Dynamix Learning Solutions

Dynamix Learning Solution Centres

Dynamix Centre	5th Floor, Tygerlakes	Ooba House
8 Milcliff Rd	Tygerfalls, Carl Cronje Drive	30 Waterkant Street
SUNNINGHILL	TYGERVALLEY	CBD
Johannesburg	Cape Town	Cape Town
T: +27 (11) 234 5555	+27 (21) 914 2878	+27 (21) 418 8760
F: 086 539 5550	086 609 2877	086 539 7323

P.O. Box 11383, BLOUBERGRANT, 7443

Sunninghill@Dynamix.co.za Tygervalley@Dynamix.co.za Cape@Dynamix.co.za www.dynamix.co.za

Microsoft GOLD CERTIFIED Partner

isett seta COMMITTED TO SKILLS DEVELOPMENT IN THE ICT SECTOR Accreditation No.: ACC02 000 077

Quicken 2008 + CertBlaster

ISBN-10: 1-4260-0417-6
Duration: One day
Description:
This ILT Series course, rated 4.9/5.0 in overall quality by ProCert Labs, teaches students how to track and manage their personal finances using Quicken 2008. Topics include account types, transaction management, budgets, reports, graphs, and data backup/protection.
Prerequisites: Windows XP: Level 1 or equivalent experience

Topic-Level Outline

Unit 1 : Getting started
*Topic A: * Introducing Quicken 2008*
A-1: Starting Quicken and exploring its centers
A-2: Opening a data file
A-3: Viewing the Account List window
A-4: Exploring an account register
A-5: Exploring categories
*Topic B: * Getting Help and closing Quicken*
B-1: Using the Search Quicken Help tab
B-2: Using the Current Window and Troubleshooting this Window commands
B-3: Using the How Do I menu
B-4: Closing Quicken

Unit 2 : Setting up accounts and entering transactions
*Topic A: * Creating data files and accounts*
A-1: Creating a data file
A-2: Creating a checking account
A-3: Creating a credit card account
*Topic B: * Entering transactions*
B-1: Entering checks
B-2: Entering a split transaction
B-3: Entering a transfer
B-4: Observing a postdated transaction
*Topic C: * Memorized and scheduled transactions*
C-1: Entering a memorized transaction
C-2: Creating and entering a scheduled transaction
*Topic D: * Using the Calendar*
D-1: Entering a transaction in the Calendar
D-2: Creating a note

Unit 3 : Managing transactions and categories
*Topic A: * Modifying transactions*
A-1: Editing a simple transaction
A-2: Editing a split transaction
A-3: Deleting a transaction and voiding a check
A-4: Adding a transaction type to the Num list
A-5: Moving and copying transactions
*Topic B: * Finding and replacing transactions*
B-1: Finding transactions
B-2: Replacing field entries in multiple registers
*Topic C: * Managing categories*
C-1: Creating a category and subcategory
C-2: Recategorizing multiple transactions
C-3: Showing and creating tags
C-4: Assigning a transaction to a tag

Unit 4 : Managing accounts and data files
*Topic A: * Reconciling accounts*
A-1: Reconciling a checking account
A-2: Entering a balance adjustment
*Topic B: * Modifying accounts*
B-1: Editing account attributes
B-2: Hiding and unhiding an account
B-3: Deleting an account
*Topic C: * Managing data files*
C-1: Renaming a data file
C-2: Copying a data file

Unit 5 : Budgets, reports, and graphs
*Topic A: * Working with budgets*
A-1: Creating a budget automatically
A-2: Modifying a budget
A-3: Setting up a transfer to savings
*Topic B: * Working with reports*
B-1: Working with EasyAnswer reports
B-2: Creating an Income/Expense report
B-3: Customizing a report
B-4: Saving a customized report
B-5: Using the QuickZoom feature
B-6: Using minireports
B-7: Previewing and printing a report
*Topic C: * Working with graphs*
C-1: Creating and working with an Income/Expense graph
C-2: Creating and working with a Spending graph

Unit 6 : Customizing Quicken and protecting data
*Topic A: * Customizing Quicken*
A-1: Customizing the Quicken Home Center view
A-2: Customizing the Quicken toolbar
A-3: Working with register options
*Topic B: * Protecting and backing up data*
B-1: Setting a password for modifying transactions
B-2: Setting a password for a data file
B-3: Removing passwords
B-4: Creating a backup
B-5: Scheduling backup reminders