

# WEEKLY STATUS REPORT

## PROJECT PROGRESS UPDATE

Week	Date	Task	Description	Status
1	01/01/2022	Project kickoff	Initial meeting with stakeholders to discuss project objectives	On track
1	01/02/2022	Requirement gathering	Conduct interviews and analyze documentation	Completed
1	01/03/2022	Planning	Develop project plan and set milestones	In progress
1	01/04/2022	Resource allocation	Assign team members to different project tasks	Not started
1	01/05/2022	Kickoff meeting presentation	Present project plan to the entire team	Scheduled
2	01/06/2022	Development	Start coding and implementing the project	In progress
2	01/07/2022	Testing	Perform unit testing and identify software issues	Not started
2	01/08/2022	Documentation	Begin documenting the project progress and updates	Not started
2	01/09/2022	Review and feedback	Collect feedback from stakeholders and make necessary changes	Not started
2	01/10/2022	Project status meeting	Review the progress and discuss any challenges	Scheduled
3	01/11/2022	Refinement	Improve code quality and optimize performance	Not started
3	01/12/2022	Integration testing	Test the integration of different modules	Not started
3	01/13/2022	User acceptance testing	Involve end-users to perform testing and provide feedback	Not started
3	01/14/2022	Documentation update	Update the project documentation based on recent changes	Not started
3	01/15/2022	Review and feedback	Gather feedback from stakeholders and make final revisions	Not started
4	01/16/2022	Finalize the project	Complete all pending tasks and prepare for project deployment	Not started
4	01/17/2022	Project presentation	Present the finalized project to stakeholders and obtain approval	Not started
4	01/18/2022	Summary report	Prepare a detailed summary of the project, including outcomes	Not started
4	01/19/2022	Project closure	Wrap up the project, handover deliverables, and evaluate success	Not started

# Update Report On Excel

**Camilla Rothe**



## **Update Report On Excel:**

**Excel Automate Report** Ceyvian C,2011-10-10 This book will teach you on how to prepare report s automatically by creating template s with combined formula Then you can use the template to generate the regular daily weekly bi weekly or monthly report as and when automatically by placing your on going updated data into the template with Excel Automate Report concept This solution saves you a lot of valuable time plus you don t have to repeat the same report making process again and again Suitable for Sales Personnel Marketing Personnel Purchaser Administrator Analyst **Excel 2007**

**Advanced Report Development** Timothy Zapawa,2007-03-31 Create powerful innovative reporting solutions with Excel 2007 With this new book which is significantly updated from the bestselling Excel 2003 version author Timothy Zapawa provides you with in depth coverage of Excel 2007 s enhanced reporting capabilities Discover what you can do with PivotTable and Spreadsheet reports enhanced conditional formatting and filtering functions improved data access and management tools and expanded OLAP features With notes tips warnings real world examples and how to videos in every chapter you ll soon be an expert on Excel report development **Proceedings of the 5th International Conference on Global Innovation and Trends in Economy 2024 (INCOGITE 2024)** Soebowo Musa,Eric J. Nasution,Derek Ong Lai Teik,Hanny N. Nasution,Gilbert M. Tumibay,Amizawati Mohd. Amir,Diena Mutiara Lenny,Sabrina O. Sihombing,2024-12-11 This is an open access book The International Conference on Global Innovation and Trends in Economy INCOGITE is the initiative of the Swiss German University SGU Universitas Pelita Harapan UPH and Universitas Multimedia Nusantara UMN in collaboration with institutions professional associations industries and partner universities in Indonesia and abroad INCOGITE aims to provide a collaborative platform for scholars researchers and industry members for the advancement of the economic field

