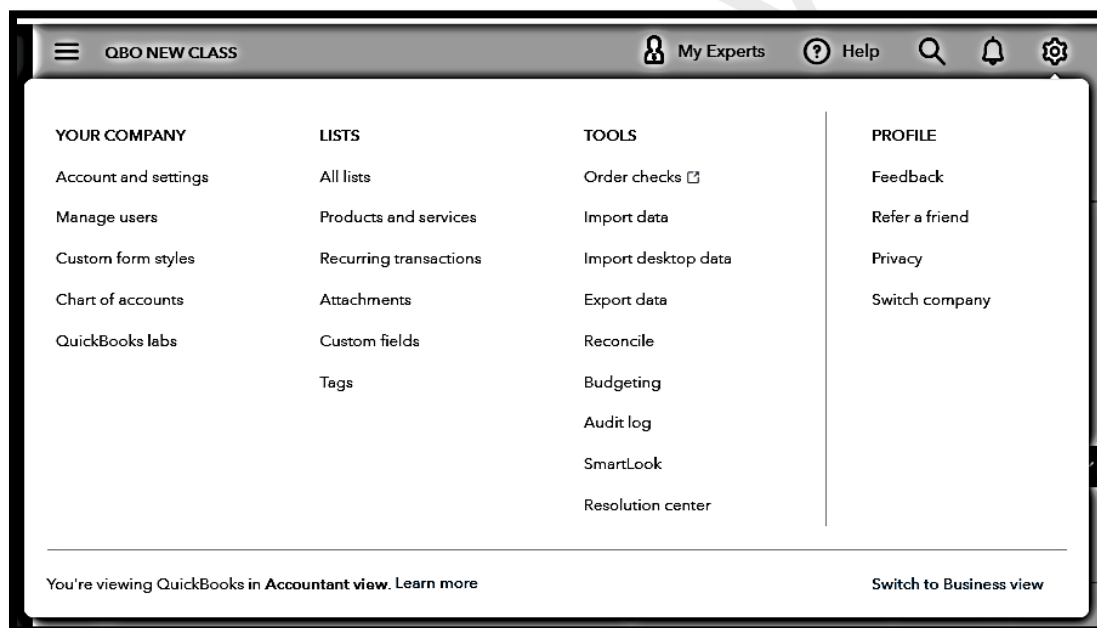
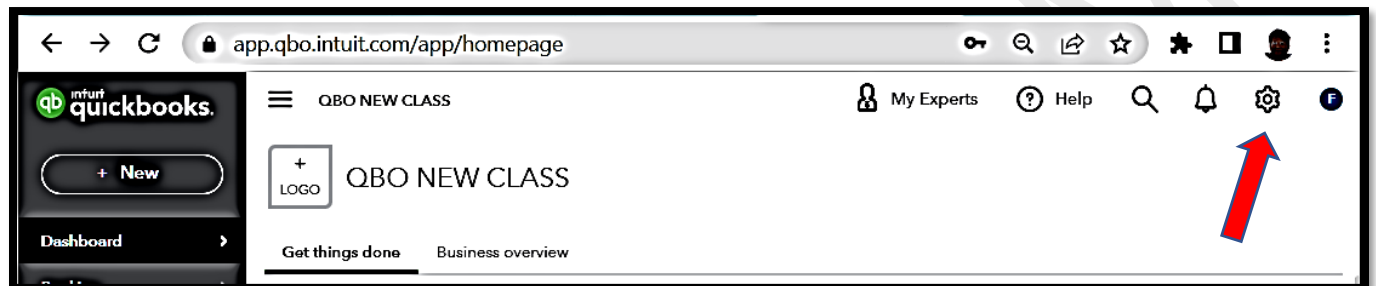


회사 정보와 기능 셋업 (Company setting)

교재: JA4

회사 정보 편집 및 교정과, 지점 (Class) 기능, 재고 관리 기능 (Inventory tracking), 주문서 작성 기능 (Purchase order), 가격표 기능 (Price rules), 회계 마감일 설정 (Closing date), 알람 기능 (reminder)의 활성화.

Setting Gear (톱니 바퀴 그림)을 클릭하여 시작합니다.



Account and Settings

Company

Company name: QBO NEW CLASS

Legal name: Same as company name

EIN/SSN: -

Company type: Partnership or limited liability company (Form 1065)

Tax form: -

Industry: -

Billing & subscription

Company email: funcomputer07@gmail.com

Customer-facing email: Same as company email

Company phone: +1 3101231234

Website: choistudy.com

Usage

Company address: 690 Wilshire Pl, Los Angeles, CA 90005

Customer-facing address: Same as company address

Legal address: Same as company address

Sales

Expenses

Payments

Time

Advanced

Communications with Intuit: Marketing Preferences

Done

Account and Settings: 이 곳에서 세분화된 회계 기능을 변경 (ON/ OFF)할 수 있습니다.

