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The QuickBooks® Client Newsletter



Helping You Grow A Profitable Business with QuickBooks® Software

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Go Back to School With QuickBooks' Educational Tools

We know. When you first cracked your copy of QuickBooks, you wanted to dive in and start generating invoices. Fortunately, QuickBooks is intuitive enough that you were able to do just that. And its help system is so robust that you were able to get procedural questions answered quickly and easily.

But there's a lot to be said for backing up a bit and taking advantage of the myriad educational tools that QuickBooks offers. Even if you've been using the program for months, you may want to explore them. You'll not only save time with the help system, but you may find better ways of performing tasks.

Learn By Watching

The QuickBooks Learning Center, one of the first things you saw when you installed the program, is always available by clicking **Help | Learning Center Tutorials**. It consists of numerous multimedia tutorials and links to additional help. As shown in **Figure 1**, the tutorials are worth a look before you take on a thorny topic like Payroll.

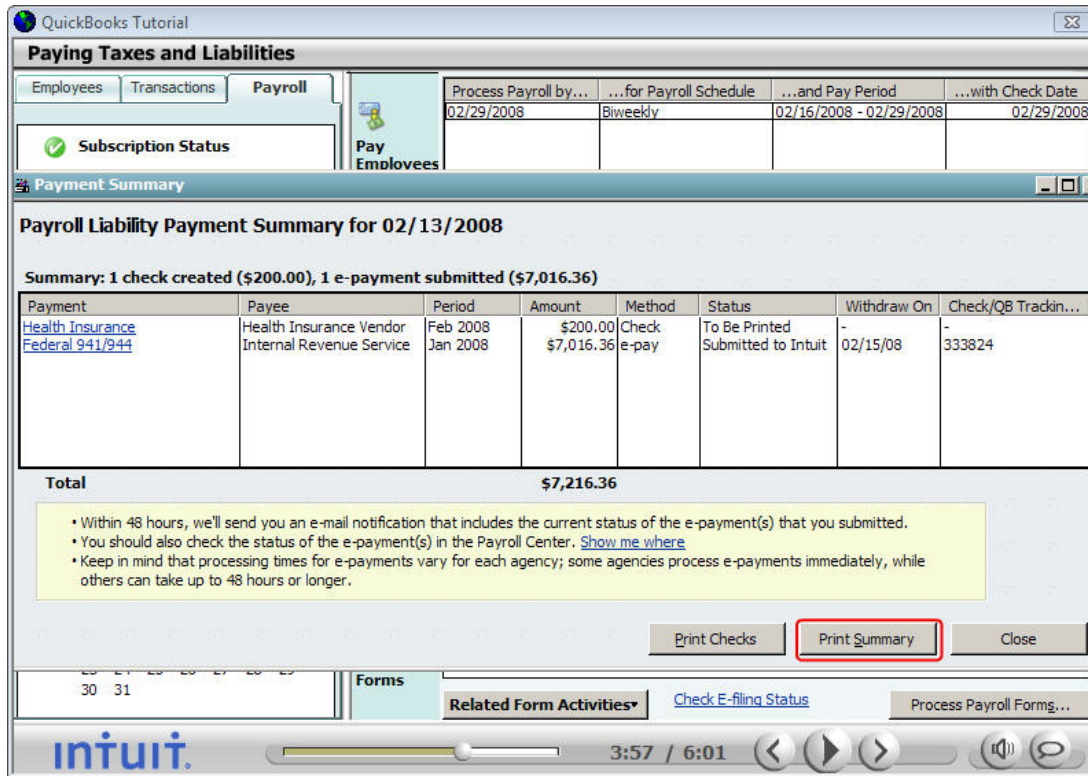


Figure 1: QuickBooks' myriad tutorials help you absorb the basics of processes like Payroll.

Though you can use QuickBooks' functions entirely from the menus, the program's home page is built to guide you through core accounting processes. If you're very new to QuickBooks and/or accounting, you can use the **Coach** function to better understand the flow. Click on **Show Coach Tips** in the vertical pane to the right of the main screen.

As shown in **Figure 2**, you'll see a small "i" next to some icons. Click on one, like the one next to **Purchase Orders**. Related icons light up, and numbers representing their logical order appear next to them. Mouse over one of the icons to read a brief description of the function. When you're done, click **Hide Coach Tips** to make them disappear.

