Content model strategy report

For Intuit QuickBooks website support pages

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Here is the analysis of the content on the QuickBooks online support pages, and the resulting recommendations.

Content Analysis

The voice and tone of Intuit QuickBooks' support content is consistent throughout. Language usage, grammar, and style is broadly consistent. There is a sense that this is written by a single author, with a clear and easy-to-understand use of American English.

However, the structure of the information varies, leading to some confusion as to whether a topic is providing information about a concept, or showing the user how to accomplish a task. Sometimes one webpage will mix different types of information without highlighting what the purpose of each type is, and what it will help the user to achieve. This, too, can lead to confusion. Headings and titles don't currently conform to a set structure. Sometimes a task title starts with 'How to print checks', while at other times a verb is used to start the title, for example 'Convert from QuickBooks Desktop to QuickBooks Online'.

One problem area is the use of links, both the related xref links at the bottom of a page and the inline links that lead users to other content outside the page. Sometimes the author extensively uses inline links (for example in 'What isn't imported when you move from QuickBooks Desktop to QuickBooks Online'), at other times the author locates the related links as xrefs at the bottom of the page (for example in 'About Multi-currency'), and sometimes there are no links at all (for example, in 'What is the difference between an invoice, sales receipt, bill, and statement', where the user is told to look at the title of another topic, but no link is provided). The overuse of inline links can be distracting in task topics, however, the absence of useful links to related topics — especially troubleshooting — means that the user must return to the home menu to find further information. Also, neglecting to highlight specific topics related to the current topic — especially within concept topics — means the customer hasn't been guided to explore related product features.

Overall, the content of the QuickBooks support pages is comprehensive. The content attempts to document any aspect of the software that the user might have difficulty with, and even attempts to troubleshoot the necessary use of external software (for example, Adobe Acrobat for cheque printing) in case that is the source of the customer's problem. The policy seems to be to keep the customer on the QuickBooks website, rather than letting them off into the web to find a solution. Customer retention is obviously something they have considered from a technical content delivery point of view, as opposed to thinking of retention only in terms of marketing and sales.

Recommendations

Part 1: Content models

Refer to the content model spreadsheet to view the original content models. They are discussed below in the strategy report, next to a screenshot of the relevant content model.

Part 2: Content model strategy report

Overview

There are certain strategies that apply across the support pages' content.

Structure each web page so that it follows a set information type. A help page should declare (in a heading or subheading) what kind of information follows. This will help clarify what the user can expect from each support article. The use of topics — concept, task, reference, and troubleshooting — will provide a framework for writers.

Split up information so that a single webpage isn't trying to achieve too much. This will ensure the end user isn't overwhelmed.

Use consistent titles and headings. These can alert the user as to whether the topic will show them how to use a feature, how to troubleshoot something that isn't working for them, or explain an aspect of QuickBooks that they may not have used before. If steps follow a title or a heading or subheading, the title should make it clear that a task will be contained in that content. Introduce a set structure for the titles and headings, for example, tasks must always start with a verb.

Develop a policy on how links should be used. For example, refer to the associated topic by title in the sentence, then add the link to a relationship title so it appears under 'Related Topics'. Also, aim for reuse (by chunking) instead of linking away from the current topic to specific sections of topics.

Make sure all content authors follow the reuse strategy, especially for certain tasks or segments of tasks and for notes. Warnings and troubleshooting information are particularly suited as content in notes, drawing the customer's eyes towards them, and they are easily reused across all the content.

Types of content

The following content models for the recommended structures are based on the DITA framework. However, not all structures or substructures from that standard are recommended for use.

Concept topic

Use a concept topic for any content that that gives the user an overview of something, or gives information that will help the user understand a feature of the product or a relevant business idea. This type of information can be best explained in prose paragraphs, and provides context for a product or product features. Examples of this type of topic are ‘What is the difference between bills, checks, and expenses?’ and ‘Multi-currency’.

Semantic	Base	Freq	Usage	Comments/Questions
Concept topic	**concept**			
Title	title	1	M	Information topic, so title will usually be a noun phrase or start with 'What is' unless doing so wouldn't make sense. Avoid starting title with 'About'.
Short description	shortdesc	1	M	Provide a single short sentence that summarises the content of the topic.
Prolog	prolog	1	M	*See Model4 sheet (Task topic) for detailed model to use for the prolog element.*
	conbody	1	M	
Paragraph	p	rep	M	Provide the information in brief paragraphs, no more than three sentences per paragraph.
Unordered list	ul	rep	O	Use unordered lists to group information that is linked but not consecutive.
Ordered list	ol	rep	O	Use ordered lists when the information can only be understood when read in a specific order.
List item	li	rep	O	Each list item must only consist of one short sentence, otherwise rewrite the list in paragraphs.
	conbodydiv	rep	O	Use to group examples or sections.
Example	example	rep	O	Provide an example to illustrate the concept. Should not be more than one sentence. Can only be followed by another example or a section.
Section	section	rep	O	Use to organise subsets of information within a larger topic. Provide a heading to announce content that follows. If more than two sections required, break up into separate topics. Can only be followed by another section or an example.
Table	table	1	O	Use a table for information that is easier to comprehend when side-by-side. Do not use to provide data or detailed facts, instead create a reference topic.
Note	note	1	O	Use to differentiate important information from the main text. Reuse when necessary. Use one of the following type attributes to provide the note heading: note, tip, important, remember, or caution.
Cross reference	xref	rep	O	Use only to link to another location within the current topic, a specific location in another topic, or an external resource. Otherwise, use a relationship table in the ditamap.

Model for a concept topic

Reference topic

Content that's made up of data (or information) that will be referred to on multiple occasions should be contained within a reference topic. Use this topic to group information that users will need to refer to when completing a task, for example 'What data doesn't convert from QuickBooks Desktop to QuickBooks Online'. This type of content is usually organised into tables, for easy reading.

