QuickBooks Training - Things to Remember

1. Good stuff located in Preferences.

If you are thinking "I wish QB would <fill in the blank>" you might find a preference change that meets your need.

Go to **Edit → Preferences**

Explore this area of QB and understand how you can tailor the database to meet your company and your work style needs.

2. Set up Users
Each user can set their own preferences. It is very helpful to crate a user for each person that logs into QB. This also allows you to use reports like Reports > Accountant and Taxes > Audit Trail to see who did what and when.

The Audit Trail report can help you sleuth out problems with your accounts and highlight additional training needs for user.

3. Enter Dates- reduce your clicks.

Many users start out by either using the calendar image to enter dates, changing some numbers in the date (changing 3/15/18 to 3/17/18 by highlighting 5 and changing it to 7), or entering a date by typing 03/17/2018.

There are much faster and easier ways to enter dates.

Enter 3.17 or 3/17 and QB will add the current year for you.

Use + and - keys to change dates.
>   **+ increases by a day**
>   **- decreases by a day**

So for our example, the user could simply press ++ to change 3/15/18 to 3/17/18.

4. Escape key closes windows.
Keep your QB desktop clean without using your mouse to click on the X button to close a window, Press Esc to close the current window. Continue pressing ESC to close the next window(s).

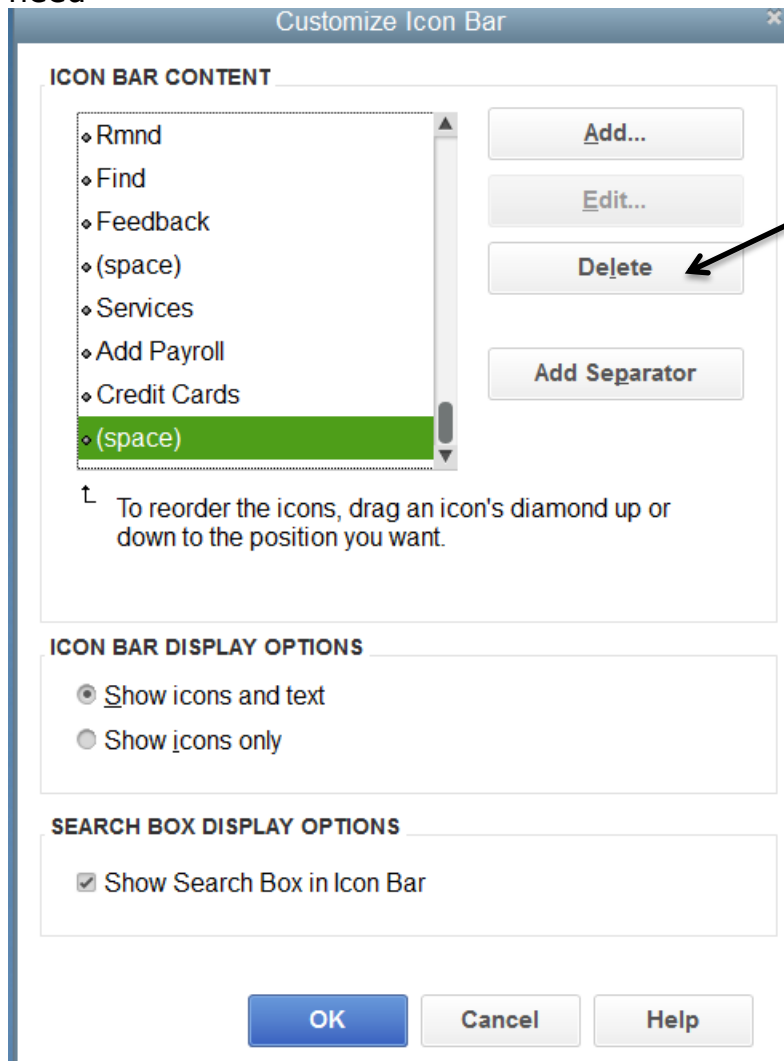**5. Set up your Desktop set up to minimize your clicks.**
I prefer the old school icon bar to the new side bar because the side bar takes up too much landscape on my computer screen.

To change: View > Top Icon Bar

If you like color: Edit > Preferences > Desktop View > My Preferences tab > check the box "Switch to colored icons/light background on the Top Icon Bar"

Next, you can add and remove icons so your icon bar has icons for the windows you use the most:

Right click on icon bar > Customize Icon Bar > Delete what you do not think you need
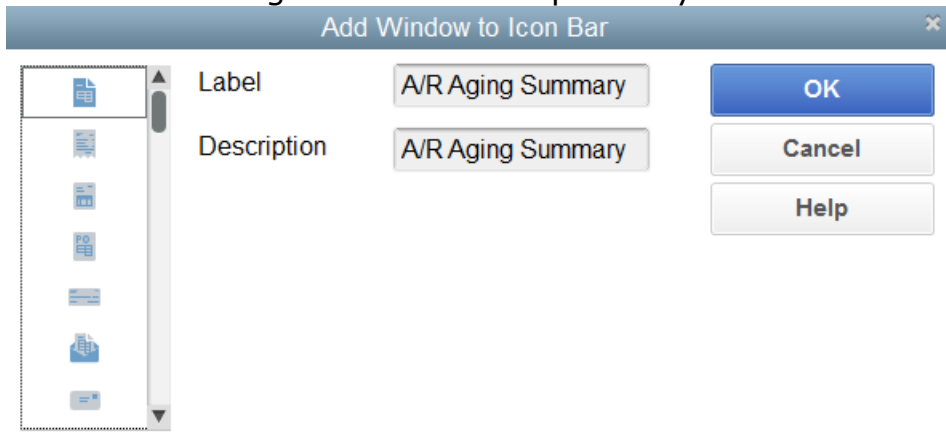
Before:

After:

Next you can add what you want/need on your Icon Bar – even reports!

Open a form or report you use all the time > View> Add "what your adding" to icon bar > Change Label or description if you want

OK.

Now I have the A/R Summary on my icon bar.

6. It is vital that you create QB backups of your database.
Store the backups on flash drives, external hard drives etc. QB backups are special files and if you experience issues with your database, you may need to use a backup as your new file.

This means 1. You need to have QB Backups (QBB files) on hand and 2. You need to have recent backups to reduce the data entry you will have to re-enter.

File > Back Up Company > Create Local Backup > Follow prompts to save.