

QuickBooks

Training Request



CHECK LIST

Choose the subject in order of interest with 1 being most important.

- _____ Company Setup & Preferences
- _____ Connecting & Setting up Banking & Credit Cards
- _____ Navigation & Short Cut Tools
- _____ Managing Data : Customers, Vendors, Lists, Company, Etc.
- _____ **Income** : Sales Receipts, Invoicing, Statements, Credits, Time Tracking, Costing, Payments, Deposits, & Accounts Receivable Reporting
- _____ **Expenses** : Bills, Bill Payments, Checks, Expenses, Transfers, & Accounts Payable Reporting
- _____ **Reporting** : Customerizations, Memorizing, Etc.
- _____ Setup Issues : Chart of Accounts, Sales Items, other Lists, Manage Users, and Forms.
- _____ **Monthly Issues** : Reconciliations, Trouble Shooting, A/R & A/P Reports, Cleaning Up Solutions, Balancing Books, Closing Periods, and Inviting Accountant.
- _____ **Other:** _____