



Get started with class tracking in QuickBooks Online

To use classes to track your PPP loan, you need to set up a Class specifically for your PPP Loan and Expenses. The first step is to turn on Class Tracking.

Learn how to use classes to track income, expenses, or profitability by business segment. You can do this in QuickBooks Online Plus and Advanced.

Note: You need QuickBooks Plus or Advanced. You can upgrade quickly and easily by calling Intuit or [CLICK HERE](#) to access instructions for doing it online.

Step 1: Turn on class tracking

When you're ready, here's how to turn on class tracking. If you need to assign classes to your employees, you can also turn on class tracking for Online Payroll.

1. Go to **Settings** ⚙️ and select **Account and Settings**.
2. Select **Advanced**. Then select **Edit** ✎️ in the Categories section.
3. Select **Track classes**.
4. Select **Warn me when a transaction isn't assigned a class**. This is optional, but it's good to turn on so when you look at reports, you know everything got classified.
5. Select the **Assign classes** ▼ dropdown, then select **One to entire transaction** or **One to each row in transaction**.

Tip: Select One to entire transaction if you don't need to enter a class for each product you sell to a customer. You can save time and assign one class to the entire invoice or sales receipt instead.

6. Select **Save**, then **Done**.

This adds a class field or column on your forms so you can assign transactions a class.

Step 2: Set up your class list

How to add a new class

Note: Only admins in QuickBooks Plus and Advanced can create classes

1. Go to **Settings** ⚙️ and then **All Lists**.
2. Select **Classes**.
3. Select **New**. Give this class a name.
4. To add a sub-class, select **Is a sub-class** and select the main class. You can nest up to five classes.
5. Select **Save**.

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How to delete a class

If you no longer need a class, you can make it inactive.

1. Go to **Settings** ⚙️ and then **All Lists**.
2. Select **Classes**.
3. Find the class you want to delete.
4. Select the **small arrow** ▼ next to Run report, then **Make inactive (reduces usage)**.

How to restore a deleted class

If you need to, you can restore a class you deleted.

1. Go to **Settings** ⚙️ and then **All Lists**.
2. Select **Classes**.
3. Select **Settings** ⚙️ next to the Print icon, then select **Include inactive**.
4. Find the class you want to restore, then select **Make active**.

Step 3: Track your transactions by class

Tag a class to a transaction

Tip: You have the option to assign one class to an entire invoice, receipt, or any other customer transaction. This saves you time if you don't need to track each product you sell by class. If you want to track your customer transactions this way, follow the steps in "Change how you tag a class in customer transactions" section.

1. Select + **New**.
2. Select the type of transaction you want to record.
3. Add the details of the transaction.
4. Assign a class:
 - a. To assign one to entire invoice or receipt, select the **Class** ▼ drop-down at the top (if you set One to entire transaction).
 - b. To assign one to each item (or row), add the class in the **Class** column (if you set One to each row in transaction).

Tip: Need a new class? Select + **Add new** at the top of the drop-down list to quickly create a new one.

5. Save your transaction.

If you download bank transactions

- You won't have to add classes again when you match downloads to existing transactions in your books.
- But if a downloaded bank transaction doesn't match with any existing transaction, you can assign a class to it and add it as a new record.

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Change how you tag a class in customer transactions

1. Go to **Settings** ⚙️ and select **Account and Settings**.
2. Select **Advanced** then select **Edit** ✎️ in the Categories section.
3. Select **Track classes**.
4. Select the **Assign classes** ▼ drop-down, then select **One to entire transaction** or **One to each row in transaction**.
5.
Tip: Select One to entire transaction if you don't need to enter a class for each product you sell to a customer.
6. Select **Save**, then **Done**.

Step 4: Run reports by class

To get started, go to **Reports**, then select **Standard**. Once you're there, here's what you can do.

See sales performance by class

Go to the "Sales and customers" group of reports. Then, run these reports:

Sales by Class Detail. This groups your sales by class, and shows more info, like date, type, product or service, quantity, rate, amount, and balance.

Sales by Class Summary. This groups your total sales by class.

See your business spending by class

Go to the "Expenses and vendors" group of reports, then run:

Purchases by Class detail. This groups your purchases by class.

See your profitability by class

Go to the "Business overview" group of reports, then run:

Profit and Loss by Class. This groups your income, expenses, and net income by class.

See transactions and balances by class in other reports

You can also customize some reports (like expenses by vendor summary) to group info by class.

1. Go to the top of a report.
2. Select **Display columns by** ▼ (or **Group by** ▼), and then **Class**.