



---

# QUICKBOOKS LEVEL 2 COURSE – REPORTING AND ADVANCED FEATURES

---

If you are responsible for providing different reports to managers, accountants, owners and or external users then this course is for you. Customized reports by different options such as Dates, Debits / Credits, Class, Jobs and etc. In addition learn QuickBooks advanced features

## COURSE DESCRIPTION:

Learn to create and customize reports using QuickBooks Reporting option. Also learn to use the advanced features of QuickBooks Accounting software.

## ADMISSION REQUIREMENTS:

- Accounting and bookkeeping knowledge
- QuickBooks Level I or experience working with QuickBooks Desktop version

## COURSE OBJECTIVE:

### Lesson 1 - REPORTING

- Overview of the Reporting Centre
- Discuss options Reporting Menu including Company and Financials, Customers and Receivables, Vendors and Payables
- Discuss the differences of detailed and summary reports
- Discuss the different reports and the reporting tools QuickBooks provides
- Discuss reporting customization
- The benefits of Memorized reports
- Some types of Reports you will learn to create: Trial Balanced Comparisons, memorized; Profit and Loss; detailed, Balance Sheet; Customers and Receivables; Vendors and Payables; etc.

## Lesson 2 - SETUP COMPANY

- Using Easy Step Wizard, setup company
- Company Name / Legal Name and contact information
- Type of company – accounting, retail, etc.
- Create and Set-up Chart of Accounts
- Services or Inventory or both
- HST number or GST and PST, if applicable
- Progress invoicing
- FISCAL Year

## Lesson 3 - QUICKBOOKS ADVANCED FEATURES

- Discuss Classes and the advantages of using classes; Create Classes for the business
- Discuss a Customer Jobs and advantages; Create Jobs for Job Costs
- Merge similar Accounts • Set-up User Security and Permissions
- Set-up Customer Price Level
- Set-up Capital/Fixed Assets
- Set-up basic Budgets

### DURATION:

16 hours

### DELIVERY FORMAT:

Live Classroom

### SCHEDULE:

Visit: [http://www.bttcollege.com/schedules/accounting\\_schedule.pdf](http://www.bttcollege.com/schedules/accounting_schedule.pdf) or contact us for flexible schedule.

### CONTACT INFORMATION:

Phone: 416-483-3567

Email: [iwantinfo@bttcollege.com](mailto:iwantinfo@bttcollege.com)