



## **Keep Going with QuickBooks 2007: For Windows**

**Course Objective:** This training guide is dedicated to providing you with a flexible, high-performance learning system. This dedication has resulted in a unique and progressive training method. Unlike other training methods that focus on theory or high-tech training products that overwhelm you, this training method provides a simple approach to learning computer software. Each guide is written to assume the user has no prior computer skills. If you are using the software for the first time, you will be introduced to its primary features. If you are familiar with the software, you will quickly learn the new features and functionality of this version. Regardless of your skill level, you will learn with the greatest of ease.

### **Performance-Based Objectives**

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

- customize forms.
- use the other QuickBooks accounts and track credit card transactions.
- create and modify various types of reports.
- create graphs.
- track and pay sales tax.
- track payroll information with QuickBooks.
- keep track of the job you are working on and generate reports for it.
- use QuickBooks to write various types of letters.
- synchronize QuickBooks with other contact management software.

### **Prerequisites**

You can successfully complete this training guide without any prior software knowledge or computer experience. A basic understanding of the computer operating system you are using is recommended.

### **Course Content**

#### **Lesson 1: Customizing Forms**

Topic 1A: Create a Custom Template

Topic 1B: Modify a Template

Topic 1C: Print an Invoice

#### **Lesson 2: Using QuickBooks Accounts**

Topic 2A: Track Credit Card Transactions

Topic 2B: Work with Asset Accounts

Topic 2C: Work with Liability Accounts

Topic 2D: Understand Equity Accounts

#### **Lesson 3: Creating Reports**

Topic 3A: Create QuickReports

Topic 3B: Modify QuickReports

Topic 3C: Memorize QuickReports

Topic 3D: Run Preset Reports

Topic 3E: Modify Preset Reports

Topic 3F: Export Reports to Microsoft Excel

Topic 3G: Print Reports

#### **Lesson 4: Creating Graphs**

Topic 4A: Create QuickInsight Graphs

Topic 4B: Customize Graphs

Topic 4C: Print Graphs

#### **Lesson 5: Tracking and Paying Sales Tax**

Topic 5A: Use Sales Tax in QuickBooks

Topic 5B: Set Up Tax Rates and Agencies

Topic 5C: Determine the Sales Tax Liability

Topic 5D: Pay the Tax Agencies

#### **Lesson 6: Doing Payroll with QuickBooks**

Topic 6A: Use Payroll Tracking

Topic 6B: Set Up for Payroll

Topic 6C: Set Up Employee Payroll Information

Topic 6D: Write a Payroll Check

Topic 6E: Track Tax Liabilities

Topic 6F: Pay Payroll Taxes

#### **Lesson 7: Keeping Track of the Job**

Topic 7A: Create Job Estimates

Topic 7B: Work with Estimates

Topic 7C: Track the Time

#### **Lesson 8: Writing Letters**

Topic 8A: Use the Letters and Envelopes Wizard

#### **Lesson 9: Synchronizing with Contact Management Software**

Topic 9A: Categorize Contact Names in Microsoft Outlook

Topic 9B: Synchronizing with Microsoft Outlook