**QuickBooks 2015: The Missing Manual** Bonnie Biafore,2014-10-20 How can you make your bookkeeping workflow smoother and faster Simple With this Missing Manual you re in control you get step by step instructions on how and when to use specific features along with basic bookkeeping and accounting advice to guide you through the learning process Discover new and improved features like the Insights dashboard and easy report commenting You ll soon see why this book is the Official Intuit Guide to QuickBooks 2015 The important stuff you need to know Get started fast Quickly set up accounts customers jobs and invoice items Follow the money Track everything from billable and unbillable time and expenses to income and profit Keep your company financially fit Examine budgets and actual spending income inventory assets and liabilities Gain insights Open a new dashboard that highlights your company s financial activity and status the moment you log in Spend less time on bookkeeping Create and reuse bills invoices sales receipts and timesheets Find key info Use QuickBooks Search and Find features as well as the Vendor Customer Inventory and Employee Centers **QuickBooks 2014 in Depth** Laura Madeira,2014 Whether you e an entrepreneur accountant or bookkeeper this comprehensive guide will help you get the most out of QuickBooks 2014 more productivity more business knowledge and

more value      **Windows Server 2012 Automation with Powershell Cookbook** Ed Goad,2013-03-26 Cookbook with recipes based on real life examples This book is written to assist the daily tasks for systems administrators engineers and architects working with Windows Server 2012      *QuickBooks 2015* Bonnie Biafore,2014 How can you make your bookkeeping workflow smoother and faster Simple With this Missing Manual you re in control you get step by step instructions on how and when to use specific features along with basic bookkeeping and accounting advice to guide you through the learning process Discover new and improved features like the Insights dashboard and easy report commenting You ll soon see why this book is the Official Intuit Guide to QuickBooks 2015 The important stuff you need to know Get started fast Quickly set up accounts customers jobs and invoice items Follow the money Track everything from billable and unbillable time and expenses to income and profit Keep your company financially fit Examine budgets and actual spending income inventory assets and liabilities Gain insights Open a new dashboard that highlights your company s financial activity and status the moment you log in Spend less time on bookkeeping Create and reuse bills invoices sales receipts and timesheets Find key info Use QuickBooks Search and Find features as well as the Vendor Customer Inventory and Employee Centers      **QuickBooks 2016: The Missing Manual** Bonnie Biafore,2015-10-19 How can you make your bookkeeping workflow smoother and faster Simple With QuickBooks 2016 The Missing Manual which covers the Windows version of QuickBooks you re in control you get step by step instructions on how and when to use specific features along with basic bookkeeping and accounting advice to guide you through the learning process Discover new and improved features like the Insights dashboard and easy report commenting The important stuff you need to know Get started fast Quickly set up accounts customers jobs and invoice items Follow the money Track everything from billable and unbillable time and expenses to income and profit Keep your company financially fit Examine budgets and actual spending income inventory assets and liabilities Gain insights Open a dashboard that highlights your company s financial activity and status the moment you log in Spend less time on bookkeeping Create and reuse bills invoices sales receipts and timesheets Find key info Use QuickBooks Search and Find features as well as the Vendor Customer Inventory and Employee Centers      **Microsoft Power BI Cookbook** Brett Powell,2017-09-27 Publisher s note This edition from 2017 is outdated and does not make use of the most recent Power BI updates A new third edition updated to the latest release is now available in color Key Features From connecting to your data sources to developing and deploying immersive mobile ready dashboards and visualizations this book covers it all Over 90 hands on technical recipes tips and use cases from across the Power BI platform including the Power BI Service and Mobile Applications Proven development techniques and guidance for implementing custom solutions with DAX and M languages Book DescriptionMicrosoft Power BI is a business intelligence and analytics platform consisting of applications and services designed to provide coherent visual and interactive insights of data This book will provide thorough technical examples of using all primary Power BI tools and features as well as demonstrate high impact end to end solutions

that leverage and integrate these technologies and services Get familiar with Power BI development tools and services go deep into the data connectivity and transformation modeling visualization and analytical capabilities of Power BI and see Power BI's functional programming languages of DAX and M come alive to deliver powerful solutions to address common challenging scenarios in business intelligence This book will excite and empower you to get more out of Power BI via detailed recipes advanced design and development tips and guidance on enhancing existing Power BI projects What you will learn Cleanse stage and integrate your data sources with Power BI Abstract data complexities and provide users with intuitive self service BI capabilities Build business logic and analysis into your solutions via the DAX programming language and dynamic dashboard ready calculations Take advantage of the analytics and predictive capabilities of Power BI Make your solutions more dynamic and user specific and or defined including use cases of parameters functions and row level security Understand the differences and implications of DirectQuery Live Connections and Import Mode Power BI datasets and how to deploy content to the Power BI Service and schedule refreshes Integrate other Microsoft data tools such as Excel and SQL Server Reporting Services into your Power BI solution Who this book is for This book is for BI professionals who wish to enhance their knowledge of Power BI beyond and to enhance the value of the Power BI solutions they deliver to business users Those who are looking at quick solutions to common problems while using Power BI will also find this book to be a very useful resource Some experience with Power BI will be useful      [Data Visualization & Presentation With Microsoft Office](#)

