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.

Contents

THE ROADMAP: WHAT'S NEW

A Quick Overview

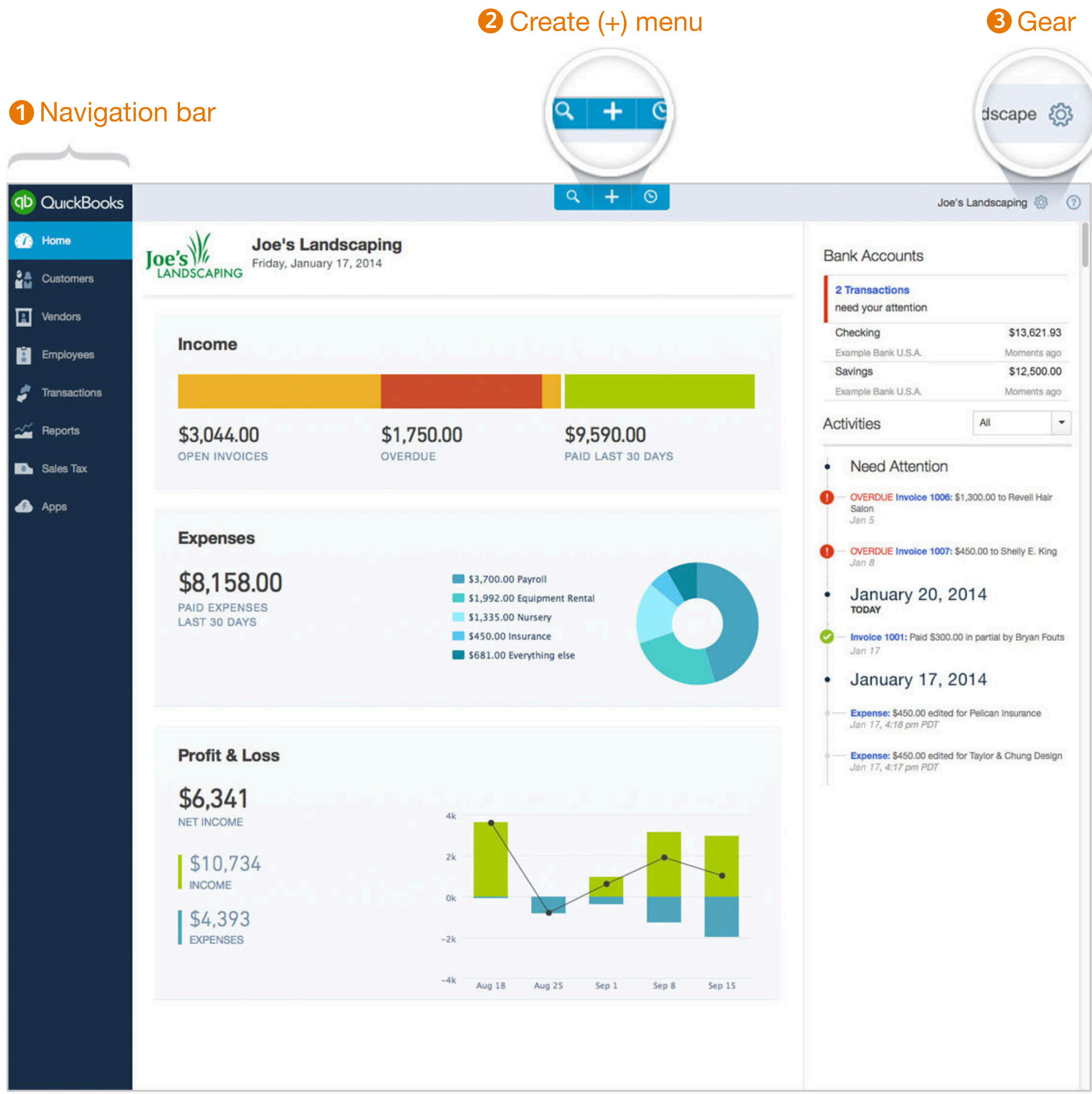
First of all, you're going to notice some organizational changes.

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.



