

advanced excel training manual

Advanced Excel Training Manual: Unlocking the Power of Data Mastery

advanced excel training manual is more than just a guide—it's a gateway to transforming how you handle data, automate tasks, and make informed decisions. Whether you're a business analyst, financial professional, project manager, or just someone eager to enhance your spreadsheet skills, diving into advanced Excel techniques can significantly boost your productivity and analytical capabilities.

In this comprehensive exploration, we'll unravel the core components of an advanced Excel training manual, highlighting essential functions, tools, and strategies that elevate your proficiency beyond basic spreadsheets. Expect practical insights and actionable tips that help you navigate complex datasets, create dynamic reports, and leverage Excel's powerful automation features.

Why an Advanced Excel Training Manual Matters

Excel has evolved tremendously over the years, becoming a robust platform for data analysis, visualization, and business intelligence. While basic Excel skills might cover simple formulas and formatting, advanced training opens doors to sophisticated functions, pivot tables, macros, and even integration with other data sources.

An advanced Excel training manual serves as a structured roadmap, guiding learners through concepts like:

- Complex formula creation and nesting
- Data modeling and scenario analysis
- Automation using VBA (Visual Basic for Applications)
- Dynamic dashboards and interactive charts

By mastering these areas, professionals can save countless hours, reduce errors, and gain deeper insights into their data.

Key Components of an Effective Advanced Excel Training Manual

To truly benefit from an advanced Excel training manual, it should be well-organized and cover a variety of topics tailored to real-world applications. Here are some critical sections that such a manual should include:

1. Advanced Formulas and Functions

At the heart of Excel's power lie its formulas and functions. Beyond the SUM and AVERAGE, advanced

users rely on:

- **INDEX-MATCH:** A versatile alternative to VLOOKUP for flexible data retrieval.
- **ARRAY FORMULAS:** Perform multiple calculations on a range of cells simultaneously.
- **IFERROR and Nested IFs:** Manage complex conditions and handle errors gracefully.
- **TEXT FUNCTIONS:** Manipulate and format strings with functions like CONCAT, LEFT, RIGHT, and MID.
- **Logical and Statistical Functions:** SUMIFS, COUNTIFS, and logical operators to analyze data subsets.

Understanding these functions means you can build dynamic spreadsheets that adapt to changing data inputs.

2. Data Analysis with Pivot Tables and Power Query

Pivot Tables are indispensable for summarizing and exploring large datasets without altering original data. An advanced Excel training manual should explain:

- Creating and customizing pivot tables to extract meaningful insights.
- Grouping data by dates, categories, or custom ranges.
- Calculated fields and items for tailored metrics.
- Using Power Query to clean, transform, and merge data from multiple sources seamlessly.

Mastering these tools accelerates your ability to analyze trends and generate actionable reports quickly.

3. Automation Through Macros and VBA

For those looking to automate repetitive tasks, learning how to record macros or write VBA scripts is a game-changer. An advanced Excel training manual typically includes:

- Basics of the VBA editor and environment.
- Writing simple macros to automate formatting, data entry, or report generation.
- Creating user-defined functions to extend Excel's capabilities.
- Error handling and debugging techniques.

Automation not only boosts efficiency but also ensures consistency across complex workflows.

Enhancing Your Excel Experience with Visualization and Dashboarding

Data visualization is crucial for communicating insights clearly. An advanced Excel training manual helps you go beyond basic charts by introducing:

- **Dynamic Charts:** Using named ranges and formulas to create charts that update automatically.
- **Slicers and Timelines:** Interactive filters for pivot tables and charts.
- **Conditional Formatting:** Highlight important data trends or outliers with color scales, icon sets, and data bars.
- **Dashboard Design Principles:** Combining multiple visual elements into a coherent, user-friendly interface.

A well-designed dashboard allows stakeholders to grasp key metrics at a glance, making presentations and decision-making more effective.

Tips for Using Conditional Formatting Effectively

- Avoid overusing colors; limit palettes to maintain clarity.
- Use rules that highlight only the most significant data points.
- Combine conditional formatting with data validation to prevent errors.

These subtle touches can elevate your spreadsheets from mundane to visually compelling.

