



## **Course Syllabus**

### **QuickBooks 2009 Level 2**

*One Day • Instructor-led*

#### **Audience**

This course is designed for anyone who has taken QuickBooks Level 1 or has the equivalent knowledge/skills and wants to continue their training in this program.

#### **Prerequisites**

Before attending this course, students must have:

- Taken the Windows XP Level 1 course or have the basic skills and knowledge of Windows applications
- Taken the QuickBooks 2009 Level 1 course or have equivalent knowledge and skills

#### **Exams**

There are no exams associated with this course.

#### **Objectives:**

- Customize forms
- Use other QuickBooks accounts
- Create Reports
- Create graphs
- Track and pay sales tax
- Do payroll with QuickBooks
- Estimate, time track, and job costs
- Write letters
- Synchronize with contact management software

## **Course Outline**

#### **Lesson 1: Customizing Forms**

- Create a Custom Template
- Modify a Template
- Printing Forms

#### **Lesson 2: Using Other QuickBooks Accounts**

- Other QuickBooks Account Types
- Tracking Credit Card Transactions
- Working with Asset Accounts
- Working with Liability Accounts
- Understanding Equity Accounts

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### **Lesson 3: Creating Reports**

- Creating QuickReports
- Modifying QuickReports
- Memorizing QuickReports
- Running Preset Reports
- Modifying Preset Reports
- Exporting Reports to Microsoft Excel
- Print Reports

### **Lesson 4: Creating Graphs**

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

### **Lesson 5: 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

### **Lesson 6: Doing Payroll with QuickBooks**

- Using Payroll Tracking
- Setting Up for Payroll
- Setting Up Employee Payroll Information
- Writing a Payroll Check
- Printing Paycheck Stubs
- Tracking Your Tax Liabilities
- Paying Payroll Taxes
- Printing Forms 940 and 941

### **Lesson 7: Estimating, Time Tracking, and Job Costing**

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

### **Lesson 8: Writing Letters**

- Writing a QuickBooks Check
- Using Bank Account Registers

### **Lesson 9: Synchronizing with Contact Management Software**

- Categorizing Contact Names in Microsoft Outlook
- Synchronizing with Microsoft Outlook
- Changing Synchronization Settings