Get Smart With QuickBooks 2021 for Windows

Category: Modern Workplace & M365 | **Vendor:** Logical Operations

Duration: 16.00 hours (2 days) **13.0 CPD Hours** **Rating:** ⭐ 4.6 (5,878 reviews)

Course Information

Delivery Format: Instructor Led - Online

Course Overview

This course covers all features that are in QuickBooks Pro and Premier 2020 and prepares you for the QuickBooks Certified User exam. This course combines all topics in the two 1 day courses Get Started with QuickBooks 2021 for Windows and Keep Going with QuickBooks 2021 for Windows . First-time QuickBooks users will learn the basic features of the software. Experienced QuickBooks users will quickly learn the new features and functionality of QuickBooks 2021.

About This Course

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Learning Outcomes

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

What’s New in This Guide

Automatic Payment Reminders for open customer invoices

Ability to automatically include the PO# (purchase order number) to Invoice Emails

Able to combine multiple emails which allows you to attach multiple sales or purchasing documents to a single email

Quickly locate a company file using the new company file search feature

Smart Help is an improved search experience that includes access to live experts through messaging and call back options

Detailed Course Outline

Getting Started

- Starting QuickBooks
- Setting QuickBooks Preferences
- Components of the QuickBooks Operating Environment
- Using QuickBooks Help
- Identifying Common Business Terms
- Exiting QuickBooks

Setting Up a Company

- Creating a QuickBooks Company
- Using the Chart of Accounts

Working with Lists

- Creating Company Lists
- Working with the Customers & Jobs List
- Working with the Employees List
- Working with the Vendors List
- Working with the Item List
- Working with Other Lists
- Managing Lists

Setting Up Inventory

- Entering Inventory
- Ordering Inventory
- Receiving Inventory
- Paying for Inventory
- Manually Adjusting Inventory

Selling Your Product

- Creating Product Invoices
- Applying Credit to Invoices
- Emailing Invoices
- Setting Price Levels
- Creating Sales Receipts

Invoicing for Services

- Setting Up a Service Item
- Changing the Invoice Format
- Creating a Service Invoice
- Editing an Invoice
- Voiding an Invoice
- Deleting an Invoice
- Entering Statement Charges
- Creating Billing Statements

Processing Payments

- Displaying the Open Invoices Report
- Using the Income Tracker
- Receiving Payments for Invoices
- Making Deposits
- Handling Bounced Checks

Working with Bank Accounts

- Writing a QuickBooks Check
- Voiding a QuickBooks Check
- Using Bank Account Registers
- Entering a Handwritten Check
- Transferring Funds Between Accounts
- Reconciling Checking Accounts

Entering and Paying Bills

- Handling Expenses
- Using QuickBooks for Accounts Payable
- Using the Bill Tracker
- Entering Bills
- Paying Bills
- Entering Vendor Credit

Memorizing Transactions

- Entering a New Memorized Transaction
- Editing a Memorized Transaction
- Deleting a Memorized Transaction
- Grouping Memorized Transactions
- Using a Memorized Transaction
- Printing the Memorized Transaction List

Customizing Forms

- Creating a Custom Template
- Modifying a Template
- Printing Forms

Using Other QuickBooks Accounts

- Other QuickBooks Account Types
- Working with Credit Card Transactions
- Working with Fixed Assets
- Working with Long-Term Liability Accounts
- Using the Loan Manager

Creating Reports

- Working with QuickReports
- Working with Preset Reports
- Sharing Reports
- Exporting Reports to Microsoft Excel
- Printing Reports

Creating Graphs

- Creating QuickInsight Graphs
- Using QuickZoom with Graphs
- Working with the Sales Graph
- Customizing Graphs
- Printing Graphs

Tracking and Paying Sales Tax

- Using Sales Tax in QuickBooks
- Setting Up Tax Rates and Agencies
- Indicating Who and What Gets Taxed
- Applying Tax to Each Sale
- Determining What You Owe
- Paying Your Tax Agencies

