

### Course Content (½ day)

#### ***Bank accounts Dashboard***

- Add bank account
- Add credit card
- Add PayPal account
- Transfer money
- Bank rules
- Uncoded statements lines

#### ***Bank feeds***

- Set up a Bank feed
- Get help on bank feeds
- Import a manual statement

#### ***Banking transactions***

- Spend money
- Receive money

#### ***Search transactions***

- Search account transactions
- Search bank statements
- View uncoded statement lines

#### ***Bank rules***

- Spend money rules
- Receive money rules
- Transfer money rules

#### ***Cash coding***

- Code multiple line items at once

#### ***Bank reconciliations***

- Match items
- Create a new item
- Transfer money
- Add notes to unreconciled items
- Use Find and Match
- Bank reconciliation summary report