

QUICKBOOKS ONLINE 2026 MASTERY GUIDE

**A STEP-BY-STEP HANDBOOK FOR SMALL
BUSINESS ACCOUNTING, BOOKKEEPING,
PAYROLL, INVENTORY, REPORTS &
AUTOMATIONS**

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“GOOD ACCOUNTING ISN’T ABOUT NUMBERS—IT’S ABOUT CLARITY, CONTROL, AND CONFIDENT DECISIONS.”



“AUTOMATION DOESN’T REPLACE GOOD ACCOUNTING—IT MAKES IT SMARTER, FASTER, AND MORE RELIABLE.”

LET GET STARTED

INTRODUCTION

QuickBooks Online 2026 is a cloud-based accounting platform designed to help individuals and businesses manage their financial activities in an organized, secure, and efficient way. Because it operates entirely online, users can perform essential bookkeeping tasks—such as tracking income and expenses, managing sales and purchases, storing receipts, and generating financial reports—from any internet-connected device without relying on traditional desktop software.

At its foundation, QuickBooks Online streamlines the recording of daily financial transactions. It organizes business data, keeps accurate books, and reduces the need for manual work through built-in automation. Features like automatic bank transaction categorization, sales tax calculations, reconciliation assistance, and AI-enhanced reporting help minimize errors and support informed financial decision-making.

One of the platform's strengths is continuous improvement. Since it is cloud-based, updates roll out automatically. The 2026 version includes enhanced automation tools, smoother navigation, expanded reporting options, and improvements to workflow efficiency. These upgrades make day-to-day accounting tasks easier for both new and experienced users. QuickBooks Online also supports real-time collaboration, allowing multiple users—including business owners, staff, and accountants—to access the same data from different locations.

The system is organized around key areas of financial management. Users can create invoices, manage customer records, and track revenue under **Sales and Income**. The **Expenses and Vendors** section supports entering bills, paying vendors, attaching receipts, and monitoring spending. **Banking** tools allow users to connect financial accounts, review transactions, and reconcile balances. **Reporting** provides essential financial statements such as Profit and Loss, Balance Sheet, and Cash Flow reports. Depending on the subscription plan, features like **Inventory**, **Projects**, and **Payroll** offer deeper management capabilities.

This introduction lays the groundwork for the chapters that follow. The remainder of the book will explore each feature of QuickBooks Online 2026 in detail, demonstrating how to use the platform effectively in real-world financial situations.

PART I: GETTING STARTED

CHAPTER ONE

GETTING STARTED WITH QUICKBOOKS ONLINE

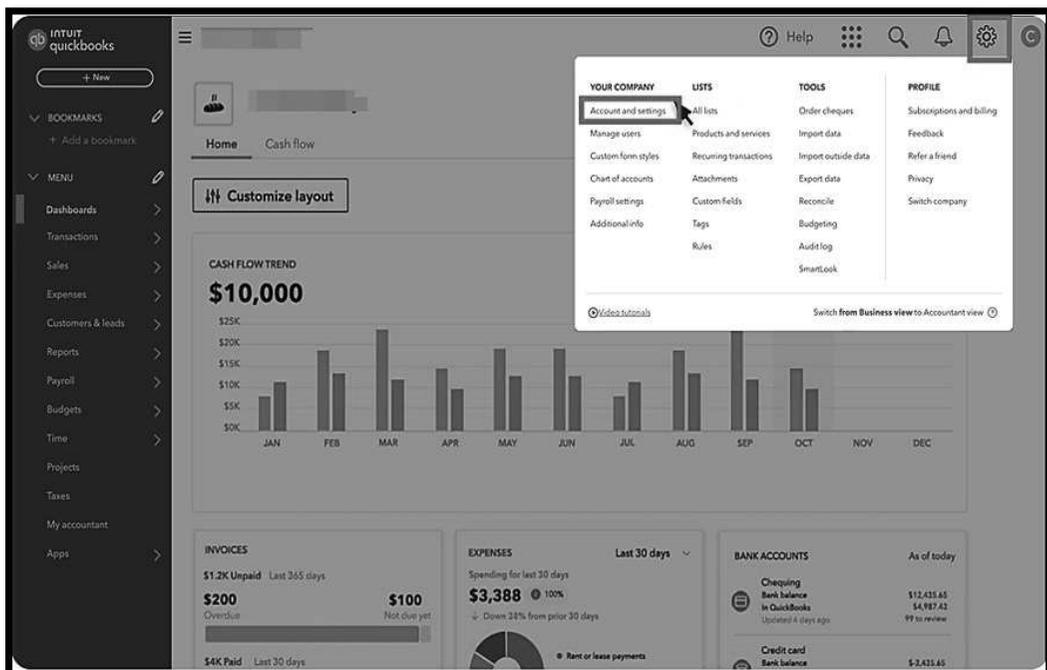
To get started with QuickBooks Online, sign up for an account, set up your company profile with basic information, and then connect your bank and credit card accounts. Once your accounts are connected, you can import existing data, set up sales tax, and start customizing and sending invoices. The platform also offers features like payroll, project management, and reporting that can be set up as needed.

MANAGING YOUR BILLING AND SUBSCRIPTION

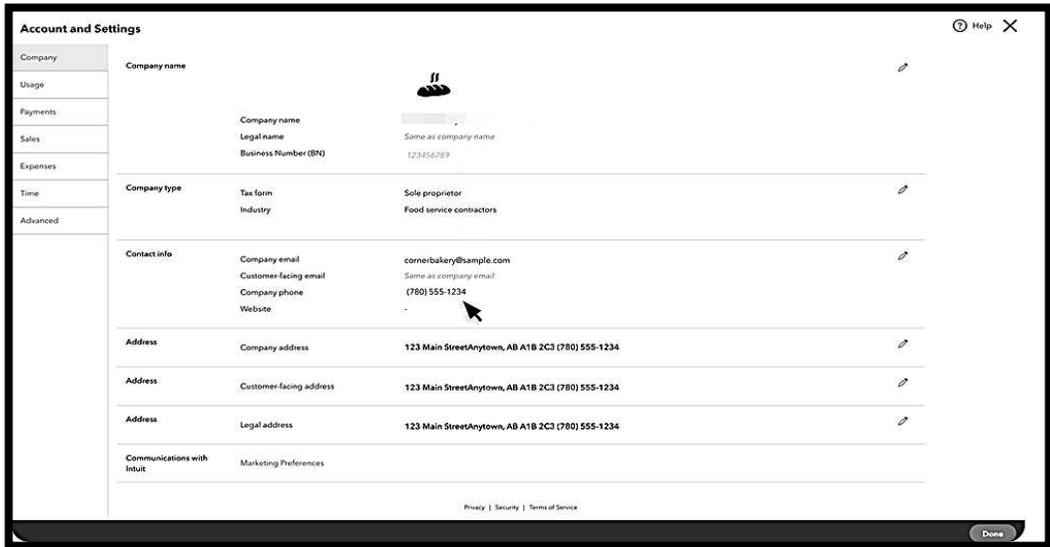
This section explains how to manage your QuickBooks Online billing and subscription settings. You'll learn how to update payment information, switch plans, change billing frequency, review payment history, and manage additional services like Payroll.

Accessing Your Billing & Subscription Settings

1. Click the **Gear** icon.
2. Select **Account and Settings**.



3. You'll land on the **Company** tab, where you can update company and contact details.



If you manage multiple companies, make sure you are working inside the correct one before making any changes.

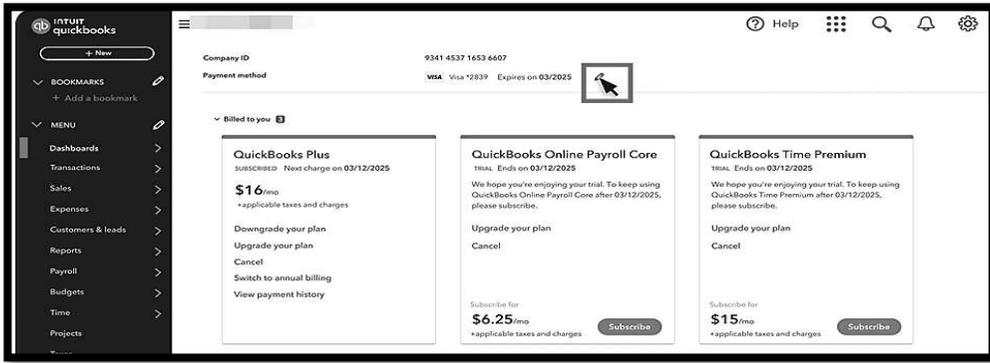
Editing Billing & Subscription Information

Once inside **Account and Settings**, open the **Billing & Subscription** tab. This is where you can adjust all your subscription-related options.

