



# QuickBooks Online Seminar

## An Introduction to QuickBooks Online

**\$195 per person – Prepayment Required**

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While QuickBooks® is user friendly most people still need **QuickBooks Training** to effectively set up the software, efficiently utilize appropriate features and ensure their data is being input in a correct manner. Nothing is more frustrating to business owners than not trusting the numbers in their accounting software; accurate numbers they need daily to make wise business decisions.

Our **QuickBooks Online seminar** is designed to meet the needs of each attendee and here is how we accomplish that goal. We conduct small classes, typically with 8 attendees or less and call one to two days in advance of the class to identify your biggest problems in business and with the software so we can provide specific training relevant to your situation. We use the information from our call to determine the direction of the class, and may focus in certain areas listed below, more than others. What is important to note is that we cover all the material but will spend the most time on information that will best help you succeed.

### 3 Main Goals of our QuickBooks Training:

- To help you improve cash flow
- To increase net profit
- To help you have more fun at work and in business

*We have discovered that the foundation for any business success is in the daily use of accurate accounting numbers. What we measure we manage; what we manage, we improve. Our goal is to teach you HOW to use your numbers for success.*

Our Introductory **QuickBooks Online Training seminars** include:

#### • Section 1 – Getting Started

- How to choose the right subscription
  - How to import company data
- How to view and utilize the Dashboard

#### • Section 2 – Settings

- How to manage account and settings default preferences.
  - How to setup and manage users.
- How to set up and utilize the Chart of Accounts and how it connects to all transactions.
  - How to use the Sales Tax Center and where to turn on the feature.
  - How to setup and maintain Products and Services.
- How to address beginning balances and historical data when setting up a new company file.





### • Section 3 - Reports

- How to save and group Custom Reports.
- How to setup and review a Balance Sheet.
- How to setup and review a Profit & Loss.
  - How to review an Audit Log.
- How to create a report and utilize Ask My Accountant
- How to access and view the Company Snapshot

### • Section 4 – Accounts Receivable

- Overview of Accounts Receivable.
- How to correctly use Customer and Accounts Receivable related accounts and settings.
  - How to use the Customer Center.
- How and when to use a Sales Receipt vs. an Invoice.
  - How to receive payments and record deposits.
  - How to use credit memos and apply credits.
  - How to issue Refund Receipts to customers.
- How to view and save Sales and Accounts Receivable related reports

### • Section 5 – Account Payable

- Overview of Accounts Payable
- How to turn on/off Accounts Payable related accounts and settings.
  - How to use the Vendor Center.
  - How and when to create and Pay Bills.
  - How to create and apply Vendor Credits.
    - How to Print Checks.
- How to view and save Accounts Payable related reports

### • Section 6 - Banking

- Overview of the banking center.
- How to connect bank and credit card accounts.
  - How to transfer funds.
- How to reconcile bank and credit card accounts.
  - How to access and view bank reports.

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## Amenities

**Breakfast Snack, Light Lunch and Beverages will be available**

## Location

**[Berkeley College](#) - 64 East Midland Avenue - Paramus, NJ 07652 - 201-291-1111**

**Room 127**

## Cost

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