



QUICK BOOKS

1. INTRODUCTION TO QUICKBOOKS ONLINE

- Which QuickBooks Online is right for me?
- QuickBooks Online Packages Available
- To find an expert in QuickBooks Online
- Benefits of using QuickBooks Online
- Mobile devices and QuickBooks Online
- Our case study for today's training

2. NAVIGATING QUICKBOOKS ONLINE

- Navigating the QuickBooks Online Home Page

3. COMPANY FILE SETUP

- GST Setup
- Using the Tax Centre Accounts
- Taxable Payments Annual Report (TPARS)
- Managing Users
- Multi-Currency
- Importing Data
- Customers Import
- Products and Services

4. ONLINE BANKING

- Linking Bank Accounts & Importing Bank transactions
- Linking Bank Accounts or Credit Cards for Automatic Bank Feeds
- Importing Bank Transactions
- How to Add Transactions
- How to Match Transactions
- Processing Transactions - Debits
- Processing Transactions – Credits
- How to accept multiple transactions in batches

- Adding Attachments to Transactions
- Setting up Bank Rules

5. TRANSACTIONS

- Creating and Managing Quotes
- Creating and Managing Invoices
- Receiving Payment of Invoices
- Customizing Invoices Attachments
- Expense Transactions Bills
- Paying Bills
- Recurring transactions
- Class and Location Tracking
- Turning on Class Tracking and/or Location Tracking
- Partial Purchase Orders
- Create a Partial Purchase Order

6. BUDGETS

- Budget vs Actual
- Set up Budget Report

7. PROJECTS

- Turn on Projects in Settings
- Create and track your projects
- Add a transaction to a project outside of Projects
- Move existing transactions into Projects

8. PAYROLL

- To Setup Payroll
- Pay Run Settings
- Setup Employees
- Setup a Pay Run
- Payroll Reports
- Important Reports to note

9. SUPERANNUATION & CLICK SUPER

- Accessing Super Payments within QuickBooks Online

10. BANK RECONCILIATION

- Banking Reconciliation Tools

11. MANAGING GST AND BAS

- QuickBooks Online Helps You to Manage Your GST
- BAS Reports Used to Review
- Revision of BAS
- Completing the BAS
- GST Exception Detail
- Processing GST in the New Tax Centre

12. RUNNING REPORTS

- Profit & Loss / Balance Sheet
- Customising Reports
- Report Groups
- Automated Reports

13. MOBILE APPS – TAKE THE IPAD / IPHONE TOU

- Download the QuickBooks Online Mobile App
- Creating and Sending Quotes on an iPad/iPhone
- Capturing Expenses on an iPad/iPhone
- Run reports on an iPad/iPhone

14. HELP & SUPPORT

- In-product support
- QB Assistant
- Customer Care telephone support
- Online support
- Get connected socially

15. NEXT STEPS

- Providing Feedback



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