

QuickBooks Managerial Reports

COURSE DESCRIPTION

This hands-on course is intended for individuals who have already installed and set up QuickBooks, including the Master File Lists. The course focuses upon creating and modifying QuickBooks reports and statements.

COURSE OBJECTIVES

Upon successful completion of this course, participants will be able to:

1. Understand QuickBooks reports are generated
2. Select and access specific QuickBooks reports
3. Create and modify QuickBooks reports
4. Use memorized reports
5. Print reports
6. Combine reports from two or more company data files

COURSE INSTRUCTOR

Marsha Ann Tate, Ph.D.

marsha@materesearch.com

Course handouts are available at https://mtateresearch.com/computer_courses_supplemental_resources

COURSE OUTLINE

The course will cover the following topics:

An Overview of QuickBooks Reports

- Understanding QuickBooks reports
- Accessing QuickBooks reports
- Exploring the available QuickBooks reports
- Setting report preferences
- Viewing graphical presentations of a company's health

Creating and Printing Reports

- Using predefined reports
 - Customer reports
 - Job reports
 - Sales reports
 - Item reports
 - Company and financial reports
- Creating and edit custom reports
- Previewing and printing reports

Customizing Reports

- Customizing data
- Adding or deleting columns
- Adding, editing, and deleting information on the header/footer

Customizing Reports, continued

- Personalizing the font and style of reports
- Using Custom Summary reports
- Using Custom Transaction Detail reports
- Using QuickZoom report

Creating and Modifying Memorized Reports

- Creating memorized reports
- Accessing memorized reports
- Editing memorized reports
- Deleting memorized reports
- Editing memorized reports lists
- Deleting memorized report groups
- Troubleshooting memorized reports

Using Advanced Report Features

- Setting up and modifying scheduled reports
- Combining reports from two or more company data files