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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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**The Chart of Accounts**  
Adding a New Account  
1. Select "List" Chart of Accounts from the Menus Bar  
2. Click the "New" button & choose "New Account"  
3. Choose an account type and click "Continue"  
4. Enter the account information and click "Save & Close"  
Editing an Account  
1. Select "List" Chart of Accounts from the Menus Bar  
2. Click the "Arrow" button and choose "Edit Account" [green]  
3. Get the information and click "Save & Close"  
Deleting or Inactivating an Account  
1. Select "List" Chart of Accounts from the Menus Bar  
2. Click to highlight the account  
3. Right-click the account and choose "Delete Account" [red] or "Inactivate Account" [blue]  
4. Click "OK" to confirm any deleted accounts

**Customers, Employees & Vendors**  
Accessing the Centers  
1. Click "Customers," "Employees" or "Vendors" from the Menus Bar and select the Center from the menu  
Adding a New Customer  
1. Click the "Customers & Jobs" tab in the Customer Center  
2. Choose "New Customer" from the "New Customer" drop-down  
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 "Customer & Jobs" tab in the Customer Center  
2. Select "Edit Customer" [green] or "Edit/Delete Customer" [red] from the menu  
3. If editing, make 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 [green]  
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 "Employee" tab in the Employee Center  
2. Select "Edit Employee" or "Edit/Delete Employee" from the menu  
3. If editing, make any changes and then click "OK"  
Adding a New Vendor  
1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center [green]  
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 on the "Vendor" tab in the Vendor Center  
2. Select "Edit Edit Vendor" or "Edit/Delete Vendor" from the menu  
3. If editing, make any changes and then click "OK"  
Creating Custom Fields  
1. Click the "Custom Fields" button in the Additional Info tab on the "Additional Info" tab in the Vendor Center  
2. Click the "Define Fields" button on the "Additional Info" tab of the "New [Edit] Item" or "Edit [Edit] Item" window [blue item - Vendor, Company or Employee]  
3. Enter custom field names and select tabs to include  
4. Click "OK"  
5. Enter any "Custom Field" values and click "OK"

**Managing List Items**  
Creating Item List Custom Fields  
1. Select "List" Item List from the Menus Bar  
2. Click the "New" button and then "New Item" [green]  
3. Click the "Custom Fields" button and then the "Define Fields" button  
4. Enter the item name, select "List" and click "OK"  
5. To enter values, select "List" item List and then "Edit Item" [green]  
6. Click the "Item" button and then "Edit Item"  
7. Click the "Custom Fields" button, enter the values  
8. Click "OK" to save the changes

**Sorting Lists**  
1. Click to sort, click and drag the column heading to move the column  
2. To automatically sort, click the column heading  
3. Remove auto sort by clicking the new standard that appears at the far left of the column heading [blue]  
4. To change the sort, click the "Sort" button, selecting "Re-Sort List" from the Menus Bar

**Inactivating and Reactivating Items**  
1. To inactivate, right-click on an item and choose "Make [the item type] Inactive"  
2. To show inactive items NOT in a Center list, check the "Include Inactive" checkboxes  
3. To reactivate, right-click on an item and choose "Make [the item type] Active"  
4. To reactivate, click the inactive items on the list and click to remove the "X" next to the item name

**Renaming and Merging List Items**  
1. To rename, open the "Edit" window of the list item  
2. Type a new name in the name field at the very top  
3. Click the "OK" or "Save & Close" button  
4. To merge, change the name to the same as another item and choose "OK" when prompted to merge

**Sales Tax**  
Creating a Sales Tax Item or Group  
1. Select "List" Item List from the Menus Bar  
2. Select "New" from the "New" button (pop-up menu)  
3. Click "Sales Tax Item" or "Sales Tax Group" from the drop-down  
4. Enter the item or group information and click "OK"  
Setting Default Sales Tax Preferences  
1. Select "Sales Preferences..." from the Menus Bar  
2. Click "Sales Tax" on the left and then the "Company Preferences" tab on the right  
3. Select preferences and click "OK"

**Indicating a Taxable Customer**  
1. Click the "Customers & Jobs" tab at the left side  
2. Double click on the name of the customer in the list  
3. On the "Sales Tax Settings" tab, make selection and click "OK"

**Indicating a Taxable Item**  
1. Select "List" Item List from the Menus Bar  
2. Click to highlight the item  
3. Select "Edit" from the "New" button menu [blue]  
4. Make the appropriate selection from the "Tax Code" drop-down and click "OK"

**Creating a Sales Tax Report**  
1. Select "Vendor Sales Tax Sales Tax Liability" or "Vendor Sales Tax Sales Tax Revenue Summary" from the Menus Bar  
2. Click the "OK" in the upper-right corner to close

**Paying Sales Tax**  
1. Select "List" Sales Tax from the Menus Bar  
2. Make selections for the account and dates  
3. Click to select the "Pay" column for agencies to pay  
4. Click the "Update" button to make any needed tax adjustments and click "OK"  
5. Click the "OK" to pay the selected checkbox, if defined  
6. Click "OK" to record the payment

**Inventory**  
Enabling Inventory in QuickBooks  
1. Select "Edit" Preferences... from the Menus Bar  
2. Select "Items & Inventory" on the left  
3. Check the "Inventory" and purchase orders are checked in the "Inventory Preferences" tab  
4. Set any preferences and click "OK"

**Creating New Inventory Part Items**  
1. Select "List" Item List from the Menus Bar  
2. Select "New" from the "New" button menu [green]  
3. Select "Inventory Part" from the "Type" drop-down  
4. Enter inventory part information and click "OK"

**Creating a Purchase Order**  
1. Select "Vendor Create Purchase Order" from the Menus Bar  
2. Select a vendor from the "Vendor" drop-down  
3. Enter purchase order information and click either the "Save & Close" or "Save & New" button

**Creating Purchase Order Reports**  
1. Select "List" Chart of Accounts from the Menus Bar  
2. Click to highlight the "Purchase Orders" account  
3. Select "Report" from the "File" menu and click "Print"  
4. Select "Purchase Order Report" from the "Print" menu

**Creating Inventory with a Bill**  
1. Select "Inventory Receive Items and Enter Bill" from the Menus Bar  
2. Select the vendor from the "Vendor" drop-down  
3. Enter bill information and click the "Save & Close" button

**Creating an Items Receipt**  
1. Select "Inventory Receive Item" from the Menus Bar  
2. Select the vendor from the "Vendor" drop-down  
3. Enter the receipt information and click the "Save & Close" button

**Matching a Bill to an Item Receipt**  
1. Select "Vendor Enter Bill for Received Items" from the Menus Bar  
2. Select a vendor from the "Vendor" drop-down  
3. Select the item receipt and click the "OK" button  
4. Enter the date the bill was received in the "Date" field and click the "Save & Close" button

**Manually Adjusting Inventory**  
1. Select "Inventory Adjusted Adjust Quantities on Hand" from the Menus Bar  
2. Enter the line of inventory adjustment to make  
3. Click the "OK" button  
4. Make the required adjustments to Fix Inventory  
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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I am re learning Quickbooks after a decade of not using it...I wish I would have purchased this months ago! I have learning CD's and a book...this Quick Reference Training should be your first purchase, before anything else! I am a sole proprietor & have enough to do... without trying to learn an entire program...& dig through trying to find what I need. I just use this reference sheet, and quickly can do what I need to do & can finish up & get back to the other tasks I need to generate income. Work Smarter...buy this!! Your time is worth a lot, if I had to sum this purchase up I would say "it enables me to be much more efficient & I now have better use of my precious time, when it comes to financial prep & recording!"

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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