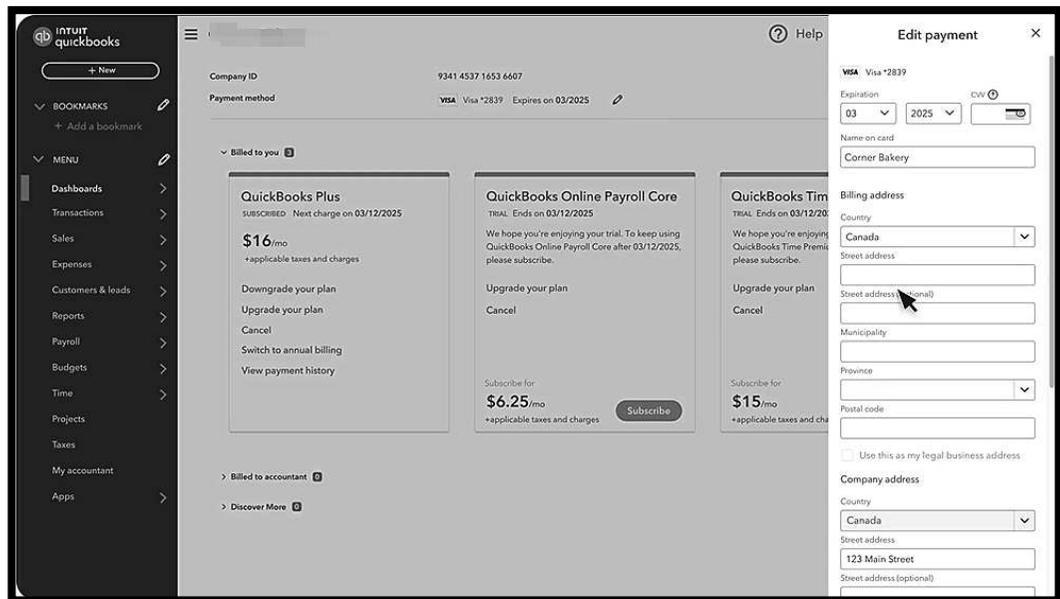
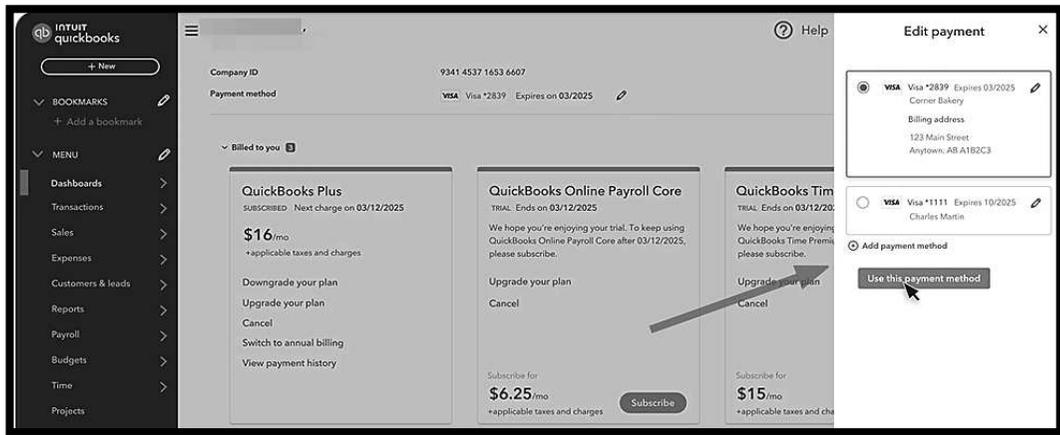


Update Payment Method

- ❖ Click **Edit** next to your payment information.



❖ Enter the new card or billing details.



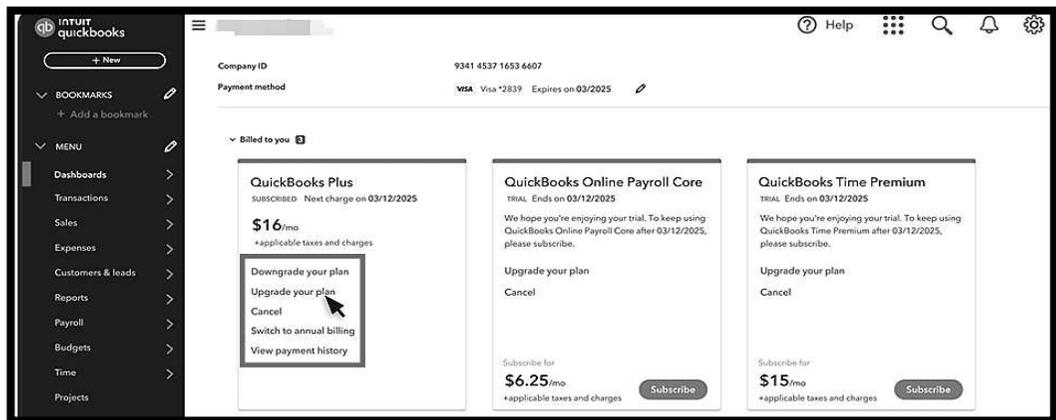
- ❖ Save your changes.

Change Billing Frequency

- ❖ Choose whether you want to be billed **monthly** or **annually**, depending on available options.

Upgrade, Downgrade, or Cancel Your Plan

- ❖ Select **Upgrade** to view available plans and switch to a higher-level subscription.
- ❖ You can also **downgrade** or **cancel** your existing plan from this same section.



Viewing Payment History

- ❖ Scroll to the **Payment History** section.
- ❖ Here, you can review past charges and download a detailed history report if needed.

Managing Add-On Services

This tab also lets you manage additional QuickBooks services:

- ❖ Add new services like **Payroll**
- ❖ Manage or update services you already subscribe to

COMPARE QUICKBOOKS ONLINE PACKAGES

Choosing the right QuickBooks Online plan matters — the wrong package can mean paying for features you don't need or missing tools that would save time and money. This section helps you compare plans quickly so you can pick the one that fits your business.

Why compare plans?

Each QuickBooks Online plan targets different business needs: from simple income/expense tracking for sole proprietors to project, inventory, and team-management tools for growing companies. Comparing plans helps you match features to real tasks — invoicing, payroll, inventory, job costing, multi-user access, reporting, and integrations — rather than buying on name alone.

What to look for

When evaluating packages, pay attention to:

- ❖ **Core bookkeeping features:** invoicing, expense tracking, bank reconciliation
- ❖ **User seats & permissions:** how many users and what role controls are available
- ❖ **Payroll & contractors:** included or add-on, and tax filing support
- ❖ **Inventory & project tracking:** FIFO costing, job profitability, time tracking
- ❖ **Reporting & budgets:** built-in reports, custom report builder, forecasting tools
- ❖ **Integrations & add-ons:** POS, e-commerce, CRM, expense apps
- ❖ **Billing options & support:** monthly vs annual pricing, dedicated support, migration help

Quick decision guide

- ❖ **Solo/freelancer:** Choose the plan that covers invoicing, expense capture, and bank connections.
- ❖ **Growing small business:** Prioritize multi-user access, project/job tracking, and inventory.
- ❖ **Larger SMB or scaling teams:** Look for advanced reporting, automation, and dedicated support.

Next steps

Below you'll find a detailed comparison table showing features, monthly pricing, and user limits to make the decision straightforward. Take your time reviewing it — and if you want personalized guidance, the Quick Focus Team is available to help you choose or migrate.

I reviewed and compared all five QuickBooks Online subscription tiers — **Solopreneur, Simple Start, Essentials, Plus, and Advanced** — with monthly prices ranging from **\$20 to \$275**. Below is a clear breakdown of what each plan offers, what you get for the price, and which type of business each one is best suited for.

1. QuickBooks Online Solopreneur

Best for: freelancers, sole proprietors, and one-person businesses

This plan covers the essentials for self-employed users, such as tracking income, expenses, and basic tax preparation needs.

2. QuickBooks Online Simple Start

Best for: small businesses that need fundamental bookkeeping tools

Simple Start adds features like invoicing, basic reporting, and sales tax tracking, making it ideal for newer businesses with straightforward accounting needs.

3. QuickBooks Online Essentials

Best for: service-based businesses that track billable hours and manage unpaid bills

Essentials introduces time tracking, accounts payable, and multi-user access — useful for companies that bill clients for time and expenses.

