



Serving the Central Coast

Your local QuickBooks expert

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Tips for the QuickBooks User **New for 2009**

Tip 1: Check you have the latest Service Pack

Hold the **Ctrl** key and press the number **1** on the main keyboard. The Product Information screen will be displayed. The first line says **Product QuickBooks**, followed by the product name (e.g. Pro), followed by the Release number. The latest release for QuickBooks 2008/09 is **R8P**. If you want to upgrade to the latest release, please contact us.

Tip 2: Merge Duplicate List Items

You can combine duplicate list items, such as Customers, Suppliers, Accounts and Items. Simply rename the unwanted item to be exactly the same spelling as an existing item and click OK. You will receive a message **“This name is already being used. Would you like to merge them?”** Select **Yes** to choose to do this.

Tip 3: Use Google Desktop Search

You can use Google Desktop Search within QuickBooks 2008/09 to search for data, even within documents such as invoices.

Tip 4: Synchronise with Microsoft Outlook

If you use Microsoft Outlook for your email program, you can synchronise names, addresses and contact information in QuickBooks with the Contacts in Microsoft Outlook. Go to **File ... Utilities ... Synchronise Contacts**. You may need to download some software before your first synchronisation.

Tip 5: Set User Restrictions

If you have other people using the data file, the Administrator can restrict them from accessing or changing certain data, for example not allowing access to payroll data. Go To **Company ... Set Up Users** and follow the prompts. You can also change passwords and set a closing date (see below)

Tip 6: Set a Closing Date.

When you have completed your bank reconciliation, you do not usually want any data to be changed. Once you have set a closing date, you will be warned if you try to enter or modify data prior to that date.

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

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