

# Get Going with QuickBooks® 2007: For Windows

## Course Specifications

Course number:084745

Software: QuickBooks® Pro 2007 for Windows

Course length: 1.0 day(s)

## Course Description

**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.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

## System Requirements

This training guide does not include software. Please refer to your software installation instructions for specific hardware requirements. Before using this guide, verify that the software is installed on your computer. This training guide works with the following application:

- QuickBooks® Pro 2007 for Windows

## Performance-Based Objectives

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

- Set up a company.
- Work with lists.
- Set up inventory.
- Sell your product.
- Invoice for services.
- Process payments.
- Work with bank accounts.
- Enter and pay bills.
- Use the EasyStep Interview.
- Use online banking.

## 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: Getting Started**

- Topic 1A: Starting QuickBooks
- Topic 1B: Identifying Components of the QuickBooks Operating Environment
- Topic 1C: Opening QuickBooks Centers
- Topic 1D: Opening Other QuickBooks Windows
- Topic 1E: Identifying Common Business Terms
- Topic 1F: Setting Up QuickBooks in Multi-User Mode
- Topic 1G: Exiting QuickBooks

### **Lesson 2: Setting Up a Company**

- Topic 2A: Creating a QuickBooks Company
- Topic 2B: Using the Chart of Accounts
- Topic 2C: Entering Account Opening Balances

### **Lesson 3: Working with Lists**

- Topic 3A: Creating Company Lists
- Topic 3B: Working with the Customers & Jobs List
- Topic 3C: Working with the Employees List
- Topic 3D: Working with the Vendors List
- Topic 3E: Adding Customized Fields
- Topic 3F: Managing Lists

### **Lesson 4: Setting Up Inventory**

- Topic 4A: Entering Products into Inventory
- Topic 4B: Ordering Products
- Topic 4C: Receiving Inventory
- Topic 4D: Paying for Inventory
- Topic 4E: Manually Adjusting Inventory

### **Lesson 5: Selling Your Product**

- Topic 5A: Creating Product Invoices
- Topic 5B: Making Cash Sales

### **Lesson 6: Invoicing for Services**

- Topic 6A: Setting Up a Service Item
- Topic 6B: Changing the Invoice Format
- Topic 6C: Creating a Service Invoice
- Topic 6D: Entering Statement Charges
- Topic 6E: Creating Billing Statements

### **Lesson 7: Processing Payments**

- Topic 7A: Receiving Payments for Invoices
- Topic 7B: Making Deposits
- Topic 7C: Printing Statements

### **Lesson 8: Working with Bank Accounts**

Topic 8A: Writing a QuickBooks Check  
Topic 8B: Using Bank Account Registers  
Topic 8C: Entering a Handwritten Check  
Topic 8D: Transferring Funds Between Accounts  
Topic 8E: Reconciling Checking Accounts

**Lesson 9: Entering and Paying Bills**

Topic 9A: Handling Expenses  
Topic 9B: Using QuickBooks for Accounts Payable  
Topic 9C: Entering Bills  
Topic 9D: Paying Bills

**Appendix A: Using the EasyStep Interview**

Topic AA: Using the EasyStep Interview

**Appendix B: Using Online Banking**

Topic BA: Setting Up an Internet Connection  
Topic BB: Activating Accounts  
Topic BC: Reading Online Statements  
Topic BD: Creating Online Payments  
Topic BE: Transferring Funds Online  
Topic BF: Canceling Online Payments  
Topic BG: Sending E-mail to Your Financial Institution