Preparing Payroll with QuickBooks

- Using Payroll Tracking
- Setting Up for Payroll
- Setting Up Employee Payroll Information
- Setting Up a Payroll Schedule
- Writing a Payroll Check
- Printing Paycheck Stubs
- Tracking Your Tax Liabilities
- Paying Payroll Taxes
- Preparing Payroll Tax Forms

Using the EasyStep Interview

- Using the EasyStep Interview
- Using Online Banking
- Setting Up an Internet Connection
- Setting Up Bank Feeds for Accounts
- Viewing, Downloading, and Adding Online Transactions
- Creating Online Payments
- Transferring Funds Online
- Canceling Online Payments

Managing Company Files

- Using QuickBooks in Multi-user Mode
- Setting Up Users and Passwords
- Setting a Closing Date
- Sharing Files with an Accountant
- Updating QuickBooks
- Backing Up and Restoring a Company File
- Condensing a Company File

Estimating, Time Tracking, and Job Costing

- Creating Job Estimates
- Creating an Invoice from an Estimate
- Displaying Reports for Estimates
- Updating the Job Status
- Tracking Time
- Displaying Reports for Time Tracking
- Tracking Vehicle Mileage
- Displaying Vehicle Mileage Reports
- Displaying Other Job Reports

Writing Letters

- Using the Letters and Envelopes Wizard
- Customizing Letter Templates

Additional Course Details

Nexus Humans Get Smart With QuickBooks 2021 for Windows training program is a workshop that presents an invigorating mix of sessions, lessons, and masterclasses meticulously crafted to propel your learning expedition forward.

This immersive bootcamp-style experience boasts interactive lectures, hands-on labs, and collaborative hackathons, all strategically designed to fortify fundamental concepts.

Guided by seasoned coaches, each session offers priceless insights and practical skills crucial for honing your expertise. Whether you're stepping into the realm of professional skills or a seasoned professional, this comprehensive course ensures you're equipped with the knowledge and prowess necessary for success.

While we feel this is the best course for the Get Smart With QuickBooks 2021 for Windows course and one of our Top 10 we encourage you to read the course outline to make sure it is the right content for you.

Additionally, private sessions, closed classes or dedicated events are available both live online and at our training centres in Dublin and London, as well as at your offices anywhere in the UK, Ireland or across EMEA.

Frequently Asked Questions

Q: What delivery options are available for Get Smart With QuickBooks 2021 for Windows?

We offer multiple delivery formats:

- Live Instructor-Led Classroom Online (Virtual/Live Online)
- Traditional Instructor-Led Classroom Training (ILT)
- On-site delivery at your offices anywhere in United Kingdom
- Private dedicated courses customized for your team

Q: How many CPD hours does this course provide?

The 2-day Get Smart With QuickBooks 2021 for Windows course provides up to 13.0 CPD hours of structured learning. CPD certificates can be provided upon request.

Q: What is the duration of the Get Smart With QuickBooks 2021 for Windows training?

The training takes place over 2 day(s), with each day lasting approximately 16.00 hours including breaks for lunch and refreshments.

Q: Do you provide corporate training for Get Smart With QuickBooks 2021 for Windows?

Yes, we provide corporate training, dedicated training, and closed classes for Get Smart With QuickBooks 2021 for Windows. Training can take place anywhere in United Kingdom including London, Manchester, Birmingham, Edinburgh, or live online allowing teams from across United Kingdom or internationally to attend.

Q: Why choose Nexus Human for Get Smart With QuickBooks 2021 for Windows?

Nexus Human is recognized as one of the leading training providers. Our trainers have won multiple awards including:

- Small Firms Best Trainer Award
- National Training Partner of the Year (Ireland) - Multiple Years
- Global Top 30 Instructor Awards (2012, 2019, 2021)
- Tech Excellence Award Nominations
- Learning Performance Institute (LPI) External Training Provider Sponsor 2024

Q: Are there any discount codes available?

Yes! Use discount code **PENPAL5** when booking your Get Smart With QuickBooks 2021 for Windows training. Please note that only one discount code can be used per booking and cannot be combined with other special offers.

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