Valerie M. Sue, Matthew T. Griffin, 2015-10-09 Written for students professionals and social scientists with little or no knowledge of data visualization principles this complete guide presents step by step instructions for clearly and effectively presenting data using MS Office programs Throughout the book the focus is on turning raw quantitative data into attractive well designed charts and tables that tell an accurate narrative about underlying information Helpful illustrations expert tips for solving common issues and discussions on working efficiently are included to equip readers with the tools they need to engage their audience using a visual format      **Visio 2007 For Dummies** John Paul Mueller, Debbie Walkowski, 2011-02-09 Reveal your inner business artist with Visio Turn your ideas into diagrams and drawings with Visio's stencils and templates If you have an idea you want to get down on electronic paper Visio 2007 is for you and so is this book They're both flexible and user friendly Here's how to use Visio to capture ideas from simple to intricate update data in a drawing with a single click add and manipulate text work with connectors and more Discover how to Create business engineering software or network diagrams Format an entire drawing using themes Analyze what if scenarios with PivotDiagrams Produce layered multipage drawings Save drawings to publish on the Web      [QuickBooks 2014 on Demand](#) Gail Perry CPA, Michelle Long, 2014-04-11 Need answers quickly QuickBooks 2014 on Demand provides those answers in a visual step by step format We will show you exactly what to do through lots of full color illustrations and easy to follow instructions Numbered Steps guide you through each task See Also points you to related information in the book Did You Know alerts you to tips and techniques Illustrations

with matching steps Tasks are presented on one or two pages Inside the Book Learn everything you need to know to quickly start using your QuickBooks financial software Produce and customize reports that show exactly how your company is doing Schedule transactions so you ll never forget a due date again Bill time and expenses directly to customers Use the new QuickBooks features for 2014 including Income Tracker Bank Feeds and Rules Create and use a budget Reconcile your bank account to the penny without waiting for the bank statement to come in the mail Keep detailed records of fixed asset acquisitions Send customized mailings to your customers and vendors Learn tips and shortcuts to help make your QuickBooks experience more efficient and to customize your program to fit your style Process transactions the right way by following the accounting rules interspersed throughout the book Includes Hundreds of the Most Essential QuickBooks 2014 Tasks Workshops Easy Setup Procedures Reporting Techniques Visit the authors websites <http://longforsuccess.com> <http://www.cpapracticeadvisor.com> Bonus Online Content Register your book at [queondemand.com](http://queondemand.com) to gain access to online files such as a video on Using the Sample Data File      *QuickBooks 2021 For Dummies* Stephen L. Nelson,2020-10-13 Save on expensive professionals with this trusted bestseller Running your own business is pretty cool but when it comes to the financial side accounts and payroll for instance it s not so cool That s why millions of small business owners around the world count on QuickBooks to quickly and easily manage accounting and financial tasks and save big time on hiring expensive professionals In a friendly easy to follow style small business guru and bestselling author Stephen L Nelson checks off all your financial line item asks including how to track your profits plan a perfect budget simplify tax returns manage inventory create invoices track costs generate reports and pretty much any other accounts and financial planning task that turns up on your desk Keep up with the latest QuickBooks changes Use QuickBooks to track profits and finances Balance your budget Back up your data safely The fully updated new edition of QuickBooks For Dummies takes the sweat and the expense out of cooking the books and gives you more time to savor the results of your labors      **QuickBooks Pro 2020 for Lawyers Training Manual**