4. QuickBooks Online Plus

Best for: growing businesses managing inventory, projects, or job costs

Plus includes inventory tracking, project profitability, budgeting, and more advanced reporting, making it a strong choice for retail, contracting, and scaling operations.

5. QuickBooks Online Advanced

Best for: established businesses with complex workflows and larger teams

Advanced provides the highest level of customization, deeper automation, enhanced reporting, and more user seats — designed for companies that require robust performance and advanced controls.

QuickBooks Online Comparison Chart

Pricing, Features & Capabilities Across All Plans

The chart below provides a simplified, side-by-side view of major features included in each subscription level. Later sections of your book can expand on each plan with deeper comparisons.

Feature	Solopreneur	Simple Start	Essentials	Plus	Advanced
Fit Small Business Rating	Not rated	3.73 ★	3.81 ★	4.61 ★	4.69 ★
Monthly Pricing	\$20	\$38	\$75	\$115	\$275

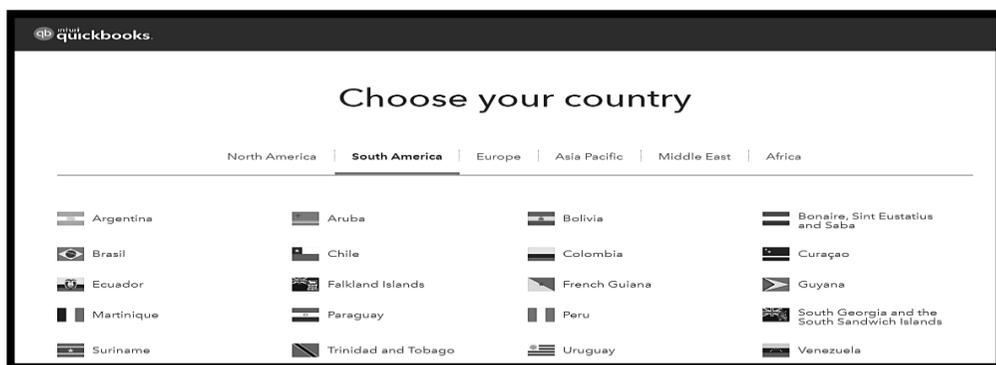
Users Included	1	1	3	5	25
Chart of Accounts	Fixed	Up to 250	to Up to 250	Up to 250	Unlimited
Sales Channel Connections	0	1	3	All	All
Connect Bank Accounts	✓	✓	✓	✓	✓
Send Invoices	✓	✓	✓	✓	✓
Manage Expenses	✓	✓	✓	✓	✓
Accept Payments	✓	✓	✓	✓	✓
Create Estimates	✓	✓	✓	✓	✓
Track Mileage	✓	✓	✓	✓	✓
Capture Receipts	✓	✓	✓	✓	✓
Print Balance Sheet	✓	✓	✓	✓	✓
File 1099s	×	✓	✓	✓	✓
Double-Entry Accounting	×	✓	✓	✓	✓
Print Checks	×	✓	✓	✓	✓
Run Payroll	×	✓	✓	✓	✓
Contractor Payments	×	✓	✓	✓	✓
Track Sales Tax	×	✓	✓	✓	✓
Modern View Reports	×	✓	✓	✓	✓
Manage Bills	×	✓	✓	✓	✓
Time Tracking & Add to Invoices	×	×	✓	✓	✓
Track Delayed Charges	×	×	✓	✓	✓
Recurring Transactions	×	×	✓	✓	✓
Multicurrency	×	×	✓	✓	✓
Track Expenses by Customer	×	×	✓	✓	✓
Budgeting	×	×	×	✓	✓
Inventory & COGS Tracking	×	×	×	✓	✓

Project, Class & Location Tracking	×	×	×	✓	✓
Batch Invoicing	×	×	×	×	✓
Fixed Asset Accounting	×	×	×	×	✓
Enhanced Custom Fields	×	×	×	×	✓
Automated Workflows	×	×	×	×	✓
Revenue Recognition	×	×	×	✓	✓
Data Restoration	×	×	×	×	✓
Batch Data Entry/Edit	×	×	×	×	✓
Excel Data Sync	×	×	×	×	✓
24/7 Support & Training	×	×	×	×	✓

How Much Does QuickBooks Online Cost—Across Different Countries?

Determining the cost of QuickBooks Online is not as straightforward as it seems. Pricing varies widely based on **your country**, the **subscription level**, and the **features** you need. Every QuickBooks Online edition—whether for the U.S., Canada, the U.K., Australia, India, or other regions—has its own pricing structure. These differences reflect each country’s tax laws, reporting requirements, and business standards.

Why Every Country Has Its Own QuickBooks Online Version



Intuit creates localized versions of QuickBooks Online so that businesses can operate accurately within their country’s financial system. This ensures:

- ❖ **Local currency support**

- ❖ **Compliance with regional tax rules** (e.g., VAT, GST, Sales Tax, Payroll Tax)
- ❖ **Country-specific financial reports**
- ❖ **Easier filing of mandatory returns**

Because tax regulations differ significantly around the world, using the QuickBooks Online edition designed for your region helps you stay compliant without manual workarounds.

How Currency and Reporting Work

Most countries require businesses to file financial statements and tax returns in **local currency**. QuickBooks Online supports this in two key ways:

1. **Reporting Currency:** You can set a home currency that aligns with your country's requirements.
2. **Multicurrency Transactions:** If your business deals with foreign suppliers or international customers, QuickBooks Online allows you to record those transactions in their original currencies while still reporting in your home currency.

This ensures accuracy in exchange-rate tracking, financial reports, and tax filings.

Pricing Depends on Your Country and Subscription Tier

Each country generally offers a tiered pricing structure—ranging from basic freelancer packages to advanced business-grade plans with multiple users and automation features.

As you move up the tiers, you get more functionality, such as:

- ❖ Time tracking, Inventory management, Project costing, Multicurrency, Advanced reporting, Automations and workflow tools, and More users

Important Tip: Always Check for Discounts

QuickBooks frequently offers **promotional rates**, especially for new subscribers. These deals may include:

- ❖ 30–50% off for the first three months
- ❖ Discounts when paying annually
- ❖ Bundled savings with payroll or payments
- ❖ Occasional regional promotions

Before subscribing, check the **Intuit website for your country** to get the best available deal.

QuickBooks Online Payroll Subscriptions

QuickBooks Online offers optional payroll add-ons, and it's important to understand that **payroll pricing is separate from your regular QuickBooks Online subscription**. These payroll plans vary significantly by country and by feature level. For example, payroll can cost as little as **£4 per month in the United Kingdom** for a basic plan, while more advanced options—such as the **Elite Payroll plan in the United States**—can cost up to **\$130 per month**.

Adding Payroll to Your QuickBooks Online Plan

Once you choose your QuickBooks Online subscription (Simple Start, Essentials, Plus, or Advanced), you can add a payroll package that suits your business needs. These payroll add-ons typically cover features such as:

- ❖ Employee and contractor payments, Automated tax calculations, Tax form filings (e.g., W-2s, 1099s, P60s, etc.), Direct deposit, Time tracking and scheduling, HR tools and compliance support, and Benefits administration (country dependent)

The level of automation, compliance support, and reporting increases as you move up to higher-tier payroll plans.

Affordability and Value

Considering the range of features, QuickBooks Online Payroll is generally priced competitively compared to other payroll software. It streamlines payroll processing, reduces administrative errors, and helps ensure compliance with local employment and tax regulations—all of which make it a cost-effective investment for many businesses.

Special Offers and Pricing Notes

The monthly fee for both QuickBooks Online and QuickBooks Payroll may vary depending on promotions. Intuit frequently runs **special discounts for new users**, which can significantly reduce your initial subscription cost for the first few months. After the promotional period ends, the regular ongoing rate applies.

WHAT YOU'LL NOTICE WHEN YOU LOG IN

Just like previous major QuickBooks updates, Intuit has introduced new names, reorganized menus, and refreshed the overall layout. During the August webinar, several key changes stood out:

1. Navigation Updates

❖ **Modules are now called “Apps.”**

The familiar left-side navigation menu is now located inside the **App Drawer**, which you can open to access all your tools.