COMPASS POINT

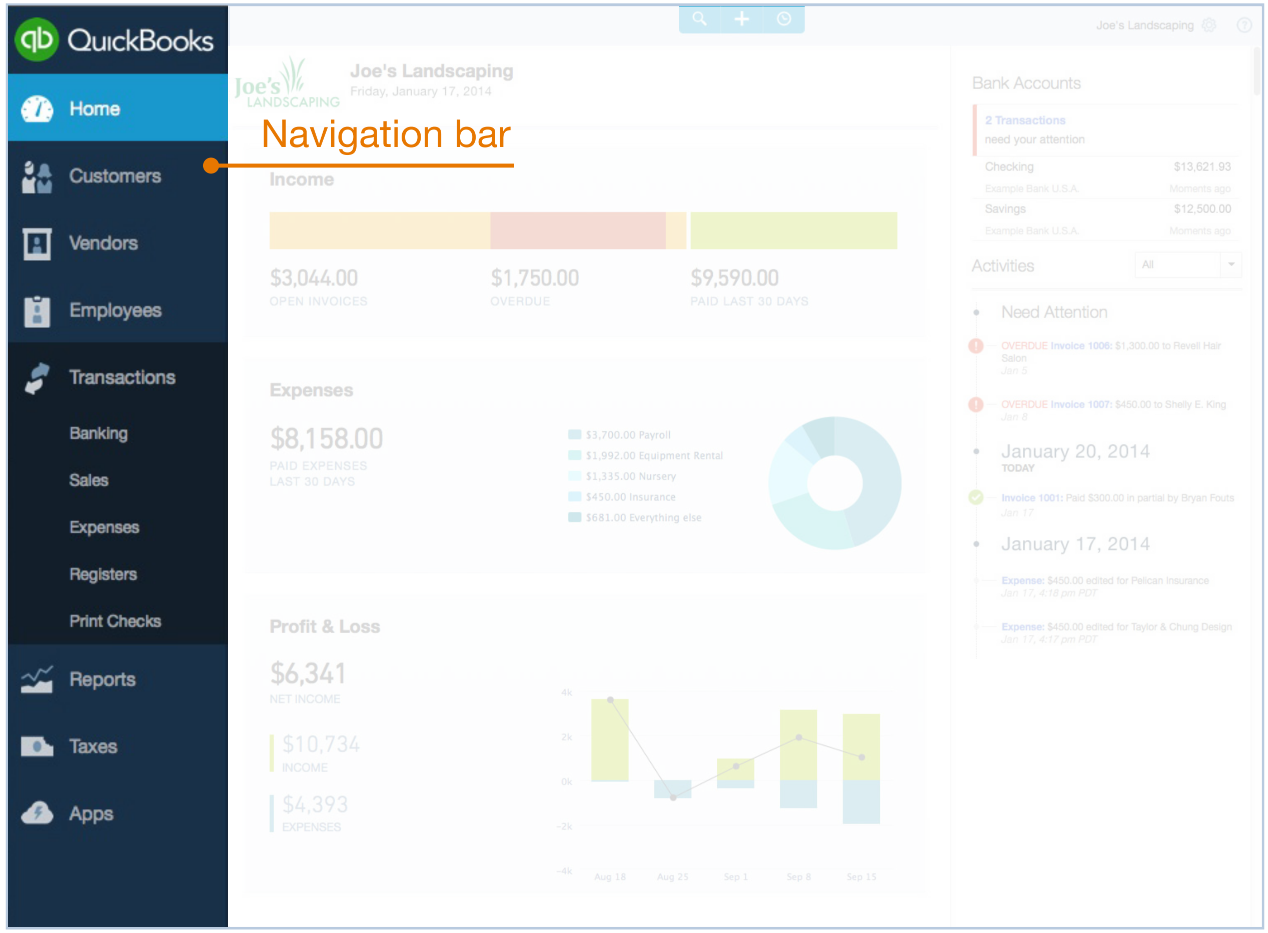
The Navigation Bar

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).

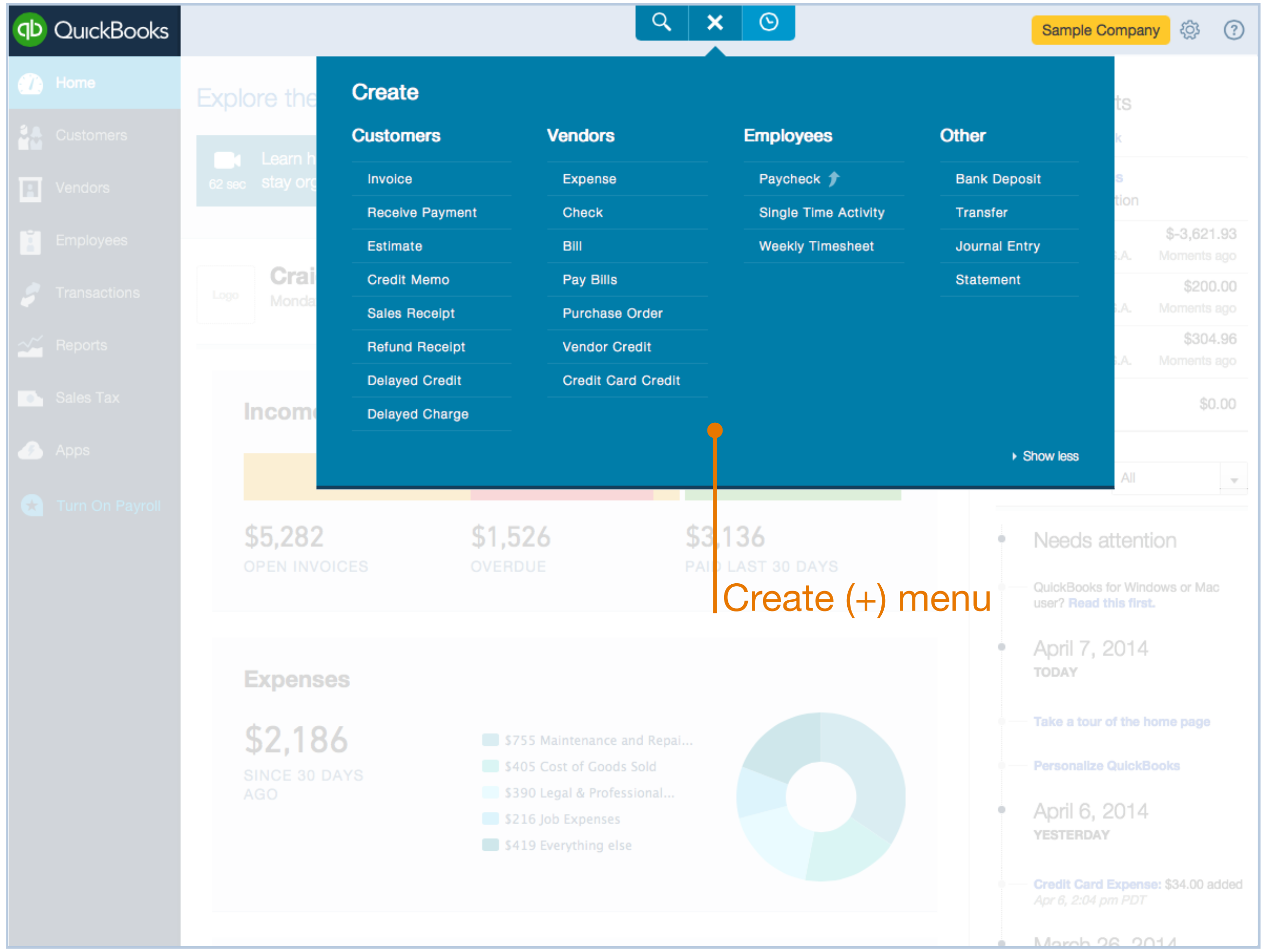


COMPASS POINT

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.