	A	B	C	D	E
1	©2018, The Rockley Group Inc., Rockley Strategic Method™				
2	**Semantic**	**Base**	**Freq**	**Usage**	**Comments/Questions**
3					
4	Reference topic	**reference**			
5	Title	title	1	M	Convey the content of the data.
6	Short description	shortdesc	1	M	Create one brief sentence to summarise the data.
7	Prolog	prolog	1	M	*See Model4 sheet (Task topic) for detailed model to use for the prolog element.*
8		**refbody**	1	M	
9	Section	section	rep	O	Provide a heading to announce content that follows, and use a maximum of two sections. If data logically needs to be split into separate sections, create another topic.
10	Example	example	1	O	Include only if the reference needs background information. This should be brief, anything longer needs a new topic, most likely a
11	Simple table	simpletable	1	or	Use when you want to show information in regular rows and columns.
12	Complex table	table	1	or	Use when data requires column or row spanning and table captions or descriptions.
13	Definitions list	dl	1	or	Use to create a list of terms and definitions. Provide descriptive headings.
14	Property list	properties	1	or	Use to list the properties of the topic. Can include the type, value, and a description.
15	Cross reference	xref	rep	O	Use only to link to another location within the current topic, a specific location in another topic, or an external resource. Otherwise, use a relationship table in the ditamap.
16	Note	note	rep	O	Create a note to highlight a specific part of the content that appears before a table. Do not use a note within a table. Use one of the following type attributes to provide the note heading: note, tip, important, remember, or caution.
17					

Model for a reference topic

General task topic

The type of content that is suitable for a task topic is always an instructional guide. Anything that uses steps to show a process — from 'How to print checks' to 'Transfer funds between accounts' — will fit well into a task topic. However, if the process involves solving a problem generated by another task topic, it should be made into a troubleshooting topic.

	A	B	C	D	E
1	©2018, The Rockley Group Inc., Rockley Strategic Method™				
2	**Semantic**	**Base**	**Freq**	**Usage**	**Comments/Questions**
3					
4	Task topic	**task**			
5	Title	title	1	M	Start the title with a verb to imply action (task/procedure)
6	Short description	shortdesc			Provide a single-sentence summary so end users can quickly determine if this topic is relevant to them.
7	Prolog	prolog	1	M	*Use this prolog model for all topic types (the critical dates and metadata elements and subelements listed here).*
8	Critical dates	critdates	1	M	
9	Date created	created	1	M	Provide the date the topic was created.
10	Date revised	revised	1	M	When revising any topics, provide the date it was revised.
11	Metadata	metadata	1	M	
12	Keywords	keywords		O	Use terms which will guide the search function in online support. Refer to the taxonomy management tool for appropriate terms.
13	Product information	prodinfo	1	M	
14	Product name	prodname	rep	M	Name the specific product or products the topic refers to (e.g. QuickBooks Online, Quickbooks Desktop, QuickBooks Desktop for Mac, QuickBooks Self-Employed, QuickBooks Apps, etc.) Refer to the current list of supported products in the taxonomy management tool for appropriate terms.
15	Category	category	rep	M	Provide the name of the most appropriate support category or categories (e.g. Employees and payroll, Payments, Banking). Refer to the taxonomy management tool for the full list of categories available for
16		**taskbody**	1	M	
17	Pre-requisite	prereq	1	O	Include a prerequisite if there are activities the user needs to know or do before starting the current task.
18	Context	context	1	O	Include a context section if the task requires background information. Keep this section short, if it gets long break it out into a concept topic.
19		**steps**	1	M	
20	Section	section	rep	O	Maximum of two sections per task topic. A task that requires more sections should be broken up into separate tasks, or a task and a concept if there is a lot of context that needs to be given.
21	Title	title	1	M	Provide a heading that indicates the content of the subsequent section.
22	Step	step	rep	M	Limit to ten step elements per task topic. Create another task topic to break down large tasks.
23	Command statement	cmd	1	M	Use one sentence to tell the user what they need to do in order to complete the step.
24	Step information	info	1	O	Include any extra information needed for the step. Keep it brief. Use this element to add a paragraph or a note related to a step.
25	Substeps	substeps	1	O	Only use if leaving the page (and the current sequence of steps) would make the task overly complicated for the user. Limit of six substep elements, and only one use of substeps per task topic. Otherwise, split the topic into multiple tasks and use a relationship table in the ditamap to link them. Follow the same model as for steps.
26	Step result	stepresult	1	O	Use one sentence to describe the expected outcome of a step. Only use when it would be unclear what should happen.
27	Step troubleshooting	steptroubleshooting	1	O	Only use if there is a significant chance of the step failing, or common mistakes are made at this step.
28					
29	Result	result	1	O	Describe the outcome of task completion, using one brief sentence.
30	Task troubleshooting	tasktroubleshooting	1	O	If there is a common problem encountered while performing this task, and the solution can be provided in one sentence, use this element. Otherwise, create a separate troubleshooting topic to contain the issue (or issues) encountered while performing this task. Link to related topics using the ditamap relationship table.
31	Cross reference	xref	rep	O	Use only to link to another location within the current topic, a specific location in another topic, or an external resource. Otherwise, use a relationship table in the ditamap.
32	Note	note	1	O	Use to differentiate important information from the main text. Reuse when necessary. Use one of the following type attributes to provide the note heading: note, tip, important, remember, or caution.

Model for a general task topic

Troubleshooting topic

A troubleshooting topic will help the user find a solution. Often, the type of content that fits into a troubleshooting topic comes from a task process that can't be completed without running into further difficulties. The initial process should be kept as a separate task topic (to allow for reuse and future updates), however for clarity the further issues encountered can be split off into an independent troubleshooting topic.

	A	B	C	D	E
1	©2018, The Rockley Group Inc., Rockley Strategic Method™				
2	**Semantic**	**Base**	**Freq**	**Usage**	**Comments/Questions**
3					
4	Troubleshooting topic	**troubleshooting**			
5	Title	title	1	M	Start the title with the word 'troubleshoot' followed by the issue the topic will solve or the related topic title.
6	Short description	shortdesc	1	O	Provide a single short sentence to summarise what the topic will achieve.
7	Prolog	prolog	1	M	*See Model4 sheet (Task topic) for detailed model to use for the prolog element.*
8		**troublebody**	1	M	
9	Condition	condition	1	O	
10	Paragraph	p	1	O	Provide a short description of the condition under which the issue occurs.
11	Solution	troubleSolution	rep	M	
12	Cause	cause	rep		
13	Title	title	1	M	Create a brief title that acts as a hook as the user skims the page.
14	Paragraph	p	1	O	Provide a short one-sentence description of what might be causing the issue.
15	Remedy	remedy	rep	M	
16	Steps	steps	1	or	Use the same steps content model as outlined for task topics, so that steps may be reused from tasks.
17	Unordered Steps	steps-unordered	1	or	Use the same steps-unordered content model as outlined for task topics, so that steps may be reused from tasks.
18	Informal steps	steps-informal	1	or	Use the same steps-informal content model as outlined for task topics, so that steps may be reused from tasks.
19	Cross reference	xref	rep	O	Use only to link to another location within the current topic, a specific location in another topic, or an external resource. Otherwise, use a relationship table in the ditamap.
20	Note	note	1	O	Use to differentiate important information from the main text. Reuse when necessary. Use one of the following type attributes to provide the note heading: note, tip, important, remember, or caution.
21					

Model for a troubleshooting topic

Structured writing guidelines

Organise the content into different topics based on their information types as outlined in 'Types of content'. Selecting the topic that best suits your content is important, as each topic uses a specific structure. Each topic should be an independent chunk of information.

