

## NAVIGATING

# Get around in QuickBooks Online Accountant

Let's start with some QuickBooks Online Accountant navigation tools:

### 1 Navigation bar

Get to your Client List, your firm's books, your ProAdvisor info, and more.

### 2 Client QuickBooks menu

Choose a client to go right into their QuickBooks account.

### 3 Create (+) icon

Create a new client, new QuickBooks Online Accountant user, or a new request.

### 4 Green Gear icon

Get to Settings, Lists, Tools and Your Company menus—lots to do and explore here!

The screenshot shows the QuickBooks Online Accountant interface. At the top, there is a green navigation bar with the QuickBooks logo, the text 'Accountant', and a 'Go to client's QuickBooks' dropdown menu. To the right of the navigation bar are icons for a plus sign (+), search, settings, and help. Below the navigation bar is a dark blue sidebar with 'YOUR PRACTICE' and 'YOUR BOOKS' sections. The main content area displays 'Brenda Bowden Accounting' with 'Mike's clients (4)'. Below this is a 'See what's new in Quickbooks Accountant' section with three video thumbnails: 'What's New' (45 sec), 'Client Collaboration' (25 sec), and 'Document Sharing' (15 sec). Below the videos is a 'Find clients' search bar and a table with columns for CLIENTS, BOOKKEEPING, and PAYROLL.

CLIENTS		BOOKKEEPING		PAYROLL	
Name	Status	For review	Banking	Status	Items due
Beautiful Landscaping 650-555-6767	qb Closed 01/31/15	1 change to closed books 2 more items...	Download failed 02/02/15		
Johnny Pops 650-555-9988	qb Closed 01/31/15	1 check without a payee	Last download 01/12/15	qb Next pay date 02/15/15	1 tax, 2 forms earliest 02/15/15
Nigel's Shipping Co 408-555-0964					
Violette Designs 831-555-8564	qb Closed 01/31/15	1 change to closed books	Last download 01/12/15	qb Next pay date 02/15/15	2 forms earliest 02/15/15