QUICK TIPS

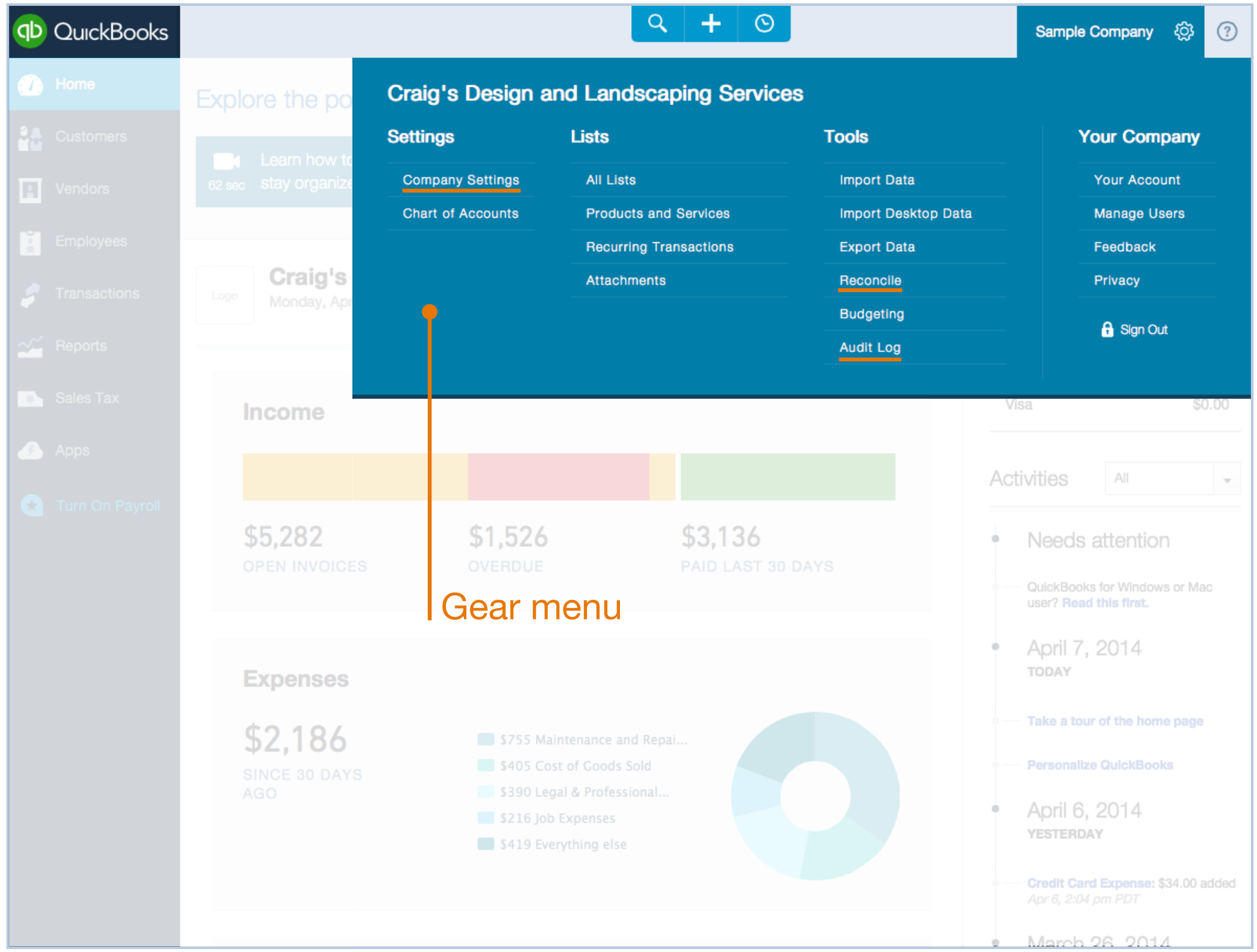
- For Statement, look at the last link under Other, on the far right side of the menu.
- If the Create menu is "collapsed" when you open it (and doesn't show all of the options), just click More to open the full menu.

COMPASS POINT

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.



