



Add
Insight

QUICKBOOKS ONLINE CLIENT TRAINING

Course 2: Navigating QuickBooks Online

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About the Author



Esther Friedberg Karp, MBA

President, EFK CompuBooks Inc.

Esther Friedberg Karp is an internationally-renowned trainer, writer, business consultant and speaker who was named one of the Top 10 QuickBooks ProAdvisors in the world, with the title Top International ProAdvisor.

Based in Toronto, Canada, Esther has the unique distinction of holding ProAdvisor certifications in the United States, Canada and the United Kingdom. She has authored materials and delivered educational and certification courses for Intuit in all those countries, as well as Australia where she conducted live QuickBooks Online training. She has spoken at Scaling New Heights, QuickBooks Connect and other conferences, as well as those of various accounting and professional organizations and written countless articles for Intuit Global.

Esther counts among her clients companies from around the world, as well as accounting professionals who seek her out on behalf of their own clients for her expertise in various countries' editions of QuickBooks Desktop and Online, and for her talent in customizing QuickBooks usage for different industries.

Esther holds a BSc from the University of Toronto in Actuarial Science and Mathematics, and an MBA in Marketing in Finance from York University's Schulich School of Business.

She can be reached at esther@e-compubooks.com or 416-410-0750.



Training at a Glance

Use this as a guide to selecting specific activities you want to cover.

Topic	Content
1. Best Practices	<ul style="list-style-type: none"> ● Browser Functionality ● Keyboard Shortcuts
2. Navigating	<ul style="list-style-type: none"> ● Client Home ● Left Hand Navigation Tabs ● Quick Create

QUICKBOOKS ONLINE TEST DRIVE

Exercises contained inside this handbook can be completed using a QuickBooks Online “test drive” file. The test drive uses a sample company file called Craig’s Design & Landscaping Services. It can be accessed through the following link:

[Craig's Design & Landscaping](#)

You don’t have to create an account or sign in to access the test drive file; just complete the security validation and click **Continue**.

As soon as you log in, go to the **Gear** icon > **QuickBooks Labs** > **Redesigned Reports** and make certain Redesigned Reports is turned **OFF**.

This test drive is designed for you to explore and try out new things without worrying that you will break something or make a mistake. It is not designed to retain any changes you make. Once you close this QuickBooks Online test drive company, it is completely refreshed, so please remember to allow sufficient time to complete each task.

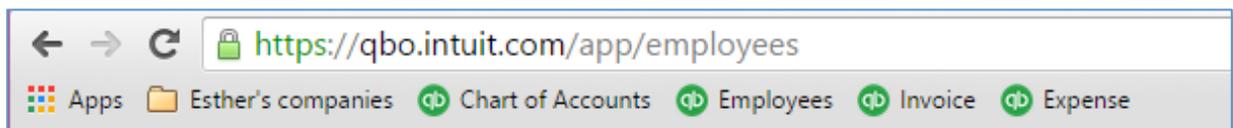
Topic 1: Best Practices

IDENTIFY BEST PRACTICES WHEN USING QUICKBOOKS ONLINE

Browser Tips

The tips below are based on Google's Chrome browser, but many of them work in other browsers:

- Log in to your QuickBooks Online company (including the Test Drive company), right-click your browser tab, left-click **Duplicate**. Now you have two tabs logged in to the same QuickBooks Online Company.
- Pull one tab out of the window and you can work in QuickBooks Online on two different screens side-by-side. You can work on these two windows independently of each other. Repeat, as needed!
- Chrome allows you to create different Users (**Customize** → **Settings** → **People**). If you have two different QuickBooks Online companies, you can log in to each of them using a different Chrome User and operate each account simultaneously. (Or you can log in using two different browsers, such as Chrome and Firefox.)
- Log in as a separate Chrome user for your QuickBooks Online companies. Open up the screens that you use most often and bookmark them (click on ★) to create a QuickBooks Online icon bar to be used with multiple QuickBooks companies.
- If a specific company has special screens that you use regularly, create a folder on the Chrome bookmark bar and bookmark those screens and save in the folder



- Right-click the **back arrow** on the browser to display a recent history of the screens you were on previously. Left-click the one you want to return to and resume working.
- If you are getting unexpected results when working in QuickBooks Online or are having problems logging in, make sure to clear your cache and cookies in Chrome (**Customize** → **History and recent tabs** → **History** → **Clear browsing data**).
- **CTRL+** and **CTRL -** allow you to zoom in and out quickly



NOTE: This browser functionality works best in a Chrome browser and is useful because many accounting professionals use two (and sometimes three) monitors. (Internet Explorer also allows the user to right-click on a tab and select **Duplicate**. Other browsers, namely Firefox and Safari, do not necessarily have the ability to select Duplicate by right-clicking a tab. However, it is possible to highlight the entire URL of the tab, right-click and select **Copy**, and then open a new tab in the same browser window, right click and select either **Paste**, or **Paste & Go** depending on the browser being used.) All the browsers mentioned do feature the ability to drag a tab off to open in another separate instance of a browser window.

