QuickBooks Online for Canada: Comprehensive

Academic Year 2021-2022

Chapter 10: Customizing and Extending Capabilities of QuickBooks Online

Learning Objectives

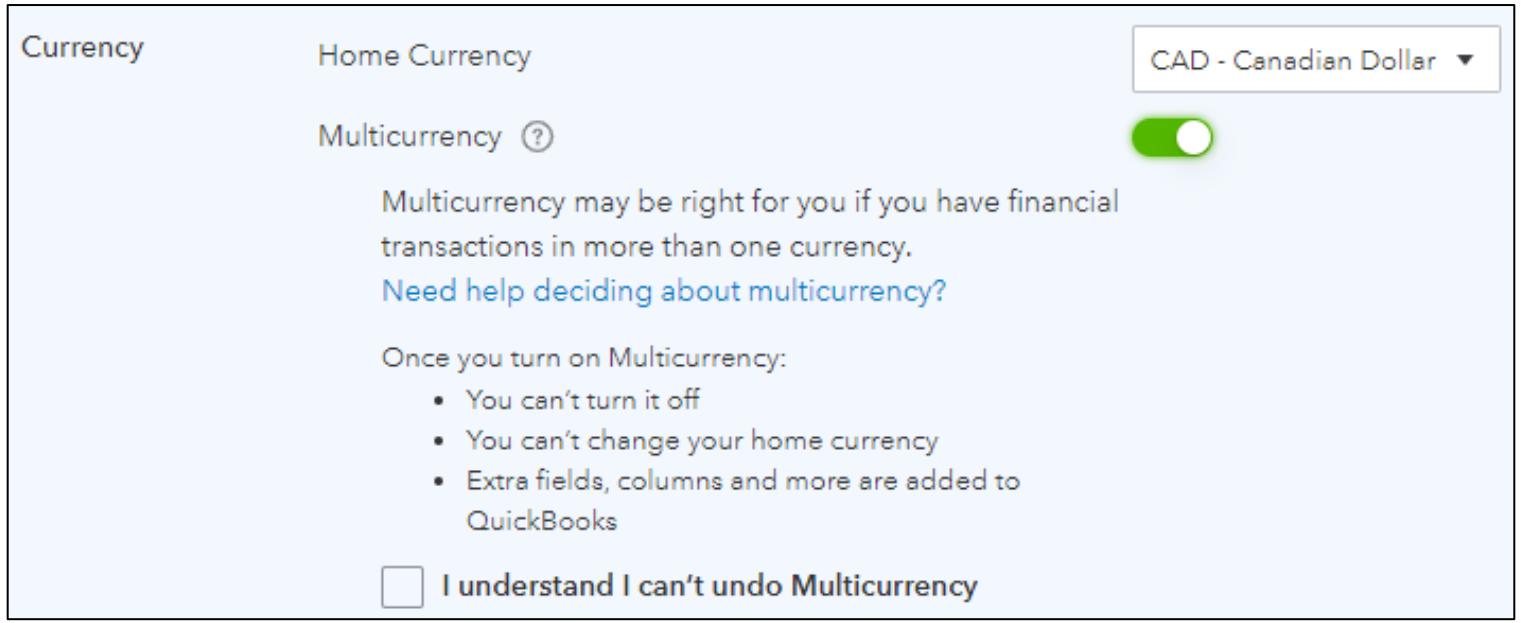
- Customize reports
- Save and send customized reports
- Use the audit log for accountability
- Export data without using reports
- Use keyboard shortcuts and search for QuickBooks Online integrated apps

Reports

- The Reports centre has three sections within it: Standard, Customer Reports and Management Reports.
- You can…
  - …make any template in the Standard section a favourite for easy access.
  - …customize reports to present the information most pertinent to your business.
  - …schedule customized reports to be emailed to anyone you choose.