Integrating External Data and Collaborative Features

Modern Excel users often need to work with data from various sources or collaborate with teams. Advanced Excel training manuals address:

- Importing data from CSV, XML, or web sources.
- Using Power Pivot for advanced data modeling and relationships.
- Sharing workbooks with track changes and commenting features.
- Protecting sensitive data with worksheet protection and permissions.

By mastering these features, you ensure your Excel environment supports teamwork and data integrity.

Practical Applications of Advanced Excel Skills

An advanced Excel training manual isn't just theoretical—it's about empowering you to solve real problems. Here are some scenarios where advanced Excel knowledge shines:

- **Financial Modeling:** Building comprehensive models with scenarios, sensitivity analyses, and forecasting.
- **Project Management:** Tracking timelines, budgets, and resource allocation using Gantt charts and custom formulas.
- **Data Cleaning:** Automating data validation and removing duplicates to maintain high-quality datasets.
- **Sales and Marketing Analytics:** Segmenting customers, calculating KPIs, and visualizing sales trends.

These applications demonstrate how advanced Excel capabilities can directly impact business outcomes.

Learning Strategies to Master Advanced Excel

Excel's depth means continuous learning is key. Consider these approaches:

- Practice by replicating examples from the manual.
- Work on real-life projects to apply new techniques.
- Join Excel forums and communities for tips and problem-solving.
- Explore online courses and video tutorials to complement manual learning.

Remember, consistent practice and curiosity are your best tools for mastering Excel.

Conclusion: Embracing the Journey with an Advanced Excel Training Manual

Navigating the complexities of Excel can seem daunting, but an advanced Excel training manual makes the path clear and manageable. As you explore advanced functions, automation, data visualization, and integration, you'll uncover new ways to make data work for you—not the other way around. The key is to approach learning with patience and a willingness to experiment, turning spreadsheets into powerful allies in your professional toolkit.

Frequently Asked Questions

What topics are covered in an advanced Excel training manual?

An advanced Excel training manual typically covers topics such as pivot tables, advanced formulas and functions (e.g., VLOOKUP, INDEX-MATCH), macros and VBA programming, data analysis tools, Power Query, Power Pivot, and automation techniques.

How can an advanced Excel training manual improve my productivity?

By mastering advanced features like automation with macros, efficient data analysis using pivot tables, and complex formula creation, an advanced Excel training manual helps users save time, reduce errors, and perform tasks more efficiently.

Is VBA programming included in an advanced Excel training

manual?

Yes, most advanced Excel training manuals include VBA programming basics and advanced techniques to help users automate repetitive tasks and create custom Excel functions and applications.

Can an advanced Excel training manual help in data analysis?

Absolutely, advanced Excel manuals teach users how to use tools like pivot tables, Power Query, and data visualization techniques to analyze and interpret large datasets effectively.

Are there practical exercises in an advanced Excel training manual?

Yes, comprehensive advanced Excel training manuals often include practical exercises and real-world examples to help users apply concepts and reinforce learning.

Who can benefit from an advanced Excel training manual?

Professionals such as data analysts, accountants, financial analysts, project managers, and anyone who works extensively with data and spreadsheets can benefit greatly from advanced Excel training manuals.

Does an advanced Excel training manual cover Power Query and Power Pivot?

Many advanced Excel manuals cover Power Query and Power Pivot, as these tools are essential for advanced data transformation, modeling, and analysis within Excel.

How is an advanced Excel training manual different from a beginner Excel guide?

An advanced Excel training manual focuses on complex functions, automation, and data analysis techniques, whereas a beginner guide covers basic navigation, simple formulas, and foundational features.

Can I learn to create dashboards using an advanced Excel training manual?

Yes, advanced Excel manuals often include sections on creating interactive dashboards using charts, slicers, pivot tables, and conditional formatting to visualize data effectively.

What are the benefits of using an advanced Excel training manual for corporate training?

Using an advanced Excel training manual in corporate training standardizes learning, improves employee skills, enhances data handling capabilities, and boosts overall productivity across teams.

