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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 "Chart of Accounts" from the Menu Bar.<br>2. Click the "Account" button and choose "New" <a href="#">[Screenshot]</a> .<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 "Chart of Accounts" from the Menu Bar.<br>2. Click to highlight the account.<br>3. Click the "Account" button and choose "Edit Account" <a href="#">[Screenshot]</a> .<br>4. Edit the information and click "Save & Close".<br><b>Deleting or Inactivating an Account</b><br>1. Select "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" <a href="#">[Screenshot]</a> .<br>4. Click "OK" to confirm any deleted accounts. | <b>Managing List Items</b><br><b>Creating Item List Custom Fields</b><br>1. Select "List" from the Menu Bar.<br>2. Click the "Item" button and then either "New" or "Edit Item" <a href="#">[Screenshot]</a> .<br>3. Click the "Custom Fields" button and then the "Define Fields" button <a href="#">[Screenshot]</a> .<br>4. Enter item list names, select "OK", and click "OK".<br>5. To enter values, select "List 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 <a href="#">[Screenshot]</a> moving 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 <a href="#">[Screenshot]</a> .<br>4. Restore original sort order by selecting "View" > "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 <a href="#">[Screenshot]</a> .<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. | <b>Paying Sales Tax</b><br>1. Select "Vendors" > "Pay Sales Tax" from the Menu Bar.<br>2. Make selections for the account 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 "List Item List" from the Menu Bar.<br>2. Select "New" from the "Item" button menu <a href="#">[Screenshot]</a> .<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" > "Purchase Order" from the Menu Bar.<br>2. Click to highlight the "Purchase Order" account.<br>3. Click the "Report" button, and select "Quick" <a href="#">[Screenshot]</a> .<br>4. Enter information and click the "Save & Close" button.<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 the 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 type of inventory adjustment to make from the "Adjustment Type" drop-down.<br>3. Make the required adjustments 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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