Company: Name, Industry, Address & other information; 회사 정보

Billing & subscription: Plans & Payments; 플랜 지불 상태

Usage: Limit for users, Chart of accounts, Tag group; 사용자 수, 계정 사용 & 태그

Sales: Customize Invoice, receipt and more; 각종 서류 형식 변경

Products & services: SKU, Price rules, Track Quantity/ price/ Inventory, 바코드, 가격표, 재고 관리 기능

Expenses: Bills & expenses: 서류 포함 사항, 고객별 비용, 지불 기간 설정

Purchase orders: 주문서 작성

Payments: 각종 지불 방법 설정

Time: Time tracking; 작업 시간 관리

Advanced: 회계 연도, 회사 법적 유형, 지점별 회계 관리, 사용 화폐 설정

2023 년 세팅 메뉴가 약간 다르게 나올 수도 있습니다.

내용이나 기능면에는 별 변동이 없습니다.

QuickBooks Online Client Overview x +

app.qbo.intuit.com/app/settings?p=company

Settings ? Help X

Company

Company name logo QBO New Company

Contact info choistudy@gmail.com

Accounting method Accrual

Employer ID (EIN) 123-45-6789

Tax form Partnership or limited liability company (Form 1065)

Categories

Track classes	Off
Track locations	Off

Customer label Customers

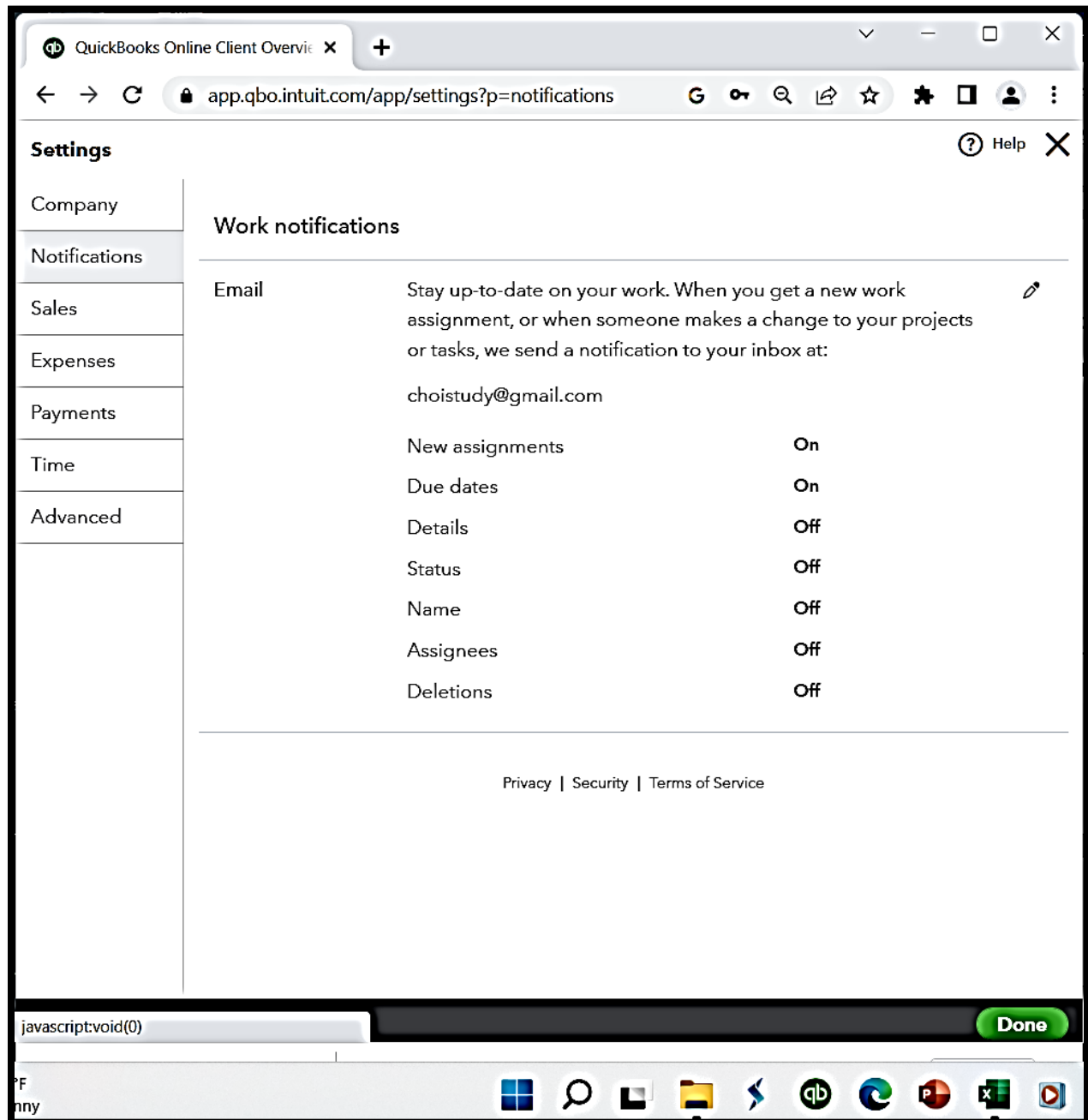
Communications with Intuit Marketing preferences

Privacy | Security | Terms of Service

Done

지점별 손익 계산서 보고를 하려면 Company 메뉴에서 Track classes/ Track locations 를 On 해야 합니다.

