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# QuickBooks Pro 2014 Quick Reference Training Card - Laminated Guide Cheat Sheet (Instructions And Tips)

## QuickBooks® Pro 2014

Quick Reference Guide  
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| <b>The Chart of Accounts</b><br>1. Select "Edit Chart of Accounts" from the Menu Bar.<br>2. Click the "Account" button and choose "New" (Screen 2).<br>3. Choose an account type and click "Continue".<br>4. Enter the account information and click "Save & Close".<br><b>Editing an Account</b><br>1. Select "Edit Chart of Accounts" from the Menu Bar.<br>2. Click to highlight the account.<br>3. Click the "Account" button and choose "Edit Account" (Screen 2).<br>4. Edit the information and click "Save & Close".<br><b>Deleting or Inactivating an Account</b><br>1. Select "Edit Chart of Accounts" from the Menu Bar.<br>2. Click to highlight the account.<br>3. Click the "Account" button and choose "Make Account Inactive" or "Delete Account" (Screen 2).<br>4. Click "OK" to confirm any deleted accounts.<br><b>Customers, Employees &amp; Vendors</b><br><b>Accessing the Centers</b><br>1. Click "Customers," "Employees" or "Vendors" from the Menu Bar and select the Center from the menu.<br><b>Adding a New Customer</b><br>1. Click the "Customers & Jobs" tab in the Customer Center.<br>2. Choose "New Customer" from the "New Customer & Job" drop-down above the table (Screen 3).<br>3. Enter all customer information on each of the tabs in the "New Customer" window and click "OK".<br><b>Editing or Deleting a Customer</b><br>1. Click to highlight the customer in the "Customer & Job" tab in the Customer Center.<br>2. Select "Edit Customer" or "Delete Customer" from the Menu Bar.<br>3. If editing, make any changes and then click "OK".<br><b>Adding a New Employee</b><br>1. Click the "New Employee" button in the upper left corner of the Employee Center (Screen 4).<br>2. Enter all employee information on each of the tabs in the "New Employee" window and click "OK".<br><b>Editing or Deleting an Employee</b><br>1. Click to highlight the employee in the "Employees" tab in the Employee Center.<br>2. Select "Edit Employee" or "Delete Employee" from the Menu Bar.<br>3. If editing, make any changes and then click "OK".<br><b>Adding a New Vendor</b><br>1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center (Screen 5).<br>2. Enter all vendor information on each of the tabs in the "New Vendor" window and click "OK".<br><b>Editing or Deleting a Vendor</b><br>1. Click to highlight the vendor in the "Vendors" tab in the Vendor Center.<br>2. Select "Edit Vendor" or "Delete Vendor" from the Menu Bar.<br>3. If editing, make any changes and then click "OK".<br><b>Creating Custom Fields</b><br>1. Open the Vendor, Company or Employee Center.<br>2. Click the "Define Fields" button on the "Additional Info" tab of the "New [Job Item]" or "Edit [Job Item]" window. Just Item-Vendor, Company or Employee.<br>3. Enter custom field names and select lists to include.<br>4. Click "OK".<br>5. Enter any "Custom Fields" values and click "OK". | <b>Managing List Items</b><br><b>Creating Item List Custom Fields</b><br>1. Select "Edit Item List" from the Menu Bar.<br>2. Click the "Item" button and then either "New" or "Edit Item" (Screen 6).<br>3. Click the "Custom Fields" button and then the "Define Fields" button (Screen 6).<br>4. Enter item list names, select "OK" and click "OK".<br>5. To enter values, select "Edit Item List" from the Menu Bar and click to select the item to edit.<br>6. Click the "Item" button and then "Edit Item".<br>7. Click the "Custom Fields" button, enter the values and click "OK".<br><b>Sorting Lists</b><br>1. To manually sort, click and drag the diamond next to the item name.<br>2. To automatically sort, click the column heading.<br>3. Remove auto sort by clicking the new diamond that appears at the far left of the column heading (Screen 7).<br>4. Restore original sort order by selecting "View By Sort List" from the Menu Bar.<br><b>Inactivating and Reactivating Items</b><br>1. To inactivate, right-click on an item and choose "Make [Item type] Inactive".<br>2. To show inactive items, click the "Include Inactive" checkbox.<br>3. To show inactive items in a Center list, select "All Item Types" in the "View" menu (Screen 8).