

**SPECIAL NOTES FOR QUICKBOOKS PRO USERS REGARDING LOCAL CUSTOM CONFIGURATION**

These are samples taken from procedures researched, designed, written, piloted and implemented at a young start-up company called KEOS (King Enterprise Office Services) Inc. At the time they had just purchased [QuickBooks Pro](#) and wanted to replace all their existing Finance and Accounting software with this, to run their [Treasury Division \(3\)](#).

The company then asked me to FULLY CONFIGURE their setup of QuickBooks. This proved to be quite a task, because many of the standard financial policies and procedures employed by this company (per the cutting edge management technology in the [Organization Executive Course](#)) were way ahead of "traditional" business practices, toward which QuickBooks ("QB") was geared at that time (1997).

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Once all the setup, configuration and testing work was done, a "Hat" (Job Procedures) Book was compiled and turned over to their new VP Treasury. Unfortunately, this entire process was performed within my last month at KEOS, and because of time constraints, I was only able to turnover "rough" procedures. The plan was that the new VP Treasury, after learning the job in great detail, would then refine and expand the "rough" procedures, then edit the write-ups.

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Below are examples of some of the individual "rough" procedures written up that pertained specifically to the highly specialized configuration and implementation of QuickBooks (QB) Pro at KEOS:

[Quickbooks "LISTS" - Control Most Functions](#)

[POSTAGE in KEOS Accounting & Functions](#)

[Adding and Editing CUSTOMER Information](#)

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END OF LINKS TO WRITING SAMPLES OF [QUICKBOOKS PRO SOFTWARE CONFIGURATION NOTES](#)