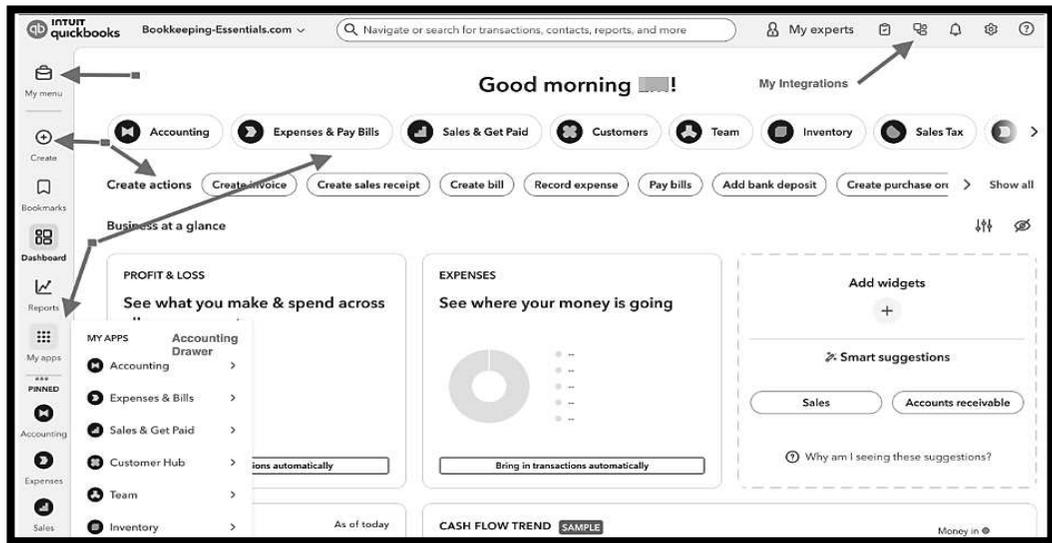
❖ **New App Carousel:**

A convenient carousel appears at the top of the screen, giving you instant access to essential apps so you don’t always need to open the drawer.

❖ **“Apps” is now “My Integrations.”**

What used to be the Apps section has been renamed **My Integrations**, accessible via an icon on the top menu bar.

Think of this redesign as *rearranging your office*, not moving to a completely new one. The tools are still there—just in slightly different places.



2. Updated Terminology

❖ The familiar **“New”** button is now labeled **“Create.”**

It still lives in the same location and functions exactly the same—it just has a more intuitive name.

3. More Flexible Customization

QuickBooks Online now gives you greater control over your workspace:

❖ **Bookmarks and pinned items** can be personalized for faster access.

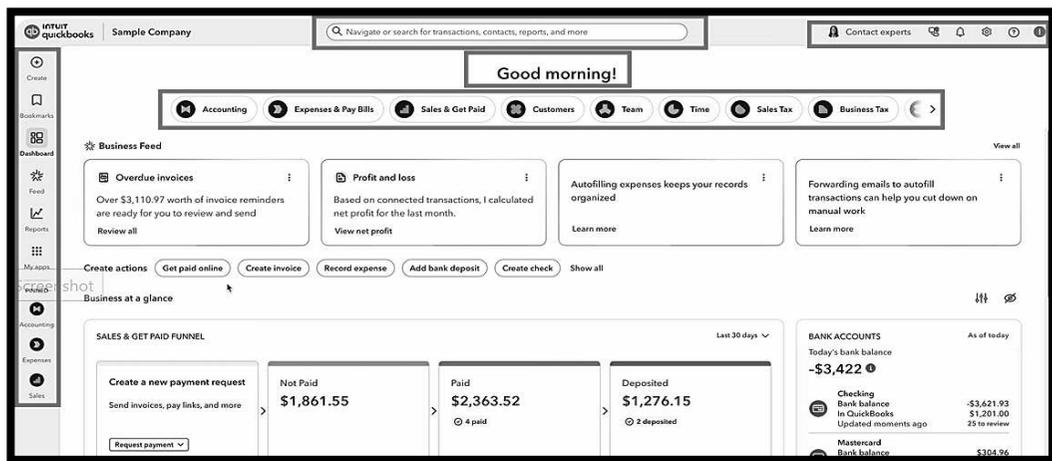
- ❖ **Dashboard widgets** are more customizable—you can add, remove, resize, and reorder them as you like.
- ❖ The **Business at a Glance** section now includes more funnel-style widgets designed to help you stay on top of your core workflows and daily tasks.

A Helpful Mindset

As with previous updates, the 2026 visual redesign is best viewed as a light reorganization rather than a full system change. Everything you need is still there—just presented in a cleaner, more modern layout.

EXPLORING THE NEW QUICKBOOKS ONLINE INTERFACE

The New interface has undergone a significant redesign. Regular users may notice a different layout, but the improved navigation is cleaner and easier to use.



Top-Left Area

- ❖ Your **company name**
- ❖ The **QuickBooks logo**, which returns you to the homepage

Left Navigation Menu

A slim, streamlined sidebar providing quick access to major functions.

At the top is the **Create (+) button**, previously known as the *New* button, used for creating customers, vendors, invoices, bills, and other transactions.

Top-Center Area

A new **Smart Search bar**, a personalized greeting, and an **app carousel** that offers shortcuts to key modules like Accounting, Expenses, and Payroll.

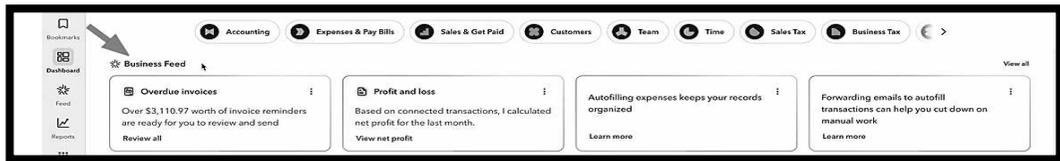
Top-Right Area

Links to: Contact experts, Integrations, Notifications, Settings, Help, and Your Intuit account

The New Homepage Layout

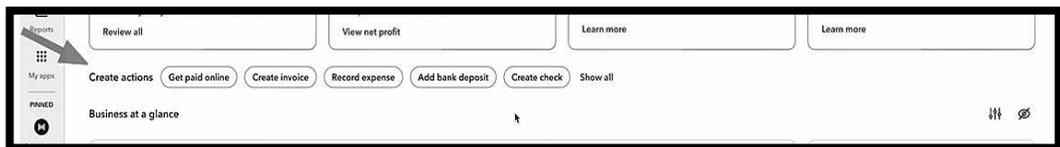
The redesigned dashboard gives you a clear snapshot of your business:

1. Business Feed Highlights



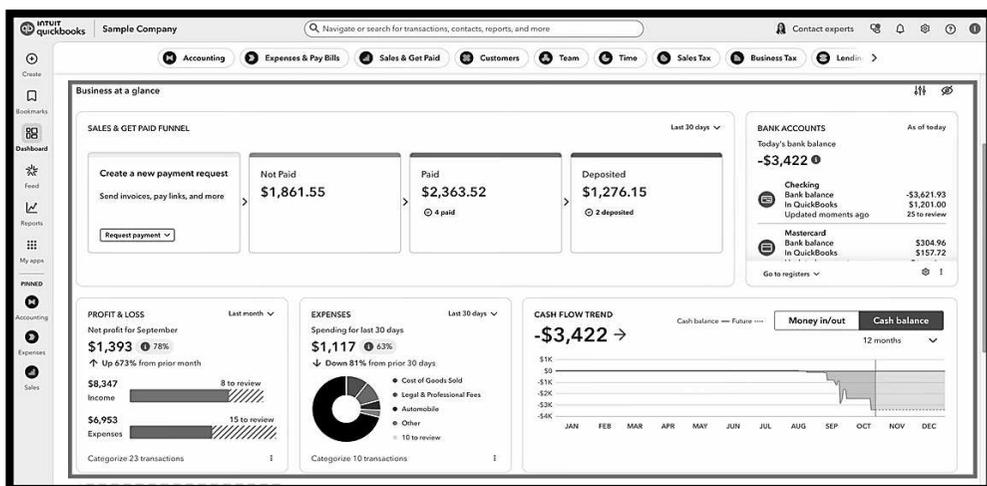
This section summarizes work completed by **Intuit Assist**, the new AI assistant. It surfaces insights and tasks that need your attention.

2. Create Actions



Customizable shortcuts for your most common tasks (e.g., creating invoices or capturing expenses).