Additional Resources

Advanced Excel Training Manual: Unlocking the Full Potential of Microsoft Excel

advanced excel training manual serves as an essential resource for professionals aiming to elevate their spreadsheet skills beyond basic data entry and simple calculations. As businesses increasingly rely on data-driven decision-making, proficiency in Excel's advanced functionalities has become a critical asset. This manual not only covers complex formulas and data analysis techniques but also dives deeply into automation, visualization, and integration capabilities that transform raw data into actionable insights.

In today's competitive landscape, an advanced Excel training manual is more than a tutorial—it is a comprehensive guide that empowers users to harness Excel's robust toolkit to streamline workflows, improve accuracy, and optimize productivity. From financial analysts and project managers to data scientists and operations personnel, mastering advanced Excel functions can significantly impact organizational efficiency.

Understanding the Scope of an Advanced Excel Training Manual

An advanced Excel training manual typically extends beyond the foundational skills taught in beginner courses. It is designed to address the needs of intermediate to expert users who are ready to explore the full spectrum of Excel's capabilities. The content often includes detailed explanations and practical examples of complex formulas, pivot tables, macros, and VBA scripting.

The manual's structure is generally modular, allowing learners to progress through topics systematically. This approach ensures a thorough understanding of each feature before moving on to more intricate tasks, such as data modeling or dynamic dashboards.

Core Features Covered

- **Advanced Formulas and Functions:** Includes array formulas, INDEX-MATCH combinations, logical functions (IF, AND, OR), text manipulation, and statistical functions.
- **Pivot Tables and Pivot Charts:** Techniques for summarizing large datasets, performing multi-dimensional analysis, and creating interactive reports.
- **Data Validation and Conditional Formatting:** Ensuring data integrity and visually highlighting key trends or anomalies.
- **Macros and VBA Programming:** Automating repetitive tasks, customizing user interfaces, and developing complex workflows.
- **Power Query and Power Pivot:** Importing, transforming, and modeling data from multiple sources to create comprehensive datasets.

- **Dashboard Creation:** Integrating charts, slicers, and other controls to build dynamic, user-friendly reports.

Why Invest in an Advanced Excel Training Manual?

The value of an advanced Excel training manual lies not only in skill acquisition but also in the practical application of those skills. With data volumes expanding exponentially, professionals must know how to efficiently organize, analyze, and present information. An advanced manual bridges the gap between theoretical knowledge and real-world application.

From an organizational perspective, employees trained with advanced Excel expertise contribute to faster report generation, reduced errors, and enhanced decision-making processes. The manual is a cost-effective solution for upskilling teams without the need for continuous external training sessions.

Comparing Training Formats: Manual vs. Interactive Courses

While interactive video courses and live workshops are popular, an advanced Excel training manual offers unique advantages:

- **Self-Paced Learning:** Users can revisit complex topics anytime without the pressure of a fixed schedule.
- **Reference Material:** Manuals serve as enduring resources for troubleshooting and refreshing knowledge.
- **Comprehensive Coverage:** Manuals often provide more in-depth explanations and examples than time-constrained workshops.

However, some users may find interactive formats more engaging, suggesting that a blended approach—combining manuals with hands-on exercises—can optimize learning outcomes.

Delving into Key Advanced Excel Skills

Gaining proficiency in advanced Excel functions requires understanding both the technical mechanics and their practical use cases. The training manual typically emphasizes not only “how” to use a feature but also “when” and “why” to apply it.

Mastering Complex Formulas and Logical Functions

One of the hallmarks of advanced Excel use is the ability to build nested formulas that perform multi-step calculations. For example, combining IF statements with VLOOKUP or INDEX-MATCH can dynamically extract and analyze data based on multiple criteria. The manual usually provides step-by-step guides to constructing these formulas, supported by real-world scenarios such as financial forecasting or inventory management.

Leveraging Pivot Tables for Data Summarization

Pivot tables are indispensable for summarizing large datasets quickly. An advanced Excel training manual explores techniques to:

- Group data by custom categories
- Calculate subtotals and grand totals dynamically
- Use calculated fields and items for customized analysis
- Create pivot charts that update automatically with the underlying data

These capabilities empower analysts to generate insightful reports that inform strategy and operational adjustments.

