



For New Online users... or if you have a mess!

Webinar

Presenter: Gregg S. Bossen, CPA



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About Instructor

- **Certified Advanced QuickBooks ProAdvisor®**
- **Specializes in Industry Specific Training**
- **Author of QuickBooks® Made Easy™**
- **National Trainer –seminars around the country**



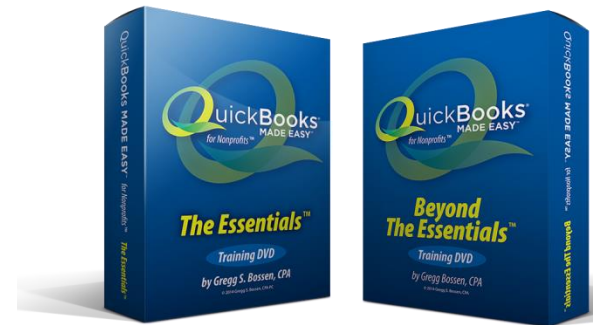
Gregg Bossen, CPA
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Atlanta, GA

www.quickbooksmadeeasy.com

What We Do

Train & Support Nonprofits using QuickBooks

- ❑ Self Paced Training Products
- ❑ Yearly Phone Tech Support
- ❑ Live Seminars across the country



Objectives

- What QuickBooks Online choices are available?
- Which QuickBooks Online product is right for me?
- Getting around in the online edition
- Which QuickBooks product is the best for me?
- Proper Set Up of the Chart of Accounts
- Where and how to track my programs
- Where and how to enter my Donors, Members or Students
- How to enter Income in QB directly
- How to sync from NeonCRM into QB (avoids double entry)
- Getting Budget to Actual Reports easily

Upcoming QuickBooks Online Training

www.QuickBooksMadeEasy.com

- November 27-29, 2018 – **3 Day Webinar Series–Online**

What Is QuickBooks For?

- Financial Software Package
 - Accounting Package (Financial Statements)
 - Tracks Invoices and A/R
 - Tracks Expenses and A/P and Prints Checks
 - Does Payroll (optional add-on)
 - Can Process CC Payments (optional add-on)
- Light Donor Data Base
 - Donor Reports, Year-End Donor Letters

Poll

How new are you to QuickBooks Online?

- Never used ANY QuickBooks products
- I know QuickBooks Desktop but new to Online.
- I kinda know QB Online, but not that well.
- I know QB online well, but not for nonprofits.
- I am a QuickBooks Master.

Poll

Have you seen Gregg Teach Before?

No, I am new to the style of Gregg

Yes, I have once. He's awesome!

Yes, many times! I am kind of a Bossen groupie!

Yes, I am here just to heckle him.

4 CHOICES OF QUICKBOOKS ONLINE

- SELF-EMPLOYED
- SIMPLE START
- ESSENTIALS
- PLUS

4 CHOICES OF QUICKBOOKS ONLINE

• ~~SELF-EMPLOYED~~

• ~~SIMPLE START~~

• ~~ESSENTIALS~~

• PLUS – has budgets and program tracking

Poll

Which is False?
Tigers have stripped skin, not
just stripped fur

Alligators will give manatees
the right of way when they
swim together

Sunsets on mars are blue

Put a pillow on your fridge day
is June 1st

MIT has classes to certify you
as a Pirate

Poll

Do you want to be added to
the QuickBooks Made Easy
Newsletter list?

- Yes
- No

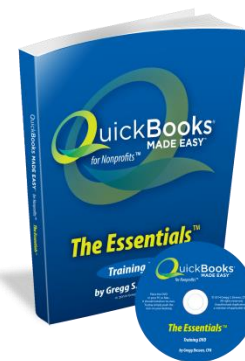
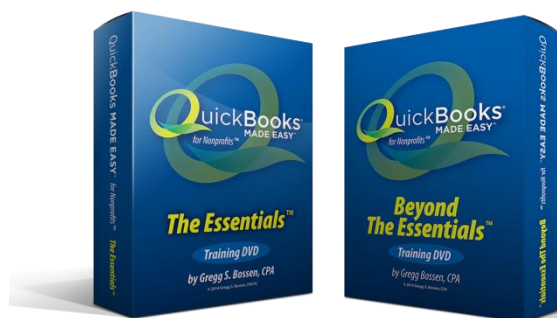
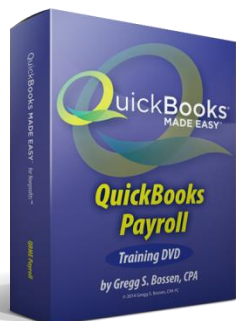
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QuickBooks Online Sync Basics

- What it works with
- Where to connect
- How to sync

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Thank You!

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