

QBO Tips and Tricks

1. QuickBooks Sample File

- a. Google Search * has to be google*
- b. “QuickBooks Test Drive”
- c. 1st link

2. Keyboard Shortcuts

- a. [ctrl]+[alt]+shortcut
- b. [ctrl]+[alt]+?
 - i. Gets you to the dialogue box with the list of shortcuts

3. Data Entry Shortcut

- a. In any date field
- b. Year
 - i. y = 1/1/YYYY
 - ii. r = 12/31/YYYY
 - iii. Use “y” to toggle down through the years
 - iv. Use “r” to toggle up through the years
- c. Month
 - i. m = MM/1/YYYY
 - ii. h = MM/31/YYYY
 - iii. Use “m” to toggle down through the months
 - iv. Use “h” to toggle up through the months
- d. Today
 - i. T = today’s date
- e. Tab
 - i. Tab – will autofill the current year
 1. Example: 4/15/YYYY
 - a. Enter 0415+[tab]


4. Tags

- a. Can be used instead of class & locations on lower subscription levels.
- b. Reporting can be pulled by tag.
 - i. Profit & Loss by Tag Group
 - ii. Transaction List by Tag Group
- c. Not able to pull other reports at this time using this method.


5. Bookmarks

- a. Useful for items accessed frequently.
- b. Click on the bookmark icon.
- c. Can be removed as needed.

6. Re-Order Bank Feed

- a. ▼ next to account name
- b. “Reorder accounts”
- c. 
- d. Click and drag as needed

7. Send Reminders

- a. Sales
- b. All Sales
- c. Type – Invoices
- d. All Statuses ▼ - Open *or Overdue
- e. Select all
- f. Batch actions – Send Reminder
- g. You can send to all, you can select a few or you can do one at a time
- h. Wording
 - i. Settings
 - ii. Account and Settings
 - iii. Sales
 - iv. Reminders 
 - v. Default email message for invoice reminders
 - vi. Edit as needed

8. Side by Side Screens

- a. Bing – Side by Side in screen
- b. Microsoft users – Pull to edges
- c. Mac users – hover over the green circle to select side by side mode

9. Report Tools

- a. Accountant Tools
- b. Reports options
- c. Report and Tool Defaults
- d. Change timeframe and basis as needed

10. Report Batching

- a. Select report
- b. Customize as needed
- c. Save customization
- d. Add new group
- e. Name and add
- f. Select group
- g. Continue with all reports needed
- h. Custom reports