

QuickBooks Online Seminar

October 8 and 15, 2021
Fridays

New Mexico Small Business Development Center Webinar

Dr. Sandra Taylor-Sawyer

Director, NMSBDC at CCC

QuickBooks ProAdvisor

Business Owner

Bachelors in Accounting

Masters Business Administration



Part 1: Topics

Topic 1: Converting from QuickBooks Desktop to QuickBooks Online

Topic 2: Introducing QuickBooks Online

Topic 3: Navigating QuickBooks Online

Topic 4: Chart of Accounts

Topic 5: Products and Services

Topic 6: Vendors, Expenses, and Purchases

Topic 7: Time Tracking, Employees, and Subcontractors

Topic 8: Customers and Sales Transactions

“Did You Know?”

Odds against small businesses:

20% fail in the first year

50% fail in the first 5 years

Odds of success go up 89% if the small business works with an accounting professional and follows their advice



QuickBooks Online Seminar

TOPIC 1: CONVERTING FROM QUICKBOOKS DESKTOP TO QUICKBOOKS ONLINE

Converting from QuickBooks Desktop to QuickBooks Online

Business is better with a ProAdvisor.

A ProAdvisor is a QuickBooks-certified independent accounting pro who can provide strategic insights to drive small business success.

Find an expert in:

- ☐ Accounting & Bookkeeping
- ☐ Tax & Financial Planning
- ☐ QuickBooks Setup & Consultation


Find an accountant or bookkeeper who loves your business as much as you do.

"We think of Jay like a partner; he's invested in our success."

Nichole Schoener & Frannie Wilson
Co-owners, Paperie and Pen

"My role is to create clarity to help them make better decisions for their business."

Jay Holmee
CPA, Blueback Accounting



QuickBooks Online Seminar

TOPIC 2: INTRODUCING QUICKBOOKS ONLINE

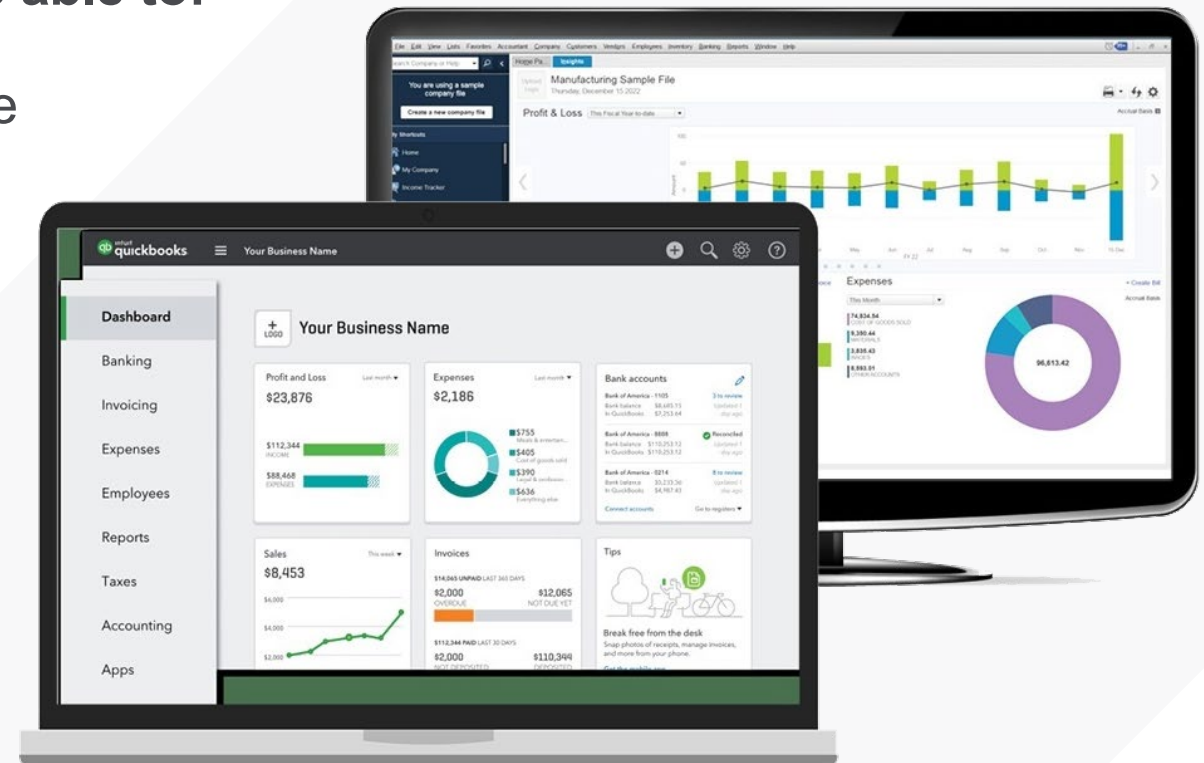
Topic 2: Introducing QuickBooks Online

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Identify the benefits of using QuickBooks Online

