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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 <ol style="list-style-type: none">1. Select 'Add Chart of Accounts' from the Menu Bar2. Click the 'Account' button & choose 'New' [Screenshot]3. Choose an account type and click 'Continue'4. Enter the account information and click 'Save & Close' Editing an Account <ol style="list-style-type: none">1. Select 'Add Chart of Accounts' from the Menu Bar2. Click to highlight the account3. Click the 'Account' button and choose 'Edit Account' [Screenshot]4. Edit the information and click 'Save & Close' Deleting or Inactivating an Account <ol style="list-style-type: none">1. Select 'Add Chart of Accounts' from the Menu Bar2. Click to highlight the account3. Click the 'Account' button and choose 'Make Account Inactive' or 'Delete Account' [Screenshot]4. Click 'OK' to confirm any deleted accounts	Managing List Items Creating Item List Custom Fields <ol style="list-style-type: none">1. Select 'Tools Item List' from the Menu Bar2. Click the 'Item' button and then either 'New' or 'Edit Item' [Screenshot]3. Click the 'Custom Fields' button and then the 'Define Fields' button [Screenshot]4. Enter item label names, labels, 'Yes' and 'No' [Screenshot]5. To enter values, select 'Tools Item List' from the Menu Bar and click to select the item to edit6. Click the 'Item' button and then 'Edit Item'7. Click the 'Custom Fields' button, enter the values, and click 'OK' Sorting Lists <ol style="list-style-type: none">1. To manually sort, click and [Screenshot] (arrow) and drag the diamond next to the item name2. To automatically sort, click the column heading3. Remove auto sort by clicking the same diamond that appears at the far left of the column heading [Screenshot]4. Restore original sort order by selecting 'View' > 'No Sort List' from the Menu Bar Inactivating and Reactivating Items <ol style="list-style-type: none">1. To inactivate, right-click on an item and choose 'Make [Item Name] Inactive'2. To show inactive items, click on a Center list, check the 'Include Inactive' checkbox3. To show inactive items in a Center list, select 'Set Item Type' in the 'View' menu [Screenshot]4. To reactivate, click the inactive item in the list and click to remove the 'I' next to the item name Renaming and Merging List Items <ol style="list-style-type: none">1. To rename, open the 'Edit' window of the list item2. Type a new name in the same field as the very top of the window3. Click the 'OK' or 'Save and Close' button4. To merge, change the name to the same as another item and choose 'Yes' when prompted to merge	Paying Sales Tax <ol style="list-style-type: none">1. Select 'Viewing Sales Tax Pay Sales Tax' from the Menu Bar2. Make selections for the account and date3. Click to specify the 'Pay' option for agencies to pay4. Click the 'Adjust' button to make any needed tax adjustments and click 'OK'5. Check the 'To be printed' checkbox, if needed6. Click 'OK' to record the payment Inventory Enabling Inventory in QuickBooks <ol style="list-style-type: none">1. Select 'Tools Preferences...' from the Menu Bar2. Select 'Items & Inventory' on the left3. Check the 'Inventory and purchase orders are active' checkboxes on the 'Company Preferences' tab4. Set any preferences and click 'OK' Creating New Inventory Part Items <ol style="list-style-type: none">1. Select 'Tools Item List' from the Menu Bar2. Select 'New' from the 'Item' button menu [Screenshot]3. Select 'Inventory Part' from the 'Type' drop-down4. Enter inventory part information and click 'OK' Creating a Purchase Order <ol style="list-style-type: none">1. Select 'Viewing Create Purchase Order' from the Menu Bar2. Select the vendor from the 'Vendor' drop-down3. Enter purchase order information and click either the 'Save & Close' or 'Save & New' button Creating Purchase Order Reports <ol style="list-style-type: none">1. Select 'Tools Chart of Accounts' from the Menu Bar2. Click to highlight the 'Purchase Orders' account3. Click the 'Reports' button, and select 'Tools' > 'QuickReport: Purchase Orders' from the 'Views' drop-down Receiving Inventory with a Bill <ol style="list-style-type: none">1. Select 'Viewing Receive Items and Enter Bill' from the Menu Bar2. Select the vendor from the 'Vendor' drop-down3. Enter bill information and click the 'Save & Close' button Creating an Item Receipt <ol style="list-style-type: none">1. Select 'Viewing Receive Items' from the Menu Bar2. Select the vendor from the 'Vendor' drop-down3. Enter receipt information and click the 'Save & Close' button Matching a Bill to an Item Receipt <ol style="list-style-type: none">1. Select 'Viewing Enter Bill for Received Items' from the Menu Bar2. Select the vendor from the 'Vendor' drop-down3. Select the item receipt and click the 'OK' button4. Enter the date the bill was received in the 'Date' field and click the 'Save & Close' button Manually Adjusting Inventory <ol style="list-style-type: none">1. Select 'Viewing Inventory Accounting Adjust Quantity/Value Adjustment' from the Menu Bar2. Select the type of inventory adjustment to make from the 'Adjustment Type' drop-down3. Make the required adjustments to the inventory4. Click the 'Save & Close' button
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TEACHCOMP, INC.
www.teachcomp.com
info@teachcomp.com
877.925.8386



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.

Book Information

Pamphlet: 4 pages

Publisher: TeachUcomp Inc. (February 3, 2014)

Language: English

ISBN-10: 1934131997

ISBN-13: 978-1934131992

Product Dimensions: 11.2 x 8.5 x 0.1 inches

Shipping Weight: 0.3 ounces (View shipping rates and policies)

Average Customer Review: 4.9 out of 5 stars [See all reviews](#) (13 customer reviews)

Best Sellers Rank: #128,142 in Books (See Top 100 in Books) #33 in [Books > Computers & Technology > Software > Quickbooks](#) #35281 in [Books > Reference](#)

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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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