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QuickBooks® Pro 2014

Quick Reference Guide
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<p>The Chart of Accounts</p> <p>Adding a New Account</p> <ol style="list-style-type: none"> 1. Select "Setup Chart of Accounts" from the Menu Bar. 2. Click the "Account" button and choose "New" [Screenshot] 3. Choose an account type and click "Continue." 4. Enter the account information and click "Save & Close." <p>Editing an Account</p> <ol style="list-style-type: none"> 1. Select "Setup Chart of Accounts" from the Menu Bar. 2. Click to highlight the account. 3. Click the "Options" button and choose "Edit Account" [Screenshot] 4. Let the information and click "Save & Close." <p>Deleting or Inactivating an Account</p> <ol style="list-style-type: none"> 1. Select "Setup Chart of Accounts" from the Menu Bar. 2. Click to highlight the account. 3. Click the "Options" button and choose "Make Account Inactive" or "Delete Account" [Screenshot] 4. Click "OK" to confirm any deleted accounts. <p>Customers, Employees & Vendors</p> <p>Accessing the Centers</p> <ol style="list-style-type: none"> 1. Click "Customers," "Employees" or "Vendors" from the Menu Bar and select the Center from the menu. <p>Adding a New Customer</p> <ol style="list-style-type: none"> 1. Click the "Customers & Invt" tab in the Customer Center. 2. Choose "New Customer" from the "New Customer & Invt" drop-down above the list [Screenshot] 3. Enter all customer information on each of the tabs in the "New Customer" window and click "OK." <p>Editing or Deleting a Customer</p> <ol style="list-style-type: none"> 1. Click to highlight the customer in the "Customer & Invt" tab in the Customer Center. 2. Select "Edit Customer" or "Delete Customer" from the Menu Bar. 3. If editing, make any changes and then click "OK." <p>Adding a New Employee</p> <ol style="list-style-type: none"> 1. Click the "New Employee" button in the upper left corner of the Employee Center [Screenshot] 2. Enter all employee information on each of the tabs in the "New Employee" window and click "OK." <p>Editing or Deleting an Employee</p> <ol style="list-style-type: none"> 1. Click to highlight the employee in the "Employee Center." 2. Select "Edit Employee" or "Delete Employee" from the Menu Bar. 3. If editing, make any changes and then click "OK." <p>Adding a New Vendor</p> <ol style="list-style-type: none"> 1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center [Screenshot] 2. Enter all vendor information on each of the tabs in the "New Vendor" window and click "OK." <p>Editing or Deleting a Vendor</p> <ol style="list-style-type: none"> 1. Click to highlight the vendor in the "Vendors" tab in the Vendor Center. 2. Select "Edit Vendor" or "Delete Vendor" from the Menu Bar. 3. If editing, make any changes and then click "OK." <p>Creating Custom Fields</p> <ol style="list-style-type: none"> 1. Open the Vendor, Company or Employee Center. 2. Click the "Define Fields" button on the "Additional Info" tab of the "New [Item Name]" or "Edit [Item Name]" window (Set 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." 	<p>Managing List Items</p> <p>Creating Item List Custom Fields</p> <ol style="list-style-type: none"> 1. Select "Setup Item List" from the Menu Bar. 2. 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, tabs, "Yes," and "No" [Screenshot] 5. To enter values, select "Edit Item List" from the Menu 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." <p>Sorting Lists</p> <ol style="list-style-type: none"> 1. To manually sort, click and [Screenshot] (moving) drag the diamond next to the Item Name. 2. To automatically sort, click the column heading. 3. Reverse auto sort by clicking the new diamond that appears at the left of the column heading [Screenshot] 4. Restore original sort order by selecting "View" > "No Sort List" from the Menu Bar. <p>Inactivating and Reactivating Items</p> <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" checkbox. 3. To show inactive items in a Center list, select "Set Item Type" in the "View" menu [Screenshot] 4. To reactivate, show the inactive items in the list and click to remove the "I" next to the item name. <p>Renaming and Merging List Items</p> <ol style="list-style-type: none"> 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" button. 4. To merge, change the name to the same as another item and choose "Yes" when prompted to merge. <p>Sales Tax</p> <p>Creating a Sales Tax Item or Group</p> <ol style="list-style-type: none"> 1. Select "Setup 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 drop-down. 4. Enter the item or group information and click "OK." <p>Setting Default Sales Tax Preferences</p> <ol style="list-style-type: none"> 1. Select "Setup 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." <p>Indicating a Taxable Customer</p> <ol style="list-style-type: none"> 1. Select "Customer Customer Center" from the Menu Bar. 2. Click the "Customers & Invt" 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." <p>Indicating a Taxable Item</p> <ol style="list-style-type: none"> 1. Select "Setup Item List" from the Menu Bar. 2. Click to highlight the item. 3. Select "Edit" from the "Item" button menu [Screenshot] 4. Make the appropriate selections from the "Tax Code" drop-down and click "OK." <p>Creating a Sales Tax Report</p> <ol style="list-style-type: none"> 1. Select "Vendors" > "Sales Tax" > "Sales Tax Liability" or "Vendors" > "Sales Tax" > "Sales Tax Revenue Summary" from the Menu Bar. 2. Click the "Y" in the upper right corner to close. 	<p>Paying Sales Tax</p> <ol style="list-style-type: none"> 1. Select "Vendors" > "Sales Tax" > "Pay Sales Tax" from the Menu Bar. 2. Make selections for the account and date. 3. Click to specify the "Pay" option for agencies 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. <p>Inventory</p> <p>Enabling Inventory in QuickBooks</p> <ol style="list-style-type: none"> 1. Select "Setup 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." <p>Creating New Inventory Part Items</p> <ol style="list-style-type: none"> 1. Select "Setup Item List" from the Menu Bar. 2. Select "New" from the "Item" button menu [Screenshot] 3. Select "Inventory Part" from the "Type" drop-down. 4. Enter inventory part information and click "OK." <p>Creating a Purchase Order</p> <ol style="list-style-type: none"> 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. <p>Creating Purchase Order Reports</p> <ol style="list-style-type: none"> 1. Select "Setup Chart of Accounts" from the Menu Bar. 2. Click to highlight the "Purchase Order" account. 3. Click the "Reports" button, and select "Quick" > "Purchase Order" from the Menu Bar. <p>Receiving Inventory with a Bill</p> <ol style="list-style-type: none"> 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. <p>Creating an Item Receipt</p> <ol style="list-style-type: none"> 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. <p>Matching a Bill to an Item Receipt</p> <ol style="list-style-type: none"> 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. <p>Manually Adjusting Inventory</p> <ol style="list-style-type: none"> 1. Select "Vendors" > "Inventory" > "Adjust Inventory Quantity/Value" 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.
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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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