



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software
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Using QuickBooks' Reminders and Calendar

Now, more than ever, you need QuickBooks to track what needs to be done.

COVID-19 has transformed the entire U.S. small business landscape in just a few short months. Companies are struggling to stay afloat. We all just want to get back to “normal,” but it’s unclear when that will happen.

We would like to help you as much as possible during these uncertain times. One of the ways we can do that is by supporting you as you keep a close watch on your income and expenses. QuickBooks is our go-to tool for that purpose, and we hope you’re making the best possible use of the software right now.

There are steps you can take to ensure that QuickBooks is working quickly and well for you, and that you’re attending to the work you must do every day. The software’s **Reminders** and **Calendar** can help you stay current with your accounting.

Setting Up Reminders

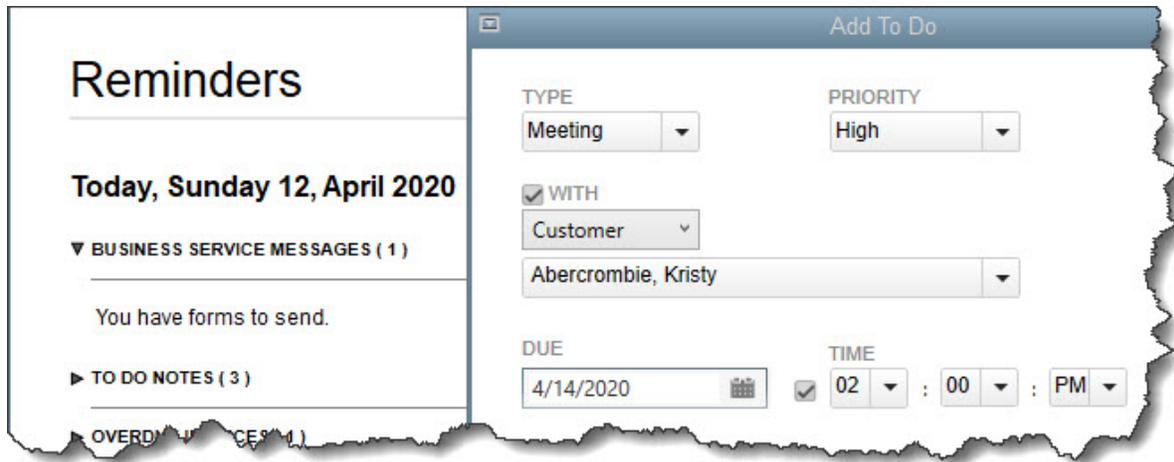
You don’t want to let anything slip through the cracks right now. It’s nearly impossible to keep up with your QuickBooks tasks without using the software’s **Reminders** feature. Before you start using this, you’ll have to set up its structure. Open the **Edit** menu and select **Preferences | Reminders**. This window will open:

	Show Summary	Show List	Don't Remind Me	Remind Me
Checks to Print	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	0 days before check date.
Paychecks to Print	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	5 days before paycheck date.
Invoices/Credit Memos to Print	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	3 days before invoice date.
Overdue Invoices	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	3 days after due date.
Almost Due Invoices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	3 days before due date.
Sales Receipts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

*You can tell QuickBooks which situations should trigger **Reminders**.*

This window should open to the **My Preferences** screen. Click the box in front of **Show Reminders List when opening a Company file** to create a checkmark. Then click **Company Preferences**. You'll see a list of QuickBooks "events," like **Checks to Print**. You can tell QuickBooks how many days in advance you'd like to be warned about this pending activity by entering a number in the box in front of **days before check date**. You can also request that this appear in either **Summary** or **List** form. If you don't want to be notified about any of them, click the button below **Don't Remind Me**. When you are done here, click **OK**.

The next time you open QuickBooks, your reminders will appear in a window on top of your home page. When you double-click on one, the transaction or other item will open. Two icons in the upper right of the **Reminders** screen open your **Preferences** and a blank **To Do** form. Here, you can schedule a call, task, appointment, etc. and associate it with a customer, vendor, or employee if desired. This item will then appear in your **Reminders** list.

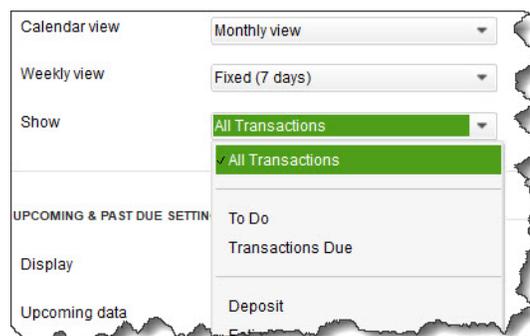


The **Reminders** window appears when you open the related Company file; you can add **To Do's** manually.

A Graphical View

QuickBooks' **Reminders** are not the only way you can ensure that you're meeting your accounting obligations. You can use the **Calendar** to see what you've scheduled and accomplished every day.

As you did with **Reminders**, you should visit this tool's **Preferences** page (**Edit | Preferences | Calendar**). Here, you will need to work with the options under the **My Preferences** tab. You can choose from among a **Daily**, **Weekly**, or **Monthly** view, or just have QuickBooks **Remember last view**. Your calendar can display your choice of a **Weekly view**: a **Fixed** view of 5 or 7 days or a **Variable** view of 5 or 7 days. And, you can show **All Transactions**, **To Do**, **Transactions Due**, or choose one type of transaction (**Invoice**, **Sales Receipt**, **Bill**, etc.).



How would you like your **Calendar** displayed? QuickBooks lets you choose from among options.

You can also define **Upcoming and Past Due Settings**. You can **Hide** or **Show** these, **Show only if data exists**, or remember the last settings. QuickBooks allows you to choose the number of days' worth of data that will be displayed for both **Upcoming data** and **Past due data**.

You can open the **Calendar** itself from the **Company** menu and by clicking a link in the **Toolbar** or on the **Home Page**. You will see a graphical calendar in the **View** you selected. Every day where there has been—or is scheduled to be — activity will say either **Due** or **Entered**, with the corresponding number of transactions in parentheses. Below that is a list of **Transactions Entered**; you can double-click on any of them to see the actual transaction form.

A list of upcoming and past due transactions appears in the right vertical pane. Fields and buttons at the top of the screen allow you to change the **View** and limit the list to a specified type of transaction. You can also add **To Do's** from this page.

We hope these tools are helpful for you as you navigate through today's choppy financial waters. Please do let us know if we can assist you in managing your company's critical accounting tasks. We want you to keep your business going as best you can until we get to the other side of the ongoing crisis.

We hope you find these QuickBooks tips helpful. Please visit our company website often at <http://www.accountingconnections.org> for we update it constantly. Our website offers a wealth of tax and accounting tips, along with links that will better serve your business needs. We archive our QuickBooks Tips newsletters on our website as well. They are printable PDFs for easy reference, as are our tax tips PDFs.

Accounting and Taxation is **our** business; making us a part of your team allows **you** to concentrate on **your** core business.



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