Guidelines common to all topics

Topic title, short description, and prolog (and its associated sub-elements) elements are common to all topics.

The title will be displayed as the heading for all content, as well as in any navigation aid. It must be clear, concise, and relevant. Use sentence case, avoid abbreviations, avoid gerunds, and make sure the title accurately describes the content. See the guidelines for each topic type for specific details on how to create titles within different topics.

Use the short description element to write a single-sentence summary of a topic. The short description will appear below the title in the topic, as an introductory paragraph. This allows end users to quickly confirm if the topic is what they need. Don't restate the title, the short description should expand on it. Don't start the sentence with 'learn how', 'find out how', or 'this article'. Be brief, jump right in, be descriptive, and be consistent.

The prolog element acts as a container element for several important sub-elements: critical dates (created, revised) and metadata (keywords, product name, and category).

- The critical dates must be consistently created and revised. This makes it easier to assess how current the content is. It also makes it more straightforward to weed out redundant or outdated content.
- Metadata is crucial for allowing end users — and content writers — to retrieve relevant content. Refer to the taxonomy management tool for the appropriate terms for each element: keywords, product name, and category. When selecting terms for metadata, consider in what context the end user or the content writers might be searching for that information. Maybe they want to fix their cheque printing, so they might use the words 'print', 'cheque', and either 'fix' or 'won't'. Thinking from different points of view will help guide you to the most appropriate terms.

Notes are another element that can be used in all topics. Use them to differentiate important information from the main text. Reuse notes when possible. One of the following type attributes should be used to provide the note heading: note, tip, important, remember, or caution. Don't use notes within tables.

Related links should be used to manage links to further topics that could be of interest to the user, instead of using embedded links at the end of a topic. This helps to keep topics free from specific contexts, so they can be reused in other locations and easily updated in the ditamap. Links created via relationship tables will appear in the sidebar of the online content.

An inline link displays inside your content. Create inline links by inserting cross-references (xrefs) to topics, elements (local links), or external resources (websites). The text around the link should give the context and explain the link's relevancy. Use inline links sparingly as future changes in the link or the topic can be difficult to track. Only use one when the link is needed to understand the concept or complete the task.

- *Link to a specific topic* – When creating xrefs to topics use the topic's title as the link text. Do not use the link text as part of a sentence, for example, 'Set it as the default PDF viewer.' If the guide's topic is later renamed, that sentence might not make sense anymore. Put xref links in a separate sentence, using the following structure: 'For more information, see <xref>' or 'See <xref>'. Use either sentence directly after the information it relates to.

- *Link to a specific location* – Creating an inline link to an element will direct users to specific content in a topic. Insert a cross-reference in a topic that references an element ID. Assign element IDs that include the element type and a short summary. For example, an element ID on a step that describes how to select different types of checks would be 'selectCheckType'.

- *Link to a website* – Create an inline link by inserting a cross-reference in a topic that will bring the user to an external resource. Add any links to external resources to the external-link manager so we can easily manage them as the content is updated and links change. Use the same link format as is standard for other types of links. For example, 'Download the latest version of Adobe Reader, or update it, if you're already using it. For more information, see [xref to http://get.adobe.com/reader/]'.

Guidelines for a concept topic

When creating a title for a concept, use noun phrases that apply to the topic, for example 'Multi-currency' or 'What is Online Bill Pay?'. Don't start a title with 'about'. Convey the essential information users will need to understand a concept. Typically, a concept topic answers the question, 'What is this?'. Provide the context or the background information for a complex topic, but don't include any reference or procedural information. That should be split off into a separate reference topic or a task topic. Use a concept topic to define aspects of a product or service, and to describe important features.

Concept topic structure and elements

Paragraph element: Provide the information in brief paragraphs, with no more than three sentences per paragraph.

Unordered list and ordered list: Use these elements for information that needs to be grouped. Use ordered lists only when the information needs to be read in a specific order. Each list item must only consist of one short sentence.

Example element: Use this to illustrate the concept, but limit it to one sentence. It can be followed by another example or a section.

Section: Use this element to organise subsets of information within a larger topic. Provide a heading to announce the content that follows. If more than two sections are needed, break them up into separate topics.

Table: Use a table (sparingly) for information that is easier to comprehend side-by-side, for example, in comparisons. Don't use it to provide data or detailed facts, instead create a reference topic.

Guidelines for a task topic

When writing a title for a task, start with a verb that implies action. For example, 'Create an Intuit account'. Don't start with 'How to'. Provide step-by-step instructions for completing a task. Write each step clearly, and only include what's relevant to that step. Consider what background information a user might need before starting the procedure. You know you need a task topic if users need to find out how to do something.

General task topic structure and elements

Prerequisite element: Include this if there are activities the user needs to know or do before starting the current task. Refer to another topic (and include a link) if appropriate.

Context: Include this element if the task requires background information. Keep this section short. If it gets long, break it out into a separate concept topic.

Section: Use a maximum of two sections per task topic. A task that requires more should be broken up into separate tasks, or a task and a concept. Provide a heading to announce the content that follows (using the title element).

Step element: This is the main element within the topic, and it's limited to ten steps per task. Create further task topics to break down large tasks into manageable (and reusable) chunks. This element breaks down into the following list of sub-elements.

Command: Use one sentence to tell the user what they need to do to complete the step.

Step information: Include any extra information needed for the step. Keep it brief. Use this element to add a paragraph or a note related to a step.

Substeps: Only use this if leaving the page (and the current sequence of steps) would make the task overly complicated for the user. There is a limit of six substep elements within substeps, and only one use of substeps per task topic. Follow the same model as for steps.

Step result: If it isn't obvious what the outcome would be, describe the expected outcome of a step.

Step troubleshooting: Only use this element if there is a significant chance of the step failing, or if common mistakes are made at this step.

There are two further elements outside of the step element that appear at the end of the task topic.

Result: Describe the expected outcome of task completion only if it isn't obvious what the outcome would be. Use only one sentence.