Automation through Macros and VBA

Excel's macro recorder and Visual Basic for Applications (VBA) scripting represent powerful tools for automating repetitive tasks and developing customized solutions. An advanced training manual introduces users to:

- Recording and editing macros to automate routine workflows
- Writing VBA code for complex logic and user-defined functions
- Debugging and error handling techniques
- Integrating Excel with other Office applications via VBA

Automation reduces manual errors and frees up time for higher-value analytical activities.

Integrating Newer Excel Technologies

Modern Excel versions have introduced features like Power Query and Power Pivot, which extend the software's data processing and modeling capabilities. An advanced Excel training manual often dedicates sections to these tools:

Power Query for Data Transformation

Power Query enables users to extract, transform, and load (ETL) data from various sources such as databases, web pages, and CSV files. The manual guides users through building queries that clean and reshape data automatically, facilitating ongoing data refreshes without manual intervention.

Power Pivot for Data Modeling

Power Pivot allows for the creation of sophisticated data models by establishing relationships between tables and using Data Analysis Expressions (DAX) formulas. This approach is invaluable for creating scalable, high-performance dashboards and reports that handle millions of rows efficiently.

Challenges and Considerations

While advanced Excel training manuals offer extensive benefits, they also come with certain limitations:

- **Steep Learning Curve:** The complexity of topics such as VBA or DAX can be daunting to some learners without prior experience.
- **Software Version Discrepancies:** Features available in the latest Excel versions may not be applicable to users on older software, potentially causing confusion.
- **Limited Interactivity:** Manuals lack the instant feedback and hands-on practice opportunities found in interactive platforms.

To mitigate these challenges, users are encouraged to supplement manuals with practice files, online forums, and video tutorials.

The Role of an Advanced Excel Training Manual in Professional Development

The pursuit of advanced Excel proficiency aligns closely with career growth and increased workplace efficiency. Professionals who master these skills are better positioned to undertake data analysis, financial modeling, project tracking, and reporting tasks with confidence and precision.

Employers increasingly recognize the importance of Excel expertise, often listing advanced skills as prerequisites for roles in finance, marketing analytics, supply chain management, and more. An advanced Excel training manual becomes a strategic investment for both individuals and organizations aiming to stay competitive in data-centric environments.

By facilitating a deeper grasp of Excel's extensive features, the manual encourages critical thinking and problem-solving, equipping users to handle complex datasets and derive meaningful conclusions that drive business success.

Advanced Excel Training Manual

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advanced excel training manual: ADVANCE EXCEL 2016 TRAINING GUIDE Ritu Arora, 2018-05-31 This book will explain you the basic and advance features of Excel.This book will also explain you why excel is such an amazing program and why it can do so much more than you think.Excel enables any format of information to be organized in a spread sheet and its innate flexibility as program, you can define and structure the layout according to how you want to manage

it. It allows for over 1 million rows by over 16,000 columns of data to be managed, which shows how Excel is advancing as a business tool. This allows Excel to be used for a large variety of business purposes. If you are New to Excel 2016 or upgrading from a previous version, Use this guide to learn the basics and advance features of Excel. This user guide will introduce you to some of Excel's 2016 more complex functionality, such as:-Use Conditional Logic in a formula-IF statements-Use the SumIF and CountIF functions-Produce a chart-Sort and filter-Apply subtotals-Data Validation-What-if-Analysis Tools-Introduction to Pivot Tables-Introduction to Macros

