

# QuickBooks Online

GoSkills online course syllabus

Friday, September 12, 2025

**Skill level**

Beginner

**Lessons**

37

**Pre-requisites**

None

**Estimated study time**

18h for all materials

**Instructor**

Rachel Barnett

## An Introduction to QuickBooks Online: A Guide to Help a New User Get Started

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1

### Subscription Options

A brief overview of the various subscription options

2

### Left Menu

Describe the left menu: groupings, bookmarks

3

### Dashboard

Describe the home page, the limited customization options

4

### Lists

Understanding and locating the customer list, vendor list, chart of accounts, product and service list

5

### Preferences

Locating and setting up common preferences

6

### Find (a.k.a. Search)

How to use global search to locate transactions and information

## Chart of Accounts

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### Navigating the chart of accounts

Learn how to locate the Chart of Accounts in QuickBooks Online, edit account details, understand the default sort order, change the sorting, and interpret the arrow icons.

**8** Adjusting the chart of accounts  
How to add, edit, merge and inactivate accounts within the chart of accounts.

**9** Reporting on accounts  
Generate account specific reports and in the case of balance sheet accounts, view registers.

## Products and Services

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**10** Introduction to the products and services list  
Locating, understanding what it is used for and various views for this list.

**11** Adding, inactivating, editing and merging  
How to add, edit, merge and inactivate accounts within the products and services list.

**12** Reporting on products and services  
How to generate sales reports for products and services.

## Reporting

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**13** Profit and loss introduction  
How to locate the profit and loss report and lightly review what is seen here.

**14** Profit and loss modification  
How to drill down into the detail behind the profit and loss, various ways to modify the report.

**15** Balance Sheet introduction  
How to locate the balance sheet report, and lightly review what is seen here.

**16** Balance Sheet modification  
How to drill down into the detail behind the balance sheet, various ways to modify the report.

**17** Accounts Receivable and Accounts Payable  
How to locate the various accounts receivable and payable reports and the benefits of each

## Banking

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- 18** Connecting the bank  
Connecting the bank to QBO for a one-way sync into QBO.
- 19** Bank transactions dashboard  
Explore the bank transactions dashboard and the information shown.
- 20** Reconciliation  
Demonstration of how and why to reconcile accounts with a balance and a statement (such as checking, savings, credit card).

## Income

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- 21** Sales Dashboard  
Discuss the various tabs located within the sales section of QBO.
- 22** Adding a customer  
How to add a customer to QuickBooks
- 23** Determining which method to use when recording income  
Income can be recorded into QuickBooks using three methods -- directly to the income account, using a sales receipt, and invoices. This lesson will focus on the differences between each allowing the user to determine which method is appropriate for them.
- 24** Posting directly to an income account  
How to post directly to an income account
- 25** Using sales receipts  
How to create a sales receipt
- 26** Using invoices  
How to create an invoice and apply the customer payment to the invoice
- 27** Combined payments  
Why and how to combine multiple payments into a single deposit

## Expenses

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- 28** Expenses Dashboard  
Discuss what can be found in the expense tab

- 29** Vendors and contractors  
Locating and adding vendors and contractors to QBO.
- 30** Manually entering expenses  
How to record expenses, checks written by hand and printing checks.
- 31** Entering downloaded expenses  
How to record expenses downloaded from the bank.
- 32** Expenses vs Bills  
Explain the difference between expenses, bills and the related workflow.

## Common errors

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- 33** Bank register  
Identify errors on the bank register such as uncleared transactions
- 34** Profit and Loss report  
Discuss common mistakes found on the profit and loss report and how to correct them.
- 35** Balance sheet report  
Discuss common mistakes found on the balance sheet report and how to correct them.
- 36** Accounts Receivable Errors  
Discuss common mistakes found on the accounts receivable report
- 37** Accounts Payable Errors  
Discuss common mistakes found on the accounts payable report

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