

# How to get started in QuickBooks Online manual

Welcome to QuickBooks Online! To ensure you're set up properly, follow these simple steps. If you do not have a subscription yet, work with your accountant to set up your account. Once you have a QuickBooks Online account, here are the things you'll want to do next.

## 1) Get familiar with the layout

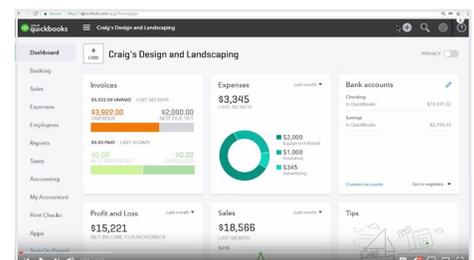
The **Dashboard** displays an interactive snapshot of the health of your business, featuring your invoice tracker, sales, expenses, and profit & loss performance.

- The **Left navigation bar** allows you to access various centers such as Banking, Sales and Expenses.
- Click the **Create (+) icon** to add transactions and activities.
- Click the **Magnifying Glass icon** to search transactions.
- Click the **Gear icon** to access settings, lists, and tools.
- Click the **Help (?) icon** to search help articles or to contact for assistance.

## 2) How to add and connect bank and credit card accounts

You can reduce your workload and save time by connecting your bank and credit card accounts to QuickBooks Online. Note, once you connect your accounts, your transactions from the last 90 days will automatically download, and you just need to accept them.

1. From the left menu, select **Banking**.
2. On the **Banking** page, select **Add Account**.
3. Search for your financial institution and select it from the list.
4. Enter your User ID and password for the financial institution's website and select **Continue**.
5. Complete the security verification steps your financial institution requires and select **Securely Connect**.
6. For each account, select the **Account Type** drop-down menu to choose either a **Bank** or **Credit Card** account and click **Connect**.



Watch this tutorial on our Youtube channel.

<https://intuit.me/2Siuz37>

### 3) How to categorize your transactions

After you've connected your financial institutions and the transactions have automatically downloaded, you can review, categorize, and accept them. QuickBooks Online analyzes all the information received from the bank to give you the best possible suggestions for accepting the transaction. You also have the option to match to existing transactions recorded in the register.

1. Go to **Banking** and navigate to the **For Review** tab.
2. You'll review your transactions to match them against records found in QuickBooks or to add them directly from the bank feed. You'll see suggestions from QuickBooks. Also, there are drop downs to add or change the payee, category, and more.
3. As you match and add transactions, they'll move from **For Review** to **In QuickBooks** and update the bank registers and financial reports, keeping your books up-to-date.

Watch this tutorial on our Youtube channel.  
<https://intuit.me/2U2mRvx>



### 4) How to view reports

You can use reports in QuickBooks to get a snapshot of various aspects of your business. Key reports to explore include the balance sheet, the profit & loss statement, and the general ledger.

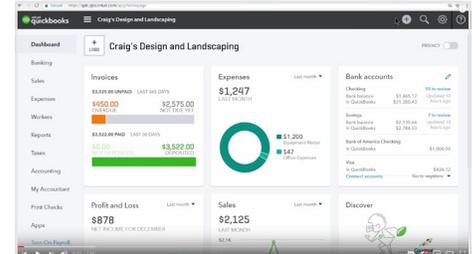
#### View available reports:

1. Select **Reports** from the left menu.
2. In the **Find report by name** search bar, enter the report name to quickly locate the report you need or browse the categories listed.
3. Select the report to open it.

Watch this tutorial on our Youtube channel.  
<https://intuit.me/2SODGxH>

## 5) How to create and customize invoices to send to your customers

1. Click the **Create (+) icon** and select **Invoices**.
2. Fill out the invoice form. If you don't see a field you need, click the **Gear icon** in the upper right to add additional fields.
3. Click **Customize** at the bottom of the form to open your sales form template preferences.
4. Upload your logo and customize the look of your invoice.
5. Click **Save** to save your customizations.
6. Click **Print** or **Preview** to check how the invoice looks.
7. Click **Save and Send** to deliver your invoice to a customer via email.

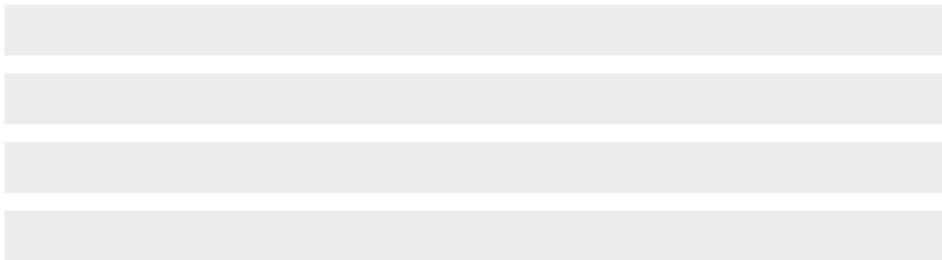


Watch this tutorial on our Youtube channel.

<https://intuit.me/2Vn3n5o>

---

For additional tutorial resources, you can check out: [quickbooks.intuit.com/tutorials](https://quickbooks.intuit.com/tutorials) or reach out to your accountant.



Contact information provided by your local independent accounting professional.