**Classroom in a Book** TeachUcomp ,2019-10-27 Complete classroom training manuals for QuickBooks Pro 2020 for Lawyers Full classroom manual in one book 344 pages and 212 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and effectively manage a legal company file as well as use QuickBooks for trust accounting In addition you ll receive our complete QuickBooks curriculum Topics Covered The QuickBooks Environment 1 The Home Page and Insights Tabs 2 The Centers 3 The Menu Bar and Keyboard Shortcuts 4 The Open Window List 5 The Icon Bar 6 Customizing the Icon Bar 7 The Chart of Accounts 8 Accounting Methods 9 Financial Reports Creating a QuickBooks Company File 1 Using Express Start 2 Using the EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from a Local Backup Copy 6 Setting Up Users 7 Single and Multiple User Modes 8 Closing Company Files 9 Opening a Company File Using Lists 1 Using Lists 2 The Chart of Accounts 3 The Customers Jobs List 4 The Employees List 5 The Vendors List 6 Using Custom Fields 7 Sorting List 8 Inactivating and

Reactivating List Items 9 Printing Lists 10 Renaming Merging List Items 11 Adding Multiple List Entries from Excel Setting Up Sales Tax 1 The Sales Tax Process 2 Creating Tax Agencies 3 Creating Individual Sales Tax Items 4 Creating a Sales Tax Group 5 Setting Sales Tax Preferences 6 Indicating Taxable Non taxable Customers and Items Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Creating a Purchase Order 4 Receiving Items with a Bill 5 Entering Item Receipts 6 Matching Bills to Item Receipts 7 Adjusting Inventory Setting Up Other Items 1 Service Items 2 Non Inventory Items 3 Other Charges 4 Subtotals 5 Groups 6 Discounts 7 Payments 8 Changing Item Prices Basic Sales 1 Selecting a Sales Form 2 Creating an Invoice 3 Creating Batch Invoices 4 Creating a Sales Receipt 5 Finding Transaction Forms 6 Previewing Sales Forms 7 Printing Sales Forms Using Price Levels 1 Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying Finance Charges and Creating Statements Payment Processing 1 Recording Customer Payments 2 Entering a Partial Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments 6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between Jobs 10 Manually Transferring Credits Between Jobs Handling Refunds 1 Creating a Credit Memo and Refund Check 2 Refunding Customer Payments Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14 Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1 Creating New Form Templates 2 Performing Basic Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and Resizing Objects in the Layout Designer 8 Formatting Objects in the Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules

6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Loan Manager 9 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner's Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using the Cash Flow Projector 7 Using Payment Reminders Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant's Review 1 Creating an Accountant's Copy 2 Transferring an Accountant's Copy 3 Importing Accountant's 4 Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4 Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items Setting up a Trust Account 1 What is an IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust Management Managing a Trust Account 1 Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and Invoicing for Legal Professionals 7 Paying the Law Firm's Invoices Using the Client Funds 8 Refunding Unused Client Trust Account Funds 9 Escheated Trust Funds Trust Account Reporting 1 Creating a Trust Account Liability Proof Report 2 Creating a Trust Liability Balances by Client Report 3 Creating a Client Ledger Report 4 Creating an Account Journal Report

**Office User Guide for MicroStrategy 9.3** MicroStrategy Product Manuals, MicroStrategy, 2012-09-30 [Office User Guide for MicroStrategy 9.2.1m](#) MicroStrategy Product Manuals Staff, MicroStrategy Product Manuals, 2011-12-20 *QuickBooks Pro 2023 for Lawyers Training Manual Classroom in a Book* TeachUcomp, Complete classroom training manual for QuickBooks Pro 2023 for Lawyers Full classroom manual in one book 351 pages and 213 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and effectively manage a legal company file as well as use QuickBooks for trust accounting In addition you'll receive our complete QuickBooks curriculum Topics Covered The QuickBooks Environment 1 The Home Page 2 The Centers 3 The Menu



