



Using QuickBooks for Real Estate Agent Bookkeeping

Susan Williams

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Using QuickBooks for Real Estate Agent Bookkeeping is a thorough "toolkit" that provides a complete system for setting up and managing the daily bookkeeping tasks faced by real estate agents. The system includes a workbook with easy-to-follow instructions and screenshots of each process, web-access to video demonstrations showcasing each concept in the workbook AND a special QuickBooks Company File template customized specifically for the real estate industry*. You'll learn how to use QuickBooks to keep track of all of your commission income deposits as well as company expenses paid using checks, debit cards and credit cards. Armed with this package specifically created for the real estate professional, you'll be up and running in no time with your own professionally designed bookkeeping process! Topics in the Using QuickBooks for Real Estate Agent Bookkeeping training system (workbook and video training demos) include:

- Installation and registration of QuickBooks software on your computer
- Customizing the QuickBooks Company File template with your own company information
- Recording bank deposits of commission sales income and other types of funds received
- Recording expenses paid directly by paper check, debit card, electronic transfers, credit cards, as well as the option to using QuickBooks to track bills owed to vendors you wish to pay later
- Creating several reports that will help you track and analyze your company's finances

The Using QuickBooks for Real Estate Agent Bookkeeping system also includes a special QuickBooks data file that can be used to set up your real estate agent company with QuickBooks. The Company File template contains the recommended Chart of Accounts, Sales Items, Sales Receipt Templates, and Memorized Reports Packages that give real estate agents a complete bookkeeping system designed specifically for them – something that generic QuickBooks training doesn't. * Note: The QuickBooks Company File Template that comes with the QB4RE System is best used with QuickBooks Pro/Premier for Windows Desktop 2013 or later. We do provide a template for usage with QuickBooks for Mac versions 2013 or later, but note the training workbook and video modules depict examples using the Windows Desktop version of the software. This Company File Template cannot be used with QuickBooks Online. Also, this system is specifically created for processes most common for the individual real estate agent and is not the best tool for real estate brokerages.

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