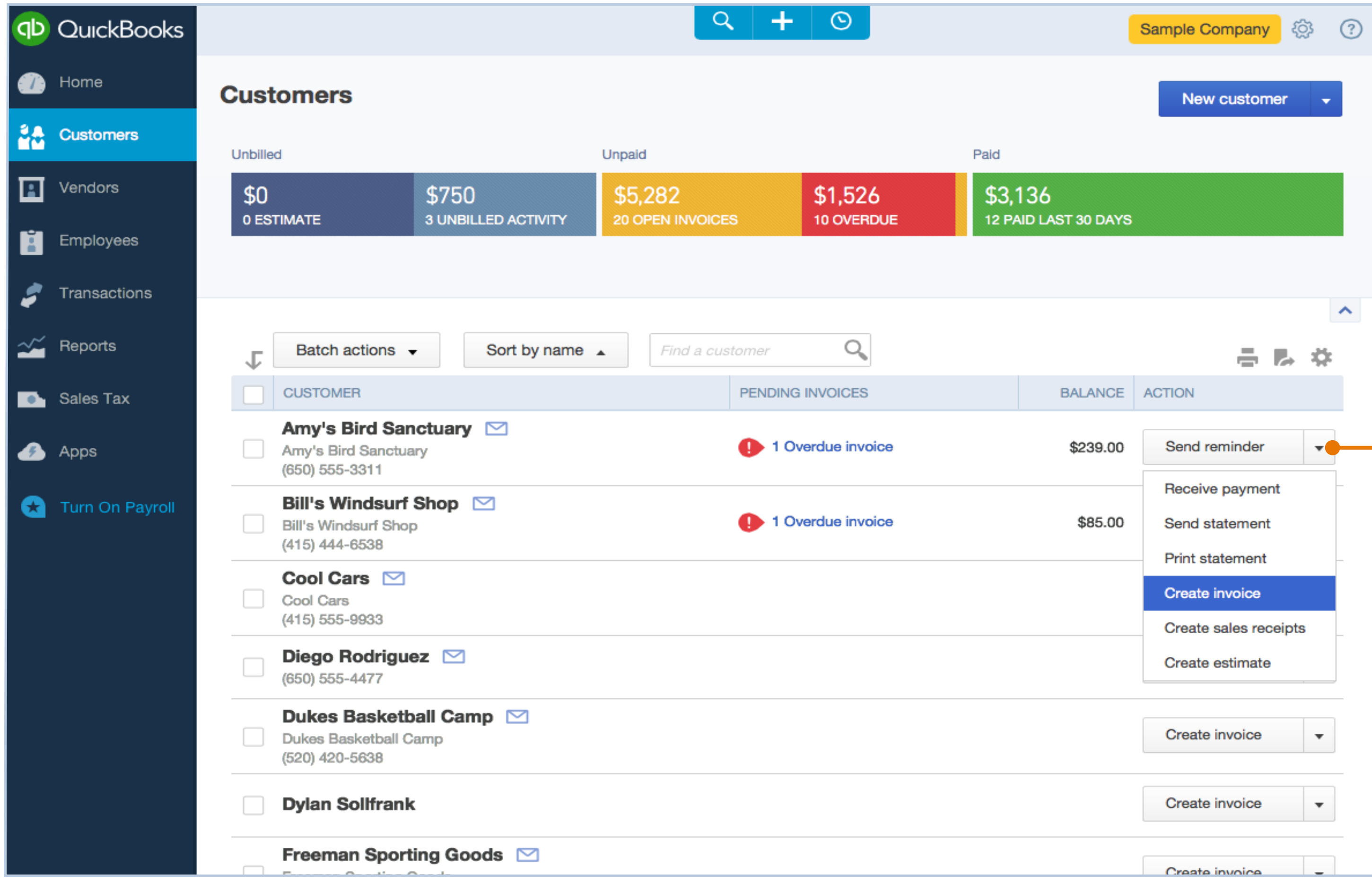
QUICK TIPS

- 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.



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

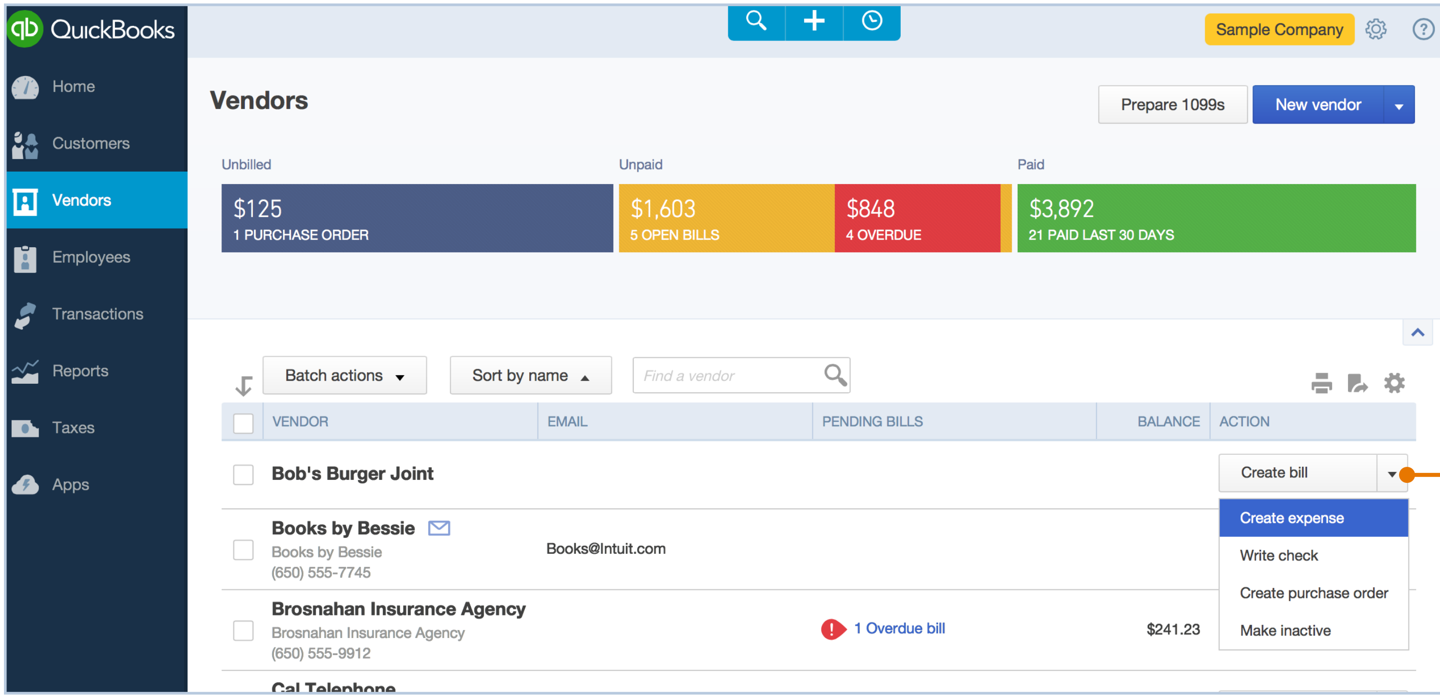
Check out our blog to learn even more about the new Customer center page:

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

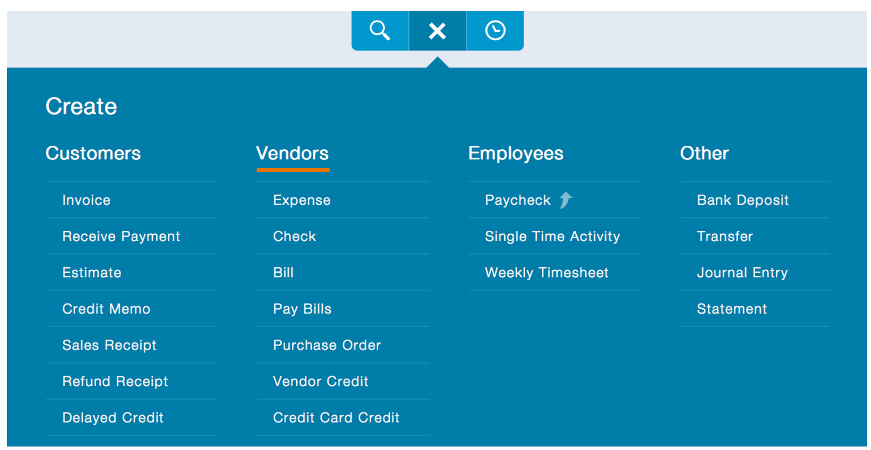
This page makes it easy for you to find the vendor you're looking for, create a purchase order, write a check, and much more.