Determine which subscription level of QuickBooks Online is best for your business



Technical Benefits

- ✓ Cloud-based software (<https://qbo.intuit.com>)
- ✓ QuickBooks Mobile and Desktop apps
- ✓ Accessible across multiple operating systems and devices
- ✓ Real-time, multi-user access from anywhere
- ✓ Hosted, updated, and secured by Intuit servers using bank-level 128-bit SSL encryption
- ✓ Integrated document management
- ✓ Ecosystem of apps with seamless integration
- ✗ Less data entry
- ✗ No expensive equipment or networks to maintain
- ✗ No Accountant Copy to manage
- ✗ No expensive equipment needed
- ✗ No networks to maintain
- ✗ No continual software updates
- ✗ No backups required

Subscription Levels

Pick your flavor

Buy now for 50% off for 3 months* ☒ Free trial for 30 days

Small Business ⓘ

MOST POPULAR

Simple Start

~~\$25~~
\$12/mo

Buy now

Essentials

~~\$40~~
\$20/mo

Buy now

Plus

~~\$70~~
\$35/mo

Buy now

Advanced

~~\$150~~
\$75/mo

Buy now

Need help choosing a plan?

|

1.844.435.1305

|

[Schedule a call](#)

intuit quickbooks.

Intuit Confidential and Proprietary 10

Subscription Level Features

<https://quickbooks.intuit.com/pricing/>

MOST POPULAR			
<div>Simple Start</div> <div>\$25 \$12/mo</div> <div>Buy now</div> <div><div>▼ Track income & expenses</div><div>▼ Capture & organize receipts</div><div>▼ Maximize tax deductions</div><div>▼ Invoice & accept payments</div><div>▼ Track miles</div><div>▼ Run general reports</div><div>▼ Send estimates</div><div>▼ Track sales & sales tax</div><div>▼ Manage 1099 contractors</div></div>	<div>Essentials</div> <div>\$40 \$20/mo</div> <div>Buy now</div> <div><div>▼ Track income & expenses</div><div>▼ Capture & organize receipts</div><div>▼ Maximize tax deductions</div><div>▼ Invoice & accept payments</div><div>▼ Track miles</div><div>▼ Run enhanced reports</div><div>▼ Send estimates</div><div>▼ Track sales & sales tax</div><div>▼ Manage 1099 contractors</div><div>▼ Manage bills</div><div>▼ Track time</div><div>▼ Includes 3 users</div></div>	<div>Plus</div> <div>\$70 \$35/mo</div> <div>Buy now</div> <div><div>▼ Track income & expenses</div><div>▼ Capture & organize receipts</div><div>▼ Maximize tax deductions</div><div>▼ Invoice & accept payments</div><div>▼ Track miles</div><div>▼ Run comprehensive reports</div><div>▼ Send estimates</div><div>▼ Track sales & sales tax</div><div>▼ Manage 1099 contractors</div><div>▼ Manage bills</div><div>▼ Track time</div><div>▼ Includes 5 users</div><div>▼ Track project profitability</div><div>▼ Track inventory</div></div>	<div>Advanced</div> <div>\$150 \$75/mo</div> <div>Buy now</div> <div><div>▼ Track income & expenses</div><div>▼ Capture & organize receipts</div><div>▼ Maximize tax deductions</div><div>▼ Invoice & accept payments</div><div>▼ Track miles</div><div>▼ Run most powerful reports</div><div>▼ Send estimates</div><div>▼ Track sales & sales tax</div><div>▼ Manage 1099 contractors</div><div>▼ Manage & pay bills</div><div>▼ Track time</div><div>▼ Includes 25 users</div><div>▼ Track project profitability</div><div>▼ Track inventory</div><div>▼ Business analytics & insights</div><div>▼ Batch import & send</div><div>▼ Customize access by role</div><div>▼ Dedicated account manager</div><div>▼ On-demand online training</div><div>▼ Restore company data</div><div>▼ Automate workflows</div></div>