3. Business Overview

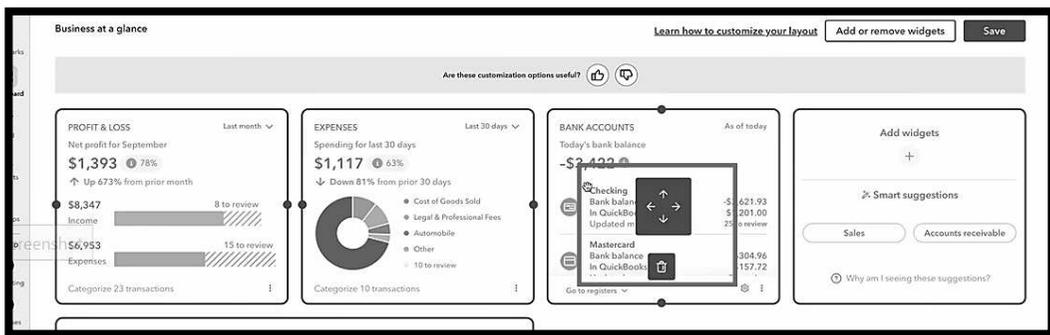


A set of financial widgets displaying: Sales funnel, Bank balances, Profit and loss, Expenses, and Cash flow

You can rearrange or remove widgets using the **Customize** option to build a dashboard that suits your workflow. A **Privacy** toggle lets you hide sensitive information whenever needed.



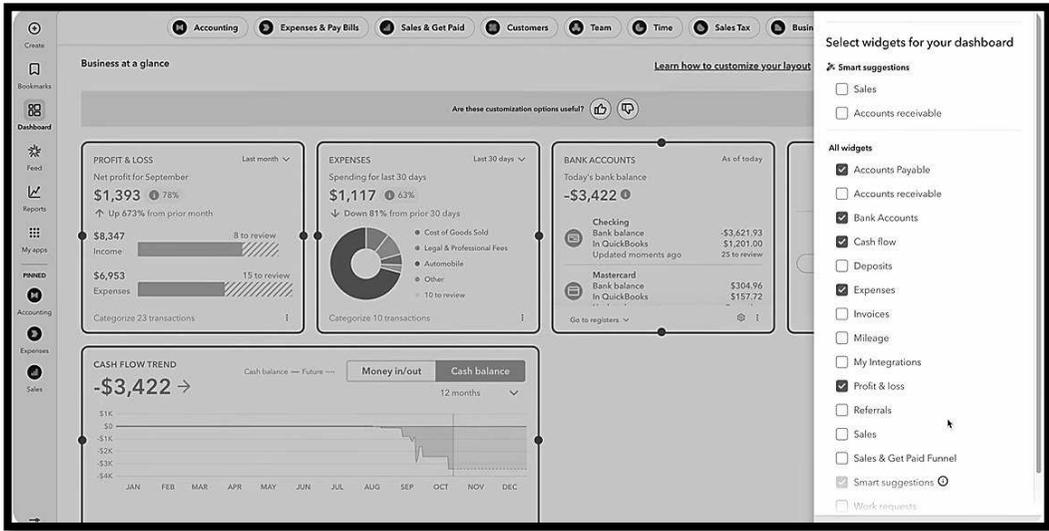
Customize option



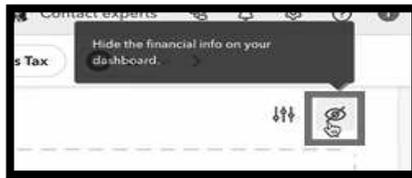
Customizing your widgets



Click Add or Remove widgets to customize your dashboard



Select widgets to display on dashboard



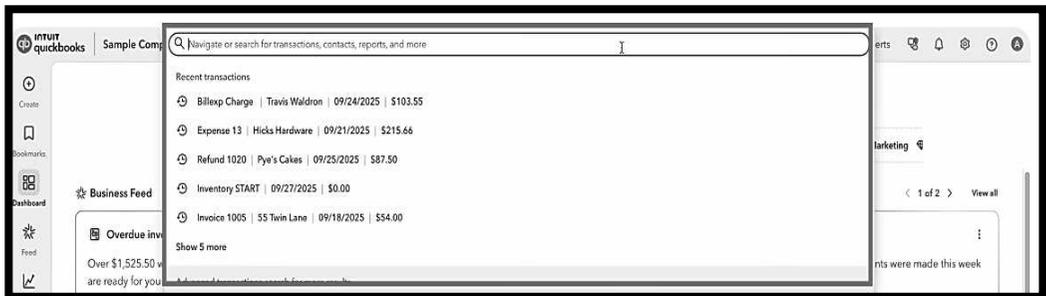
Privacy button

How the New QuickBooks Online Works

The redesigned QuickBooks Online interface introduces a more intuitive layout and smarter tools. Let's walk through the main features starting with the buttons at the top of the screen.

Top Navigation Tools

Smart Search Bar

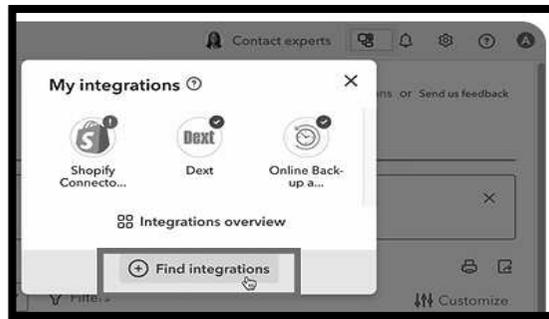


The new smart search bar allows you to quickly locate transactions, customers, vendors, and reports. You can type keywords, use commands, or even enter full questions—QuickBooks’ AI assistant now interprets natural language to help you find what you need faster.

Contact Experts

This option connects you directly with your accountant or a certified QuickBooks ProAdvisor—useful when you need professional guidance.

My Integrations



This section shows all third-party applications linked to your QuickBooks account. You can browse for more apps by selecting **Find Integrations**.

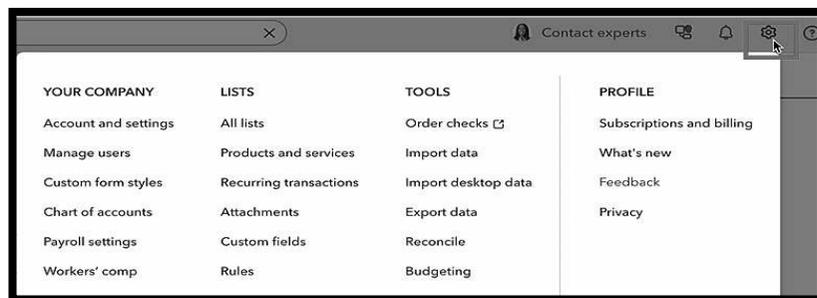
Notifications

The bell icon displays alerts related to your account, updates, or tasks that need attention.

Help Menu

Opens an assistance panel where you can ask questions to the AI assistant or search through QuickBooks’ help articles and FAQs.

Settings Menu (Gear Icon)



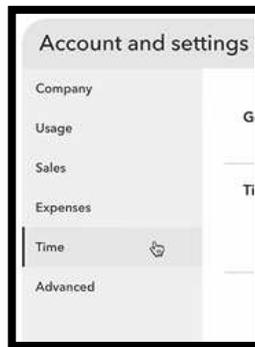
The gear icon is where you configure your company's setup and core accounting settings.

Account and Settings



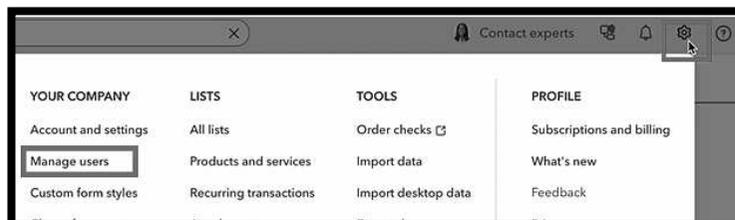
Here you set up your company information, including: Logo, Business name, Address and contact details, Website, Industry, EIN/SSN, and Business structure and tax details

- ❖ **Usage Limits:** Shows your plan's restrictions on features such as billable users, chart of accounts size, and class/location tracking.



- ❖ **Sales, Expenses, and Time Settings:** Customize how your forms appear, set default terms, and configure expense tracking options.
- ❖ **Advanced Settings:** Choose between cash or accrual accounting, enable multicurrency, and adjust automation preferences.