회사의 로고, 이름, 법적 구성, 연락처, 회계 방식, 지점별 회계 등의 설정을 할 수 있습니다.



Work notifications 는 새 작업 (assignment) 진도에 변동이 있을 때, 대표 이메일로 연락합니다.

Sales 메뉴에서:

Invoice, Estimate, Sales receipt 등 각종 양식 (Form)의 형식과 내용의 변형

바코드(SKU) 사용, 여러 개의 가격표 작성 (Price rules), Late fee 의 설정

진행형 인보이스 (Progressive Invoicing), Message, Reminder, Online delivery(invoice/ sales receipt),

Statement 에 밀린 기간 표시의 사용 설정 등

Settings

Company

Discount

Off

Notifications

Deposit

Off

Sales

Accept tips

Off

Expenses

Tags

On

Products and services

Show Product/Service column on sales forms

On

Payments

Show SKU column

Off

Time

Turn on price rules

BETA

Off

Advanced

Track quantity and price/rate

On

Track inventory quantity on hand

Off

Late fees

Default charge applied to overdue invoices

Off

Appears as a line under **Product/Service** on the invoice, and applies to all customers. [Learn More](#)

Progress Invoicing

Create multiple partial invoices from a single estimate

Off

Messages

Default email message sent with sales forms

Reminders

Set up invoice reminder emails

Online delivery

Email options for all sales forms




Statements

Show aging table at bottom of statement

On

Privacy | Security | Terms of Service

Done

Settings Help			
Company	Bills and expenses	Show Items table on expense and purchase forms	On 
Notifications			
Sales		Show Tags field on expense and purchase forms	On
Expenses		Track expenses and items by customer	On
Payments		Make expenses and items billable	On
Time	Default bill payment terms		
Advanced	Purchase orders	Use purchase orders	On 
	Messages	Default email message sent with purchase orders	

Expenses 메뉴에서: Bills and expenses 일반적으로 모두 ON

Purchase order: 주문서 작성 기능 상품, 비품 구입을 한다면 ON

Settings Help			
Company	QuickBooks Payments	Get paid more ways, fast!	Learn more
Notifications		<ul style="list-style-type: none"> Take credit cards or bank transfers Accept payments through QuickBooks, emailed invoices, and mobile QuickBooks automatically updates when you're paid 	
Sales			
Expenses			
Payments		Existing account	Connect
Time	If you already have a Payments account with Intuit (you may know it as GoPayment or Merchant Services), connect it to your QuickBooks.		
Advanced			

QBO 는 Intuit 본사가 관리하는 QuickBooks Payment 나 외부 Credit Card Processing Company 와 연결하여, QBO 프로그램에서 직접 고객의 데빗,크레딧 카드, PayPal 등 결제가 가능합니다.

Settings

Company

Notifications

Sales

Expenses

Payments

Time

Advanced

General

First day of work week

Sunday

Timesheet

Show service field

On

Allow time to be billable

On

Privacy | Security | Terms of Service

Time setting 을 ON 해 놓으면, 외부 (혹은 내부 특수 업무)로 나가서 하는 시간 계산표 기능이 가능해집니다.

Settings

Company

Notifications

Sales

Expenses

Payments

Time

Advanced

Accounting

First month of fiscal year ?

January

First month of income tax year

Same as fiscal year

Accounting method ?

Accrual

Close the books ?

☒

Closing date

12/31/2023

Allow changes after viewing a warning and entering password ?

Password

Confirm Password

Cancel

Save

Chart of accounts

Enable account numbers

Off

Tips account

Advanced 에서는 세무 연도, 회계 방식, 연말 장부 동결 (날짜와 암호를 정해야 함)을 결정합니다.
Account (회계 계정)에 numbering 을 할 것인지 정합니다. 그리고

Settings

Company

Notifications

Sales

Expenses

Payments

Time

Advanced

Automation

Pre-fill forms with previously entered content

Off

Automatically apply credits

Off

Automatically invoice unbilled activity

Off

Automatically apply bill payments

Off

Projects

Use project financial tracking

Off

Currency

Home Currency

United States Dollar

Multicurrency

Off

Other preferences

Date format

MM/dd/yyyy

Number format

\$123,456.00

Warn if duplicate check number is used

On

Warn me when I enter a bill number that's already been used for that vendor

Off

Warn if duplicate journal number is used

Off

Sign me out if inactive for

1 hour

Help

Done

Automation: 마지막 Invoice, Check 등의 내용을 반복함

자동으로 고객에게 credit 을 적용함

Invoice 가 안되어 있는 고객에게의 판매/서비스를 자동으로 Invoice 작성함

Project 추적 (?)

Currency: 한 개 이상의 화폐를 사용할 때 ON (4 시간마다 환율 자동 조절 기능)

Other preferences: 기타 사항의 설정

모든 설정이 끝나면 오른쪽 하단의 Done 을 클릭하여 update 합니다.