<br>4. To reactivate, click the inactive item in the list and click to remove the "I" next to the item name.<br><b>Renaming and Merging List Items</b><br>1. To rename, open the "Edit" window of the list item.<br>2. Type a new name in the name field at the very top of the window.<br>3. Click the "OK" or "Save and Close" button.<br>4. To merge, change the name to the same as another item and choose "Yes" when prompted to merge.<br><b>Sales Tax</b><br><b>Creating a Sales Tax Item or Group</b><br>1. Select "Edit Item List" from the Menu Bar.<br>2. Select "New" from the "Item" button drop-up menu.<br>3. Select "Sales Tax Item" or "Sales Tax Group" from the drop-down.<br>4. Enter tax item or group information and click "OK".<br><b>Setting Default Sales Tax Preferences</b><br>1. Select "Edit Preferences" from the Menu Bar.<br>2. Click "Sales Tax" on the left and then the "Company Preference" tab on the right.<br>3. Select preference and click "OK".<br><b>Indicating a Taxable Customer</b><br>1. Select "Customer Center" from the Menu Bar.<br>2. Click the "Customers & Jobs" tab at the left side.<br>3. Double-click on the name of the customer in the list.<br>4. On the "Sales Tax Settings" tab, make selections and click "OK".<br><b>Indicating a Taxable Item</b><br>1. Select "Edit Item List" from the Menu Bar.<br>2. Click to highlight the item.<br>3. Select "Edit" from the "Item" button menu (Screen 9).<br>4. Make the appropriate selection from the "Tax Code" drop-down and click "OK".<br><b>Creating a Sales Tax Report</b><br>1. Select "Vendors" Sales Tax (Sales Tax Liability) or "Vendors" Sales Tax (Sales Tax Revenue Summary) from the Menu Bar.<br>2. Click the "X" in the upper right corner to close. | <b>Paying Sales Tax</b><br>1. Select "Vendors" Sales Tax Pay Sales Tax from the Menu Bar.<br>2. Make selections for the amount and date.<br>3. Click to specify the "Pay" criteria for agencies to pay.<br>4. Click the "Adjust" button to make any needed tax adjustments and click "OK".<br>5. Check the "To be printed" checkbox, if desired.<br>6. Click "OK" to record the payment.<br><b>Inventory</b><br><b>Enabling Inventory in QuickBooks</b><br>1. Select "Edit Preferences" from the Menu Bar.<br>2. Select "Items & Inventory" on the left.<br>3. Check the "Inventory and purchase orders are active" checkbox on the "Company Preferences" tab.<br>4. Set any preferences and click "OK".<br><b>Creating New Inventory Part Items</b><br>1. Select "Edit Item List" from the Menu Bar.<br>2. Select "New" from the "Item" button menu (Screen 10).<br>3. Select "Inventory Part" from the "Type" drop-down.<br>4. Enter inventory part information and click "OK".<br><b>Creating a Purchase Order</b><br>1. Select "Vendors" Create Purchase Order from the Menu Bar.<br>2. Select the vendor from the "Vendor" drop-down.<br>3. Enter purchase order information and click either the "Save & Close" or "Save & New" button.<br><b>Creating Purchase Order Reports</b><br>1. Select "Vendors" Create Purchase Order from the Menu Bar.<br>2. Click to highlight the "Purchase Order" account.<br>3. Click the "New" button, and select "Purchase Order" from the "Purchase Order" drop-down.<br><b>Receiving Inventory with a Bill</b><br>1. Select "Vendors" Receive Items and Enter Bill from the Menu Bar.<br>2. Select the vendor from the "Vendor" drop-down.<br>3. Enter bill information and click the "Save & Close" button.<br><b>Creating an Item Receipt</b><br>1. Select "Vendors" Receive Items from the Menu Bar.<br>2. Select the vendor from the "Vendor" drop-down.<br>3. Enter receipt information and click the "Save & Close" button.<br><b>Matching a Bill to an Item Receipt</b><br>1. Select "Vendors" Enter Bill for Received Items from the Menu Bar.<br>2. Select the vendor from the "Vendor" drop-down.<br>3. Select the item receipt and click the "OK" button.<br>4. Enter the date the bill was received in the "Date" field and click the "Save & Close" button.<br><b>Manually Adjusting Inventory</b><br>1. Select "Vendors" Inventory Adjusted Adjust Quantity/Value on Hand from the Menu Bar.<br>2. Select the item receipt and click the "OK" button.<br>3. Make the required adjustment to the inventory.<br>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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