Manage Users

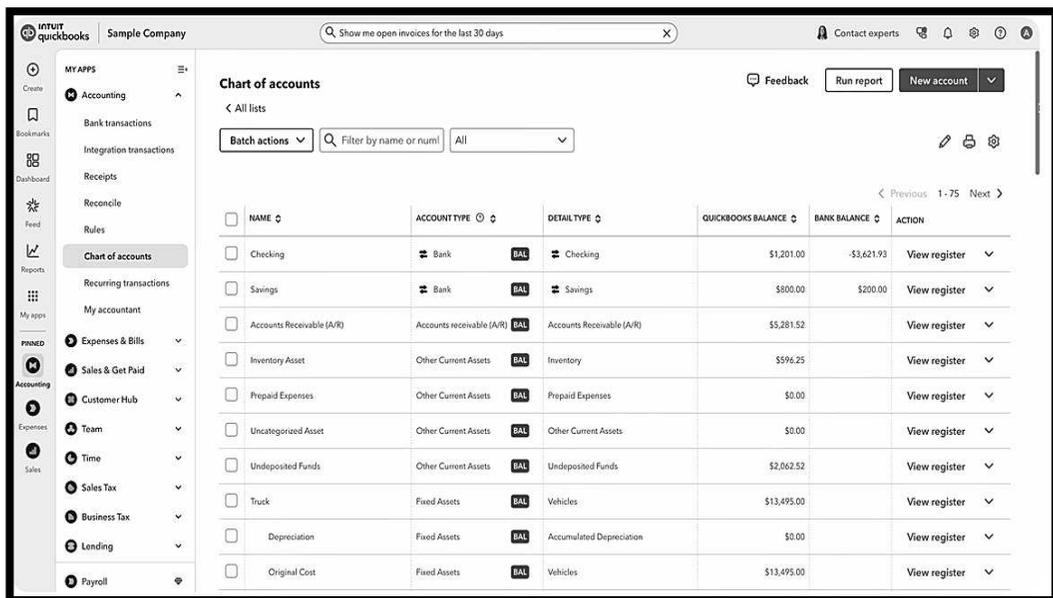


Add, remove, or edit users and assign different levels of access depending on their role (admin, standard user, accountant, etc.).

Chart of Accounts



This is the backbone of your accounting system. It lists every asset, liability, equity, income, and expense account in your business. Proper setup is crucial. If you're unsure how to structure your accounts, consult an accountant before making changes.



Additional Tools in Settings: Keyboard Shortcuts

Additional information

You're viewing QuickBooks in **Accountant view**

Your Company ID is **9341 4555 6915 5216** Copy

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

SHORTCUT KEY	ACTION
i	Invoice
w	Check
e	Estimate
x	Expense
r	Receive payment
j	Journal entry
c	Customers
u	Run payroll
v	Vendors
a	Chart of accounts
l	Lists
h	Help
f	Global search
d	Focus the left menu
ctrl/cmd + .	Toggle ZenMode
? or /	This dialog

On transactions, like an invoice or expense

SHORTCUT KEY	ACTION
x	Exit transaction view
c	Cancel out
s	Save and new
d	Save and close
m	Save and send
p	Print
? or /	This dialog

OK

QuickBooks offers a set of keyboard commands to speed up navigation. Print the list and keep it handy—great for power users.

Products and Services List

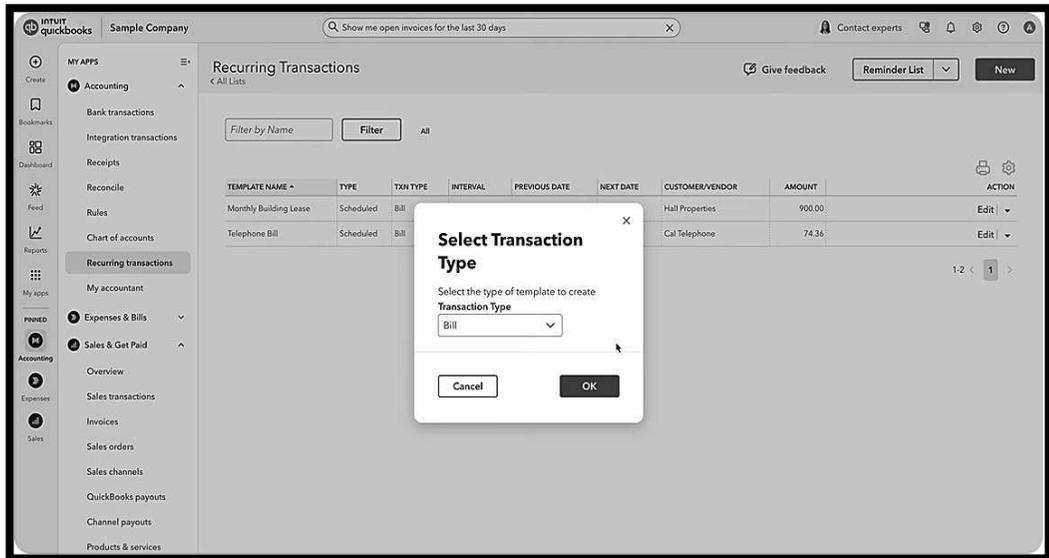
Products and Services

Find products and services

NAME	SKU	TYPE	SALES DESCRIPTION	SALES PRICE	COST	TAXABLE	QTY ON HAND	REORDER POINT	ACTION
Design									
Design		Service	Custom Design	75					Edit
Fountains									
Concrete		Service	Concrete for fo...	0		✓			Edit
Pump	P461-17	Inventory	Fountain Pump	15	10	✓	25		Edit
Rock Fountain	R154-68	Inventory	Rock Fountain	275	125	✓	2		Edit
Lighting		Service	Garden Lighting	0		✓			Edit

Create or edit the items you sell. This makes invoicing faster and ensures accurate tracking of inventory, income, or service activity.

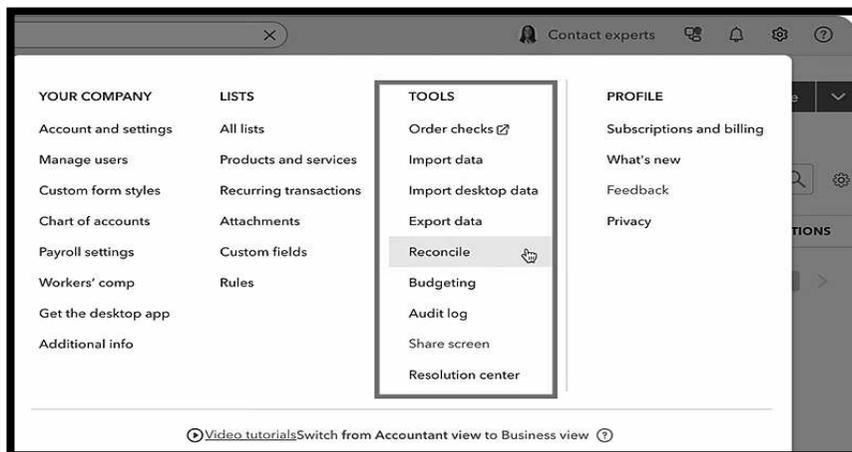
Recurring Transactions



Use templates and automation rules to create repeating invoices or automatically categorize bank transactions. These tools save time and improve consistency.

Check Ordering, Importing/Exporting Data & Bank Reconciliation

Under the **Tools** section you can:

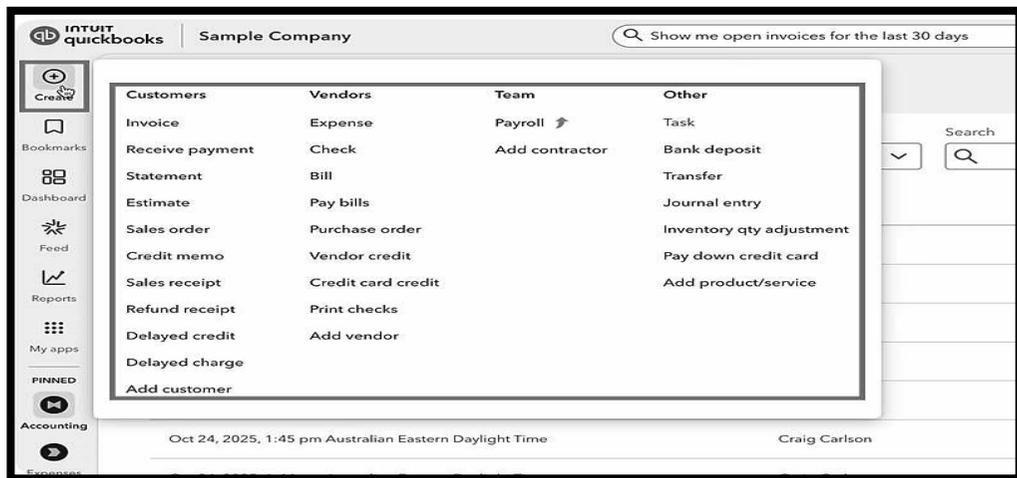


- ❖ Order checks
- ❖ Import or export lists and data

- ❖ Reconcile your bank accounts
- ❖ Set up budgets
- ❖ View the audit log to see who made changes
- ❖ Share your screen with support
- ❖ Access the resolution center for billing or account issues

Left Navigation Menu

At the top of the navigation bar is the **Create (+) button**, which allows you to quickly create: Customer invoices, Vendor bills, Estimates, Expenses, Time entries, Journal entries, And more

