and then "Edit Item"
7. Click the "Custom Fields" button, enter the values and click "OK."

Sorting Lists

1. Select "List Item List" from the Menus Bar
2. Click to highlight the item
3. To automatically sort, click the column heading
4. To remove auto sort by clicking the new standard that appears at the far left of the column heading
5. To change the sort order, click the "Sort" button [Sort] and then click "Save List" from the Menus Bar

Inactivating and Reactivating Items

1. To inactivate, right-click on an item and choose "Make the item type inactive"
2. To reactivate inactive items, right-click on a Center list, click the "Inactivate" [Inactivate] check box
3. To change inactive items in a Center list, select "Edit" for the type in the "View" menu
4. To reactivate, click the "Inactive" items on the list and click "OK" to remove the "X" next to the item name

Renaming and Merging List Items

1. To rename, open the "Edit" window of the list item
2. Type a new name or the same name at the very top
3. Click the "Edit" [Edit] "Save & Close" button
4. To merge, change the name to the same as another item and choose "OK" when prompted to merge

Sales Tax

Creating a Sales Tax Item or Group

1. Select "List Item List" from the Menus Bar
2. Select "New" from the "New" button [New]
3. Select "Sales Tax Item" or "Sales Tax Group" from the drop-down
4. Enter the item or group information and click "OK."

Setting Default Sales Tax Preferences

1. Select "Sales Tax Preferences..." from the Menus Bar
2. Click "Sales Tax" on the left and then the "Company Preferences" tab on the right
3. Select preferences and click "OK."

Indicating a Taxable Customer

1. Click the "Customer & Jobs" tab at the left side
2. Double click on the name of the customer in the list
3. On the "Sales Tax Settings" tab, make selections and click "OK."

Indicating a Taxable Item

1. Select "List Item List" from the Menus Bar
2. Click to highlight the item
3. Select "Edit" from the "Edit" button menu [Edit]
4. Make the appropriate selection from the "Tax Code" drop-down and click "OK."

Creating a Sales Tax Report

1. Select "Vendor Sales Tax Sales Tax Liability" or "Vendor Sales Tax Sales Tax Revenue Summary" from the Menus Bar
2. Click the "X" in the upper-right corner to close

Paying Sales Tax

1. Select "Paying Sales Tax" from the Menus Bar
2. Make selections for the account and date
3. Click to select the "Pay" option for agencies to pay
4. Click the "Pay Now" button to make any needed tax adjustments and click "OK."
5. Check the "To be paid in the month" field
6. Click "OK" to record the payment

Inventory

Enabling Inventory in QuickBooks

1. Select "Edit Preferences..." from the Menus Bar
2. Select "Items & Inventory" on the left
3. Check the "Inventory and purchase orders are enabled" check box and click "OK."
4. Set any preferences and click "OK."

Creating New Inventory Part Items

1. Select "List Item List" from the Menus Bar
2. Select "New" from the "New" button [New]
3. Select "Inventory Part" from the "Type" drop-down
4. Enter inventory part information and click "OK."

Creating a Purchase Order

1. Select "Vendor Create Purchase Order" from the Menus Bar
2. Select the vendor from the "Vendor" drop-down
3. Enter purchase order information and click either the "Save & Close" or "Save & New" button

Creating Purchase Order Reports

1. Select "List Item List" from the Menus Bar
2. Click to highlight the "Purchase Order" account
3. Click "New" [New] and then "Print" [Print]
4. Quantify "Purchase Order" from the Menus Bar

Creating Inventory with a Bill

1. Select "Inventory/Bill for Received Items" from the Menus Bar
2. Select the vendor from the "Vendor" drop-down
3. Enter the receipt information and click the "Save & Close" button

Creating an Item Receipt

1. Select "Inventory/Bill for Received Items" from the Menus Bar
2. Select the vendor from the "Vendor" drop-down
3. Enter the receipt information and click the "Save & Close" button

Matching a Bill to an Item Receipt

1. Select "Vendor/Bill for Received Items" from the Menus Bar
2. Select the vendor from the "Vendor" drop-down
3. Select the item receipt and click the "OK" button
4. Enter the date the bill was received in the "Date" field and click the "Save & Close" button

Manually Adjusting Inventory

1. Select "Manually Adjust Inventory/Adjusted Adjust Quantity/Materials" from the Menus Bar
2. Select the type of inventory adjustment to make from the "Type" drop-down
3. Make the required adjustments to the inventory
4. Click the "Save & Close" button

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Synopsis

Designed with the busy professional in mind, this 4-page laminated quick reference guide provides step-by-step instructions in QuickBooks Pro 2014. When you need an answer fast, you will find it right at your fingertips. Durable and easy-to-use, quick reference cards are perfect for individuals, businesses and as supplemental training materials. Topics Include: The Chart of Accounts; Customers, Employees, and Vendors; Managing List Items; Sales Tax; Inventory; Other Items; Basic Sales; Price Levels; Billing Statements; Payment Processing; Entering and Paying Bills; Bank Accounts; Reporting; Estimating; Time Tracking; Payroll; Credit Card Accounts; The Loan Manager; Company Management.

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This is a great little reference guide for newbies like me! Seller was also great. The price was great, product was received within specified delivery time and packaging was perfect! I would definitely

buy from this seller again!

Great go to for a quick reference instead of having to flip thru a bulky manual.

This comes in very handy as a quick reference as I'm learning/working my way through this new program for me.

very handy and has a little of everything that you might want to do in qb, but you do need to know qb to use it

Very helpful.

It is a nice quick reference. I'm new at QB, so use it 3-4 times a week. Durable, easy read, organized.

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