QuickBooks Online Simple Start

Track Income & Expenses

Capture & organize receipts

Maximize tax deductions

Invoice & accept payments

Run basic reports

Send estimates

Track mileage

Manage 1099 contractors

Track sales & sales tax

1 user

2 Accountant users (Outsourced Accounting firm and/or Bookkeeping Firm)

20+ standard reports

Simple Start

~~\$25~~

\$12/mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run general reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors

QuickBooks Online Essentials

Everything in Simple Start, plus:

Manage bills (Accounts Payable)

Multiple currencies

Recurring transactions

Track time

Delayed charges & credits

Unlimited users for time tracking

Track billable hours by customer

Multiple users (up to 3) with user permissions

40+ standard reports

Essentials

~~\$40~~

\$20/mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run enhanced reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage bills

QuickBooks Online Plus

Everything in Simple Start and Essentials, plus:

Unlimited users for reports only

Purchase Orders

Class & Location tracking

Track inventory using FIFO by
Location & Class

Inventory bundles

Projects

Prepare and print 1099-Misc

Budgets

Two-sided items

Access for 5 users with permissions

65+ reports

MOST POPULAR

Plus

~~\$70~~
\$35 /mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run comprehensive reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage bills

QuickBooks Online Advanced

Everything in Simple Start and Essentials, plus:

Unlimited general ledger accounts, classes and locations

Batch import or send invoices

Automated workflows

Enhanced custom fields

ChronoBooks backup & restore

Access for 25 users with advanced permissions

3 Accountant users

Revenue Streams: configurable interactive dashboard

80+ reports

Priority Circle membership

Google Sheets integration

Smart Reporting by Fathom

Advanced

~~\$150~~

\$75/mo

[Buy now](#)

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run most powerful reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage & pay bills

Which QuickBooks Online?

Business Example #1:

Sells cosmetics at house parties

Keeps track of income and expenses

No inventory, one user

All expenses paid via credit card



Which QuickBooks Online?

QBO Simple Start!

Simple Start

~~\$25~~

\$12/mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run general reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors



Which QuickBooks Online?

Business Example #2:

Dental practice

Third party billing software

Records revenue using single customer name

Pays bills by check

Needs access for Doctor, Office Manager,
bookkeeper, and CPA



Which QuickBooks Online?

QBO Essentials!

Essentials

~~\$40~~

\$20/mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run enhanced reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage bills



Which QuickBooks Online?

Business Example #3:

Interior design firm

Billable expenses

Inventory items

Track revenue by designer

Budgets and time tracking



Which QuickBooks Online?

QBO Plus!

MOST POPULAR

Plus

~~\$70~~

\$35 /mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run comprehensive reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage bills



Which QuickBooks Online?

Business Example #4:

Mortgage company

Needs to track appraisal value of each home for reporting to state

Needs drop-down loan type list in QBO

Needs contact person to appear on documents



Which QuickBooks Online?

QBO Advanced!

Advanced

~~\$150~~

\$75/mo

Buy now

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run most powerful reports
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Manage & pay bills



POLL QUESTION

QuickBooks Online Seminar

TOPIC 3: NAVIGATING QUICKBOOKS ONLINE

Topic 3: Navigating QuickBooks Online

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Recognize the steps to manage Account and Settings