QuickBooks Online Tips

Keyboard shortcuts

You may be used to working with keyboard shortcuts when using desktop programs, whether QuickBooks Desktop, Word, Excel or other programs. There are also keyboard shortcuts when working in QuickBooks Online. Some common keyboard shortcuts can be found by clicking **Ctrl + Alt + /**. If you're on a Mac use **Option + CTRL + /**. Notice that the same shortcut key acts differently depending on which screen you are on.

For example, **Ctrl + Alt + C** opens up the Customer Center as long as you are not on a transaction. If you are on a transaction, it cancels the transaction. If you're using a Mac, substitute **Command + Alt + letter**.

Your Company ID is **1281355140 H23**

Keyboard Shortcuts

To take advantage of shortcuts, simultaneously press [ctrl] and [alt or option] and one [key from the list below]

Regular pages - homepage, customers etc.		Transaction pages - invoice, expense etc.	
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		

OK

This screen also is one place where you can find your Company ID, which you might need if you have to call technical support.

Other keyboard shortcuts you may be interested in are the date shortcuts. When you are in a date field, you can move forward and back a day at a time by using your + and - keys. To go to today, use the letter T. Here are some other date shortcuts:

- **W** for first day of the week
- **K** for the last day of the week
- **M** for the first day of the month
- **H** for the last day of the month
- **Y** for the first day of the year
- **R** for the last day of the year

Are you seeing a pattern? As long as you can spell those words, use the first letter to go to the beginning and the last letter of the word to go to the end.

Also, the ESC key will cancel the current transaction being entered/edited.

Calculations

There's a simple calculator available directly on the rate or amount fields of a transaction. Enter your first number and then use your keyboard to add (+), subtract (-), multiply (*) or divide (/). The beauty of this feature is the results are entered directly into the transaction by moving to the next field, either with your mouse or the **TAB** key; no retyping of numbers is necessary.

Check #71

Choose a payee: Checking Balance \$1,201.00

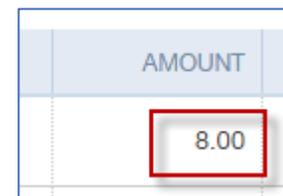
AMOUNT: \$0.00

Mailing address: [Empty]
Payment date: 09/25/2014
Check no.: 71
 Print later

Account details

#	ACCOUNT	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER
1	Enter Text		2+ =	<input type="checkbox"/>	<input type="checkbox"/>	Enter Text
2						

Add lines Clear all lines



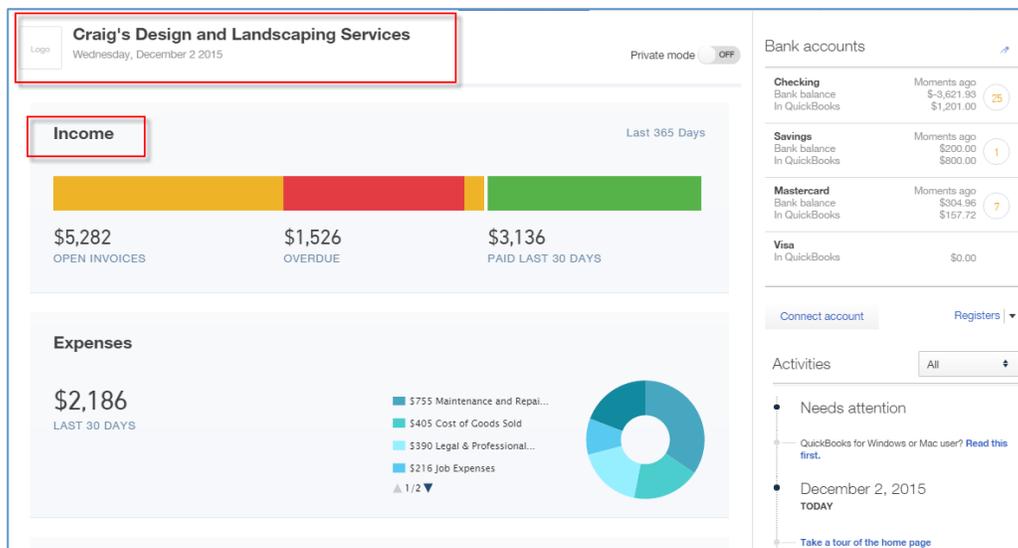
Topic 2: Navigating

In this topic we discuss navigating around QuickBooks Online. It's important to understand the interface and also to know the options of entering information so you can figure out the correct workflow for your business.

