



Serving the Central Coast

Your local QuickBooks expert

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## ***Tips for the QuickBooks User 2008***

### **Tip 1: Use the Company Data Auditor**

*Go to File menu and select "Audit Company File." This provides sections for Company File Information, Company File Actions, Account Reconciliation Summary and Data Auditor, so that you can quickly see areas of your file that may need attention. This is a new feature in the 2006/07 versions.*

### **Tip 2: Track Changes**

*Turn on the Audit Trail (go to Edit ... Preferences ... Accounting, go to Company Preferences and tick "Use Audit Trail"). It allows you to view changes to your file including transactions that have been modified or deleted.*

### **Tip 3: Display Report Customisation options**

*Turn on this option under Edit ... Preferences ... Reports & Graphs. Under "My Preferences," tick "Display Modify Report windows automatically." If you don't do this, when you click "Display" the report will be generated for the current month with the default settings. If this is not what you want, you will need to re-run the report with the correct settings.*

### **Tip 4: Customise your Invoices**

*Add a logo, use larger fonts, add a remittance section and eliminate unused information. This can give a more professional image and help your invoice stand out when your customer receives it.*

### **Tip 5: Backup Regularly**

*The easy way to do this is to click on the Backup icon. Initially select "Set Defaults." Tick the option "Remind me to backup when closing the data file every:" and select 1 times. The default backup location should be removable media such as CD or USB drive. Click on OK the tick the option to "Verify Data Integrity" then click OK. When you close QuickBooks you will be reminded to backup. Follow the prompts.*

### **Tip 6: Check your backups can be restored**

*Every month or so, try to restore your latest backup. Before doing so, rename or move your QBW files so that you do not overwrite your current data.*

### **Tip 7: Secure your environment**

*Ensure that you have installed software to protect your computer against viruses and other threats. It is essential that virus definitions or signatures are kept up to date. This is important for other computer records, and CRUCIAL for your financial records.*

*If you would like assistance with these or other functions, please contact us.*