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

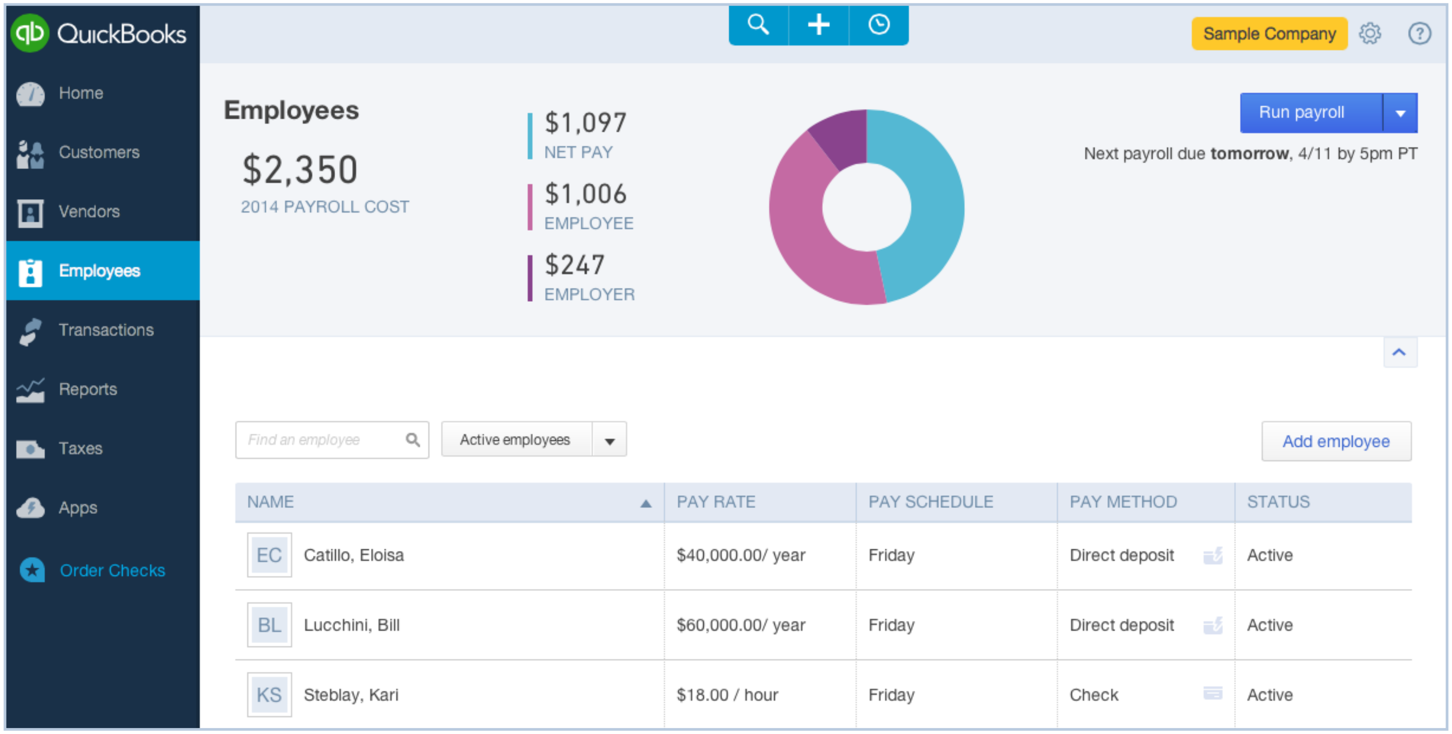
Access all your vendor forms (Expense, Check, Bill, and more), from the Create (+) menu.



WHERE DO I FIND?

