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QuickBooks Pro 2017 Quick Reference Training Card Tutorial Guide Cheat Sheet (Instructions And Tips)

QuickBooks® Pro 2017

Quick Reference Guide

Comprehensive video training & instruction manuals available at www.teachucomp.com

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The Chart of Accounts

Adding a New Account

1. Select "Chart of Accounts" from the Menu Bar.
2. Click the "Account" button and choose "New" (2017).
3. Choose an account type and click "OK".
4. Enter the account information and click "Save & Close".

Editing an Account

1. Select "Chart of Accounts" from the Menu Bar.
2. Click to highlight the account.
3. Click the "Account" button and choose "Edit".
4. Enter the information and click "Save & Close".

Deleting or Inactivating an Account

1. Select "Chart of Accounts" from the Menu Bar.
2. Click to highlight the account.
3. Click the "Account" button and choose "Delete".
4. Click "OK" to confirm any deleted accounts.

Customers, Employees & Vendors

Accessing the Centers

1. Click "Customers", "Employees" or "Vendors" from the Menu Bar and select the Center from the menu.

Adding a New Customer

1. Click the "Customers & Vendors" tab in the Customer Center.
2. Choose "New Customer" from the "New" (2017) drop-down menu.
3. Enter all customer information on each of the tabs in the "New Customer" window and click "OK".

Editing or Deleting a Customer

1. Click to highlight the customer in the "Customers & Vendors" list.
2. Click the "Customer" button and choose "Edit" or "Delete".
3. Enter all information and click "Save & Close".
4. Click "OK" to confirm any changes and then click "OK".

Adding a New Employee

1. Click the "New Employee" button in the upper left corner of the Employee Center (2017).
2. Enter all employee information on each of the tabs in the "New Employee" window and click "OK".

Editing or Deleting an Employee

1. Click to highlight the employee in the "Employees" list in the Employee Center.
2. Click the "Employee" button and choose "Edit" or "Delete".
3. Enter all information and click "Save & Close".
4. Click "OK" to confirm any changes and then click "OK".

Adding a New Vendor

1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center (2017).
2. Enter all vendor information on each of the tabs in the "New Vendor" window and click "OK".

Editing or Deleting a Vendor

1. Click to highlight the vendor in the "Vendors" list in the Vendor Center.
2. Click the "Vendor" button and choose "Edit" or "Delete".
3. Enter all information and click "Save & Close".
4. Click "OK" to confirm any changes and then click "OK".

Creating Custom Fields

1. Open the desired Company or Department Center.
2. Click the "Custom Fields" button or the "Additional" tab in the "New" (2017) or "Edit" (2017) window. Click the item-Vendor Company or Employee.
3. Enter custom field names and select the field to include.
4. Click "OK".
5. Enter any "Custom Fields" values and click "OK".

Managing List Items

Creating Item List Custom Fields

1. Select "Tools" from the Menu Bar.
2. Click the "Item" button and choose "New" (2017).
3. Click the "Custom Fields" button and then the "Custom Fields" button.
4. Enter item name, select "OK" and click "OK".
5. Enter the "Custom Fields" values and click "OK".
6. No existing custom fields, select "Add New" and click "OK".
7. Enter the item name and select the item. Click the "Item" button and then "Save Item". Click the "Custom Fields" button enter values and click "OK".

Sorting Lists

1. To manually sort, click and drag the list items.
2. To automatically sort, click the "Custom Fields" button, click the "Sort" button, and select the field to sort by.
3. To sort by date, click the "Custom Fields" button, click the "Sort" button, and select the field to sort by.
4. To sort by date, click the "Custom Fields" button, click the "Sort" button, and select the field to sort by.

Inactivating and Reactivating Items

1. To deactivate, right-click on an item and choose "Make Item Inactive".
2. To reactivate, right-click on an item and choose "Make Item Active".
3. To show inactive items in a Center list, click the "Include Inactive" checkbox.
4. To show inactive items in a Center list, click the "Include Inactive" checkbox.

Renaming and Merging List Items

1. To rename, click the list item and then the "Rename" button.
2. To merge, click the list item and then the "Merge" button.
3. To merge, click the list item and then the "Merge" button.
4. To merge, click the list item and then the "Merge" button.

Deleting List Items

1. To delete, click the list item and then the "Delete" button.
2. To delete, click the list item and then the "Delete" button.
3. To delete, click the list item and then the "Delete" button.
4. To delete, click the list item and then the "Delete" button.

Sales Tax

Creating a Sales Tax Item or Group

1. Select "Tools" from the Menu Bar.
2. Select "Sales Tax" from the "Sales Tax" drop-down menu.
3. Select "Sales Tax" from the "Sales Tax" drop-down menu.
4. Select "Sales Tax" from the "Sales Tax" drop-down menu.

Setting Default Sales Tax Preferences

1. Select "Tools" from the Menu Bar.
2. Select "Sales Tax" from the "Sales Tax" drop-down menu.
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Indicating a Taxable Customer

1. Select "Customers & Vendors" from the Menu Bar.
2. Click the "Customers & Vendors" tab in the left side.
3. Click the "Customers & Vendors" tab in the left side.
4. Click the "Customers & Vendors" tab in the left side.

Indicating a Taxable Item

1. Select "Tools" from the Menu Bar.
2. Click to highlight the item.
3. Click the "Item" button and choose "New" (2017).
4. Make the appropriate selection from the "New" (2017) drop-down menu and click "OK".

Creating a Sales Tax Report

1. Select "Tools" from the Menu Bar.
2. Click the "Tools" button and choose "New" (2017).
3. Click the "Tools" button and choose "New" (2017).
4. Click the "Tools" button and choose "New" (2017).

Managing Sales Tax

Creating Sales Tax

1. Select "Tools" from the Menu Bar.
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Managing Sales Tax

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Synopsis

Designed with the busy professional in mind, this 4-page quick reference guide provides step-by-step instructions in QuickBooks Pro 2017. When you need an answer fast, you will find it right at your fingertips. These easy-to-use quick reference guides 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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Customer Reviews

Cheap way to get started with basics on QuickBooks Pro 2017. Helped me greatly to learn enough to get into things quickly that would certainly have taken much longer.

I am new to Quickbooks so this handy tool is right on time!!

Like having this cheat sheet to help with learning about quick books.

I haven't really gotten into this yet, but it looks good on the surface. I am thinking I'll be making good use of it - often.

Excellent product and quick delivery.

Handy cheat sheet for an otherwise potentially overwhelming situation.

For such a small guide (4 laminated pages) it packs a LOT of punch! There is a lot of very helping quick tips in here and is extremely useful!! VERY HAPPY WITH PURCHASE!!!!

Still learning the program so maybe after a while, I can understand what I am reading.

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