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QuickBooks Pro 2016 Quick Reference Training Card Tutorial Guide Cheat Sheet (Instructions And Tips)

QuickBooks® Pro 2016

Quick Reference Guide
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The Chart of Accounts

Adding a New Account
1. Select "List" Chart of Accounts from the Menu Bar.
2. Click the "ACCOUNT" button & choose "New" 
3. Choose an account type and click "Continue."
4. Enter the account information and click "Save & Close."

Editing an Account

1. Select "List" Chart of Accounts from the Menu Bar.
2. Click to highlight the account.
3. Click the "ACCOUNT" button and choose "Edit Account" 
4. Edit the information and click "Save & Close."

Deleting or Inactivating an Account


1. Select "List" Chart of Accounts from the Menu Bar.
2. Click to highlight the account.
3. Click the "ACCOUNT" button and choose "Make Account Inactive" or "Delete Account" 
4. Click "OK" to confirm any deleted accounts.

Customers, Employees & Vendors

Accessing the Centers

1. Click "Customers," "Employees" or "Vendors" from the Menu Bar and select the Center from the menu.


Adding a New Customer

1. Click the "Customers & Jobs" tab in the Customer Center.
2. Choose "New Customer" from the "New Customer" & Job" drop-down above the tab. 
3. Enter all customer information on each of the tabs in the "New Customer" window and click "OK."

Editing or Deleting a Customer

1. Click to highlight the customer in the "Customer & Job" tab in the Customer Center.
2. Select "Edit" Edit Customer Job" or "Edit" Delete Customer Job" from the Menu Bar.
3. If editing, make any changes and then click "OK."

Adding a New Employee

1. Click the "New Employee" button in the upper-left corner of the Employee Center. 
2. Enter all employee information on each of the tabs in the "New Employee" window and click "OK."

Editing or Deleting an Employee

1. Click to highlight the employee in the "Employee" tab in the Employee Center.
2. Select "Edit" Edit Employee" or "Edit" Delete Employee" from the Menu Bar.
3. If editing, make any changes and then click "OK."

Adding a New Vendor

1. Choose "New Vendor" from the "New Vendor" drop-down in the Vendor Center. 
2. Enter all vendor information on each of the tabs in the "New Vendor" window and click "OK."

Editing or Deleting a Vendor

1. Click to highlight the vendor on the "Vendors" tab in the Vendor Center.
2. Select "Edit" Edit Vendor" or "Edit" Delete Vendor" from the Menu Bar.
3. If editing, make any changes and then click "OK."

Creating Custom Fields

1. Open the Vendor, Company or Employee Center.
2. Click the "Define Fields" button on the "Additional Info" tab of the "New [Item Type]" or "Edit [Item Type]" window. List Item/Vendor, Company or Employee.
3. Enter custom field names and select tabs to include.
4. Click "OK."
5. Enter any "Custom Fields" values and click "OK."

Managing List Items

Creating Item List Custom Fields

1. Select "List" Item List from the Menu Bar.
2. Click the "Item" button and then either "New" or "Edit Item" 
3. Click the "Custom Fields" button and then the "Define Fields" button. 
4. Enter item label names, select "Use" and click "OK."
5. Enter any "Custom Fields" values and click "OK."
6. For existing custom fields, select "List" Item List from the Menu Bar and select the item. Click the "Item" button and then "Edit Item." Click the "Custom Fields" button, enter values, and click "OK."

Sorting Lists

1. To manually sort, click and                  

Synopsis

Designed with the busy professional in mind, this 4-page quick reference guide provides step-by-step instructions in QuickBooks Pro 2016. When you need an answer fast, you will find it right at your fingertips. These easy-to-use quick reference guides are perfect for individuals, businesses and as supplemental training materials. Topics Include: The Chart of Accounts; Customers, Employees, and Vendors; Managing List Items; Sales Tax; Inventory; Other Items; Basic Sales; Price Levels; Billing Statements; Payment Processing; Entering and Paying Bills; Bank Accounts; Reporting; Estimating; Time Tracking; Payroll; Credit Card Accounts; The Loan Manager; Company Management.

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Customer Reviews

Very helpful cheat-sheet!

Quick and easy.

Some what helpful, but will be getting a manual instead as I am a beginner with Quick Books. Which is great when it gets set up, as our CPA has it and we would be able to share the information.

always a great product that works great!

Perfect reference guide - my go to when I forget one simple step. Easy to follow.

not really helpful for my employees.

Great Quickbook Notes!

good reference

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