Bar and Keyboard Shortcuts 4 The Open Window List 5 The Icon Bar 6 Customizing the Icon Bar 7 The Chart of Accounts 8 Accounting Methods 9 Financial Reports Creating a QuickBooks Company File 1 Using Express Start 2 Using the EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from a Local Backup Copy 6 Setting Up Users 7 Single and Multiple User Modes 8 Closing Company Files 9 Opening a Company File Using Lists 1 Using Lists 2 The Chart of Accounts 3 The Customers Jobs List 4 The Employees List 5 The Vendors List 6 Using Custom Fields 7 Sorting List 8 Inactivating and Reactivating List Items 9 Printing Lists 10 Renaming Merging List Items 11 Adding Multiple List Entries from Excel 12 Customer Groups Setting Up Sales Tax 1 The Sales Tax Process 2 Creating Tax Agencies 3 Creating Individual Sales Tax Items 4 Creating a Sales Tax Group 5 Setting Sales Tax Preferences 6 Indicating Taxable Non taxable Customers and Items Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Creating a Purchase Order 4 Receiving Items with a Bill 5 Entering Item Receipts 6 Matching Bills to Item Receipts 7 Adjusting Inventory Setting Up Other Items 1 Service Items 2 Non Inventory Items 3 Other Charges 4 Subtotals 5 Groups 6 Discounts 7 Payments 8 Changing Item Prices Basic Sales 1 Selecting a Sales Form 2 Creating an Invoice 3 Creating Batch Invoices 4 Creating a Sales Receipt 5 Finding Transaction Forms 6 Previewing Sales Forms 7 Printing Sales Forms Using Price Levels 1 Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying Finance Charges and Creating Statements Payment Processing 1 Recording Customer Payments 2 Entering a Partial Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments 6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between Jobs 10 Manually Transferring Credits Between Jobs Handling Refunds 1 Creating a Credit Memo and Refund Check 2 Refunding Customer Payments Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit 7 Upload and Review Bills Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks 8 Adding Bank Feeds 9 Reviewing Bank Feed Transactions 10 Bank Feed Rules 11 Disconnecting Bank Feed Accounts Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14 Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1 Creating New Form Templates 2 Performing Basic Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and Resizing Objects in the Layout Designer 8 Formatting Objects in the

Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using Payment Reminders 7 Receipt Management Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant s Review 1 Creating an Accountant s Copy 2 Transferring an Accountant s Copy 3 Importing Accountant s 4 Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4 Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items Setting up a Trust Account 1 What is an IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust Management Managing a Trust Account 1 Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and Invoicing for Legal Professionals 7 Paying the Law Firm s Invoices Using the Client Funds 8 Refunding Unused Client Trust Account Funds 9 Escheated Trust Funds Trust Account Reporting 1 Creating a Trust Account Liability Proof Report 2 Creating a Trust Liability Balances by Client Report 3 Creating a Client Ledger Report 4 Creating an

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EasyStep Interview 3 Returning to the Easy Step Interview 4 Creating a Local Backup Copy 5 Restoring a Company File from  
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Using Price Levels Creating Billing Statements 1 Setting Finance Charge Defaults 2 Entering Statement Charges 3 Applying  
Finance Charges and Creating Statements Payment Processing 1 Recording Customer Payments 2 Entering a Partial  
Payment 3 Applying One Payment to Multiple Invoices 4 Entering Overpayments 5 Entering Down Payments or Prepayments  
6 Applying Customer Credits 7 Making Deposits 8 Handling Bounced Checks 9 Automatically Transferring Credits Between  
Jobs 10 Manually Transferring Credits Between Jobs Handling Refunds 1 Creating a Credit Memo and Refund Check 2  
Refunding Customer Payments Entering and Paying Bills 1 Setting Billing Preferences 2 Entering Bills 3 Paying Bills 4 Early  
Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit Using Bank Accounts 1 Using Registers 2  
Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7  
Voiding Checks Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies  
Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report  
6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch  
Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14

Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1  
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Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8  
Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly  
Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7  
Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4  
Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating  
Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying  
Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15  
Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card  
Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other  
Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating  
Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Loan Manager 9 The Fixed Asset  
Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Writing Letters  
With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing  
Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5  
Making General Journal Entries 6 Using the Cash Flow Projector 7 Using Payment Reminders 8 Receipt Management Using  
QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of  
Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The  
Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the  
Accountant s Review 1 Creating an Accountant s Copy 2 Transferring an Accountant s Copy 3 Importing Accountant s 4  
Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using  
Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4  
Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items  
Setting up a Trust Account 1 What is an IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust  
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