COMPANY HOME PAGE

When you log into QuickBooks Online, the Home page is the first screen that appears. The top of the screen shows the name of the QuickBooks Online company (helpful when you are running more than one company in QuickBooks Online).

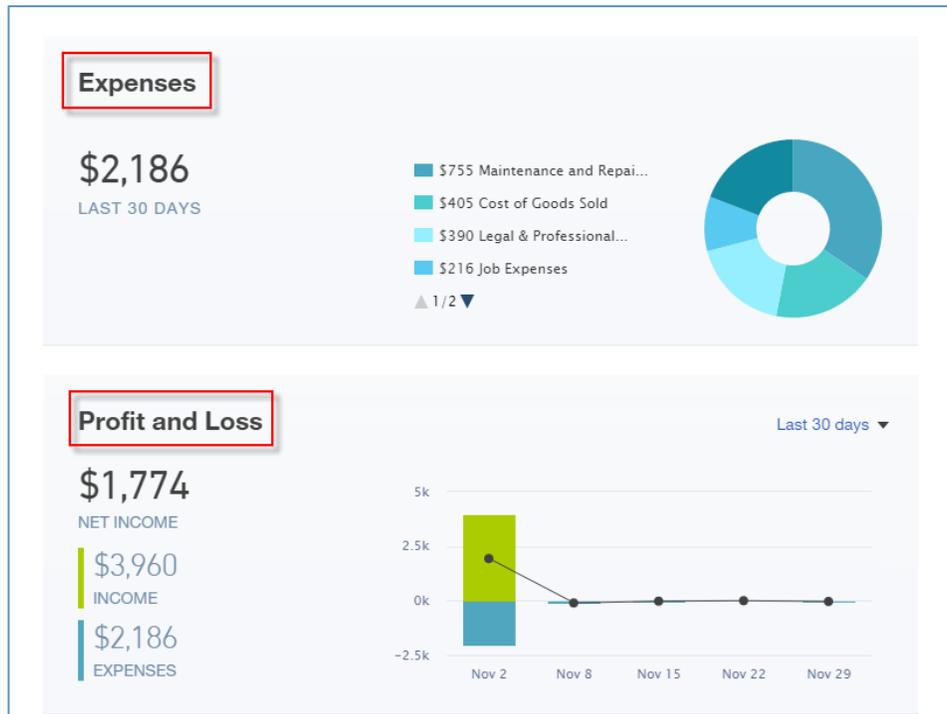
Notice there is an Income bar on the Home page showing you open invoices and which of them are overdue, as well as what was paid in the last 30 days.



Further down the Home page there is an Expenses graph giving you a breakdown of types of expenses.

As you scroll down, QuickBooks combines the income and expenses and lets you see a chart related to your profit and loss.

As you hover over any of the sections of these graphics, you will get more information about that section and you can drill down to get either a detail report related to totals or to an actual transaction.