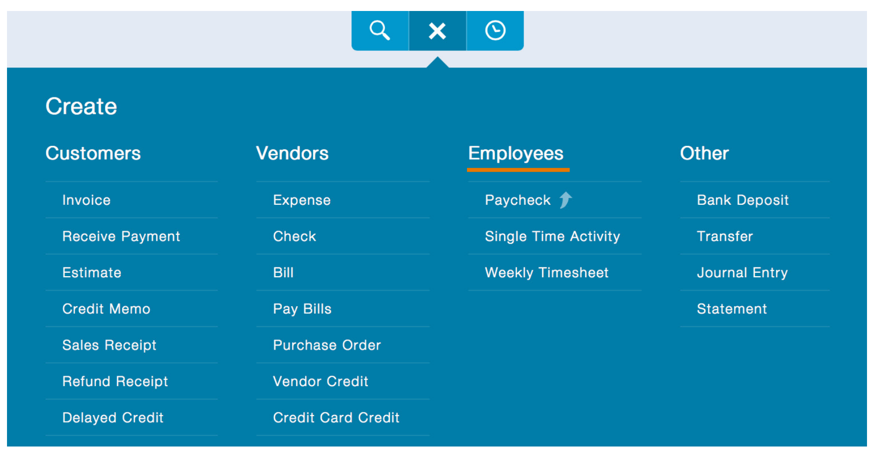
My Employees

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



QUICK TIP

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



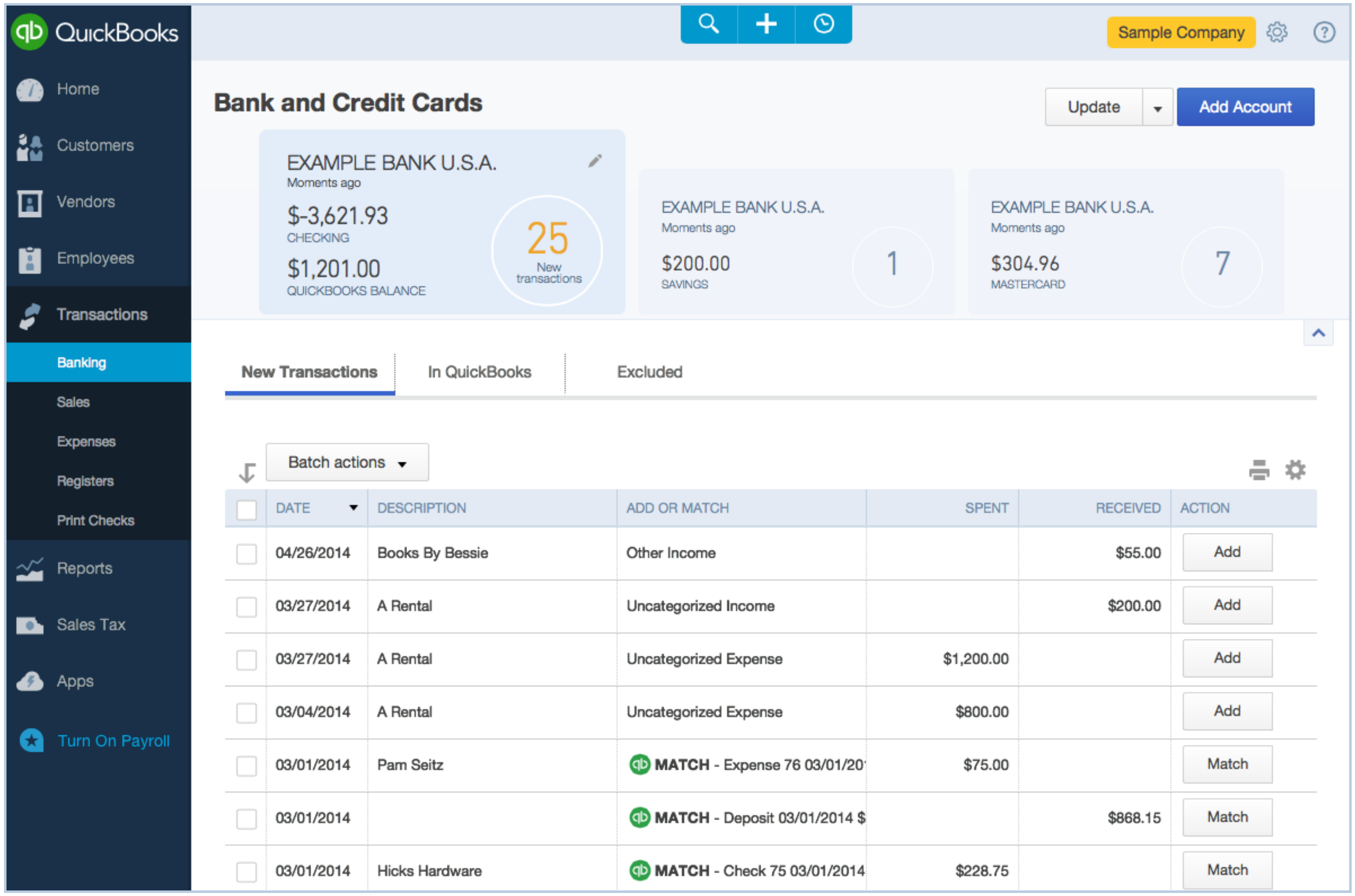
WHERE DO I FIND?

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.



QUICK TIP

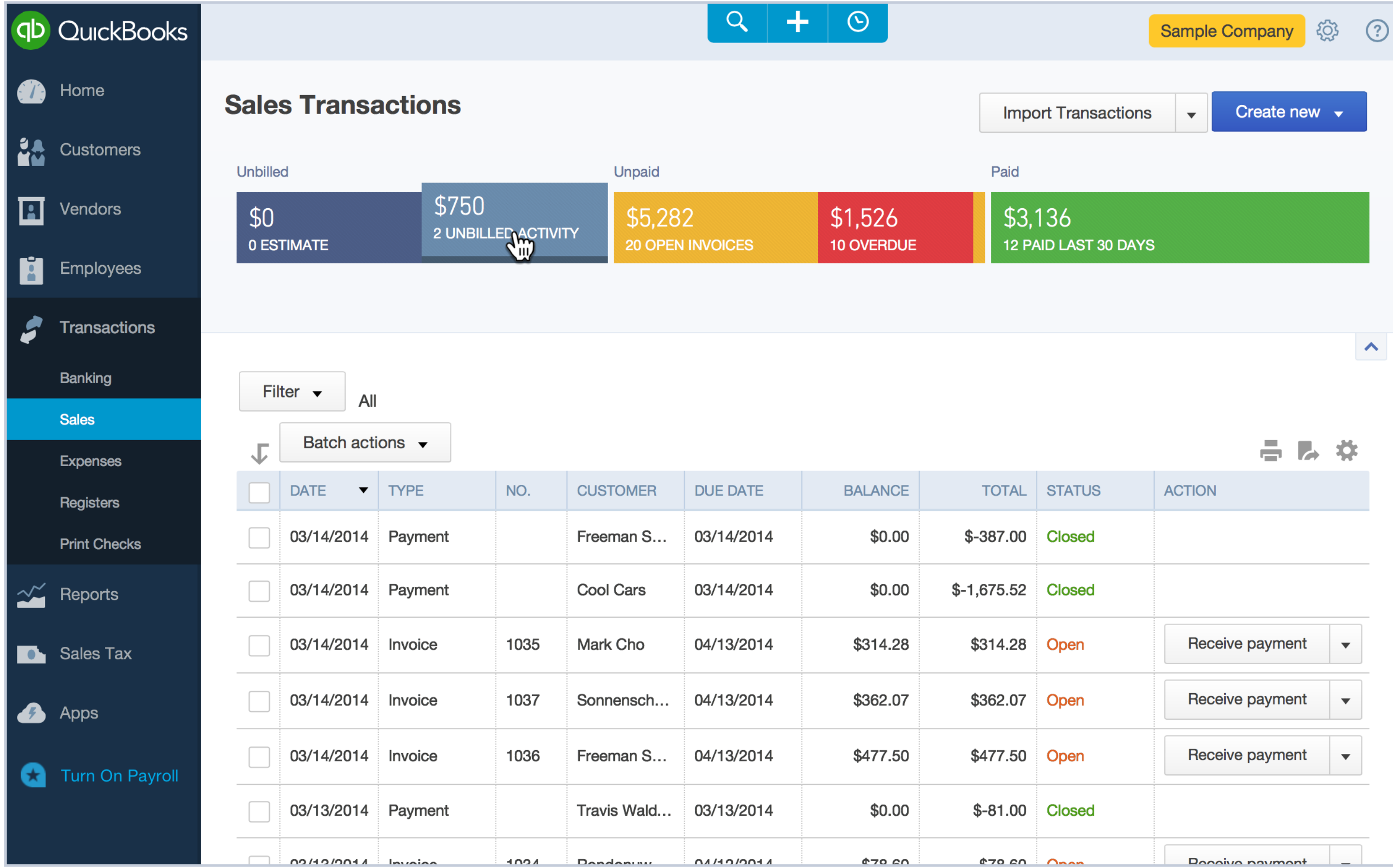
In the navigation bar you’ll also find Sales, Expenses, Registers, and the Print Checks setup. (Just a reminder that Print Checks is available for US and Canada only.)

