

The book was found

QuickBooks Pro 2016 Quick Reference Training Card - Laminated Tutorial Guide Cheat Sheet (Instructions And Tips)

QuickBooks® Pro 2016

Quick Reference Guide
Comprehensive video training & instruction manuals available at www.teachucomp.com

TEACHUComp, INC.
...it's all about you

The Chart of Accounts

Adding a New Account

1. Select "List" Chart of Accounts from the Menu Bar
2. Click the "Account" button and choose "New" [Screen 1]
3. Choose an account type and click "Continue" [Screen 2]
4. Enter the account information and click "Save & Close"

Editing an Account

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

Deleting or Inactivating an Account

1. Select "List" Chart of Accounts from the Menu Bar
2. Click to highlight the account
3. Click the "Account" button and choose "Delete Account Inactive" or "Delete Account" [Screen 4]
4. Click "OK" to confirm any deleted accounts

Customers, Employees & Vendors

Accessing the Centers

1. Click "Customers," "Employees" or "Vendors" from the Menu Bar and select the Center from the menu

Adding a New Customer

1. Click the "Customers & Jobs" tab in the Customer Center
2. Choose "New Customer" from the "New Customer & Job" drop-down above the list [Screen 5]
3. Enter all customer information on each of the tabs in the "New Customer" window and click "OK"

Editing or Deleting a Customer

1. Click to highlight the customer in the "Customer & Job" tab in the Customer Center
2. Select "Edit" (Edit Customer/Job) or "Delete Customer/Job" from the Menu Bar
3. If editing, make any changes and then click "OK"

Adding a New Employee

1. Click the "New Employee" button in the upper left corner of the Employee Center [Screen 6]
2. Enter all employee information on each of the tabs in the "New Employee" window and click "OK"

Editing or Deleting an Employee

1. Click to highlight the employee in the "Employees" tab in the Employee Center
2. Select "Edit" (Edit Employee) or "Delete Employee" from the Menu Bar
3. 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 [Screen 7]
2. Enter all vendor information on each of the tabs in the "New Vendor" window and click "OK"

Editing or Deleting a Vendor

1. Click to highlight the vendor in the "Vendors" tab in the Vendor Center
2. Select "Edit" (Edit Vendor) or "Delete Vendor" from the Menu Bar
3. If editing, make any changes and then click "OK"

Creating Custom Fields

1. Open the Vendor, Company or Employee Center
2. Click the "Define Fields" button on the "Additional Info" tab of the "New [Item Type]" or "Edit [Item Type]" window. List Item-Vendor, Company or Employee
3. Enter custom field names and select tabs 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 List from the Menu Bar
2. Click the "Item" button and then either "New" or "Edit Item" [Screen 8]
3. Click the "Custom Fields" button and then the "Define Fields" button [Screen 9]
4. Enter item list names, select "List" and click "OK"
5. Enter any "Custom Fields" values and click "OK"
6. For existing custom fields, select "List" Item List from the Menu Bar and select the item. Click the "Item" button and then "Edit Item". Click the "Custom Fields" button, enter values, and click "OK"

Sorting Lists

1. To manually sort, click and [Screen 10] drag the diamond next to the item name.
2. To automatically sort, click the column heading.
3. Remove auto sort by clicking the new diamond that appears at the far left of the column heading [Screen 11]
4. Restore original sort order by selecting "View", "Re-Sort List" from the Menu Bar. Then click "OK"

Inactivating and Reactivating Items

1. To inactivate, right-click on an item and choose "Make [List Item Type] Inactive"
2. To show inactive items NOT in a Center list, check the "Include Inactive" checkbox
3. To show inactive items in a Center list, select "All [List Item Type]" in the "View" menu [Screen 12]
4. To reactivate, show the inactive items within the list and click 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 in the name field at the very top of the window
3. Click the "OK" or "Save and Close" buttons
4. To merge, change the name to the same as another item and choose "Yes" when prompted to merge

Sales Tax

Creating a Sales Tax Item or Group

1. Select "List" Item List from the Menu Bar
2. Select "New" from the "Item" button pop-up menu
3. Select "Sales Tax Item" or "Sales Tax Group" from the "Type" drop-down
4. Enter tax item or group information and click "OK"

