



GETTING AROUND IN THE NEW QUICKBOOKS

What's New in QuickBooks Online

We've made some changes to QuickBooks Online, inspired by input from you, our users. This guide gives you a roadmap to those changes. Let's get started.

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THE ROADMAP: WHAT'S NEW

A Quick Overview

First of all, you're going to notice some organizational changes.

We know you're used to working in specific ways, and we want to help you transition your workflows to the new QuickBooks. (We also know this may be a little painful initially, but we'll help you through that). You'll get the hang of it quickly, and see how the new QuickBooks can streamline your work.

Let's start with some important compass points. We call them:

- 1 The navigation bar
- 2 The Create (+) menu
- 3 The Gear icon

We're going to walk you through each of them, so you understand what they are and why we've made these changes.

The screenshot shows the QuickBooks dashboard for 'Joe's Landscaping' on Friday, January 17, 2014. The interface is divided into several sections:

- Navigation bar (1):** A dark blue sidebar on the left containing icons for Home, Customers, Vendors, Employees, Transactions, Reports, Sales Tax, and Apps.
- Create (+) menu (2):** A circular callout highlighting the search, plus, and refresh icons in the top right corner of the dashboard.
- Gear icon (3):** A circular callout highlighting the gear icon in the top right corner of the dashboard.

The main dashboard content includes:

- Income:** A horizontal bar chart showing three categories: OPEN INVOICES (\$3,044.00), OVERDUE (\$1,750.00), and PAID LAST 30 DAYS (\$9,590.00).
- Expenses:** A donut chart showing PAID EXPENSES LAST 30 DAYS totaling \$8,158.00. The chart is broken down into: Payroll (\$3,700.00), Equipment Rental (\$1,992.00), Nursery (\$1,335.00), Insurance (\$450.00), and Everything else (\$681.00).
- Profit & Loss:** A bar and line chart showing NET INCOME of \$6,341. It also displays INCOME of \$10,734 and EXPENSES of \$4,393. The chart shows data points for Aug 18, Aug 25, Sep 1, Sep 8, and Sep 15.
- Bank Accounts:** A section titled '2 Transactions need your attention' listing transactions from 'Example Bank U.S.A.' with amounts like \$13,621.93 for Checking and \$12,500.00 for Savings.
- Activities:** A section titled 'Need Attention' listing overdue invoices and recent transactions, such as 'OVERDUE Invoice 1006: \$1,300.00 to Revell Hair Salon' and 'Invoice 1001: Paid \$300.00 in partial by Bryan Fouts'.

The Navigation Bar

The navigation bar, on the left side of the page, has the items that you used to see in tabs across the top of the page (like Customers, Vendors, and Employees).

You used to have to select a tab and then click on a menu, but now it takes just one click to see how you're doing, what you've done, and choose what you want to do next. Try it out for customers, vendors, employees, and transactions.

Here are two examples:

- Click Customers to create a new invoice for a customer, or review a customer's history with you over time.
- Click Transactions to review your banking information, or manage your accounts (with no need for tab jumping, like in the old QuickBooks).

The screenshot shows the QuickBooks interface for 'Joe's Landscaping' on Friday, January 17, 2014. On the left is a dark blue navigation bar with icons and labels for: Home, Customers, Vendors, Employees, Transactions (Banking, Sales, Expenses, Registers, Print Checks), Reports (Taxes, Apps), and Home. An orange line points to the 'Customers' icon in the navigation bar, with the text 'Navigation bar' written above it. The main dashboard area displays:

- Income:** A horizontal bar chart showing three categories: OPEN INVOICES (\$3,044.00), OVERDUE (\$1,750.00), and PAID LAST 30 DAYS (\$9,590.00).
- Expenses:** A donut chart showing PAID EXPENSES LAST 30 DAYS totaling \$8,158.00. The breakdown includes: Payroll (\$3,700.00), Equipment Rental (\$1,992.00), Nursery (\$1,335.00), Insurance (\$450.00), and Everything else (\$681.00).
- Profit & Loss:** A bar chart showing NET INCOME of \$6,341. Below it, a summary shows INCOME of \$10,734 and EXPENSES of \$4,393. A line graph shows trends from August 18 to September 15.
- Bank Accounts:** A section on the right titled 'Bank Accounts' showing '2 Transactions need your attention'. It lists Checking (\$13,621.93) and Savings (\$12,500.00) accounts.
- Activities:** A section titled 'Activities' with a dropdown menu set to 'All'. It lists 'Need Attention' items, including two 'OVERDUE Invoice' entries and two 'Expense' entries.