Task troubleshooting: If there is a common problem encountered while performing this task, and the solution can be provided briefly (in a couple of sentences), use this element. Otherwise, create a separate troubleshooting topic.

Guidelines for a reference topic

When writing a title for a reference, use noun phrases that apply to the referenced information set. For example, 'Data that doesn't convert from QuickBooks Desktop to QuickBooks Online'. Provide specifications that support other topics. Reference topics are usually accessed more than once by users. Put content into easy-to-read structures like tables. Organise the content so that it can be quickly scanned. Use this topic type for reference information (think dictionary or data table), not concepts or procedures.

Reference topic structure and elements

Section: Provide a heading to announce the content that follows, and use a maximum of two sections. If the data needs to be split into multiple sections, create another topic for each.

Example: Include only if the reference needs further explanation. This should be brief, no longer than two to three sentences.

Any of the following elements may be used to organise data.

Simple table: Use this table to show information in regular rows and columns.

Complex table: Use this type of table when the data requires a more complex structure, for example, columns or rows to be spanned. Table captions and descriptions may be included.

Definitions list: Use this to create a list of terms and definitions. Provide descriptive headings.

Property list: Use this to list the properties of the topic. It can include the type, value, and a description.

Note: Create a note to highlight a specific part of the context. Do not use a note within a table.

Guidelines for a troubleshooting topic

When writing a title for a troubleshooting topic, use relevant nouns and include the issue or error. For example, 'Checks won't print' or 'Troubleshoot Print Checks'. Use this topic type for solutions to problems. Document common problems that have multiple solutions, and unusual problems that are reproducible. Include all possible remedies for the issue. Make sure that you include all the information for the situation. The troubleshooting topic uses a logical cause-remedy structure.

Troubleshooting topic structure and elements
Condition element: Describe the issue or problem that the topic will solve. Under what conditions does the issue occur?

Solution: This is the main element within the topic, and breaks down into the following sub-elements.

Cause: Create a brief title that acts as a hook as the user skims the page. Provide a short one-sentence description of what might be causing the issue.

Remedy: This contains the steps element. Use the same steps content model as outlined for the task topics, so that steps can be reused. Steps may be ordered, unordered, or informal. The content of the remedy element provides a potential solution to the issue.

Rewritten content type examples

Original concept topic

QuickBooksHelp
Intuit

posted 10-25-2018 12:52 AM ● last updated March 27, 2019 5:10 PM

About Multi-currency

This provides a brief description of the effects on the accounts and balances on your company file when turning on the Multi-Currency feature.

The feature Multi-currency is available on most QuickBooks online version, namely:

- QuickBooks Essentials
- QuickBooks Plus
- QuickBooks Advanced

If you need this feature, but your version doesn't support it and you're considering to upgrade, proceed to How do I upgrade my QuickBooks Online subscription or visit our website.

Multi-currency and accounts

You can assign a currency to most types of accounts, including customers, vendors, bank and credit card accounts, accounts receivable, and accounts payable.

Income and expense accounts always use your Home currency.

Your Home currency is the currency of the country where your business is physically located.

You can only assign one currency to each account or contact name, and you have to add a new account for each different currency that you will use in transactions.

Multi-currency fields

Once Multi-currency is activated, new fields will appear on some screens:

- **Chart of Accounts**: A **Currency** column appears on the Chart of Accounts, identifying each account's currency.
  Once an account has had a transaction posted to it, you can no longer change the account's currency,

- **Bank and Credit card registers**: A currency notation appears in the headings of the **Payment**, **Deposit**, **Sales tax,** and **Balance Due** columns on Bank and Credit card registers (or account histories).

More information about Multi-currency

See the following articles for more information about the Multi-currency feature

- How Multi-currency works
- How to turn on Multi-currency and add or delete currencies
- About exchange rates
- How to manually enter an exchange rate
- How to add a foreign currency account
- How to add transactions in a foreign currency
- How do I add foreign customers?
- How do I add foreign vendors/vendors?
- Understanding Home currency adjustment

Related discussions

- Set up and use Multi-currency
- How Multi-currency works
- How to turn on Multi-currency and add or delete cu...
- Multi-Currency: Journal Entry Error Message
- About exchange rates

Rewrite of a concept topic

Multi-currency

created 10-25-2018
revised 5-1-2019

This provides a brief description of the effects on the accounts and balances on your company file when you turn on the Multi-currency feature.

The Multi-currency feature is available on most QuickBooks online versions, namely:

- QuickBooks Essentials
- QuickBooks Plus
- QuickBooks Advanced

If you need this feature, but your version doesn't support it and you would like to upgrade, go to <xref href="">How do I upgrade my QuickBooks Online subscription</xref> or visit our website, <xref href="">Intuit QuickBooks</xref >

Multi-currency and accounts

You can assign a currency to most types of accounts, including customers, vendors, bank and credit card accounts, accounts receivable, and accounts payable.

Income and expense accounts always use your Home currency. Your Home currency is the currency of the country where your business is physically located.

You can only assign one currency to each account or contact name. Add a new account for each different currency that you will use in transactions.

Multi-currency fields

Once Multicurrency is activated, new fields will appear on some screens:

Chart of Accounts: A Currency column appears on the Chart of Accounts, identifying each account's currency. Once an account has had a transaction posted to it, you can no longer change the account's currency.

Bank and Credit card registers: A currency notation appears in the headings of the Payment, Deposit, Sales tax, and Balance Due columns on Bank and Credit card registers (or account histories).

