



QUICKBOOKS ON-LINE: Get Comfortable with Your Financials

Saturday, June 26, 2021: Two Sessions

(No-Cost, Open to Anyone)

SESSION I: 9:00 AM – 11:00AM (HST)

Business Foundations and Get On-board with QB

- Understanding the Different Types of Entities
- Which Entity is right for you?
- What are the different types of taxes I need to plan for?
- What is GE tax, and how is it paid?
- What is accounting?
- What is the difference between a bookkeeper, accountant, CPA, EA, CMA, or CFO?
- How should I be keeping my books?
- What's deductible vs what should I be tracking?

SESSION II: 12:00 PM – 2:00 PM (HST)

Taking a Deeper Look into QB for Your Business

- What are the different versions of QuickBooks, and which one do I need?
- When do I need payroll?
- How to setup my QuickBooks file (Chart of Accounts)
- How to setup the Products & Services?
- How to use Invoices, Sales Receipts, Receive Payments, and Bank Deposits
- How to record different expenses?
- How to integrate the Banking Downloads?
- How to setup Merchant Services?
- How to add other Apps and Add-Ons?
- How to read Reports for historical information and forecasting?
- How to create and share custom reports and add users?

Presenter:

Lisa Wells



"If you feel you don't understand what you are supposed to do monthly, quarterly, and annually, if you are interested in moving your business from paper file to electronic files to start forecasting rather than dealing with just "results", or if you want to know how to start or get more out of QB, you should take these sessions."

REGISTER: bit.ly/QuickBooks-hawaii

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All opinions, conclusions, and/or recommendations expressed herein are those of the author(s) and do not necessarily reflect the views of the SBA.

Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance. Contact Dennis Kwak dkwak@hawaii.edu.