COMPASS POINT

The Create (+) Menu: Your Source for All Forms

Use the (+) to start anything new for anyone you work with: customers, vendors, employees, etc. Here's just a small sample of what you can do:

- For customers you can create an invoice, receive a payment, set up an estimate, and more.
- For your vendors you can record an expense, check, or bill, and more.
- For employees, you can set up a paycheck, a single time activity, or a weekly timesheet.
- You can even review bank deposits, transfer funds, make a journal entry, and create and send statements.

The screenshot shows the QuickBooks interface with the 'Create (+) menu' open. The menu is organized into four columns: Customers, Vendors, Employees, and Other. The 'Customers' column includes Invoice, Receive Payment, Estimate, Credit Memo, Sales Receipt, Refund Receipt, Delayed Credit, and Delayed Charge. The 'Vendors' column includes Expense, Check, Bill, Pay Bills, Purchase Order, Vendor Credit, and Credit Card Credit. The 'Employees' column includes Paycheck, Single Time Activity, and Weekly Timesheet. The 'Other' column includes Bank Deposit, Transfer, Journal Entry, and Statement. An orange arrow points to the '+' icon in the top right corner of the menu, labeled 'Create (+) menu'.



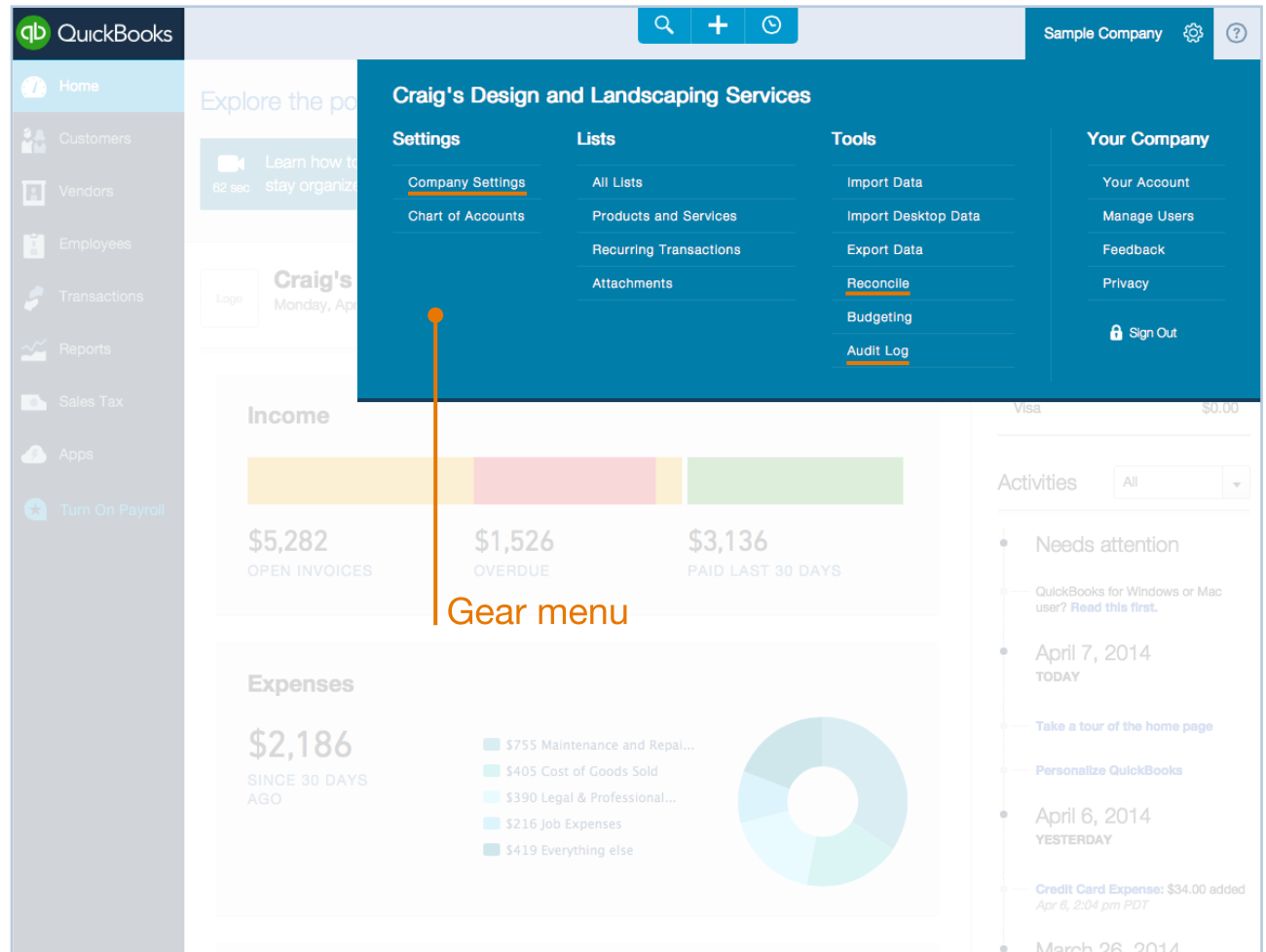
QUICK TIPS

- For **Statement**, look at the last link under Other, on the far right side of the menu.
- If the Create menu is “collapsed” when you open it (and doesn't show all of the options), just click More to open the full menu.

The Gear: Your Toolbox

The Gear lets you manage tasks that you do less often, like changing company settings, managing your chart of accounts, setting up products and services, or reviewing recurring transactions.

It's organized so that you can quickly get to tasks that involve your settings and your lists, use tools like importing, exporting, reconciling or budgeting, and manage the details of your account.



Gear menu



QUICK TIPS

- **Preferences** is now called **Company Settings**, and you'll find it right under Settings.
- **Activity Log** has been changed to **Audit Log** (to be more in line with accounting industry standards), so look for it under Tools.
