



QuickBooks Online Cheat Sheet for Nonprofits (2025)

Here's a quick reference to some of the latest (and most helpful) QBO features for nonprofit financial management, plus how to put them to work for your organization or clients.

Custom Tags for Better Tracking

Use tags to track events, campaigns, or board-restricted funds without adding to your chart of accounts. Great for cross-cutting expenses.

Recurring Transactions Enhancements

Automate monthly allocations, grant disbursements, or regular bills with new flexibility in scheduling and reminders.

Receipt Capture + Expense Matching

Staff can snap photos or email receipts directly to QBO, reducing manual tracking and missing documentation.

Custom Reports + Dashboard Filters

Create filtered reports for funders, board members, or internal management—show restricted/unrestricted balances or grant spending easily.

Class + Location Enforcement

Require program or grant tagging on transactions—great for clean financial reports and avoiding missed coding.

Advanced Reporting (QBO Advanced Only)

Build dashboards and auto-schedule reports for boards, funders, or EDs who want regular updates.