Setting Default Sales Tax Preferences

1. Select "Edit Preferences..." from the Menu 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. Select "Customers" Customer Center from the Menu Bar
2. Click the "Customers & Jobs" tab at the left side
3. Double-click on the name of the customer in the list
4. On the "Sales Tax Settings" tab, make selections and click "OK"

Indicating a Taxable Item

1. Select "List" Item List from the Menu Bar
2. Click to highlight the item
3. Click the "Item" button and choose "Edit Item" [Screen 13]
4. Make the appropriate selection from the "Tax Code" drop-down and click "OK"

Creating a Sales Tax Report

1. Select "Vendors" Sales Tax Sales Tax Liability" or "Vendors" Sales Tax Sales Tax Revenue Summary" from the Menu Bar. Change dates, as needed
2. Click the "X" in the upper right corner to close

Paying Sales Tax

1. Select "Vendors" Sales Tax Pay Sales Tax" from the Menu Bar
2. Make selections for the account and dates
3. Click to select the "Pay" column for amounts to pay
4. Click the "Adjust" button to make any needed tax adjustments and click "OK"
5. Check the "To be printed" checkbox, if desired
6. Click "OK" to record the payment

Inventory

Enabling Inventory in QuickBooks

1. Select "Edit Preferences..." from the Menu Bar
2. Select "Items & Inventory" on the left
3. Check the "Inventory and purchase orders are active" checkbox on the "Company Preferences" tab
4. Set any preferences and click "OK"

Creating New Inventory Part Items

1. Select "List" Item List from the Menu Bar
2. Select "New" from the "Item" button menu [Screen 14]
3. Select "Inventory Part" from the "Type" drop-down
4. Enter inventory part information and click "OK"

Creating a Purchase Order

1. Select "Vendors" Create Purchase Order" from the Menu 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" Chart of Accounts from the Menu Bar
2. Click to highlight the "Purchase Orders" account
3. Click the "Reports" button and select [Screen 15]
4. "QuickReport: Purchase Orders" from the menu

Receiving Inventory with a Bill

1. Select "Vendors" Receive Items and Enter Bill" from the Menu Bar
2. Select the vendor from the "Vendor" drop-down
3. Enter bill information and click the "Save & Close" button

Creating an Item Receipt

1. Select "Vendors" Receive Items from the Menu 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 "Vendors" Enter Bill for Received Items" from the Menu 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 "Vendors" Inventory Adjusted Quantity/Value on Hand" from the Menu Bar
2. Select the type of inventory adjustment to make from the "Adjustment" type drop-down
3. Make the required adjustments to the inventory
4. Click the "Save & Close" button

TeachUComp, Inc.
www.teachucomp.com
info@teachucomp.com
877-925-8888



Synopsis

Designed with the busy professional in mind, this 4-page laminated quick reference guide provides step-by-step instructions in QuickBooks Pro 2016. 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.; 2016 edition (October 5, 2015)

Language: English

ISBN-10: 1941854060

ISBN-13: 978-1941854068

Product Dimensions: 11 x 8.5 x 0.1 inches

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

Average Customer Review: 4.3 out of 5 stars [See all reviews](#) (59 customer reviews)

Best Sellers Rank: #2,732 in Books (See Top 100 in Books) #1 in [Books > Computers & Technology > Software > Quickbooks](#) #823 in [Books > Reference](#)

Customer Reviews

This laminated quick reference guide makes for a great cheat sheet to do various basic tasks with Quickbooks Pro 2016. It provides detailed step by step instructions to set up a chart of accounts, make entries into accounts, doing payroll, setting up inventory, etc. I found it to be a wonderful training tool for a new employee, who will be assisting me with Quickbooks entries, etc. I went over each section with her that was applicable to our business, showing her how to do the task at hand using the steps on the guide. She is keeping this in her desk to remind her of the steps to complete the various tasks and is happy because she feels she can work more independently since the steps are clearly written out for her if she forgets. Obviously, I will continue monitoring her work, but this nifty guide is really helping us to work efficiently and well. I love it and strongly recommend it to anyone who is learning Quickbooks or is training someone to use Quickbooks!

