Training Course on Financial Management using QuickBooks

Professional Development Training Course Outline

Category	Research and Data Analysis	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Financial management is a cornerstone of any successful business, and having the right tools to manage finances efficiently is crucial. QuickBooks is one of the leading accounting software solutions globally, designed to simplify financial tracking, reporting, and decision-making. This training course on Financial Management Using QuickBooks will guide participants through its essential features, enabling them to manage accounting processes such as invoicing, payroll, inventory management, and financial reporting. Whether you're a beginner or an experienced user, this course provides the knowledge and hands-on experience necessary to leverage QuickBooks for business success.

QuickBooks offers a robust platform that streamlines financial management, making it easier for businesses to track expenses, generate financial reports, and manage cash flow. By automating many of the repetitive tasks involved in accounting, QuickBooks frees up valuable time for businesses to focus on strategic planning and growth. This course will empower participants to master QuickBooks, from setting up an account to managing financial statements, giving them the confidence to handle their business's finances with precision.

Programme Curriculum

Training Course on Financial Management using QuickBooks

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Throughout the course, participants will learn how to navigate QuickBooks' user-friendly interface, customize the software for specific business needs, and optimize its features to improve financial oversight. They will also gain practical experience in reconciling accounts, tracking invoices, and using QuickBooks' reporting tools to make data-driven financial decisions. With expert-led instruction and hands-on practice, participants will be able to apply what they learn immediately to their work.

Course Duration

5 Days

Course Objectives

1. Understand the key features and functions of QuickBooks.
2. Learn how to set up a QuickBooks account for a new business.
3. Effectively manage financial transactions such as invoicing, expenses, and payments.
4. Gain proficiency in using QuickBooks for payroll and employee management.
5. Understand how to track inventory and sales in QuickBooks.
6. Learn how to create and customize financial reports using QuickBooks.
7. Master the process of reconciling bank and credit card accounts in QuickBooks.
8. Understand tax management within QuickBooks, including VAT and other deductions.
9. Learn how to analyze financial data and make data-driven decisions.
10. Gain the skills to maintain accurate financial records for business compliance and reporting.

Organizational Benefits

1. Streamlined financial management, reducing time spent on accounting tasks.
2. Improved accuracy in financial reporting and reduced risk of errors.
3. Greater control over cash flow, expenses, and profitability.
4. Enhanced ability to generate real-time financial reports for decision-making.
5. Increased efficiency through automation of key financial processes such as payroll and invoicing.
6. Improved tax compliance by using QuickBooks to track deductions and expenses.
7. Better resource allocation through accurate financial forecasting.
8. Reduced dependency on external accountants by empowering in-house staff with financial management skills.
9. Facilitated collaboration across teams with shared access to financial data.
10. Strengthened business growth potential with a solid foundation of financial data for planning and strategy.

Target Participants

- Small business owners and entrepreneurs looking to manage their finances effectively.

- Accounting professionals seeking to expand their knowledge of QuickBooks.
- Finance managers aiming to streamline financial reporting and management.
- Bookkeepers who want to learn how to use QuickBooks for more efficient recordkeeping.
- Individuals aspiring to build a career in accounting or financial management

Course Outline

Module 1: Introduction to QuickBooks

1. Overview of QuickBooks and its benefits for financial management.
2. Installing and setting up QuickBooks for your business.
3. Navigating the QuickBooks interface and understanding key features.
4. Setting up your company profile and chart of accounts.
5. Case Study: Setting up QuickBooks for a small retail business.

Module 2: Managing Financial Transactions

1. Recording sales, purchases, and payments in QuickBooks.
2. Creating and sending invoices to customers.
3. Managing bills and payments to vendors.
4. Tracking credit card transactions and managing accounts payable/receivable.
5. Case Study: Managing daily financial transactions for a service-based business.

Module 3: Payroll and Employee Management

1. Setting up payroll in QuickBooks.
2. Managing employee records, deductions, and pay rates.
3. Processing payroll and paying employees via direct deposit or checks.
4. Tracking employee taxes and generating payroll reports.
5. Case Study: Payroll management for a small team in a growing company.

Module 4: Inventory and Sales Tracking

1. Setting up and managing inventory in QuickBooks.
2. Recording sales orders and shipping items.
3. Creating and managing purchase orders and vendor bills.
4. Tracking inventory levels and managing reorder points.
5. Case Study: Managing inventory and sales data for an e-commerce business.

Module 5: Financial Reporting and Analysis

1. Creating basic financial reports: Profit and Loss, Balance Sheet, Cash Flow.
2. Customizing financial reports to suit business needs.
3. Generating tax reports and preparing for tax season.
4. Using QuickBooks’ reporting tools for financial analysis and decision-making.
5. Case Study: Analyzing financial reports for a seasonal business.

Module 6: Bank Reconciliation and Tax Management

1. Reconciliation of bank and credit card accounts in QuickBooks.
2. Handling and categorizing transactions during reconciliation.
3. Understanding tax settings in QuickBooks for VAT and other taxes.

4. Generating tax reports and preparing for tax filings.
5. Case Study: Reconciling accounts for a business with multiple bank accounts.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Online	$1,000

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com