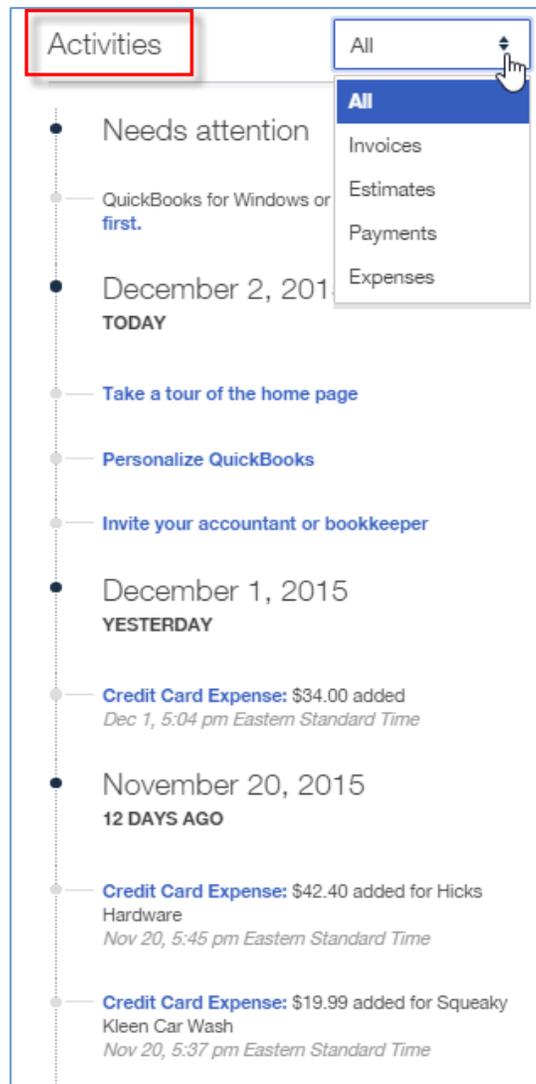


On the right hand side of the Home Page, there is a listing of bank and credit card balances, and, if those accounts are connected with the banks, you get information as to current bank or credit card balance versus the QuickBooks Online balance for each account, how many transactions have been downloaded and have not been matched or entered into QuickBooks Online. It acts as a reminder to review the bank feeds on a timely basis. You'll learn more about the Banking Center later in this training.

Bank accounts ✎

Checking	Moments ago	
Bank balance	\$-3,621.93	25
In QuickBooks	\$1,201.00	
Savings	Moments ago	
Bank balance	\$200.00	1
In QuickBooks	\$800.00	
Mastercard	Moments ago	
Bank balance	\$304.96	7
In QuickBooks	\$157.72	
Visa		
In QuickBooks	\$0.00	

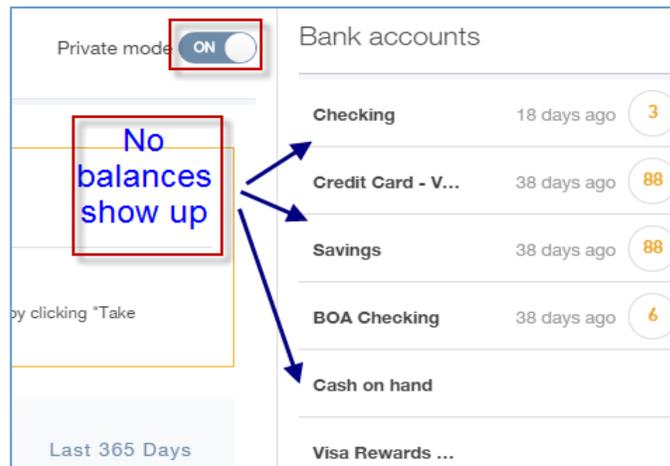
On the lower right of the Home page is a listing of activities that need your attention, such as tax payments that are due. You can also see a listing of transactions that have been added, listed by date. This area can be filtered for a particular type of transaction which is helpful, for example, if a customer calls and you easily want to find an invoice that you recently created.



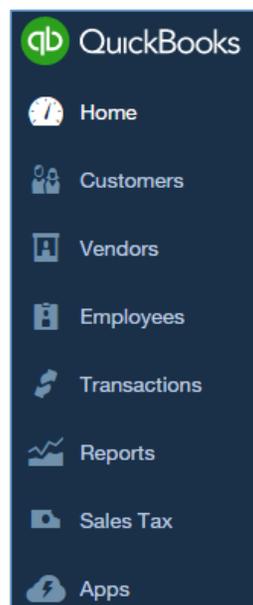
The screenshot shows the 'Activities' section of the QuickBooks Online interface. A red box highlights the 'Activities' header. A dropdown menu is open, showing the following options: 'All' (selected), 'Invoices', 'Estimates', 'Payments', and 'Expenses'. The main content area displays a vertical timeline of activities:

- Needs attention**
- QuickBooks for Windows or **first.**
- December 2, 2015**
TODAY
- [Take a tour of the home page](#)
- [Personalize QuickBooks](#)
- [Invite your accountant or bookkeeper](#)
- December 1, 2015**
YESTERDAY
- Credit Card Expense: \$34.00 added**
Dec 1, 5:04 pm Eastern Standard Time
- November 20, 2015**
12 DAYS AGO
- Credit Card Expense: \$42.40 added for Hicks Hardware**
Nov 20, 5:45 pm Eastern Standard Time
- Credit Card Expense: \$19.99 added for Squeaky Kleen Car Wash**
Nov 20, 5:37 pm Eastern Standard Time

At the top of the screen is a switch called Private Mode. When you turn on Private Mode, QuickBooks basically hides all the financial numbers on the screen to protect this sensitive information from anyone walking by your computer. This is really helpful if you're working in QuickBooks Online and you're in a public place such as an airport or a coffee shop.