- **Reconcile** is also in the Tools menu.

WHERE DO I FIND?

The New Customer Center Page

This page makes it easy to find the customer you're looking for and take the appropriate next action.

You'll see more data here now, and quickly send emails and statements from the Batch actions dropdown.

The screenshot shows the QuickBooks interface for the 'Customers' page. At the top, there's a navigation bar with 'QuickBooks' logo, search, add, and refresh icons, and a 'Sample Company' dropdown. Below this is a 'Customers' header with a 'New customer' button. A summary bar displays financial data: Unbilled (\$0, 0 ESTIMATE), Unpaid (\$750, 3 UNBILLED ACTIVITY), \$5,282 (20 OPEN INVOICES), \$1,526 (10 OVERDUE), and Paid (\$3,136, 12 PAID LAST 30 DAYS). Below the summary is a table of customers with columns for CUSTOMER, PENDING INVOICES, BALANCE, and ACTION. The table lists several customers, including Amy's Bird Sanctuary, Bill's Windsurf Shop, Cool Cars, Diego Rodriguez, Dukes Basketball Camp, Dylan Sollfrank, and Freeman Sporting Goods. An orange arrow points to the 'ACTION' dropdown for Amy's Bird Sanctuary, which is open and shows options like 'Send reminder', 'Receive payment', 'Send statement', 'Print statement', 'Create invoice', 'Create sales receipts', and 'Create estimate'.

CUSTOMER	PENDING INVOICES	BALANCE	ACTION
Amy's Bird Sanctuary	1 Overdue invoice	\$239.00	Send reminder, Receive payment, Send statement, Print statement, Create invoice , Create sales receipts, Create estimate
Bill's Windsurf Shop	1 Overdue invoice	\$85.00	
Cool Cars			
Diego Rodriguez			
Dukes Basketball Camp			
Dylan Sollfrank			
Freeman Sporting Goods			

Next recommended action is listed here, or you can open the dropdown to do other tasks, like receiving payment, creating an invoice, or creating an estimate.

QUICK TIP

Check out our blog to learn even more about the new Customer center page:

<http://blog.qbo.intuit.com/2013/12/04/whats-changed-in-quickbooks-online-customers-and-vendors/>

WHERE DO I FIND?

The New Vendors Center Page

This page makes it easy for you to find the vendor you're looking for, create a purchase order, write a check, and much more.

