



QuickBooks 2015 Level 2

Course QB15-02 - 2 Days - Instructor-led - Hands on

Introduction

This course builds on the skills and knowledge gained in Course QB15-01' QuickBooks 2015 Getting Started

At Course Completion

Upon successful completion of this course, students will be able to:

- Memorize transactions
- Customize forms
- Use other QuickBooks accounts
- Create reports
- Create graphs
- Track and pay sales tax
- Prepare payroll with QuickBooks
- Use online banking
- Manage company files
- Estimating, time tracking and job costing
- Write letters

Prerequisites

This course is intended for students with a basic understanding of QuickBooks 2015. This knowledge can be gained by attending Course QB15-01, Getting Started with QuickBooks 2015.

Course Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

Course Outline

Module 1: Memorizing Transactions

- Entering a New Memorized Transaction
- Editing a Memorized Transaction
- Deleting a Memorized Transaction
- Grouping Memorized Transactions
- Using a Memorized Transaction

Module 2: Customizing Forms

Contact ISInc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>



- Creating a Custom Template
- Modifying a Template
- Printing Forms

Module 3: 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

Module 4: Creating Reports

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

Module 5: Creating Graphs

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

Module 6: 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

Module 7: 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

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Module 8: 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

Module 9: 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

Module 10: 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

Module 11: Writing Letters

- Using the Letters and Envelopes Wizard
- Customizing Letter Templates