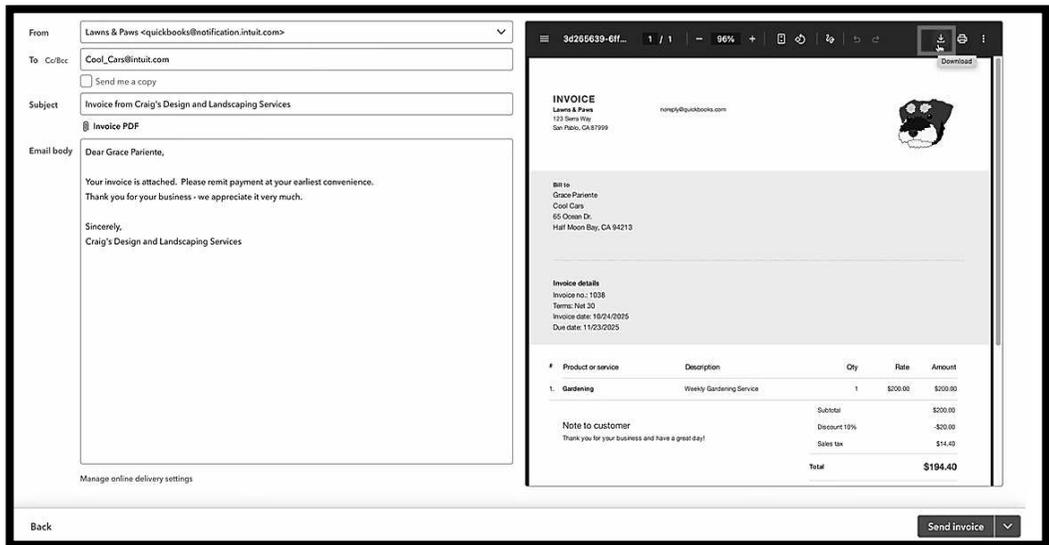


Creating a Sales Invoice

To create an invoice:

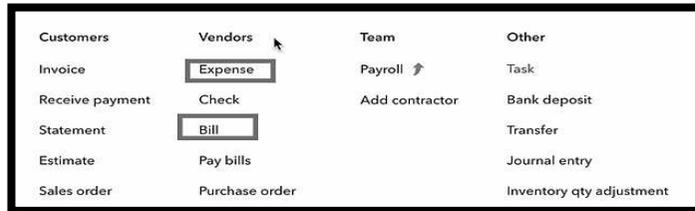
1. Select **Create → Invoice**.
2. Choose an existing customer or add a new one.
3. Select the product or service sold.
4. Enter the quantity and rate.
5. Add any discounts or sales tax.
6. Click **Review and Send**.

QuickBooks generates a clean PDF of the invoice and prepares an email you can customize before sending. This is the standard process when recording a sale to a customer.

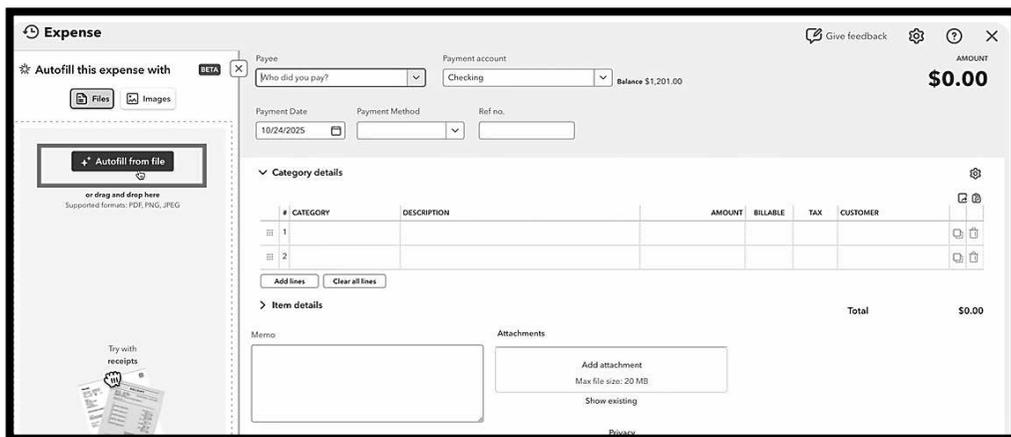


Vendor Transactions Recording Purchases

You can record purchases in two ways:



- ❖ **Expense:** Use this when the money has already left your bank account. AI can autofill details from uploaded receipts.



Books by Bessie | Checking | balance \$1,201.00 **\$1,000.00**

Receipt - Books by Bessie

Books by Bessie
210 Ocean View Blvd
Santa Monica, CA 90401
info@booksbybessie.com

RECEIPT

Bill to:
Laws & Paws
123 Main Street
San Jose, CA 95131
USA

Invoice Number: 12345 Date: October 18, 2025

Description	Qty	Unit price	Total price
Bookkeeping Service	1	\$1,000.00	\$1,000.00
Notes:			
Thank You!			
		Subtotal	\$1,000.00
		Tax	\$0.00
		Total	\$1,000.00

Category details

#	CATEGORY	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER
1	Final Fees Bookkeeper	Receipt for bookkeeping services provided by Books by Bessie to Laws & Paws	\$1,000.00	<input type="checkbox"/>	<input type="checkbox"/>	

Item details

Memo

Attachments

Receipt - Books by Bessie.png

Add attachment
Max file size: 20 MB
Show existing
Privacy

Total \$1,000.00

Cancel Clear Make recurring Save Save and close

❖ **Bill:** Use this when you owe money and will pay later. Enter payment terms or due dates. This increases your Accounts Payable balance until paid.

Paying Bills

Cal Telephone | **\$100.00**

Bill - Cal Telephone

Cal Telephone
10 Main St
Palo Alto, CA 94303

Bill to:
Laws & Paws
123 Main Street
San Jose, CA 95131
USA

Invoice Number: 12345 Date: October 18, 2025

Description	Qty	Unit price	Total price
Telephone Usage	1	\$100.00	\$100.00
Notes:			
Thank You!			
		Subtotal	\$100.00
		Tax	\$0.00
		Total	\$100.00

Mailing address

Terms: Due on receipt Bill date: 10/20/2025 Due date: 11/19/2025 Bill no.: 5298

Category details

#	CATEGORY	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER
1	Utilities: Telephone	Invoice for telephone usage from Cal Telephone to Laws & Paws	\$100.00	<input type="checkbox"/>	<input type="checkbox"/>	

Item details

Memo

Attachments

Bill - Cal Telephone.png

Add attachment
Max file size: 20 MB
Show existing
Privacy

Total \$100.00

Cancel Clear Print Make recurring Save Save and schedule payment

Click **Save** or **Schedule Payment** after entering bill details.

Other Important Forms

Journal Entries

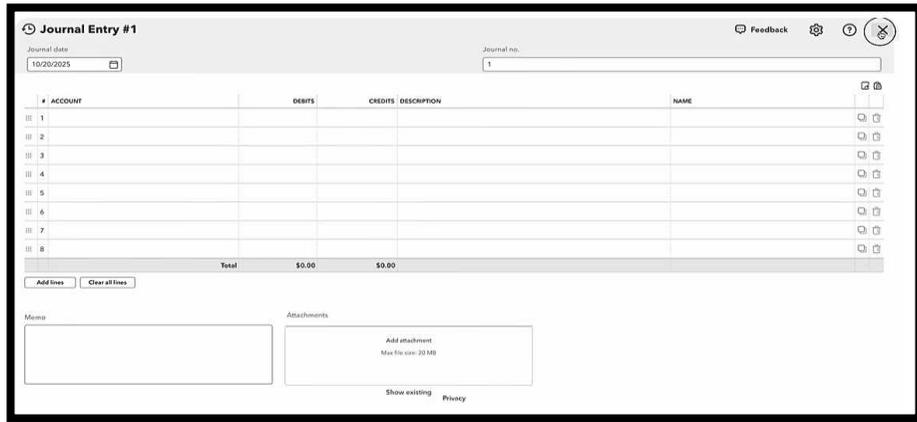
intuit quickbooks Sample Company

Show me open invoices for the last 30 days

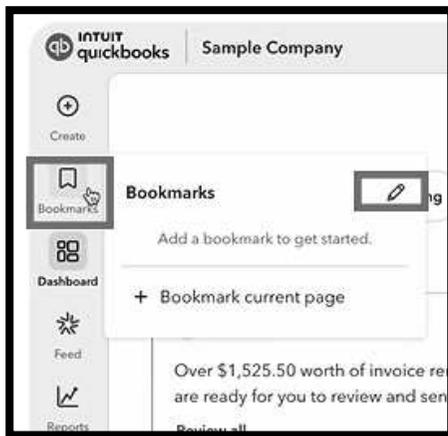
Create

Customers	Vendors	Team	Other
Invoice	Expense	Payroll	Task
Receive payment	Check	Add contractor	Bank deposit
Statement	Bill		Transfer
Estimate	Pay bills		Journal entry

Use these only when necessary. They bypass the normal workflows, so consult an accountant before creating one.