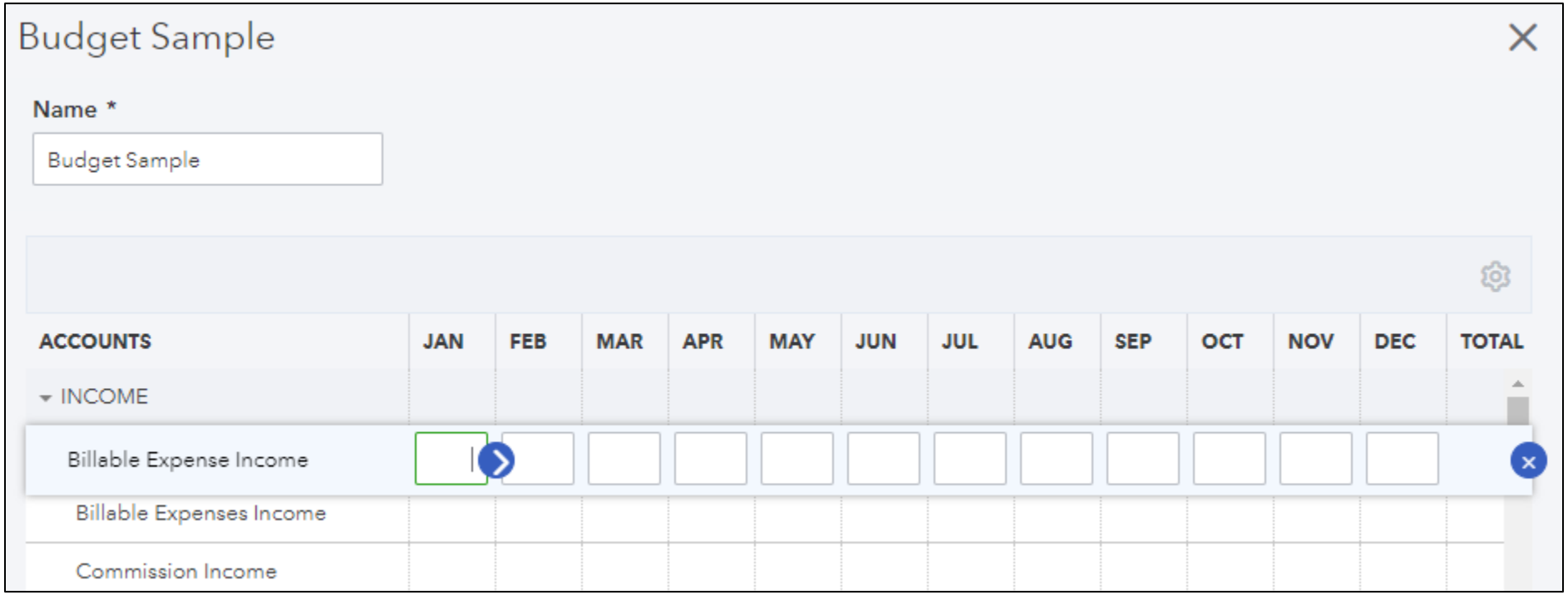
Multicurrency

- It is important to have the ability to invoice and post expenses for customers/suppliers who use other currencies.



Budgets

- Budgets predict future expenses and income and measure performance against the prediction.

