

QUICKBOOKS ONLINE

10

Customizing and Extending the 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

- Reports centre is organized into sections:
 - Standard reports
 - Customer reports
 - Management reports
- Make any standard template a favourite for easy access
- Customize reports to present the info most pertinent to your business
- Schedule QBO to email customized reports to a distribution list

Multicurrency

- Create invoices and post expenses in other currencies
- Exchange rates are updated several times a day
- Once the multicurrency feature is enabled...
 - ...it cannot be turned off
 - ...the home currency cannot be changed

Home Currency: CAD - Canadian Dollar

Multicurrency ? ☒

Multicurrency may be right for you if you have financial transactions in more than one currency.
[Need help deciding about multicurrency?](#)

Once you turn on Multicurrency:

- You can't turn it off
- You can't change your home currency
- Extra fields, columns and more are added to QuickBooks
- Some features may no longer be available

☐ I understand I can't undo Multicurrency

Cancel Save

Budgets

- Help you predict future expenses and income
- Allow you to measure performance against predictions
- Can be imported if use a specific format

[illegible]

Class and Location Tracking

- **Class tracking** – allows you to track income/expenses by department, project, event, etc.
 - Provides excellent reporting capabilities
- **Location tracking** – allows you to produce financial information reports by location
 - Limited to one location per transaction form
 - Creates location details
 - Can be changed on sales transaction forms

Additional Tools

You can export data (reports and lists) from QBO...

- ...from multiple reports simultaneously
- ...for various time frames

Which reports and lists do you want to export?

Add or remove items and set your date range to get just what you need.

Reports

Lists

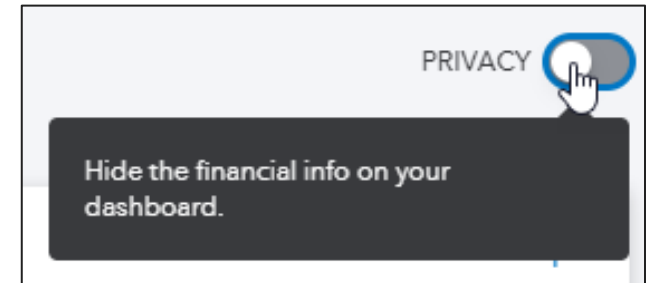
All dates ▼

For more reports, [visit the reports page](#)

General ledger	<input checked="" type="checkbox"/>
Profit and loss	<input checked="" type="checkbox"/>
Balance sheet	<input checked="" type="checkbox"/>

Additional Tools (cont.)

- Two good ways to help protect confidential information:
 - Via user permissions
 - Through the use of Privacy mode (on the Dashboard)
- Two features that let you track changes to forms and transactions:
 - Audit log – chronological list of activities performed
 - Audit history – who did what and when



Keyboard Shortcuts

To access the list of QBO shortcuts...

- Windows: Click [Ctrl]+[Alt]+[?]
- Mac: Click [Ctrl]+[Option]+[?]

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		On transactions, like an invoice or expense	
SHORTCUT KEY	ACTION	SHORTCUT KEY	ACTION
i	Invoice	x	Exit transaction view
w	Cheque	c	Cancel out
e	Estimate	s	Save and new
x	Expense	d	Save and close
r	Receive payment	m	Save and send
c	Customers	p	Print
v	Suppliers	? or /	This dialog
a	Chart of accounts		
l	Lists		
h	Help		
f	Global search		
d	Focus the left menu		
? or /	This dialog		

Extending Capabilities with Integrated Applications

- There are third-party apps that help you extend QBO's capabilities
- Before using one, verify the app integrates with the Canadian version of QBO
- Access the App store via:
 - Navigation bar
 - Apps.com