

# QuickBooks Training Outline

## MODULE 1: GETTING STARTED

- QBO Test Account Link: <https://qbo.intuit.com/redir/testdrive>
- Why We Need an Accounting System
- Advantages of QuickBooks Online (QBO)
- QBO Versions & Tour
- What to Discuss with Your Accounting Professional

## MODULE 2: CHART OF ACCOUNTS (COA)

- What Is the COA
- Sample COA
- Adding and Deleting Accounts

## MODULE 3: BANKING CENTER – PART 1

- Connecting Bank Accounts/Credit Cards
- Receipt and Invoice Process
- Recording Expenses in QBO

## MODULE 4: BANKING CENTER – PART 2

- Recurring Transactions
- Bank Deposits
- Creating Rules
- Miscellaneous Transactions (Equity)
- Credit Card Credits

## MODULE 5: CONTRACTORS & EMPLOYEES

- Contractors, Vendor Center, 1099 Process
- Employee Forms, Setting Up Payroll
- Time Entry

## Module 6: Reconciling & Reporting

- Invoices, Products & Services
- Reconciliation Process
- Basic Reporting