WHERE DO I FIND?

Income List

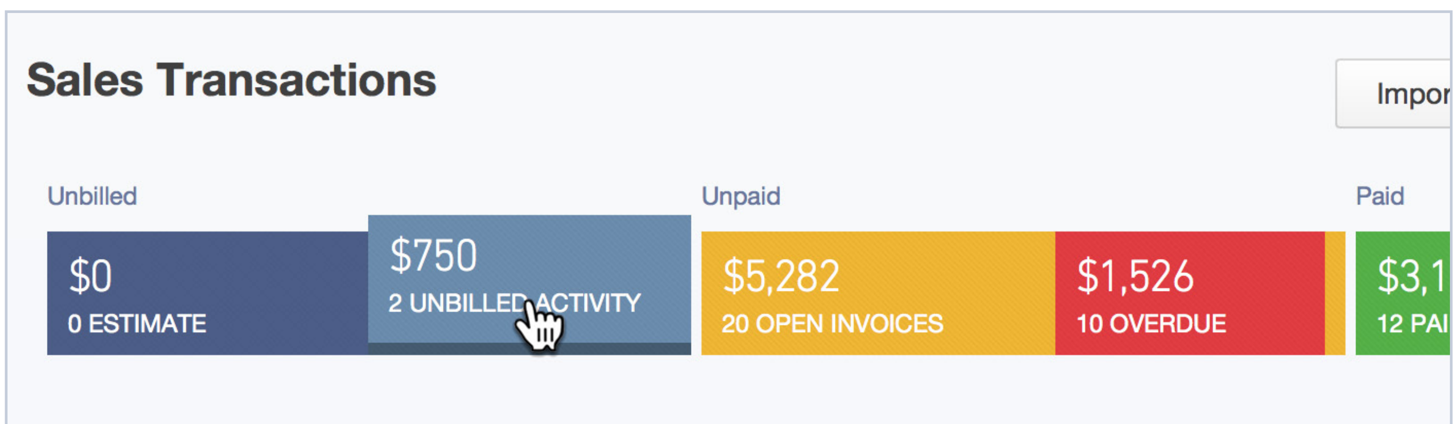
It's under the Transactions tab.

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



QUICK TIP

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



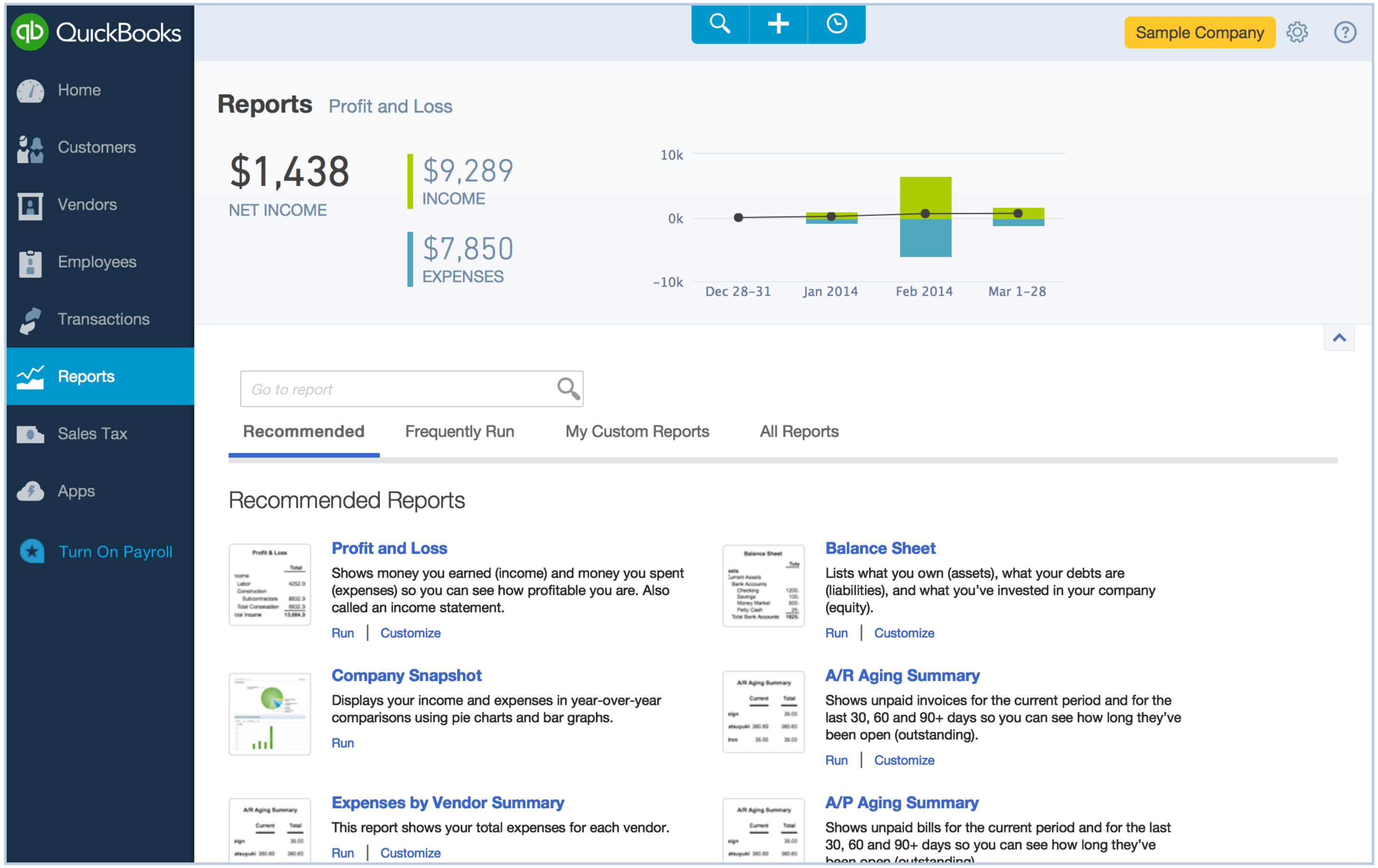
WHERE DO I FIND?

