



Q.A.T. Business Services

Extreme Competence Inspires Extreme Confidence™

Module Outline **QB052 – Customizing Forms & Reports**

This is module #52 of Q.A.T.'s QuickBooks® series. It shows how to format invoices, purchase orders, pick lists, and other source documents.

Format:

online presentation

Maximum Class Size:

20

Duration:

3 hours

Schedule:

gatBusinessServices.com/training/schedule.html

Intended Audience:

This module is designed for the following people, but others are welcome to attend:

- bookkeepers
- finance managers

Instructor:

Warren Gaebel, B.A., B.C.S. — Mr. Gaebel is a Certified QuickBooks ProAdvisor® and the General Manager of Q.A.T. Business Services. He taught at Learning Tree International, the University of Waterloo, and several colleges since the early 1980's.

Prerequisites:

For the benefit of all attendees, the following prerequisites should be observed:

- any 5 modules

Learning Objectives:

Upon completion of this course, attendees will be able to:

- identify which template is used when entering a transaction,
- create/edit templates,
- add a logo to a template,
- link company information to templates,
- select header and footer fields,
- select columns, and
- use the layout designer.

Tuition:

\$69 payable upon registration

How to Enroll:

enrol@gatBusinessServices.com
or (519) 404-7904

Required Textbook(s) & Supplies:

none

Outline:

- 1 The Template List
 - 1.1 Invoices
 - 1.1.1 Service Invoices
 - 1.1.2 Product Invoices
 - 1.1.3 Packing Slips
 - 1.1.4 Progress Invoices
 - 1.1.5 Time & Expense Invoices
 - 1.2 Credit Memos
 - 1.2.1 Credit Memos
 - 1.2.2 Return Receipts
 - 1.3 Sales Receipts
 - 1.3.1 Service Receipts
 - 1.3.2 Product Receipts
 - 1.4 Purchase Orders
 - 1.5 Statements
 - 1.6 Estimates
 - 1.7 Sales Orders
 - 1.7.1 Sales Orders
 - 1.7.2 Packing Slips
 - 1.7.3 Pick Lists
 - 1.7.4 Work Orders
- 2 Add a Logo
- 3 Linking Customer Information to Templates
- 4 Selecting Header & Footer Information
- 5 Selecting Columns
- 6 Using the Layout Designer
- 7 Q&A