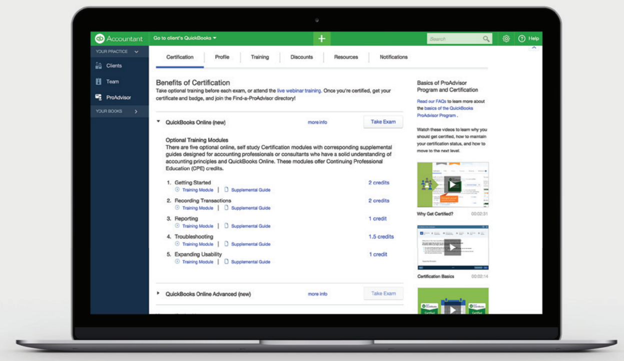
Tips & Hints to save you time in QuickBooks® Online

QuickBooks Online is designed to make simple tasks easier and faster.

Here are some of our favorite tips
to help you work more efficiently.



Keyboard shortcuts

To use keyboard shortcuts, press CTRL + ALT + the following keys:

REGULAR PAGES (e.g., HOMEPAGE, CUSTOMERS)		TRANSACTION PAGES (e.g., INVOICE, EXPENSE)	
Shortcut key	**Action**	**Shortcut key**	**Action**
i	Invoice	x	Exit transaction view
w	Check	c	Cancel out
e	Estimate	s	Save and New
x	Expense	d	Save and Close
r	Receive payment	m	Save and Send
c	Customers		
v	Vendors		
a	Chart of Accounts		
l	Lists		
h	Help		
f	Search Transactions		
? or /	This dialog		

Note: Mac users should use CTRL + OPTION + key.

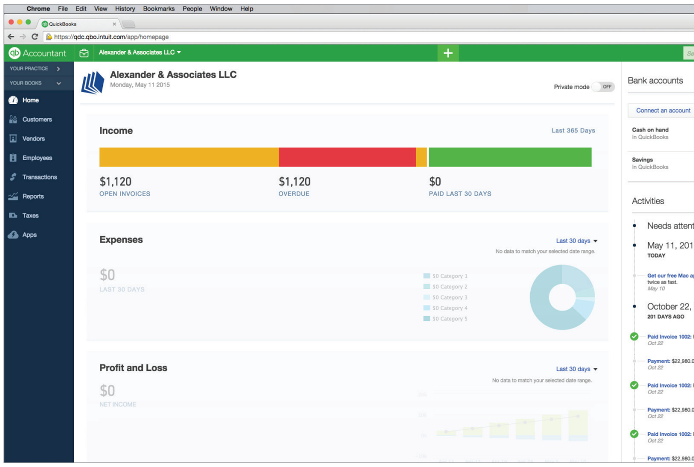
DATE FIELD SHORTCUTS:		
T = **T**oday	**W** = first day of the **W**eek	**H** = last day of the mont**H**
+ (plus key) = next day	**K** = last day of the wee**K**	**Y** = first day of the **Y**ear
– (minus key) = previous day	**M** = first day of the **M**onth	**R** = last day of the yea**R**

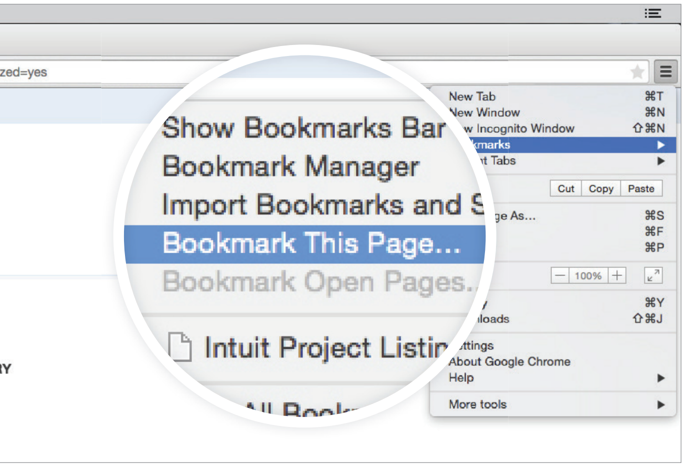
Work in multiple QuickBooks Online companies at once.

There are two ways to do this:

Option 1: Open QuickBooks Online Accountant in different browsers. It works well on Chrome, Safari, Firefox and Internet Explorer.

Option 2: Open QuickBooks Online Accountant in Chrome. Click on the People browser menu and select Add Person. Create unique users in one session to open multiple books at a time.





Bookmarks

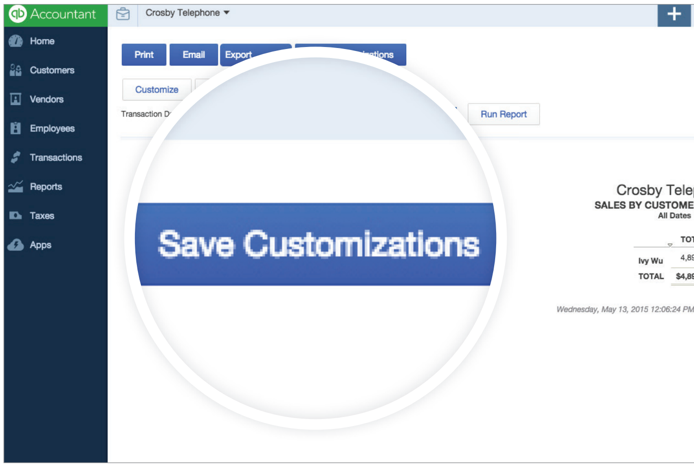
Bookmark QuickBooks Online tasks and pages that you use often, like customized reports, banking screens, report filters—anything that you want to access quickly and easily. Here’s how:

- Open a QuickBooks Online task
- Select “Bookmarks” in your browser toolbar
- Create a Bookmark

Automate Reports

Save your customized reports by clicking the **Save Customizations** button on any report. Then you can name it, group it with other reports or share it with other users. You can keep clients updated by sending reports by email:

- Go to Reports > My Custom Reports
- Select your report or group
- Click Edit
- Check “Set the email schedule for this group”
- Click Edit Schedule and set the schedule
- Complete the Email Information fields
- Choose Excel or HTML under Report Format



With thanks to Laura Redmond, Certified ProAdvisor, for her support in compiling this tip sheet!