QuickBooks Vendors Center Page Summary:

Category	Amount	Count	Details
Unbilled	\$125	1	1 PURCHASE ORDER
Unpaid	\$1,603	5	5 OPEN BILLS
Overdue	\$848	4	4 OVERDUE
Paid	\$3,892	21	21 PAID LAST 30 DAYS

VENDOR	EMAIL	PENDING BILLS	BALANCE	ACTION
<input type="checkbox"/> Bob's Burger Joint				Create bill
<input type="checkbox"/> Books by Bessie	Books@Intuit.com			Create expense Write check Create purchase order Make inactive
<input type="checkbox"/> Brosnahan Insurance Agency		1 Overdue bill	\$241.23	
<input type="checkbox"/> Cal Telephone				

Now you can pay one vendor right here. You can also choose the next recommended action, or open the dropdown and do other tasks like creating an expense, or creating a purchase order.

QUICK TIP

Access all your vendor forms (Expense, Check, Bill, and more), from the Create (+) menu.

Create Menu Options:

Customers	Vendors	Employees	Other
Invoice	Expense	Paycheck	Bank Deposit
Receive Payment	Check	Single Time Activity	Transfer
Estimate	Bill	Weekly Timesheet	Journal Entry
Credit Memo	Pay Bills		Statement
Sales Receipt	Purchase Order		
Refund Receipt	Vendor Credit		
Delayed Credit	Credit Card Credit		

WHERE DO I FIND?

My Employees

Use the Employees page to see a list of all your employee information, and set up or use Payroll.

The screenshot shows the QuickBooks interface for the 'Employees' page. The top navigation bar includes the QuickBooks logo, search, create, and refresh icons, and the company name 'Sample Company'. The left sidebar lists navigation options: Home, Customers, Vendors, Employees (highlighted), Transactions, Reports, Taxes, Apps, and Order Checks. The main content area displays a summary for 'Employees' with a 'Run payroll' button. The summary includes: NET PAY (\$1,097), 2014 PAYROLL COST (\$2,350), EMPLOYEE (\$1,006), and EMPLOYER (\$247). A donut chart visualizes the payroll cost breakdown. Below the summary is a search bar for employees, a filter for 'Active employees', and an 'Add employee' button. A table lists three active employees with their names, pay rates, schedules, methods, and statuses.

NAME	PAY RATE	PAY SCHEDULE	PAY METHOD	STATUS
EC Catillo, Eloisa	\$40,000.00/ year	Friday	Direct deposit	Active
BL Lucchini, Bill	\$60,000.00/ year	Friday	Direct deposit	Active
KS Steblay, Kari	\$18.00 / hour	Friday	Check	Active



QUICK TIP

Use the Create (+) menu to create Paychecks (if you have Payroll enabled) and record Single Time or Weekly activities for your employees.

The screenshot shows the 'Create' menu in QuickBooks. The menu is organized into four columns: Customers, Vendors, Employees (selected), and Other. The Employees column is highlighted with an orange underline and contains three items: Paycheck (with an upward arrow), Single Time Activity, and Weekly Timesheet.

Customers	Vendors	Employees	Other
Invoice	Expense	Paycheck ↑	Bank Deposit
Receive Payment	Check	Single Time Activity	Transfer
Estimate	Bill	Weekly Timesheet	Journal Entry
Credit Memo	Pay Bills		Statement
Sales Receipt	Purchase Order		
Refund Receipt	Vendor Credit		
Delayed Credit	Credit Card Credit		

WHERE DO I FIND?

My Banking

It's under Transactions in the navigation bar.

We've created a centralized location where you can manage all of your accounts. Just click on Transactions to reveal Banking and select it to open the Bank and Credit Cards page.

To connect a bank account to your financial institution (so you can download electronic statements), click Add Account at the top right of the page. This may have been called either "download transactions" or "online banking" in your old QuickBooks.

The screenshot shows the QuickBooks interface. On the left is a dark navigation bar with the following items: Home, Customers, Vendors, Employees, Transactions, Banking (highlighted), Sales, Expenses, Registers, Print Checks, Reports, Sales Tax, Apps, and Turn On Payroll. The main content area is titled 'Bank and Credit Cards' and includes an 'Update' dropdown and an 'Add Account' button. Below this, there are three account cards for 'EXAMPLE BANK U.S.A.': a CHECKING account with a balance of \$-3,621.93 and 25 new transactions, a SAVINGS account with a balance of \$200.00 and 1 new transaction, and a MASTERCARD account with a balance of \$304.96 and 7 new transactions. Below the account cards is a 'New Transactions' section with tabs for 'In QuickBooks' and 'Excluded'. A table of transactions is displayed with columns for DATE, DESCRIPTION, ADD OR MATCH, SPENT, RECEIVED, and ACTION. The table contains several rows, including transactions for 'Books By Bessie', 'A Rental', 'Pam Seitz', and 'Hicks Hardware', with some marked as 'MATCH'.