Nice! It's 4 full pages (like a book) front, middle, back... Very helpful and nicely done.

Very helpful cheat-sheet!

Quick and easy.

I didn't find anything that I didn't already know. Mostly I am self-taught when it comes to Quickbooks, along with some help from accountants I have worked with. I thought this reference would give me some advanced tips, but it was really stuff I already know. Doesn't mean it wouldn't be helpful to some, just not really to me.

nice consolidated presentation.

This is so awesome for the Quickbooks learner, intermediate or pro. I'm not going to buy any other Quickbooks learning tool. This is all I need. TeachUcomp was brilliant to create this!

Wasn't exactly what I was hoping for. I was looking more for a quick reference on how to use and access different parts of the program.

[Download to continue reading...](#)

QuickBooks Pro 2016 Quick Reference Training Card - Laminated Tutorial Guide Cheat Sheet (Instructions and Tips) QuickBooks: Best Way to Learn QuickBooks within a day to optimize bookkeeping! (QuickBooks, Bookkeeping, QuickBooks Online, QuickBooks 2016, ... Business Taxes, Small Business Accounting) Microsoft Excel 2016 Business Analytics & Power BI Quick Reference Guide - Windows Version (4-page Cheat Sheet of Instructions, Tips & Shortcuts - Laminated Guide) QuickBooks: The Easiest and Simple Guide to Learn QuickBooks. (Quickbooks 2016 Guide, Bookkeeping, Quickbook Hosting, Accounting solutions, Personal Finance, Small Business, Software.) QuickBooks: The Complete Beginners Guide 2016 -Everything You Need To Know To Keep Your Books! (Quickbooks 101, Quickbooks 2016 Guide) QuickBooks: 2016 QuickBooks for Your Small Business: A Beginner's Guide to Bookkeeping Your Amazing Itty Bitty Book of QuickBooks Terminology: 15 Terms Every QuickBooks User Should Understand LL COMPUTER ACCOUNTING QUICKBOOKS 2015 W QUICKBOOKS STUDENT DATA SOFTWARE GoWISE Air Fryer Cookbook: 101 Easy Recipes and How To Instructions for Healthy Low Oil Air Frying and Baking (Air Fryer Recipes and How To Instructions) Shell Scripting Tutorial

For Unix Linux - Included Free 6+ Hours of Online Tutorial Included Pokemon Go The Ultimate Full Guide (Pokemon Go Game + Extra Bonus Cheat Sheet, Tricks, Hints, Tactics, Tips, Hacks, for iOS, Android) Pokemon Go : The Complete Guide (Strategies For Rare and Legendary Pokemon): Pokemon Go Ultimate Guide : A Robust Tutorial Backed By Over 200 Hours Of Research and Data With Daily Tips (iOs, Android) Puppy Training: How To Train a Puppy: A Step-by-Step Guide to Positive Puppy Training (Dog training,Puppy training, Puppy house training, Puppy training ... your dog,Puppy training books Book 3) Laminated Venice Map by Borch (English, Spanish, French, Italian and German) (English, Spanish, French, Italian and German Edition) Mosaics for the Home and Garden: Creative Guide, Original Projects and instructions (Art and crafts) (Volume 1) Pick 4 Lottery Charts - Florida: The Daily Cheat Sheet (Play 1-3 days only) Pick 4 Lottery Charts - Georgia: The Daily Cheat Sheet (Play 1-3 days only) Pop-Up NYC Map by VanDam - City Street Map of New York City, New York - Laminated folding pocket size city travel and subway map, 2016 Edition (Pop-Up Map) Potty Training In 3 Days: Quick And Easy Guide To Potty Training Your Toddler In As Short As 3 Days (potty training, toddlers, toddler, toilet training) Sleisenger and Fordtran's Gastrointestinal and Liver Disease Review and Assessment (Sleisenger and Fordtrans Gastrointestinal and Liver)

[Dmca](#)