DITA version

```xml
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE concept PUBLIC "-//OASIS//DTD DITA Concept//EN" "concept.dtd">
<concept id="multi_currency">
  <title>Multi-currency</title>
  <shortdesc>This provides a brief description of the effects on the accounts and balances on your company
file when you turn on the Multi-currency feature.</shortdesc>
  <prolog>
    <critdates>
      <created date="10-25-2018"/>
      <revised modified="5-1-2019"/>
    </critdates>
    <metadata>
      <category>Getting Started</category>
      <keywords>
        <keyword>multi-currency</keyword>
        <keyword>currency</keyword>
      </keywords>
      <prodinfo>
        <prodname>QuickBooks Essentials</prodname>
      </prodinfo>
      <prodinfo>
        <prodname>QuickBooks Plus</prodname>
      </prodinfo>
      <prodinfo>
        <prodname>QuickBooks Advanced</prodname>
      </prodinfo>
    </metadata>
  </prolog>
  <conbody>
    <p>The Multi-currency feature is available on most QuickBooks online versions, namely:</p>
    <ul>
      <li>QuickBooks Essentials</li>
      <li>QuickBooks Plus</li>
      <li>QuickBooks Advanced</li>
    </ul>
    <p>If you need this feature, but your version doesn't support it and you would like to upgrade, go to <xref
href="">How do I upgrade my QuickBooks Online subscription</xref> or visit our website, <xref href="">Intuit
QuickBooks</xref>.</p>
    <section>
      <title>Multi-currency and accounts</title>
      <p>You can assign a currency to most types of accounts, including customers, vendors, bank and
credit card accounts, accounts receivable, and accounts payable.</p>
      <p>Income and expense accounts always use your Home currency. Your Home currency is the currency
of the country where your business is physically located.</p>
      <p>You can only assign one currency to each account or contact name. Add a new account for each
different currency that you will use in transactions.</p>
    </section>
    <section>
      <title>Multi-currency fields</title>
      <p>Once Multicurrency is activated, new fields will appear on some screens:</p>
      <ul>
        <li>Chart of Accounts: A Currency column appears on the Chart of Accounts, identifying each
account's currency. Once an account has had a transaction posted to it, you can no longer change the
account's currency.</li>
        <li>Bank and Credit card registers: A currency notation appears in the headings of the Payment,
Deposit, Sales tax, and Balance Due columns on Bank and Credit card registers (or account histories).</li>
      </ul>
    </section>
  </conbody>
</concept>
```

Original reference topic

QuickBooksHelp
Intuit

posted 10-25-2018 08:51 PM ● last updated April 19, 2019 7:39 PM

What data doesn't convert from QuickBooks Desktop to QuickBooks Online?

Find out what data don't convert when you migrate from QuickBooks Desktop to QuickBooks Online.

Here's the complete list of features with the data changes that will occur after migration to help you decide which product is suitable for your business.

> **Note:** While you're trying QuickBooks Online, we highly recommend keeping your data file in QuickBooks Desktop. We also suggest that you maintain your transactions on both sets of books until you determine if QuickBooks Online is right for your business. Also, pay close attention if you have recurring transactions.

See the condensed version of the list that is not supported and the guide to converting from QuickBooks Desktop to QuickBooks Online for more information.

- To confirm if a feature is not converted
- Size limitations when converting from QuickBooks Desktop to QuickBooks Online

List of not converted features

- Chart of Accounts
- Attachments
- Audit Trail
- Bills and Bill payments
- Budget
- Closing date
- Credit card changes
- Custom fields on lists
- Customer and Jobs
- Discount
- Documents
- Estimates
- Finance charges
- Group items
- Inactive elements on lists
- Inventory
- Invoice
- Journal entry
- Layout customization (sales from templates)
- Memorized reports
- Multi - currency
- Online banking
- Online bill payment
- Other names
- Password
- Payroll: How does it convert from Desktop
- Payroll items
- Pending sales
- Price levels
- Printing mailing labels
- Progress invoicing
- Purchase orders
- QuickBooks Payments
- Receive items
- Reconcile
- Recurring transactions
- Reimbursable expenses
- Reminders
- Reports
- Report customization
- Sales rep (converts as a custom field)
- Sales tax and Value Added Tax (VAT)
- Ship via
- Shortcut list
- Tax support
- Terms
- Type: customer, vendor, job
- To Do list
- Users and Permissions
- Vendor
- Write letters

Related discussions

- Convert QuickBooks Desktop file to QuickBooks Onli...
- Convert from QuickBooks Desktop to QuickBooks Onli...
- Export data file from QuickBooks Online to Desktop
- Convert Quicken data to QuickBooks Desktop
- What to do after converting from QuickBooks Deskto...

Rewrite of a reference topic

What data doesn't convert from QuickBooks Desktop to QuickBooks Online?

created 10-25-2018
revised 5-1-2019

Here's the complete list of features with the data changes that will occur after migration to help you decide which product is suitable for your business.

> **Note**: While you're trying QuickBooks Online, keep your data file in QuickBooks Desktop. Maintain your transactions on both sets of books until you determine if QuickBooks Online is right for your business. Also, QuickBooks Online Simple Start does not support recurring transactions.

Features not converted

Chart of Accounts	• The bank account number (if any) and notes (if any) are not converted. • QuickBooks Online has an additional level of account typing called the "Detail Type". • For accounts where the detail type is obvious (Example: Undeposited Funds), the conversion process assigns that detail type. • For accounts where it isn't clear what the detail type should be (the majority of accounts are like this), the conversion process assigns a generic detail type within the type, such as Other Miscellaneous Income which can be edited later.
Attachments	Attachments in your QuickBooks Desktop file is not converted in QuickBooks Online.
Audit trail	• The audit trail in QuickBooks Desktop is not converted to QuickBooks Online. • QuickBooks Online has its own automatic Audit Log with a detailed audit trail of every transaction that is added or changed, and the log in/out of users accessing the file.
Bills	Item receipts are converted to Bills. The Bill Received checkbox is not convert.
Bill payments	The discount applied to a bill in QuickBooks Desktop is converted as a Vendor Credit. The address on the bill payment check is replaced by Vendor address in Vendor list.
Budget	Budgets are only available in QuickBooks Online Plus and Advanced. Only Profit and Loss budget types convert to QuickBooks Online.
Closing date	Your QuickBooks Desktop closing date is converted but the password is not.