DATE	DESCRIPTION	ADD OR MATCH	SPENT	RECEIVED	ACTION
04/26/2014	Books By Bessie	Other Income		\$55.00	Add
03/27/2014	A Rental	Uncategorized Income		\$200.00	Add
03/27/2014	A Rental	Uncategorized Expense	\$1,200.00		Add
03/04/2014	A Rental	Uncategorized Expense	\$800.00		Add
03/01/2014	Pam Seitz	qb MATCH - Expense 76 03/01/20	\$75.00		Match
03/01/2014		qb MATCH - Deposit 03/01/2014 \$		\$868.15	Match
03/01/2014	Hicks Hardware	qb MATCH - Check 75 03/01/2014	\$228.75		Match



QUICK TIP

In the navigation bar you'll also find Sales, Expenses, Registers, and the Print Checks setup. (Just a reminder that Print Checks is available for US and Canada only.)

WHERE DO I FIND?

Income List

It's under the Transactions tab.

The Income List has been renamed "Sales," and is grouped in the Navigation bar with other transaction lists.

QuickBooks Search + Refresh Sample Company

Sales Transactions

Import Transactions Create new

Unbilled Unpaid Paid

\$0 0 ESTIMATE \$750 2 UNBILLED ACTIVITY \$5,282 20 OPEN INVOICES \$1,526 10 OVERDUE \$3,136 12 PAID LAST 30 DAYS

Filter All Batch actions

DATE	TYPE	NO.	CUSTOMER	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
03/14/2014	Payment		Freeman S...	03/14/2014	\$0.00	-\$387.00	Closed	
03/14/2014	Payment		Cool Cars	03/14/2014	\$0.00	-\$1,675.52	Closed	
03/14/2014	Invoice	1035	Mark Cho	04/13/2014	\$314.28	\$314.28	Open	Receive payment
03/14/2014	Invoice	1037	Sonnensch...	04/13/2014	\$362.07	\$362.07	Open	Receive payment
03/14/2014	Invoice	1036	Freeman S...	04/13/2014	\$477.50	\$477.50	Open	Receive payment
03/13/2014	Payment		Travis Wald...	03/13/2014	\$0.00	-\$81.00	Closed	



QUICK TIP

Just click on the **Money Bar** to do a fast sort of your transactions.

Sales Transactions

Import

Unbilled Unpaid Paid

\$0 0 ESTIMATE \$750 2 UNBILLED ACTIVITY \$5,282 20 OPEN INVOICES \$1,526 10 OVERDUE \$3,136 12 PAID

WHERE DO I FIND?

My Reports

Use the Reports page to see an overview of your available reports.

Below the search bar are links for Recommended, Frequently Run, My Custom Reports, and All Reports. (Recommended Reports shows what reports other businesses like yours are running.) Use these handy links to move quickly between different reports.

The new Reports page gives you a lot of flexibility. Search All Reports if you're not sure what you're looking for, go to My Custom Reports for your memorized reports, and check out Frequently Run for your most-used reports.

The screenshot shows the QuickBooks interface for the 'Sample Company'. The top navigation bar includes a search icon, a plus sign, a refresh icon, and the company name 'Sample Company' with settings and help icons. The main header displays 'Reports Profit and Loss' with a summary of financial data: NET INCOME of \$1,438, INCOME of \$9,289, and EXPENSES of \$7,850. A bar chart below shows a trend over time from Dec 28-31 to Mar 1-28. The left sidebar contains navigation options: Home, Customers, Vendors, Employees, Transactions, Reports (highlighted), Sales Tax, Apps, and Turn On Payroll. The main content area features a search bar 'Go to report' and tabs for 'Recommended', 'Frequently Run', 'My Custom Reports', and 'All Reports'. Under the 'Recommended' tab, several report cards are displayed, each with a thumbnail, title, description, and 'Run'/'Customize' buttons. The reports include Profit and Loss, Balance Sheet, Company Snapshot, A/R Aging Summary, Expenses by Vendor Summary, and A/P Aging Summary.

This is a close-up view of the 'Recommended Reports' section. It shows the search bar 'Go to report' and the 'Recommended' tab selected. Below the tabs, the heading 'Recommended Reports' is visible, and the start of the report cards is shown.

