QuickBooks Online Training Class

**Agenda**

**INTRODUCTION**

**I. Getting Started**

1. Product overview

* Know the features of your QuickBooks Online Subscription

1. Importing Data

* Identify Steps to Import Data into QuickBooks Online

1. Setting up your company

* Recognize the Steps to Set up and Modify Lists and Users
* Recognize the Steps to Manage Company Settings

**II. Navigating QuickBooks Online**

1. Best Practices

* Identify Best Practices when Using QuickBooks Online

1. Navigating

* Company Home Page
* Customer Center
* Vendor Center
* Transactions Tab
* Quick Create

**Break 10:50-11:00am**

**III. Recording Transactions in QuickBooks Online**

1. Sales & Revenue Transactions

* Determine the Appropriate Sales-Related Settings
* Recognize Alternative Entry Points for Entering Sales Transactions

1. Expense & Purchase Transactions

* Determine Appropriate Expense-Related Settings
* Recognize Alternative Entry Points for Entering Purchasing Transactions

1. Additional Transaction Types

Identify Additional Transactions Initiated Using the Quick Create Menu

* Single Time Activity
* Filling a Weekly Time Sheet
* Make a Bank Deposit
* Transfer Funds
* Record a journal Entry

1. Other Tools

* Bank reconciliation
* Setting the closing date

**Lunch break 12:00-1:00pm**

**IV. Reporting**

1. The Benefits of Reporting

* Introduction to Reporting

1. Reporting Capabilities

* QuickBooks Online Simple Start: 20+ Reports
* QuickBooks Online Essentials: 40+ Reports
* QuickBooks Online Plus: 65+ Reports
* Common Report Settings
* Browser Settings
* Printing Wide Reports

1. Reporting Methods

* Identify Functionality of Grouped Reports
* The Report Dashboard
* Business Overview
* Manage Accounts Receivable
* Review Sales
* Manage Accounts Payable

1. Review Expenses and Purchases

* Manage Payroll
* Manage Sales Tax
* Manage Products and Inventory
* Accountant
* List Reports
* My Custom Reports
* Export Reports
* Send Reports
* Redesigned Reports

**Break 2:50-3:00pm**

**V. Expanding Usability**

1. Payments -- Activate QuickBooks Payments

* Topic Objectives
* Identify the Functionality of QuickBooks Payments
* Recognize the Features of Online Invoices
* Recognize the Steps to Use the Invoicing Portal

1. Payroll

* Topic Objectives
* Identify Intuit's Payroll Offerings that Integrate with QuickBooks Online
* Identify the Steps to Setup QuickBooks Online Payroll
* Identify the Various Payroll Reports in QuickBooks Online Payroll

1. Intuit App Center

* Topic Objectives
* Recognize the Benefits of Intuit Approved Add-Ons
* Identify the Steps to Find, Purchase and Access QuickBooks Online Add-Ons

**Questions and Answers**