

Excel Illuminated

QuickBooks Analysis - Part 1

Course Description

In this course, Excel and QuickBooks expert David Ringstrom, CPA, shares valuable tips to help you overcome the limitations of QuickBooks internal reports. David teaches several techniques, including how to combine two reports into one, create pivot tables from QuickBooks data, access memorized QuickBooks reports, and more.

David demonstrates every technique at least twice: first, on a PowerPoint slide with numbered steps, and second, in the subscription-based Microsoft 365 version of Excel. David draws your attention to any differences in the older versions of Excel (2019, 2016, 2013, and earlier) during the presentation as well as in his detailed handouts. David also provides an Excel workbook that includes most of the examples he uses during the presentation.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Intermediate

CPE Credits: 2 (CPA)

Category: Computer Software and Applications

Prerequisite: Experience with Excel spreadsheets

Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Identify QuickBooks features and techniques that can be used to streamline reports for faster analysis in Excel.
2. Recognize how to analyze QuickBooks data by way of pivot tables in Excel.
3. Identify the setting that enables certain browsers to launch Excel files exported from QuickBooks Online and other sources.