Bookmarks & Dashboard

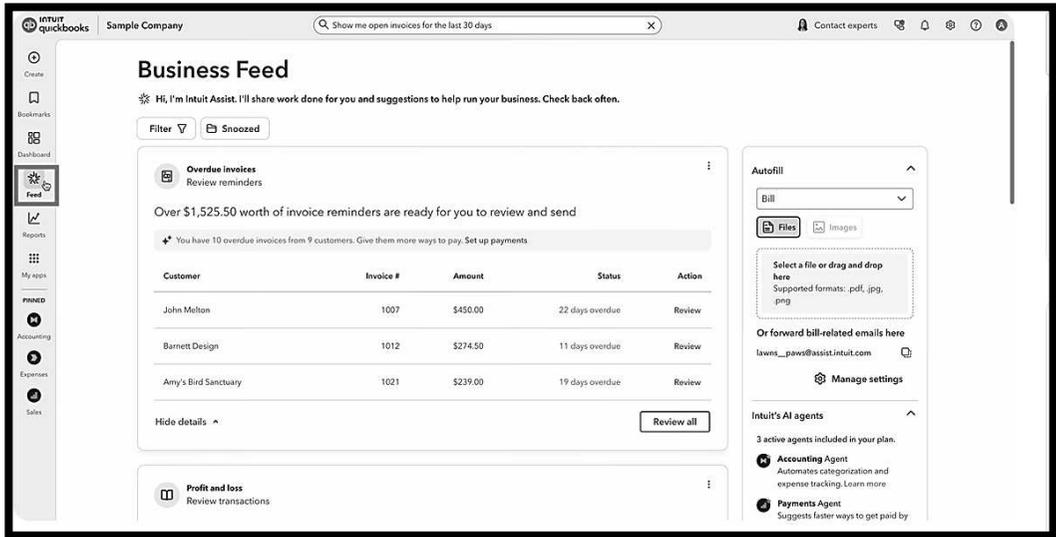


You can bookmark your most frequently visited pages.

The **Dashboard** brings you back to your homepage,

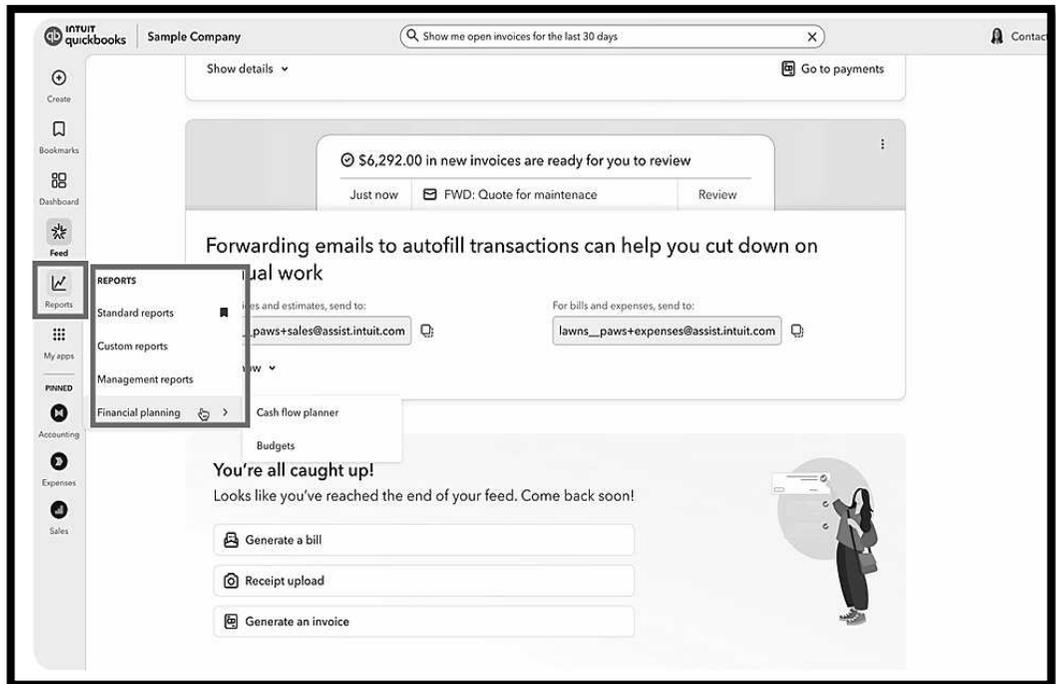
Business Feed

The **Business Feed**—powered by AI—shows tasks, alerts, and personalized insights.



Reports

Reports now have their own menu category.

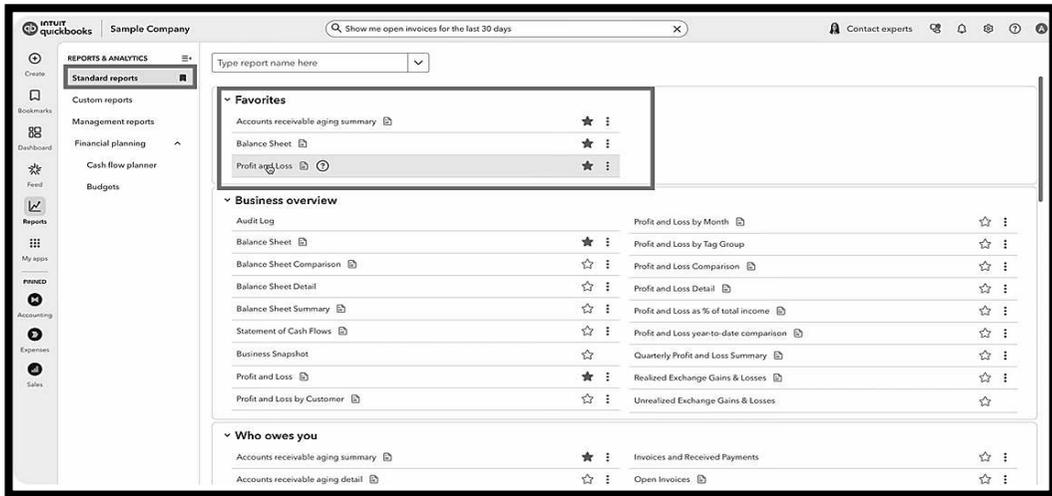


You can access:

- ❖ Standard Reports
- ❖ Custom Reports

- ❖ **Management Reports**
- ❖ **Financial Planning Reports**

Key examples include:



- ❖ **Balance Sheet:** Snapshot of assets, liabilities, and equity.
- ❖ **Profit & Loss Statement:** Summary of income and expenses.
- ❖ **Cash Flow Statement:** Details of cash movement in and out of your business.

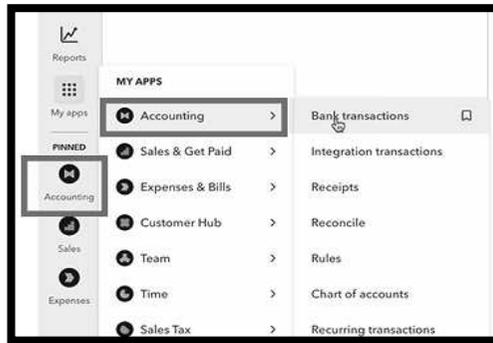
You can “favorite” reports for quick access.

My Apps



This section houses all your connected and pinned apps. Customize it as needed.

Accounting



This is where you manage bank feeds:

- ❖ Connect new accounts
- ❖ Review downloaded transactions
- ❖ Match QuickBooks transactions with bank activity
- ❖ Categorize uncategorized items
- ❖ Create bank rules for recurring transactions
- ❖ Perform bank reconciliations

DATE	DESCRIPTION	PAYEE	CATEGORIZE OR MATCH	SPENT	RECEIVED	ACTION
11/24/2025	Books By Bessie		Uncategorized Income		\$55.00	Add
10/25/2025	A Rental		Uncategorized Income		\$200.00	Add
10/25/2025	A Rental		Uncategorized Expense	\$1,200.00		Add
10/02/2025	A Rental		Uncategorized Expense	\$800.00		Add
09/29/2025	Firm Seitz	Firm Seitz	2 matches found	\$75.00		View