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Worksheets 2. Tracing Precedent and Dependent Cells 3. Tracing Errors 4. Error Checking 5. Using the Watch Window 6. Cell Validation Outlining Worksheets 1. Using Outlines 2. Applying and Removing Outlines 3. Applying Subtotals Consolidating Worksheets 1. Consolidating Data Tables 1. Creating a Table 2. Adding an Editing Records 3. Inserting Records and Fields 4. Deleting Records and Fields Sorting Data 1. Sorting Data 2. Custom Sort Orders Filtering Data 1. Using AutoFilters 2. Using the Top 10 AutoFilter 3. Using a Custom AutoFilter 4. Creating Advanced Filters 5. Applying Multiple Criteria 6. Using Complex Criteria 7. Copying Filter Results to a New Location 8. Using Database Functions Using What-If Analysis 1. Using Data Tables 2. Using Scenario Manager 3. Using Goal Seek 4. Forecast Sheets Table-Related Functions 1. The Hlookup and Vlookup Functions 2. Using the IF, AND, and OR Functions 3. The IFS Function Sparklines 1. Inserting and Deleting Sparklines 2. Modifying Sparklines Creating Charts In Excel 1. Creating Charts 2. Selecting Charts and Chart Elements 3. Adding Chart Elements 4. Moving and Resizing Charts 5. Changing the Chart Type 6. Changing the Data Range 7. Switching Column and Row Data 8. Choosing a Chart Layout 9. Choosing a Chart Style 10. Changing Color Schemes 11. Printing Charts 12. Deleting Charts Formatting Charts in Excel 1. Formatting Chart Objects 2. Inserting Objects into a Chart 3. Formatting Axes 4. Formatting Axis Titles 5. Formatting a Chart Title 6. Formatting Data Labels 7. Formatting a Data Table 8. Formatting Error Bars 9. Formatting Gridlines 10. Formatting a Legend 11. Formatting Drop and High-Low Lines 12. Formatting Trendlines 13. Formatting Up/Down Bars 14. Formatting the Chart and Plot Areas 15. Naming Charts 16. Applying Shape Styles 17. Applying WordArt Styles 18. Saving Custom Chart Templates Data Models 1. Creating a Data Model from External Relational Data 2. Creating a Data Model from Excel Tables 3. Enabling Legacy Data Connections 4. Relating Tables in a Data Model 5. Managing a Data Model PivotTables and PivotCharts 1. Creating Recommended PivotTables 2. Manually Creating a PivotTable 3. Creating a PivotChart 4. Manipulating a PivotTable or PivotChart 5. Changing Calculated Value Fields 6. Formatting PivotTables 7. Formatting PivotCharts 8. Setting PivotTable Options 9. Sorting and Filtering Using Field Headers PowerPivot 1. Starting PowerPivot 2. Managing the Data Model 3. Calculated Columns and Fields 4. Measures 5. Creating KPIs 6. Creating and Managing Perspectives 7. PowerPivot PivotTables and PivotCharts 3D Maps 1. Enabling 3D Maps 2. Creating a New 3D Maps Tour 3. Editing a 3D Maps Tour 4. Managing Layers in a 3D Maps Tour 5. Filtering Layers 6. Setting Layer Options 7. Managing Scenes 8. Custom 3D Maps 9. Custom Regions 10. World Map Options 11. Inserting 3D Map Objects 12. Previewing a Scene 13. Playing a 3D Maps Tour 14. Creating a Video of a 3D Maps Tour 15. 3D Maps Options Slicers and Timelines 1. Inserting and Deleting Slicers 2. Modifying Slicers 3. Inserting and Deleting Timelines 4. Modifying Timelines Security Features 1. Unlocking Cells 2. Worksheet Protection 3. Workbook Protection 4. Password Protecting Excel Files Making Macros 1. Recording Macros 2. Running and Deleting Recorded Macros 3. The Personal Macro Workbook

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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

Using Lists

1. 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

Setting Up Sales Tax

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

Setting Up Inventory Items

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
2. Non-Inventory Items
3. Other Charges
4. Subtotals
5. Groups
6. Discounts
7. Payments
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

Using Price Levels

Creating Billing Statements

1. Setting Finance Charge Defaults
2. Entering Statement Charges
3. Applying Finance Charges and Creating Statements

Payment Processing

1. Recording Customer Payments
2. Entering a Partial Payment
3. Applying One Payment to Multiple Invoices
4. Entering Overpayments
5. Entering Down Payments or Prepayments
6. Applying Customer Credits
7. Making Deposits
8. Handling Bounced Checks
9. Automatically Transferring Credits Between Jobs
10. Manually Transferring Credits Between Jobs

Handling Refunds

1. Creating a Credit Memo and Refund Check
2. Refunding Customer Payments

Entering and Paying Bills

1. Setting Billing Preferences
2. Entering Bills
3. Paying Bills
4. Early Bill Payment Discounts
5. Entering a Vendor Credit
6. Applying a Vendor Credit
7. Upload and Review Bills Using Bank Accounts