DITA version

```xml
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE reference PUBLIC "-//OASIS//DTD DITA Reference//EN" "reference.dtd">
<reference id="what_data_doesn_t_convert_from_quickbooks_desktop_to_quickbooks_online">
  <title>What data doesn't convert from QuickBooks Desktop to QuickBooks Online?</title>
  <shortdesc>Here's the complete list of features with the data changes that will occur after migration to help
you decide which product is suitable for your business.</shortdesc>
  <prolog>
    <critdates>
      <created date="10-25-2018"/>
      <revised modified="5-1-2019"/>
    </critdates>
    <metadata>
      <category>Getting Started</category>
      <keywords>
        <keyword>desktop</keyword>
        <keyword>online</keyword>
      </keywords>
      <prodinfo>
        <prodname>QuickBooks Desktop</prodname>
      </prodinfo>
      <prodinfo>
        <prodname>QuickBooks Online</prodname>
      </prodinfo>
    </metadata>
  </prolog>
  <refbody>
    <section>
      <p><note type="note">While you're trying QuickBooks Online, keep your data file in QuickBooks
Desktop. Maintain your transactions on both sets of books until you determine if QuickBooks Online is right for
your business. Also, QuickBooks Online Simple Start does not support recurring transactions.</note></p>
    </section>
    <section>
      <title>Features not converted</title>
    </section>
    <table>
      <tgroup cols="2">
        <tbody>
          <row>
            <entry>Chart of Accounts</entry>
            <entry>
              <ul>
                <li>The bank account number (if any) and notes (if any) are not converted.</li>
                <li>QuickBooks Online has an additional level of account typing called the "Detail
Type."</li>
                <li>For accounts where the detail type is obvious (Example: Undeposited Funds), the
conversion process assigns that detail type.</li>
                <li>For accounts where it isn't clear what the detail type should be (the majority of accounts
are like this), the conversion process assigns a generic detail type within the type, such as Other Miscellaneous
Income which can be edited later.</li>
              </ul>
             </entry>
          </row>
          <row>
            <entry>Attachments</entry>
            <entry>Attachments in your QuickBooks Desktop file is not converted in
              QuickBooks Online.</entry>
          </row>
          <row>
            <entry>Audit trail</entry>
            <entry>
              <ul>
                <li>The audit trail in QuickBooks Desktop is not converted to QuickBooks Online.</li>
                <li>QuickBooks Online has its own automatic Audit Log with a detailed audit trail of every
transaction that is added or changed, and the log in/out of users accessing the file.</li>
              </ul>
```

</entry>
</row>
<row>
<entry>Bills</entry>
<entry>Item receipts are converted to Bills. The Bill Received checkbox is not converted.</entry>
</row>
<row>
<entry>Bill payments</entry>
<entry>The discount applied to a bill in QuickBooks Desktop is converted as a Vendor Credit. The address on the bill payment check is replaced by Vendor address in Vendor list.</entry>
</row>
<row>
<entry>Budget</entry>
<entry>Budgets are only available in QuickBooks Online Plus and Advanced. Only Profit and Loss budget types convert to QuickBooks Online.</entry>
</row>
<row>
<entry>Closing date</entry>
<entry>Your QuickBooks Desktop closing date is converted but the password is not.</entry>
</row>
</tbody>
</tgroup>
</table>
</refbody>
</reference>

Original task topic and troubleshooting topic (combined)

QuickBooksHelp
Intuit

posted 10-24-2018 09:57 PM ● last updated March 12, 2019 12:46 AM

Align how your checks print

168 Helpful Votes

Printing checks is quick and easy in QuickBooks Online. Follow these simple steps to setup print checks.

> **Note**: We can only guarantee compatibility with checks specifically designed for QuickBooks Online. Check out the Intuit Market to find checks designed exclusively for QuickBooks.

Set up Print Checks

1. From the left menu, select **Expenses**.
2. Choose **Print Checks**.
3. At the bottom of the page, select **Print setup**.
4. Select the type of checks you have: voucher or standard.
   Note: Depending on your region, there may only be one type available.
5. Load blank paper into your printer. You'll print on blank paper first, so that if you need to correct alignment, you won't waste actual checks.
6. Select **View preview and print sample**, then choose the Print icon.
   Note: Follow Solution 1 if you're unable to print, or the printed sample doesn't align with the blank check.

Solution 1: Set up Adobe Reader

1. Download the latest version of Adobe Reader, or update it, if you're already using it. This will control printing checks in QuickBooks Online.
2. After downloading, installing, or updating Adobe Reader, set it as the default PDF viewer for your browser.

2. After downloading, installing, or updating Adobe Reader, set it as the default PDF viewer for your browser.

3. Print another sample using the steps you used in Method 1, if this doesn't work, proceed to Solution 2.

Solution 2: Fine-tune alignment

1. On the Print checks setup window, select **No, continue setup** at the bottom right, twice until you get to Fine-tune alignment page.
2. Drag the grid inside the large square to the place where it appears on your printout. QuickBooks Online will figure out how to adjust the alignment.
   Note: QuickBooks Online uses the numbers on the vertical and horizontal to figure where exactly to print the check amount. These numbers change whenever you drag the grid.
3. After adjusting the grid, print another sample using the steps you used in Method 1 then check the alignment again. Continue to fine-tune until the alignment is OK.
4. Select **View preview and print sample** in the lower left, and choose **Print** icon at the top right.
5. After the sample is printed on plain paper, hold it up to the light against a check and see if the alignment is correct.
6. If you still need to do some fine tuning, close the sample and then go back to the grid to make adjustments, then print a fresh sample.
7. Select **Finish Setup** when your sample's alignment looks correct.
8. Apply the following changes:
   Note: Changes should apply to most printer versions - make changes for the options you see below.

Related discussions

How to align preprinted paychecks

Set up printing alignment for 1099 Tax Forms

How to print checks

Align checks, invoices, and other forms for contin...

How to print sales forms

a. **Page Scaling**: set to **None**
b. **Auto-Rotate and Center** must not be checked.
c. Make sure that **Choose Paper Source by PDF size** is check.
d. If you're using **Adobe Acrobat**, these options are slightly different:
    i. Under **Page Size & Handling**
        - Select **Actual Size**
        - Select **Choose paper source by PDF size**
    ii. Under **Orientation**
        - Select **Auto portrait/landscape**

For additional questions related to printing paychecks, pay stubs, and forms, proceed to Troubleshoot printing paychecks, pay stubs and forms.

Other related topic

- Set up alignment for invoices, sales receipts, and other forms
- Set up alignment for preprinted paycheck
- Set up alignment for 1099 Tax Forms

Rewrite of a troubleshooting topic

Troubleshoot Print Checks

created 10-24-2018
revised 5-1-2019

What to do when checks won't print, or the printed sample doesn't align with the blank check.

Adobe Reader not set up

1. Download the latest version of Adobe Reader, or update it if you're already using it. This will control printing checks in QuickBooks Online. See <xref href="https://get.adobe.com/reader/" scope="external" format="html">Get Adobe Reader.</xref>
2. After downloading, installing, or updating Adobe Reader, set it as the default PDF viewer for your browser. See <xref href="https://helpx.adobe.com/acrobat/using/display-pdf-in-browser.html" scope="external" format="html">Display PDF in browser.</xref>
3. Load blank paper into your printer. You'll print on blank paper first, so that if you need to correct alignment, you won't waste actual checks.
4. Print another sample using the steps you used in **Align how your checks print**. See <xref href="align_how_your_checks_print.dita">Align how your checks print.</xref>
5. If this doesn't work, proceed to **Check not aligning on paper**.

