

QuickBooks® For Your Law Practice



*An Attorney's Guide to
Maintaining Trust Accounts and Operating Accounts
Using QuickBooks®*

By: Chase Lynette Benson
Computer Technology Services, Inc.



Quickbooks For Your Law Practice

**Sharon D. Nelson, John W.
Simek, Michael C. Maschke**



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Topics Covered

The QuickBooks Environment

1 The Home Page

2 The Centers

3 The Menu Bar and Keyboard Shortcuts

4 The Open Window List

5 The Icon Bar

6 Customizing the Icon Bar

7 The Chart of Accounts

8 Accounting Methods

9 Financial Reports

Creating a QuickBooks Company File

1 Using Express Start

2 Using the EasyStep Interview

3 Returning to the Easy Step Interview

4 Creating a Local Backup Copy

5 Restoring a Company File from a Local Backup Copy

6 Setting Up Users

7 Single and Multiple User Modes

8 Closing Company Files

9 Opening a Company File

Using Lists

1 Using Lists

2 The Chart of Accounts

3 The Customers Jobs List

4 The Employees List

5 The Vendors List

6 Using Custom Fields

7 Sorting List

8 Inactivating and Reactivating List Items

9 Printing Lists

10 Renaming Merging List Items

11 Adding Multiple List Entries from Excel

12 Customer Groups

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1 The Sales Tax Process

2 Creating Tax Agencies

3 Creating Individual Sales Tax Items

4 Creating a Sales Tax Group

5 Setting Sales Tax Preferences

6 Indicating Taxable Non taxable Customers and Items

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1 Setting Up Inventory

2 Creating Inventory Items

3 Creating a Purchase Order

4 Receiving Items with a Bill

5 Entering Item Receipts

6 Matching Bills to Item Receipts

7 Adjusting Inventory

Setting Up Other Items

1 Service Items

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3 Other Charges

4 Subtotals

5 Groups

6 Discounts

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8 Changing Item Prices

Basic Sales

1 Selecting a Sales Form

2 Creating an Invoice

3 Creating Batch Invoices

4 Creating a Sales Receipt

5 Finding Transaction Forms

6 Previewing Sales Forms

7 Printing Sales Forms

Using Price Levels

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1 Setting Finance Charge Defaults

2 Entering Statement Charges

3 Applying

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QuickBooks for Law Firms Caren Schwartz, 2014 QuickBooks is the most popular small business accounting software program and it is used in all types of industries Legal firms are no exception with thousands of small law offices using QuickBooks across the country But lawyers and their firms have specific needs QuickBooks can be a smart choice for legal firms but only if it is properly set up and transactions are entered correctly and consistently This book will help lawyers and their staff make the right choices and use QuickBooks correctly It will guide attorneys through the terminology special setup issues and billing needs to help ensure their law firm's accounting is accurate and easy We also cover ways to make law offices more efficient with add on products that work for attorneys QuickBooks for Law Firms Smart Techniques That Will Save Time and Money shows you how to use QuickBooks to Set up your Chart of Accounts and items Set up customers and vendors Set up rates and track time Track expenses and bill them to your clients Generate invoices and statements for your clients Track your receivables Manage general retainers Manage Interest on Lawyer Trust Accounts IOLTAs and trust accounts Any lawyer using QuickBooks in his or her office will find this a very valuable resource Julie Zevchek Executive Office Solutions Inc *QuickBooks Pro 2020 for Lawyers Training Manual Classroom in a Book* TeachUcomp, 2019-10-27 Complete classroom training manuals for QuickBooks Pro 2020 for Lawyers Full classroom manual in one book 344 pages and 212 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and effectively

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Modernize Your Law Firm Lynda Artesani, 2024-01-12 Unlocking Success in the Digital Age Transform Your Law Firm for the Future In today's rapidly evolving digital age it's become crucial for law firms to modernize and adapt to stay ahead of the competition With advancements in technology and a shift in client expectations it's essential for law firms to embrace digital transformation to remain relevant and successful But where should you start In this book I outline essential steps that your law firm needs to take to modernize and thrive in the digital age From leveraging digital billing solutions to integrating cloud based practice management software we'll provide actionable tips and insights to help you streamline your operations enhance client satisfaction and increase your firm's overall efficiency and profitability By implementing these steps you'll not only position your law firm as a forward thinking and innovative practice but you'll also be able to attract and retain a larger client base Don't get left behind in this digital revolution join me as I guide you through the process of modernizing your law firm and show you how to stay ahead in the fast paced digital age

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