Using Registers

1. Using Registers
2. Writing Checks
3. Writing a Check for Inventory Items
4. Printing Checks
5. Transferring Funds
6. Reconciling Accounts
7. Voiding Checks
8. Adding Bank Feeds
9. Reviewing Bank Feed Transactions
10. Bank Feed Rules
11. Disconnecting Bank Feed Accounts

Paying Sales Tax

1. Sales Tax Reports
2. Using the Sales Tax Payable Register
3. Paying Your Tax Agencies

Reporting

1. Graph and Report Preferences
2. Using QuickReports
3. Using QuickZoom
4. Preset Reports
5. Modifying a Report
6. Rearranging and Resizing Report Columns
7. Memorizing a Report
8. Memorized Report Groups
9. Printing Reports
10. Batch Printing Forms
11. Exporting Reports to Excel
12. Saving Forms and Reports as PDF Files
13. Comment on a Report
14. Process Multiple Reports
15. Scheduled Reports Using Graphs

Using Graphs

1. Using Graphs
2. Company Snapshot

Customizing Forms

1. Creating New Form Templates
2. Performing Basic Customization
3. Performing Additional Customization
4. The Layout Designer
5. Changing the Grid and Margins in the Layout Designer
6. Selecting Objects in the Layout Designer
7. Moving and Resizing Objects in the Layout Designer
8. Formatting Objects in the Layout Designer
9. Copying Objects and Formatting in the Layout Designer
10. Adding and Removing Objects in the Layout Designer
11. Aligning and Stacking Objects in the Layout Designer
12. Resizing Columns in the Layout Designer

Estimating

1. Creating a Job
2. Creating an Estimate
3. Duplicating Estimates
4. Invoicing From Estimates
5. Updating Job Statuses
6. Inactivating Estimates
7. Making Purchases for a Job
8. Invoicing for Job Costs
9. Using Job Reports

Time Tracking

1. Tracking Time and Printing a Blank Timesheet
2. Weekly Timesheets
3. Time/Enter Single Activity
4. Invoicing from Time Data
5. Using Time Reports
6. Tracking Vehicle Mileage
7. Charging Customers for Mileage

Payroll

1. The Payroll Process
2. Creating Payroll Items
3. Setting Employee Defaults
4. Setting Up Employee Payroll Information
5. Creating Payroll Schedules
6. Creating Scheduled Paychecks
7. Creating

Unscheduled Paychecks 8. Creating Termination Paychecks 9. Voiding Paychecks 10. Tracking Your Tax Liabilities 11. Paying Your Payroll Tax Liabilities 12. Adjusting Payroll Liabilities 13. Entering Liability Refund Checks 14. Process Payroll Forms 15. Tracking Workers Compensation Using Credit Card Accounts 1. Creating Credit Card Accounts 2. Entering Credit Card Charges 3. Reconciling and Paying Credit Cards Assets and Liabilities 1. Assets and Liabilities 2. Creating and Using an Other Current Asset Account 3. Removing Value from Other Current Asset Accounts 4. Creating Fixed Asset Accounts 5. Creating Liability Accounts 6. Setting the Original Cost of Fixed Assets 7. Tracking Depreciation 8. The Fixed Asset Item List Equity Accounts 1. Equity Accounts 2. Recording an Owner's Draw 3. Recording a Capital Investment Writing Letters With QuickBooks 1. Using the Letters and Envelopes Wizard 2. Editing Letter Templates Company Management 1. Viewing Your Company Information 2. Setting Up Budgets 3. Using the To Do List 4. Using Reminders and Setting Preferences 5. Making General Journal Entries 6. Using Payment Reminders 7. Receipt Management Using QuickBooks Tools 1. Company File Cleanup 2. Exporting and Importing List Data Using IIF Files 3. Advanced Importing of Excel Data 4. Updating QuickBooks 5. Using the Calculator 6. Using the Portable Company Files 7. Using the Calendar 8. The Income Tracker 9. The Bill Tracker 10. The Lead Center 11. Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant's Review 1. Creating an Accountant's Copy 2. Transferring an Accountant's Copy 3. Importing Accountant's 4. Removing Restrictions Using the Help Menu 1. Using Help Creating a Legal Company File 1. Making a Legal Company Using Express Start 2. Making a Legal Company Using the EasyStep Interview 3. Reviewing the Default Chart of Accounts 4. Entering Vendors 5. Entering Clients and Cases 6. Enabling Class Tracking for Law Firms 7. Creating Billing Line Items Setting up a Trust Account 1. What is an IOLTA? 2. Creating Accounts for Trust Management 3. Creating Items for Trust Management Managing a Trust Account 1. Depositing Client Money into the Client Trust Account 2. Entering Bills to Pay from the Trust Account 3. Recording Bills for Office Expenses 4. Paying Bills from the Client Trust Account 5. Using a Client Trust Credit Card 6. Time Tracking and Invoicing for Legal Professionals 7. Paying the Law Firm's Invoices Using the Client Funds 8. Refunding Unused Client Trust Account Funds 9. Escheated Trust Funds Trust Account Reporting 1. Creating a Trust Account Liability Proof Report 2. Creating a Trust Liability Balances by Client Report 3. Creating a Client Ledger Report 4. Creating an Account Journal Report

