

JOHN FINTECH

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QUICKBOOKS

ONLINE *FOR*

BEGINNERS

\$ \$

2024

STEP BY STEP GUIDE



TASK STATUS

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Bonus

Keyboard Shortcuts

Utilizing keyboard shortcuts for efficient navigation within QuickBooks Online is straightforward. These shortcuts are compatible with various browsers, including:

- Internet Explorer
- Firefox
- Chrome (with minor exceptions)

Note: Mac users can experiment with these shortcuts by substituting the CMD ⌘ key for Alt or CTRL when indicated.

You can obtain the QuickBooks Online Keyboard Shortcuts reference guide by either downloading it or accessing it from within QuickBooks. This reference guide is available exclusively in English.

To access the quick reference guide within QuickBooks Online, simply press Control + Option (Alt) + ? (for Mac).

Keyboard shortcuts available in QuickBooks Online include the following:

How to open a second window:

- For Internet Explorer: Press Ctrl + N. (Please note that you will be signed in to the existing company on both windows.)
- For Firefox: Press Ctrl + N. (You won't have an active session in the second window, but your sign-in status will be maintained in the first one. The second window enables you to log in to the existing company, facilitating simultaneous work on both screens.)
- For Chrome: Press Ctrl + N. (Going to QuickBooks Online in that window will sign you in to the existing company.)

How to locate text within a window:

- Press CTRL + F (works in Internet Explorer, Firefox, and Chrome, and Internet Explorer) to open a pop-up window for searching.
- Firefox displays a Find toolbar at the bottom of your screen.
- In Chrome, a search field appears in the upper-right corner of the screen.

Instructions for inputting dates are as follows:

- For the next day: Use the + (plus key).
- For the previous day: Employ the - (minus key).
- For today's date: Simply press T.
- To select the first day of the week: Press W.
- To designate the last day of the week: Utilize K.
- For the initial day of the month: Input M.
- To specify the final day of the month: Enter H.
- For the commencement of the year: Type Y.
- To indicate the conclusion of the year: Use R.
- To access a pop-up calendar icon on the right of a date field, press Alt+down arrow.

Calculating amounts and rates:

- In any Amount or Rate field, input a calculation. QuickBooks Online will automatically compute the result upon pressing the Tab key.
- Examples:
 - Add: + 1256.94 + 356.50
 - Subtract: - 48.95 - 15
 - Multiply: * 108 * 1.085
 - Divide: / 89.95 / .33
 - Group: () 13.95 + (25.95 * .75)

Navigating between fields on most forms:

- Use the Tab key to move forward.
- Use Shift+Tab to move backward.
- Utilize the Space Bar to mark a checkbox field as selected.

Selecting items from dropdown lists:

- Tab your way to the field.
- Use Alt + down arrow to access the list.
- Use up or down arrows to navigate through the items in the list.
- Press Tab to select the desired item and move to the next field.
- To navigate through the items in the text box without expanding the entire list, use Ctrl + down arrow or Ctrl + up arrow.

How to choose items in a list with sub-items:

1. Type the initial characters of the parent item to select it.
 - To jump to the list of sub-items, type the initial characters of the sub-item until it's selected.

- Use Alt + down arrow to initiate the sub-items list, then employ the up or down arrows to navigate through them.
2. Press the Tab key to choose your desired item and move on to the next field.

How to save forms:

- On any form, press Alt + S instead of clicking Save.
- For Firefox and Chrome, use Alt + Shift + S. Mac users should use Option + Control + S.

How to respond to messages:

Hold down the Alt key. If button names have underlined letters, keep Alt held down and type the letter to select the desired button.

How to choose a transaction type in an account register:

- In a fresh, highlighted transaction row, utilize Shift + Tab to focus on the transaction type field.
- Employ Alt + down arrow to unveil the selection menu.
- Navigate through the options using the up or down arrows, or simply input the initial letter of your desired transaction type. If there are multiple transaction types commencing with the same letter, input the letter twice to pinpoint the second one (e.g., "C" for Cheque and then "C" again for Cash Purchase).
- To finalize your choice and proceed to the next field, press the Tab key. Once you become acquainted with the available transaction types, you can directly input the first letter without invoking the list.

When the Ref # field is active, follow these actions:

- Use the "+" key to increment the Ref #.
- Use the "-" key to decrease the Ref #.
- To input "To Print" into the Ref # field for a Cheque, Bill Payment (from a current account), or Payroll payment, simply enter the letter "T."

To save or edit a selected transaction, apply the following:

- Press Alt + S to save it. For Firefox and Chrome, utilize Alt + Shift + S.
- Press Alt + E to access and edit a saved transaction, opening the transaction form.

For moving between transactions within the register and selecting the date field in the process, perform these steps:

- To choose the transaction above, employ the up arrow.
- To pick the transaction below, utilize the down arrow.

To make adjustments to print alignment, take these measures:

- Select either the Vertical or Horizontal field.
- Then, press the "+" key to raise the number or the "-" key to lower it.
- Ensure you use the keys on the numeric keypad.

How to navigate in journal entries:

In the Journal Entry screen, use the up arrow to move to the distribution line above and the down arrow to move to the one below.

That covers the available keyboard shortcuts in QuickBooks Online.