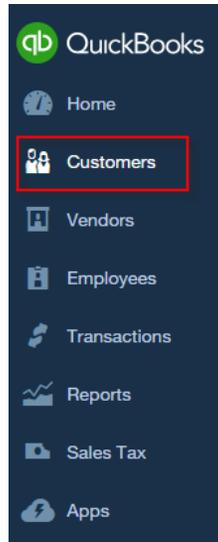
On the left hand side of any QuickBooks Online company is the Navigation bar. You will learn more about this as you go through this module.



Because the Home page automatically opens when you open up QuickBooks Online, it directs the small business owner to review key metrics about their business as well as alerts them to important upcoming tasks. This is a good thing. Too often, small businesses enter transactions but don't really look at their results until tax time. And that could be too late.

CUSTOMER CENTER

The Customers tab on the Navigation bar opens the Customer Center.



Customers New customer ▾

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$0 0 ESTIMATE	\$750 3 UNBILLED ACTIVITY	\$5,282 20 OPEN INVOICES	\$1,526 10 OVERDUE	\$3,136 12 PAID LAST 30 DAYS
-------------------	------------------------------	-----------------------------	-----------------------	---------------------------------

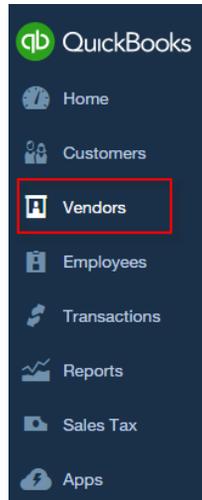
Batch actions ▾

<input type="checkbox"/>	CUSTOMER ▾ / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/>	Amy's Bird Sanctuary	(650) 555-3311	\$239.00	Receive payment ▾
<input type="checkbox"/>	Bill's Windsurf Shop	(415) 444-6538	\$85.00	Receive payment ▾
<input type="checkbox"/>	Cool Cars	(415) 555-9933	\$0.00	Create invoice ▾
<input type="checkbox"/>	Diego Rodriguez	(650) 555-4477	\$0.00	Create invoice ▾
<input type="checkbox"/>	Dukes Basketball Camp	(520) 420-5638	\$0.00	Create invoice ▾

- The **Money** bar is a visual representation of unbilled estimates and time & expenses, receivables (including overdue invoices), as well as invoices paid in the last 30 days. You can drill down on any color block of the Money bar to get to the underlying list, and ultimately, to transactions for reviewing, editing or deleting.
- The **New Customer** button creates a New Customer right in the Customer Center as opposed to creating one on the fly in the Customer field of a transaction, which you can always do
- You can also click on the **drop-down** next to **New Customer** and choose to Import customers here
- The **visible columns** of the Customer Center can be set by selecting the **gear** icon (in the top right corner of the customer list, above the **Action** column) to show the address and/or the email column, as well as how many rows of the Center to display on a page, and whether or not to include inactive Customers. This setting is “sticky,” which means that the next time you open the Customer Center, QuickBooks Online will remember your preference.
- Click on the customer name to view or edit the profile information, see a listing of transactions or create new transactions
- Clicking on the **envelope** icon next to a customer name in the **Customer Center** launches your native email client to send them an email
- Above the customer list, you can easily find a customer by typing part of the name in the search box
- You can sort the customer list (or a transaction list for a customer, if you’ve clicked on the customer name or a color block of the Money bar) forwards and backwards by several parameters, simply by clicking on the **column header** for that parameter, either once or twice, to specify forward or backwards
- Once in the transaction list for a customer (or if you’ve clicked on **Open Invoices** or **Overdue Invoices** in the **Money** bar), create invoices, receive payments, send a reminder or print a statement for an individual customer under the Actions column
- Clicking on a hyperlink for pending invoices takes you to those invoices
- You can perform batch actions related to statements and email for more than one customer by clicking on the appropriate customers in the **Customer Center** and choosing from the **Batch Actions drop down** menu

VENDOR CENTER

The Vendors tab on the Navigation bar opens the Vendor Center.