Check not aligning on paper

1. On the Print checks setup window, select **No, continue setup** at the bottom right, twice until you get to the Fine-tune alignment page.
2. Drag the grid inside the large square to the place where it you would like it to appear on your printout. QuickBooks Online will figure out how to adjust the alignment. QuickBooks Online uses the numbers on the vertical and horizontal to calculate where exactly to print the check amount. These numbers change whenever you drag the grid.
3. After adjusting the grid, print another sample using the steps you used in **Adobe Reader not set up**, then check the alignment again. Continue to fine-tune until the alignment is okay.
4. Select **View preview and print sample** in the lower left, and choose Print icon at the top right.
5. After the sample is printed on plain paper, hold it up to the light against a check and see if the alignment is correct.
6. If you still need to do some fine tuning, close the sample and then go back to the grid to make adjustments, then print a fresh sample.
7. Select **Finish Setup** when your sample's alignment looks correct.

Troubleshoot printer setup

Note: Changes should apply to most printer versions – make changes for the options you see below.

1. **Page Scaling**: set to **None**.
2. Uncheck **Auto-Rotate and Center**.
3. Make sure that **Choose Paper Source by PDF** size is checked.
4. If you're using Adobe Reader, these options are slightly different:
   a. Under **Page Size & Handling**, select **Actual Size**, then select **Choose paper source by PDF size**.
   b. Under **Orientation**, select **Auto portrait/landscape**.

DITA version

```xml
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE troubleshooting PUBLIC "-//OASIS//DTD DITA Troubleshooting//EN" "troubleshooting.dtd">
<troubleshooting id="troubleshoot_print_checks">
  <title>Troubleshoot Print Checks</title>
  <shortdesc>What to do when checks won't print, or the printed sample doesn't align with the blank
    check.</shortdesc>
  <prolog>
    <critdates>
      <created date="10-24-2018"/>
      <revised modified="5-1-2019"/>
    </critdates>
    <metadata>
      <category>Getting Started</category>
      <keywords>
        <keyword>checks</keyword>
        <keyword>print</keyword>
      </keywords>
      <prodinfo>
        <prodname>QuickBooks Online</prodname>
      </prodinfo>
    </metadata>
  </prolog>
  <troublebody>
    <troubleSolution>
      <cause>
        <title>Adobe Reader not set up</title>
      </cause>
      <remedy>
        <steps>
          <step>
            <cmd>Download the latest version of Adobe Reader, or update it if you're already using it. This
will control printing checks in QuickBooks Online. See <xref href="https://get.adobe.com/reader/"
scope="external" format="html">Get Adobe Reader.</xref></cmd>
          </step>
          <step>
            <cmd>After downloading, installing, or updating Adobe Reader, set it as the default PDF viewer
for your browser. See <xref href="https://helpx.adobe.com/acrobat/using/display-pdf-in-browser.html"
scope="external" format="html">Display PDF in browser.</xref></cmd>
          </step>
          <step>
            <cmd>Load blank paper into your printer. You'll print on blank paper first, so that if you need to
correct alignment, you won't waste actual checks.</cmd>
          </step>
          <step>
            <cmd>Print another sample using the steps you used in <b>Align how your checks print</b>.
See <xref href="align_how_your_checks_print.dita">Align how your checks print.</xref> If this doesn’t work,
proceed to <b>Check not aligning on paper.</b></cmd>
          </step>
        </steps>
      </remedy>
    </troubleSolution>
    <troubleSolution>
      <cause>
        <title id="check_not_aligned">Check not aligning on paper</title>
      </cause>
      <remedy>
        <steps>
          <step>
            <cmd>On the Print checks setup window, select <b>No, continue setup</b> at the bottom right,
twice until you get to the Fine-tune alignment page.</cmd>
          </step>
          <step>
            <cmd>Drag the grid inside the large square to the place where it you would like it to appear on
your printout. QuickBooks Online will figure out how to adjust the alignment.</cmd>
            <info>QuickBooks Online uses the numbers on the vertical and horizontal to calculate where
```

```xml
exactly to print the check amount. These numbers change whenever you drag the grid.</info>
          </step>
          <step>
            <cmd>After adjusting the grid, print another sample using the steps you used in <b>Adobe
Reader not set up</b>, then check the alignment again. Continue to fine-tune until the alignment is OK.</cmd>
          </step>
          <step>
            <cmd>Select <b>View preview and print sample</b> in the lower left, and choose Print icon at
the top right.</cmd>
          </step>
          <step>
            <cmd>After the sample is printed on plain paper, hold it up to the light against a check and see if
the alignment is correct.</cmd>
          </step>
          <step>
            <cmd>If you still need to do some fine tuning, close the sample and then go back to the grid to
make adjustments, then print a fresh sample.</cmd>
          </step>
          <step>
            <cmd>Select <b>Finish Setup</b> when your sample's alignment looks correct.
            </cmd>
          </step>
        </steps>
      </remedy>
    </troubleSolution>
    <troubleSolution>
      <cause>
        <title>Finish printer setup</title>
        <note type="note" id="printer_version">Changes should apply to most printer versions – make
changes for the options you see below.</note>
      </cause>
      <remedy>
        <steps>
          <step>
            <cmd><b>Page Scaling</b>: set to <b>None.</b></cmd>
          </step>
          <step>
            <cmd>Uncheck <b>Auto-Rotate and Center</b>.</cmd>
          </step>
          <step>
            <cmd>Make sure that <b>Choose Paper Source by PDF</b> size is checked.</cmd>
          </step>
          <step>
            <cmd>If you're using Adobe Reader, these options are slightly different:</cmd>
            <substeps>
              <substep>
                <cmd>Under <b>Page Size &amp; Handling</b>, select <b>Actual Size</b>, then select
<b>Choose paper source by PDF size.</b></cmd>
              </substep>
              <substep>
                <cmd>Under <b>Orientation</b>, select <b>Auto portrait/landscape.</b></cmd>
              </substep>
            </substeps>
          </step>
        </steps>
      </remedy>
    </troubleSolution>
  </troublebody>
</troubleshooting>
```

Rewrite of a general task topic

Align how your checks print

created 10-24-2018
revised 5-1-2019

Follow these steps to setup the Print Checks feature in QuickBooks Online.

Note: We can only guarantee compatibility with checks specifically designed for QuickBooks Online. Check out the Intuit Market to find checks designed exclusively for QuickBooks.