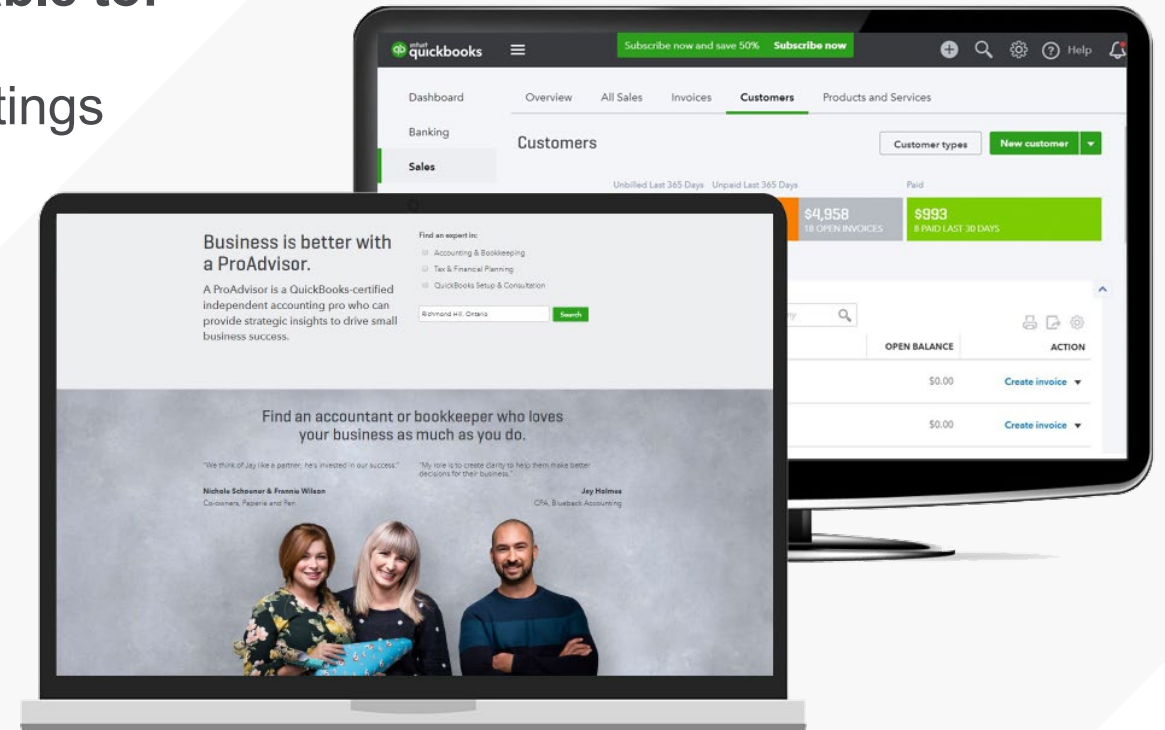
Identify accounting related preferences

Specify the steps to modify Users

Identify additional transactions in the + New menu

Understand the Left Navigation Bar

Specify the steps to modify Lists



QuickBooks Online Test Drive Company

Test Drive qbo.intuit.com/redir/testdrive qbo.intuit.com/redir/testdrive_us_advanced

qb intuit quickbooks

+ New

Dashboard

Banking >

Expenses >

Sales >

Projects >

Workers >

Reports >

Taxes >

Mileage >

Accounting >

My Accountant

Sample Company

Help

LOGO

Craig's Design and Landscaping Services

PRIVACY

Start invoicing

See how much you're making

Start tracking time

Connect with an accountant

Add the finishing touches

1

Set up payments

2

Send your first invoice

3

Swipe cards in person with our mobile app

INVOICES

\$5,282 Unpaid Last 365 days

\$1,526 Overdue

\$3,756 Not due yet

\$3,692 Paid Last 30 days

\$2,063 Not deposited

\$1,630 Deposited

EXPENSES

Last 30 days

\$2,186 Last 30 days

\$755 Maintenance and ..

\$405 Cost of Goods Sold

\$390 Legal & Professio...

\$636 Everything else

PROFIT AND LOSS

Last 30 days

\$1,774 Net income for last 30 days

\$3,960 Income 8 TO REVIEW

\$2,186 Expenses 14 TO REVIEW

BANK ACCOUNTS

Checking

Bank balance \$-3,621.93 Updated moments ago

In QuickBooks \$1,201.00

Savings

Bank balance \$200.00 Updated moments ago

In QuickBooks \$800.00

Mastercard

Bank balance \$304.96 Updated moments ago




In QuickBooks \$157.72

Visa

In QuickBooks \$0


27

Signing into QuickBooks Online


 quickbooks  turbotax

Sign In

One account for everything Intuit, including QuickBooks. [Learn more](#)

 Sign in with Google


or

User ID

Password

Please enter password.

☒ Remember my user ID

 Sign in

By clicking Sign in, you agree to our [Terms](#) and have read and acknowledge our [US Privacy Statement](#).
Updated on January 1, 2020

[I forgot my user ID or Password](#)

New to QuickBooks? [Sign up](#)

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Privacy | Support

Using the Setup Wizard

1. Tell us about your business.

Everyone needs something a little different from QuickBooks. Let's get to know what you need so we can tailor things to fit you. You can change your info anytime in Settings.

What is the full, legal name of your business?

Esther's Earrings

How would you describe what your business does?

Jewelry, watch, precious stone, and precious metal merchant wholesalers

Start typing and select the industry that fits best.