Vendors Prepare 1099s ▾ [New vendor ▾](#)

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$125 <small>1 PURCHASE ORDER</small>	\$1,603 <small>5 OPEN BILLS</small>	\$848 <small>4 OVERDUE</small>	\$3,892 <small>21 PAID LAST 30 DAYS</small>
---	---	--	---

Batch actions ▾ 🖨️ 📄 ⚙️

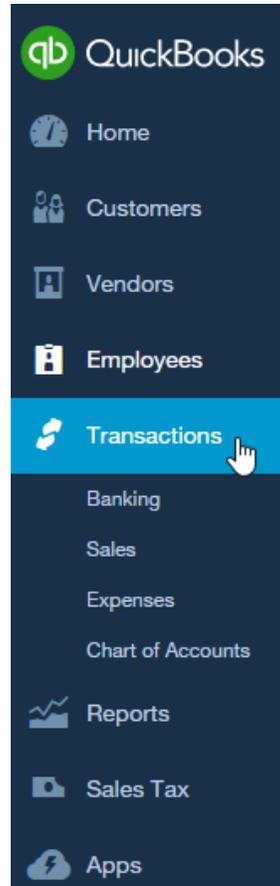
	VENDOR ▾ / COMPANY	PHONE	EMAIL	OPEN BALANCE	ACTION
<input type="checkbox"/>	Bob's Burger Joint			\$0.00	Create bill ▾
<input type="checkbox"/>	Books by Bessie ✉️ <small>Books by Bessie</small>	(650) 555-7745	Books@Intuit.com	\$0.00	Create bill ▾
<input type="checkbox"/>	Brosnahan Insurance Agency <small>Brosnahan Insurance Agency</small>	(650) 555-9912		\$241.23	Make payment ▾
<input type="checkbox"/>	Cal Telephone <small>Cal Telephone</small>	(650) 555-1616		\$0.00	Create bill ▾
<input type="checkbox"/>	Chin's Gas and Oil <small>Chin's Gas and Oil</small>			\$0.00	Create bill ▾

It is very similar to the Customer Center except it's related to vendors, not customers.

- The **Money** bar relates to potential expenses (open purchase orders), unpaid and overdue bills and what has been paid in the last 30 days
- If you click on any of these color blocks, QuickBooks will display the underlying list of transactions that pertain to that section for reviewing, editing or deleting
- Although you can always create a new vendor “on the fly” in transactions by simply typing a new vendor name in the Vendor field, the New Vendor button in the Vendor Center also allows you to create a new Vendor
- If you click on the **drop-down** next to **New Vendor**, you can import vendors here
- The **Prepare 1099s** button allows you to – you guessed it – prepare 1099s. Note that 1099s are available only in QuickBooks Online Plus. Also, note that Accounts Payable is available only in QuickBooks Online Essentials and Plus.
- Otherwise the editing columns, individual transactions, batch transactions, emailing and viewing the vendor work that same as what we just saw in the Customer Center

TRANSACTIONS TAB

There are four ways to enter transactions in the Transactions tab of the left navigation bar: Banking, Sales or Expenses.



- **Banking** - This opens up the Banking Center. If you have connected your bank and/or credit card accounts to QuickBooks, you'll see those accounts listed across the top of the page and a listing of transactions that need to be either matched or added to QuickBooks. You will learn about that in Topic 4 of this training.
- **Sales** - This opens up the Sales Center where there is a Sales Money bar that shows potential revenue, unpaid/overdue invoices and what has been paid in the last 30 days
 - As opposed to the Customer Center which shows a Customer list, the Sales Center shows a listing of transactions that can easily be filtered
 - New transactions can be easily added from the top of the screen
 - The Action column shows suggested next steps as well as other choices related to that transaction in the drop-down menu

- As in the other Centers, you can check multiple transactions and perform batch actions of printing or sending

Sales Transactions Import Transactions ▾ New transaction ▾

Unbilled Last 365 Days

\$0
0 ESTIMATE

\$750
2 UNBILLED ACTIVITY

Unpaid Last 365 Days

\$5,282
20 OPEN INVOICES

\$1,526
10 OVERDUE

Paid

\$3,136
12 PAID LAST 90 DAYS

Filter ▾ Last 365 Days

Batch actions ▾

<input type="checkbox"/>	DATE ▾	TYPE	NO.	CUSTOMER	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	11/07/2015	Invoice	1037	Sonnenschein Famil...	12/07/2015	\$362.07	\$362.07	Open	Receive payment ▾
<input type="checkbox"/>	11/07/2015	Payment		Cool Cars	11/07/2015	\$0.00	\$-1,675.52	Closed	
<input type="checkbox"/>	11/07/2015	Invoice	1035	Mark Cho	12/07/2015	\$314.28	\$314.28	Open	Receive payment ▾
<input type="checkbox"/>	11/07/2015	Payment		Freeman Sporting G...	11/07/2015	\$0.00	\$-387.00	Closed	
<input type="checkbox"/>	11/07/2015	Invoice	1036	Freeman Sporting G...	12/07/2015	\$477.50	\$477.50	Open	Receive payment ▾
<input type="checkbox"/>	11/06/2015	Invoice	1034	Rondonuwu Fruit an...	12/06/2015	\$78.60	\$78.60	Open	Receive payment ▾