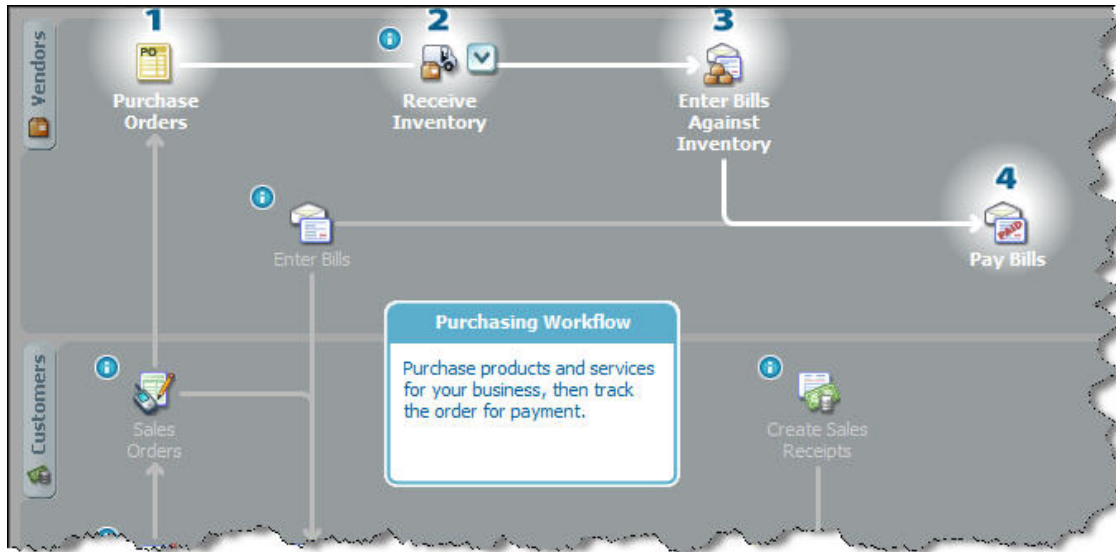


Figure 2: QuickBooks' Coach tool lays out the workflow for primary accounting processes.

Other Support Options

No matter how much you study and prepare, you may still run into situations where you need an expert's hand. Your accounting professional can be a real resource here as they have the expertise to walk you through installation and setup, processes that are critical to your effective ongoing relationship with QuickBooks. And they can also pitch in when you're facing other daunting accounting hurdles.

Another option for expert help is Intuit. The company offers a support plan that may or may not be in your budget, but it's certainly something to consider if you anticipate needing to have frequent questions answered. The best value is the Annual Support Plan (\$349 for first year; \$299 thereafter). You get 24x7 phone support, data backup and recovery services, and learning tools only available with the Support Plan.

Intuit also hosts an in-depth online support presence. Click **Help | Support** to get to the main page as shown in **Figure 3**. Installation, troubleshooting (with guides to error messages), company and data file management, general procedures—they're all covered there. You can search the support database or browse by topic. These and other resources are available within QuickBooks' embedded browser (you must have Internet access to reach it, as with many other features of the program – click **Help | Internet Connection Setup** if you're not already set up).



Figure 3: Intuit's online support for QuickBooks can help when you're stumped.

Interactive Help

If you haven't yet visited QuickBooks' interactive forum, you should. Click on the **Live Community** tab at the top of the far right vertical pane if it's not already displayed (the pane toggles between it and **Help**). As shown in **Figure 4**, you can enter questions here and get answers from other users and/or Intuit pros.

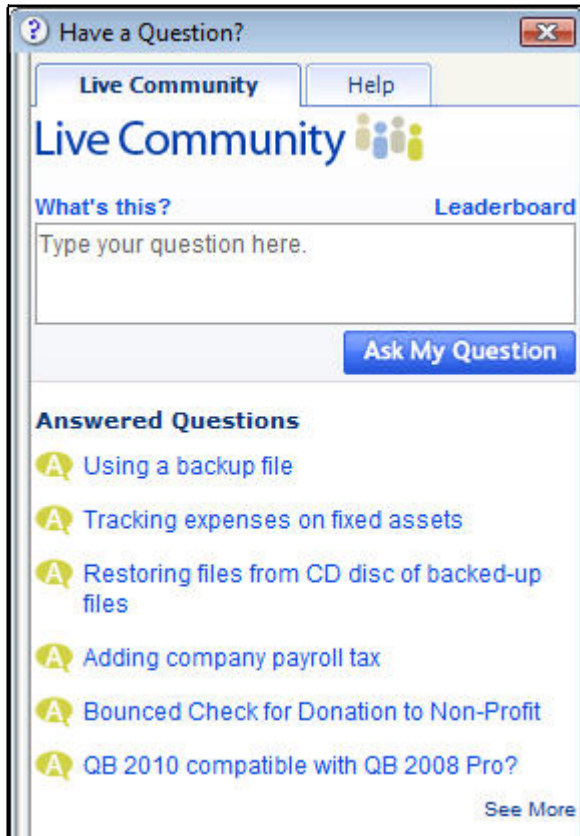


Figure 4: Intuit included interaction in its QuickBooks palette of help tools. Live Community features questions from users and accompanying answers from users and Intuit pros.

For the expanded Intuit community, click on the **Visit the Intuit Community** link at the bottom of the Live Community pane.

Of course, don't forget the core of QuickBooks' help scheme: the **Help** pane. You can get a lot of your questions answered here. This pane constantly changes to display content relative to the current screen. This content provides explanations of concepts as well as step-by-step instructions.

So don't throw up your hands in defeat when what you're attempting in QuickBooks isn't working. Remember how much help is available from Intuit, QuickBooks itself, and experts like your accounting professional. Some additional schooling may just be in order.