DETAIL VIEW

QUICK TIP

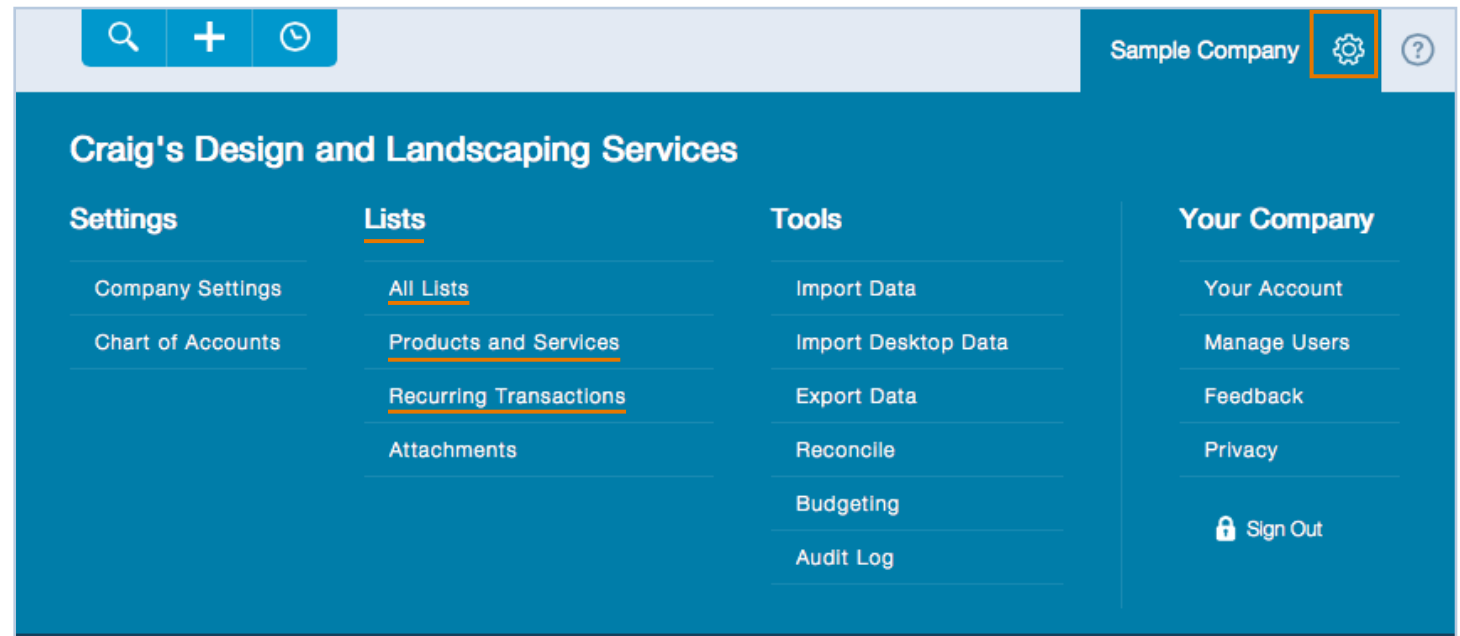
To find Scorecard, go to All Reports > Business Overview > Scorecard. Take some time to look around and see what else you can find.

WHERE DO I FIND?

My Lists

Click All Lists under the Lists column to find: Chart of Accounts, Recurring Transactions, Products and Services, Locations, Payment Methods, Terms, Classes, and Attachments.

You can get right to your most frequently used lists via the Gear. Just click the link (Products and Services, Recurring Transactions, or Attachments.)



WHERE DO I FIND?

The Shortcut Keys

We know how important shortcut keys are to some users. To see a handy list of shortcuts built into the new QuickBooks, just press Ctrl+Alt+?

Craig's Design and Landscaping Services

Your Company ID is 1185004180 H23

Keyboard Shortcuts

To take advantage of shortcuts, simultaneously press **[ctrl]** and **[alt or option]** and one **[key from the list below]**

Regular pages - homepage, customers etc.		Transaction pages - invoice, expense etc.	
Shortcut Key	Action	Shortcut Key	Action
i	Invoice	x	Exit transaction view
w	Check	c	Cancel out
e	Estimate	s	Save and New
x	Expense	d	Save and Close
r	Receive Payment	m	Save and Send
c	Customers		
v	Vendors		
a	Chart of Accounts		
l	Lists		
h	Help		
f	Search Transactions		
? or /	This dialog		

OK