



## QuickBooks Online Training Agenda

- 1. Opening Remarks**
- 2. QBO Training Topics**
  - a. Overview/Navigation Tips
  - b. Security & Backup Provisions
  - c. Dashboard
  - d. Master Data
    - i. Users
    - ii. Chart of Accounts
    - iii. Classes
    - iv. Vendors (Show both ways – new vendor and checks)
    - v. Customers (Show both ways – new customer and bank deposit)
    - vi. Payment Methods
    - vii. Attachments
    - viii. Audit Log
  - e. Money In
    - i. Bank Deposit
    - ii. Transfer
  - f. Money Out
    - i. Entering Checks process within QBO
    - ii. Entering Checks process using Stock Checks
    - iii. Ordering Checks
    - iv. Pay Bill
  - g. Reconciling an account
  - h. Budgeting
  - i. Reports
  - j. Other
    - i. Journal Entries
- 3. Practice Session**
  - a. Adding vendors
  - b. Adding customers
  - c. Bank Deposit
  - d. Entering Checks
  - e. Bills
  - f. Printing Checks
  - g. Reconciling an account
  - h. Reports
- 4. Closing remarks/wrap up**

*It starts with us*