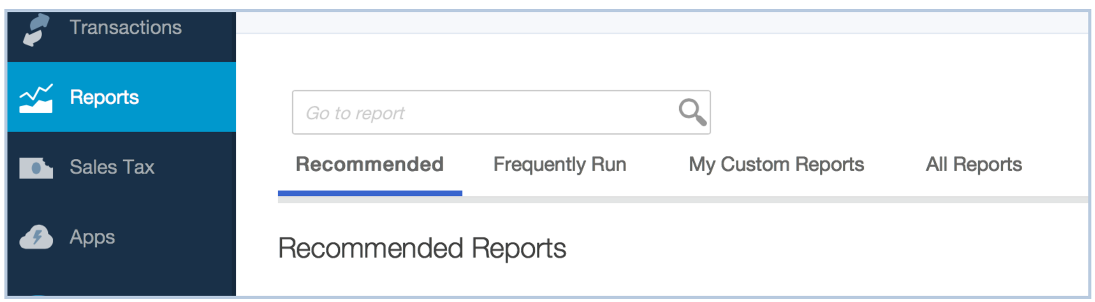
My Reports

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.





DETAIL VIEW

QUICK TIP

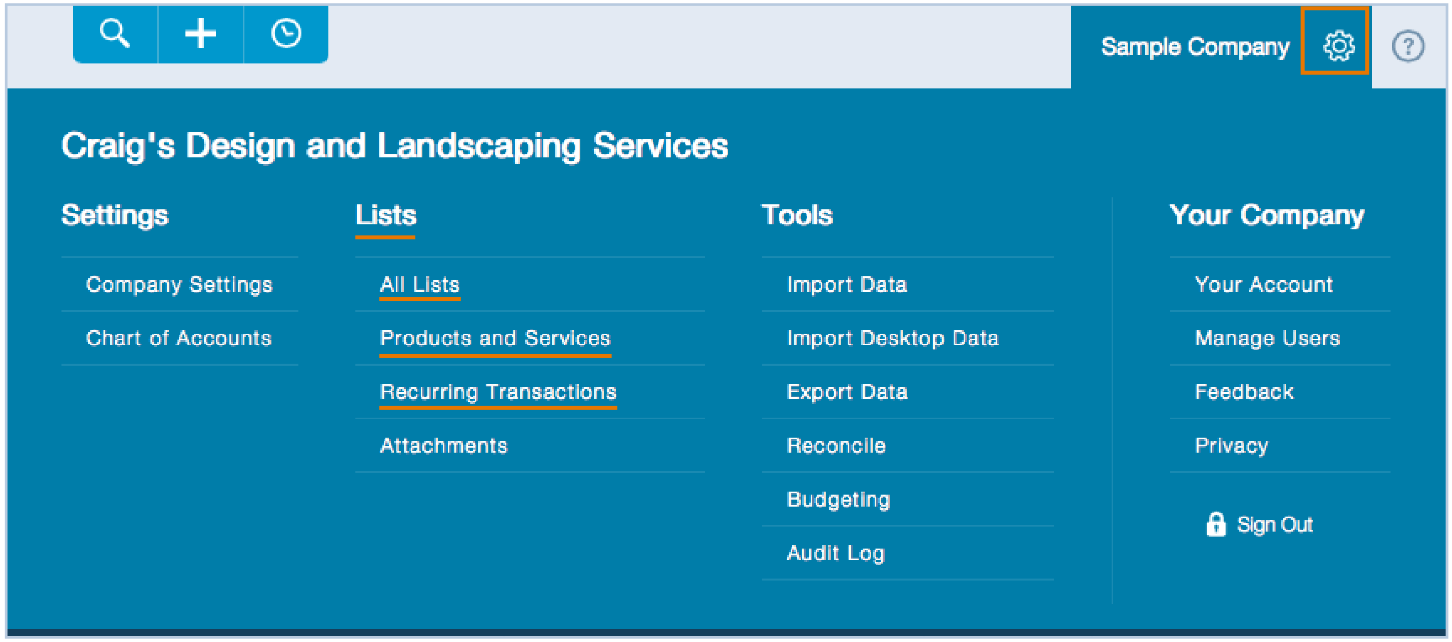
To find Scorecard, go to All Reports > Business Overview > Scorecard. Take some time to look around and see what else you can find.

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+?