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Toolbar 10. The Entry Bar 11. The Status Bar 12. Touch Mode Project Basics 1. Opening Projects 2. Closing Projects 3. Creating New Projects 4. Saving Projects 5. Changing Project Views 6. Planning a Project Tasks 1. Creating Tasks 2. Editing and Deleting Tasks 3. Setting Task Duration 4. Linking Tasks 5. Marking Milestones 6. Using Phases and Summary Tasks 7. Using Task Notes Resources 1. Project Resources Overview 2. Creating Work Resources 3. Creating Material Resources 4. Creating Cost Resources 5. Entering Costs for Project Resources 6. Scheduling Work Resources 7. Creating New Base Calendars Resource and Task Assignment 1. Assigning Work Resources to Tasks 2. Assigning Material Resources to Tasks 3. Assigning Cost Resources to Tasks 4. The Team Planner Tracking Project Tasks 1. Creating Project Baselines 2. Updating Multiple Tasks in a Project 3. Updating Tasks Individually 4. Rescheduling Uncompleted Work Formatting Gantt Chart Views 1. Formatting Text in a Gantt Chart 2. Formatting Gridlines in a Gantt Chart 3. Formatting the Task Bar Layout in a Gantt Chart 4. Formatting Columns in Gantt Charts 5. Applying Bar and Gantt Chart Styles 6. Drawing Objects 7. Formatting Timescale in Gantt Charts 8. Creating Custom Views Other Project Views 1. Using Timeline View 2. Creating Multiple Timelines 3. The Task Usage View 4. The Network Diagram View 5. The Calendar View 6. Printing Views Advanced Task Management 1. Setting Task Lead and Lag Time 2. Using Task Constraints 3. Task Types 4. Setting Deadlines 5. Interrupting Tasks 6. Moving and Rescheduling Tasks 7. Inspecting Tasks 8. Creating Recurring Tasks 9. Entering Fixed Costs 10. Critical Paths 11. Using WBS Codes Advanced Resource Management 1. Applying Multiple Resource Rates 2. Advanced Resource Availability 3. Using Work Contours 4. Material Resource Consumption Rates 5. Delaying Resource Assignments Advanced Project Tracking 1. Monitoring Resource Allocation 2. Leveling Overallocated Resources 3. Monitoring Project Costs 4. Monitoring Project Statistics Advanced Project Tools 1. Using the Organizer 2. Making Macros 3. Customizing the Ribbon 4. Creating and Linking Resource Pools 5. Using and Updating Resource Pools 6. Consolidating and Linking Multiple Projects Reporting 1. Using Earned Value Analysis 2. Creating Basic Reports 3. Selecting Report Objects 4. Changing the Report View 5. Basic Report Formatting 6. Inserting Report Objects 7. Managing Reports 8. Basic Page Setup for Reports 9. Advanced Page Setup for Reports 10. Printing Reports Modifying Report Objects 1. Selecting, Moving and Resizing Report Charts 2. Using the Field List with Report Charts 3. Designing Report Charts 4. Formatting Report Charts 5. Using Report Tables 6. Designing Report Tables 7. Setting Report Table Layout Options 8. Modifying Pictures, Text Boxes and Shapes 9. Formatting Text Boxes and Shapes 10. Formatting Report Pictures Visual Reporting 1. Using Visual Reports

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