● **Expenses** - Here is a listing of recent expense transactions, which, like other centers, can be easily filtered

- Click on the transaction to get back to the original transaction
- The types of transactions that can be entered from here are: bills, expenses, checks, purchase orders or vendor credits
- You can also print checks from this screen

Expense Transactions
Print Checks ▾
New transaction ▾

Filter ▾ Last 365 Days

Batch actions ▾

<input type="checkbox"/>	DATE ▾	TYPE	NO.	PAYEE	CATEGORY	TOTAL	
<input type="checkbox"/>	12/02/2015	Credit Card Expense			Automobile ▾	\$34.00	
<input type="checkbox"/>	11/21/2015	Credit Card Credit			Checking ▾	\$900.00	
<input type="checkbox"/>	11/19/2015	Credit Card Expense		Squeaky Kleen Car Wash	Automobile ▾	\$19.99	
<input type="checkbox"/>	11/13/2015	Credit Card Expense		Hicks Hardware	Job Expenses:Job Mater ▾	\$42.40	
<input type="checkbox"/>	11/12/2015	Credit Card Expense		Bob's Burger Joint	Meals and Entertainment ▾	\$18.97	
<input type="checkbox"/>	11/12/2015	Credit Card Expense		Squeaky Kleen Car Wash	Automobile ▾	\$19.99	
<input type="checkbox"/>	11/10/2015	Cash Expense		Tania's Nursery	Job Expenses:Job Mater ▾	\$23.50	
<input type="checkbox"/>	11/07/2015	Bill		Robertson & Associates	Legal & Professional Fee: ▾	\$315.00	Make payment ▾
<input type="checkbox"/>	11/07/2015	Expense	76	Pam Seitz	Legal & Professional Fee: ▾	\$75.00	

● **Chart of Accounts** - Here you see a listing of your general ledger accounts. You can double-click on the account or select **View register** to open the register for any Balance Sheet account (with the exception of Retained Earnings)

– If you click on the drop-down in the top left corner of the register, you can add many types of transactions that affect a bank account:

- Check
- Deposit
- Sales Receipt
- Receive Payment
- Bill Payment
- Refund
- Expense
- Transfer
- Journal Entry

– The types of transactions that are available from the drop-down will vary depending on the type of balance sheet account being viewed in the register

Bank Register

Checking Bank Balance \$-3,621.93

ENDING BALANCE \$1,201.00 Reconcile

You can read about all the changes and why we made them. [Learn More](#) | [Tell us what you think](#)

Go to: 1 of 1 < First Previous 1-44 of 44 Next Last >

DATE	REF NO. TYPE	PAYEE ACCOUNT	MEMO	PAYMENT	DEPOSIT	BALANCE
11/21/2015				\$900.00		\$1,201.00
11/10/2015	CC-Credit	Mastercard		\$23.50		\$2,101.00
11/07/2015	Cash Purch	Job Expenses:Job Materials:Plants and Soil		\$75.00		\$2,124.50
11/07/2015	76 Expense	Legal & Professional Fees		\$228.75		\$2,199.50
11/07/2015	75 Check	Hicks Hardware			\$868.15	\$2,428.25

– If you click on the drop-down next to **View Register**, you can:

- Edit the account
- Delete the account (which actually makes it inactive)
- Run a report (an Account QuickReport)