Setup Print Checks:

1. From the left menu, select Expenses.
2. Choose Print Checks.
3. At the bottom of the page, select Print setup.
4. Select the type of checks you have: voucher or standard. Depending on your region, there may only be one type available.
5. Load blank paper into your printer. You'll print on blank paper first, so that if you need to correct alignment, you won't waste actual checks.
6. Select View preview and print sample, then choose the Print icon.

Troubleshooting: In some cases the printed sample doesn't align with the blank check, or you may be unable to print. For more information, see **Error! Hyperlink reference not valid.**

DITA version

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE task PUBLIC "-//OASIS//DTD DITA General Task//EN" "generalTask.dtd">
<task id="align_how_your_checks_print">
  <title>Align how your checks print</title>
  <shortdesc>Follow these steps to setup the Print Checks feature in QuickBooks Online.</shortdesc>
  <prolog>
    <critdates>
      <created date="10-24-2018"/>
      <revised modified="5-1-2019"/>
    </critdates>
    <metadata>
      <category>Getting Started</category>
      <keywords>
        <keyword>checks</keyword>
        <keyword>print</keyword>
      </keywords>
      <prodinfo>
        <prodname>QuickBooks Online</prodname>
```

```xml
      </prodinfo>
    </metadata>
  </prolog>
  <taskbody>
    <prereq>
      <note type="note">We can only guarantee compatibility with checks specifically designed for QuickBooks Online. Check out the Intuit Market to find checks designed exclusively for QuickBooks.</note>
    </prereq>
    <context>
      <p>Setup Print Checks:</p>
    </context>
    <steps>
      <step>
        <cmd>From the left menu, select Expenses.</cmd>
      </step>
      <step>
        <cmd>Choose Print Checks.</cmd>
      </step>
      <step>
        <cmd>At the bottom of the page, select Print setup.</cmd>
      </step>
      <step>
        <cmd>Select the type of checks you have: voucher or standard. Depending on your region, there may only be one type available.</cmd>
      </step>
      <step>
        <cmd>Load blank paper into your printer. You'll print on blank paper first, so that if you need to correct alignment, you won't waste actual checks.</cmd>
      </step>
      <step>
        <cmd>Select View preview and print sample, then choose the Print icon.</cmd>
      </step>
    </steps>
    <tasktroubleshooting>
      <note>In some cases the printed sample doesn't align with the blank check, or you may be unable to print. For more information, see <xref>Troubleshooting Print Checks.</xref></note>
    </tasktroubleshooting>
  </taskbody>
</task>
```

How the issues are addressed with the rewrite

In all the topics, some of the text content needed to be rewritten for usage (to be grammatically correct or easy to understand) or for consistency. Some sentences were shortened, and some were put into the active voice.

The concept title was changed to a simple noun, for clarity and consistency. The long list of related links embedded at the bottom of the concept topic was removed, for insertion into a relationship table in the ditamap. This will make it easier to update the links in the future, and to keep track of them to ensure that there are no dead links. (The related links managed via the ditamap appear in the sidebar, on the top right.)

In the reference topic, there were two opening paragraphs that seemed like short descriptions. The first one was redundant as it simply paraphrased the title, so I deleted it and made the second paragraph the short description. Some links had been embedded just before the information. I deleted the links. They should be placed in a relationship table for display in the sidebar. I rewrote the table title so that the most important word, ‘features’, would be the first word the user would see. Two sets of context-type information appeared before the table. They belong in a separate concept topic, and instead should be referred to with an inline link, as well as being added to the ditamap relationship table. The list of features was too long and difficult to skim because the terms appeared as underlined links. Also, the user had to click on each one in succession to read the associated information. I turned that list into a table. This makes it easier to scan for relevant content.

The short description in the task topic was rewritten so that it didn’t contain a value judgement (‘quick and easy’ and ‘simple’) and so that it consisted of one sentence. The task topic was too long so I cut down to just the first section, ‘Set up Print Checks’. The two tasks that followed are actually troubleshooting, so I set them up in a separate troubleshooting topic. The original structure meant there were too many potential problems and solutions to read in a task topic.

The resulting troubleshooting topic needed a few structural changes. The titles needed the numerical order removed, for potential reuse or change in a future update. Also, the different tasks (both the original general task and the in-topic solutions) were originally referred to as ‘Method 1’ and ‘Method 2’, which was confusing and could lead to difficulties if the topic was rewritten or changed at some point. All references to solutions or tasks now refer to the title or heading. The final nested instructions for changing the printer setup were taken out and put into a separate solution, to make it easier to understand and easier to reuse. The list of related links that were embedded at the bottom of the concept topic were removed, for insertion into a relationship table in the ditamap. That makes them easier to keep track of and easier to make sure they’re up to date.

References

The following QuickBooks webpages are shown in this report:

What data doesn't convert from QuickBooks Desktop to QuickBooks Online
https://quickbooks.intuit.com/community/Help-Articles/What-data-doesn-t-convert-from-QuickBooks-Desktop-to-QuickBooks/m-p/186758
Align how your checks print
https://quickbooks.intuit.com/community/Getting-Started/Align-how-your-checks-print/m-p/185561
About Multi-currency
https://quickbooks.intuit.com/community/Getting-Started/About-Multi-currency/m-p/185951

The following QuickBooks webpages have been referred to in this report:

How to print checks
https://quickbooks.intuit.com/community/Help-Articles/How-to-print-checks/td-p/186099
Convert from QuickBooks Desktop to QuickBooks Online
https://quickbooks.intuit.com/community/Getting-Started/Convert-from-QuickBooks-Desktop-to-QuickBooks-Online/td-p/186229
What isn't imported when you move from QuickBooks Desktop to QuickBooks Online?
https://quickbooks.intuit.com/community/Getting-Started/What-isn-t-imported-when-you-move-from-QuickBooks-Desktop-to/m-p/185840
What is the difference between an invoice, sales receipt, bill, and statement?
https://community.intuit.com/articles/1782100-what-is-the-difference-between-an-invoice-sales-receipt-bill-and-statement
What is the difference between bills, checks, and expenses?
https://community.intuit.com/articles/1782067-what-is-the-difference-between-bills-cheques-and-expenses
Transfer funds between accounts
https://quickbooks.intuit.com/community/Banking-and-bank-feeds/Transfer-funds-between-accounts/td-p/186729
What is Online Bill Pay?
https://quickbooks.intuit.com/community/Help-Articles/What-is-Online-Bill-Pay/td-p/186144
How to create an Intuit account
https://community.intuit.com/articles/1777068-how-to-create-an-intuit-account