



QuickBooks® and Quicken® Training Course Descriptions

Before you register: You must be an adult with basic computer knowledge. Prior use of Excel and/or Word. Level 1 is designed to assist you in making a software and computer purchase decision, whether you are an individual or business person. **If you are starting a business, you should attend Level 1 to consider an appropriate purchase or subscription.**

Levels 2 and above require you to have your own laptop that is wireless enabled (to go online), with your software and browsers already installed. Visit your bank first and have your bank account already established, and ask the bank to assist you in obtaining your online log in and password. Bring your laptop to the course. Each course is 1.5 hour unless otherwise stated. Each upper level requires prior attendance, or equivalent knowledge, of the lower level.

QuickBooks® or Quicken®? Making an Informed Decision Level 1

Learn the basic features of QuickBooks Pro, QuickBooks online, and Quicken Deluxe and how they can be used to organize your business or personal finances. Determine the right program you should buy or subscribe (hint: it depends on your situation). Explore the environment of each program and discuss your specific situation. Laptop not required.

Quicken® Level 2

Learn Quicken Deluxe and how to further use it to organize your business or personal finances. Learn how to professionally add and effectively personalize coding. Learn how to professionally add an account, and when to do so. Learn how to reconcile your bank account, and produce two important reports. Learn how to back up your file(s). Time: 2 hours

QuickBooks® Level 2

Learn the basic features of QuickBooks Pro and how it can be used to organize your business finances. Explore the basic concepts of balance sheet, and how to set up your new company profile, including the Vendor Center, Customer Center and adding Items.

QuickBooks® Level 3

Learn how to record different types of business transactions such as posting accounts payable and accounts receivable. Learn how to set up receivable templates and preferences, and what the accounting fields mean.

QuickBooks® Level 4

This course is for business owners who have already set up their company, and have already set up and used levels 2 and 3. This level will provide instruction on reconciling the bank statement(s) for the company, and how to generate financial reports for your company. Discussion of features such as point-of-sale, merchant cards, payroll. Time: 2 hours