QuickBooks Consulting

At Grider + Co, P.A., we understand QuickBooks because we use it every day! We perform accounting department functions for clients, as well as our own company. We know how to customize invoices, how to process payroll, how to look up information and how to pull relevant reports.

We have worked with QuickBooks since DOS 1.0 and every version since. We have stayed current maintaining Certified ProAdvisor status. We understand the many capabilities of the software, as well as its limitations.

We have worked with clients across the country adapting QuickBooks to the needs of their companies. If you are struggling to get the most out of QuickBooks for your company, contact us today. We can discuss your specific needs, our rates and scheduling.

QuickBooks Helpful Hints:

 - Make use of the "Find" feature. (From the top menu, select Edit, then Find, then click on the Advanced Tab). It can be very helpful when you entered a transaction and can't find it where you expected it to be. Filter the find on "Amount" and search for the amount of the transaction you entered. It will show up quickly and allow you to zoom in on the transaction and edit, if necessary.

 - If you have problems with transaction edits after a period has been reconciled and finished, add a closed date to your QuickBooks file. Select Edit then Preferences from the top menu. Within the Preferences page, select Accounting from the left side menu. At the bottom of the Company Preferences page, you can set the closing date and password. With this set, you can only make changes by entering the closed date password. This prevents those mishaps of entering the wrong date on a transaction.

 - To set up 1099 preparation in the first year, you must make entries in the vendor file and the preferences file. From the Vendor Center, double click on the vendor that is eligible for a 1099. Select the Additional Info tab and fill in the Tax ID and check mark that the vendor is eligible for a 1099. Then select Edit and Preferences from the top menu. On the Preferences screen, select Tax:1099 from the left menu. Under Company Preferences, you will have the option to select accounts that relate to the 1099 fields. For example, highlight the account column next to Box 7:Nonemployee Compensation and select Multiple Accounts. You will then be able to check mark all QuickBooks accounts that should cause the generation of a 1099.