Craig's Design and Landscaping Services								
ACCOUNT QUICKREPORT								
Since September 4, 2015								
DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	ACCOUNT	CLR	AMOUNT	BALANCE
Checking								
09/18/2015	Check	4	Chin's Gas and Oil		Checking		-54.55	-54.55
09/24/2015	Sales Tax Payment			Q1 Payment	Checking		-38.50	-93.05
09/24/2015	Sales Tax Payment			Q1 Payment	Checking		-38.40	-131.45
09/27/2015	Expense	9	Tania's Nursery		Checking		-89.09	-220.54
09/27/2015	Check	12	Books by Bessie		Checking		-55.00	-275.54
10/03/2015	Check	5	Chin's Gas and Oil		Checking		-62.01	-337.55
10/04/2015	Expense	15	Tania's Nursery		Checking		-108.09	-445.64
10/13/2015	Sales Receipt	1008	Kate Whelan		Checking		225.00	-220.64
10/13/2015	Payment	5664	Freeman Sporting Goods:55 Twin Lane		Checking		86.40	-134.24
10/15/2015	Payment		Amy's Bird Sanctuary	Amy claims the pest control did not occur	Checking		105.00	-29.24
10/17/2015	Bill Payment (Check)	7	Hicks Hardware		Checking		-250.00	-279.24
10/20/2015	Expense	8	Hicks Hardware		Checking		-24.36	-303.60
10/29/2015	Cash Expense		Squeaky Kleen Car Wash		Checking		-19.99	-323.59
10/29/2015	Check		Tony Rondonuwu		Checking		-100.00	-423.59
10/29/2015	Cash Expense		Bob's Burger Joint		Checking		-5.66	-429.25
10/30/2015	Check	70	Chin's Gas and Oil		Checking		-185.00	-614.25
10/30/2015	Cash Expense		Chin's Gas and Oil		Checking		-52.14	-666.39
10/31/2015	Bill Payment (Check)	11	Hall Properties		Checking		-900.00	-1,566.39
10/31/2015	Payment	1886	Cool Cars		Checking		694.00	-872.39
11/01/2015	Check	2	Mahoney Mugs		Checking		-18.08	-890.47
11/01/2015	Expense	13	Hicks Hardware		Checking		-215.66	-1,106.13
11/02/2015	Sales Receipt	1003	Dylan Sollfrank		Checking		337.50	-768.63
11/03/2015	Cash Expense		Bob's Burger Joint		Checking		-3.86	-772.49
11/04/2015	Bill Payment (Check)	1	Brosnahan Insurance Agency		Checking		-2,000.00	-2,772.49
11/05/2015	Refund	1020	Pye's Cakes		Checking		-87.50	-2,859.99

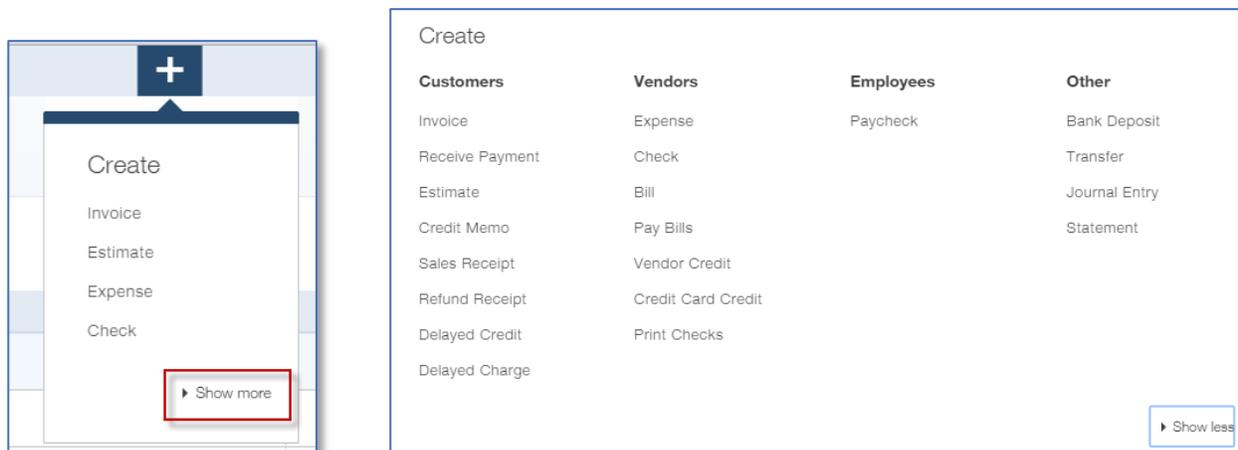
To summarize, the Navigation bar in general, and the Transactions tab specifically, are places to go to enter transactions.

However, there is one other place to launch all transactions and we are going to cover it next.

QUICK CREATE

The Quick Create icon is at the top of the page. It's the + key that spins into an X when you click on it! This is your one-stop shop for creating new transactions.

There are two views of Quick Create. There's a condensed view that just shows the common transactions of Invoice, Estimate, Expense and Check and a Show More view that lists all transactions in QuickBooks sorted by the different areas of the company, Customers, Vendors, Employees and Other.



Course Conclusion

You have just covered *Course 2: Navigating QuickBooks Online*. This Course has been developed to help you train your clients on how to use QuickBooks Online successfully.

By completing this module, your client should understand:

- ◆ Best practices in QuickBooks Online
- ◆ How to navigate around QuickBooks Online