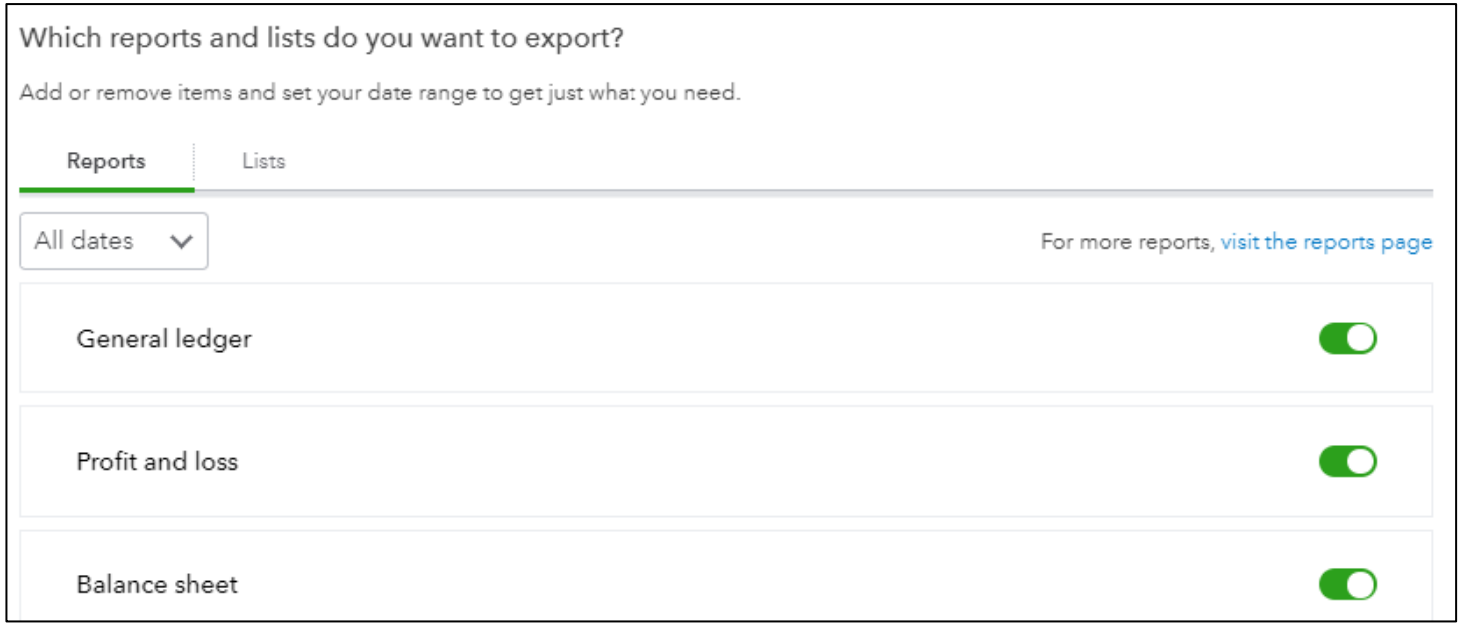


Class and Location Tracking

- Class Tracking
  - It allows you to keep track of income and expenses by department, project, event or some other segment.
  - It provides excellent reporting capabilities.
- Location Tracking
  - It allows you to produce financial information reports by location.
  - It’s limited to one location per transaction form.
  - It creates location details that can be changed on a sales transaction form.

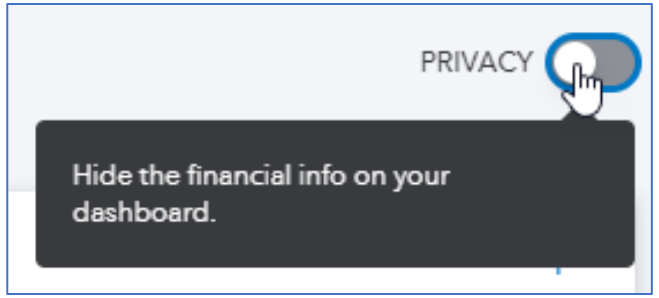
Additional Tools

- You can export data from the QuickBooks Online file.



Additional Tools (continued)

- To protect confidential information, you can…
  - …set user permissions.
  - …use Privacy mode on the Dashboard.



- You can track changes to forms and transactions with:
  - the audit log
  - the audit history

Keyboard Shortcuts

- Press Ctrl + Alt + ? for Windows or Ctrl + Option + ? for Mac to view the keyboard shortcuts.

Your Company ID is **9130 3488 1481 4516** Copy

Keyboard shortcuts

To use a shortcut, press and hold **ctrl/control** and **alt/option** at the same time. Then press one of the keys below.

On main pages, like the dashboard or customers

SHORTCUT KEY	ACTION
i	Invoice
w	Cheque
e	Estimate
x	Expense
r	Receive payment
c	Customers
v	Suppliers
a	Chart of Accounts
l	Lists
h	Help
f	Search Transactions
d	Focus the left menu
? or /	This dialog

On transactions, like an invoice or expense

SHORTCUT KEY	ACTION
x	Exit transaction view
c	Cancel out
s	Save and New
d	Save and Close
m	Save and Send
p	Print
? or /	This dialog

Extending Capabilities with Integrated Applications

- Third-party applications can extend the capabilities of your company file.
- Verify that the app can integrate with the Canadian version of QuickBooks Online.

The QuickBooks Community

- QuickBooks Online provides a direct link to the development staff.
  - You can report bugs in the software.
  - You can recommend added features.
- QuickBooks Labs is a testing ground for new or improved features.