☐ I've been using QuickBooks Desktop and want to bring in my data.

Next

2. What would you like to do in QuickBooks?

This is just to get you started. You can always do more later.

✓

Send and track invoices

✓

Organize your expenses

✓

Manage your inventory

Track your retail sales

✓

Track your bills

✓

Track your sales tax

Pay your employees

Track hours

Back

Next

3. What's your role at your business?

We'll use this info to help personalize your QuickBooks. You can always change it later in Settings.

Bookkeeper

✓

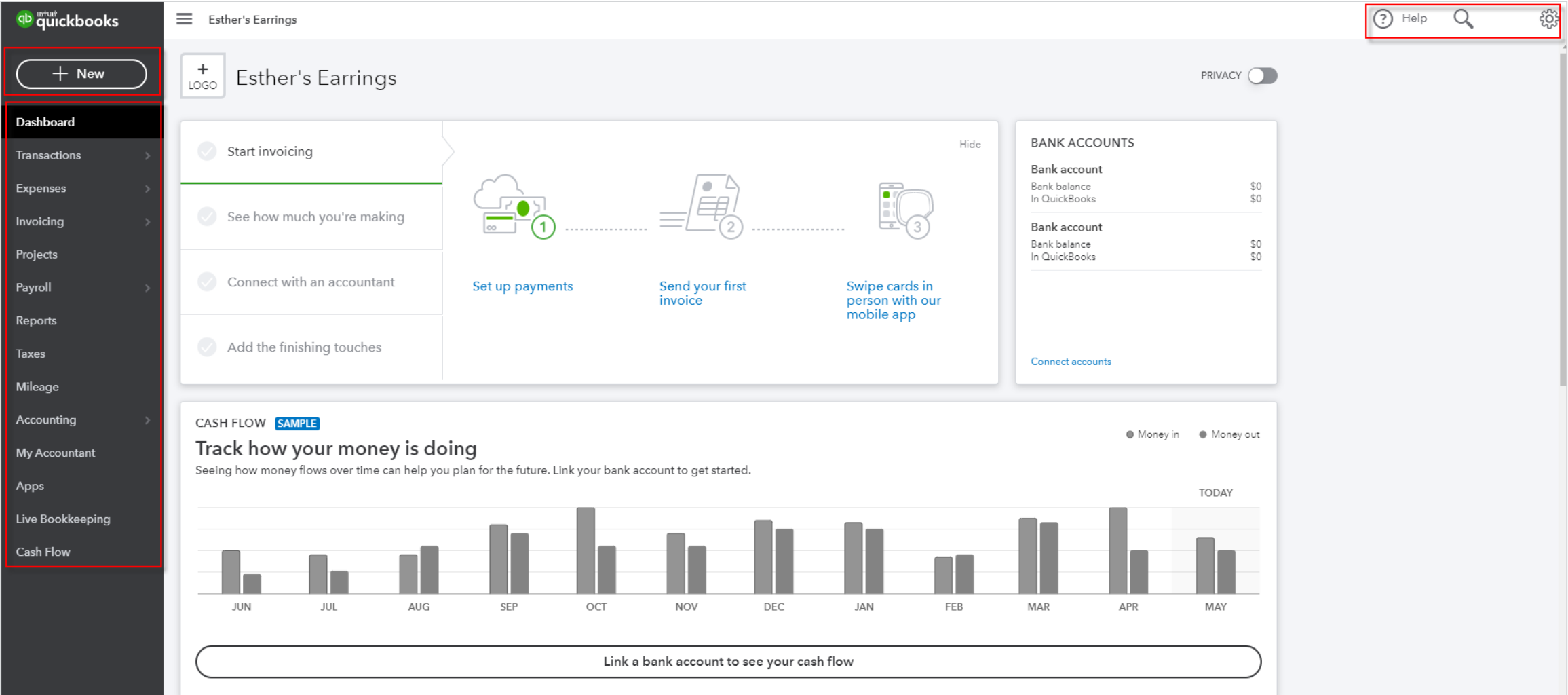
Owner

Accountant

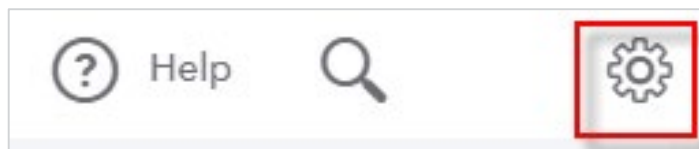
Employee

It's something else

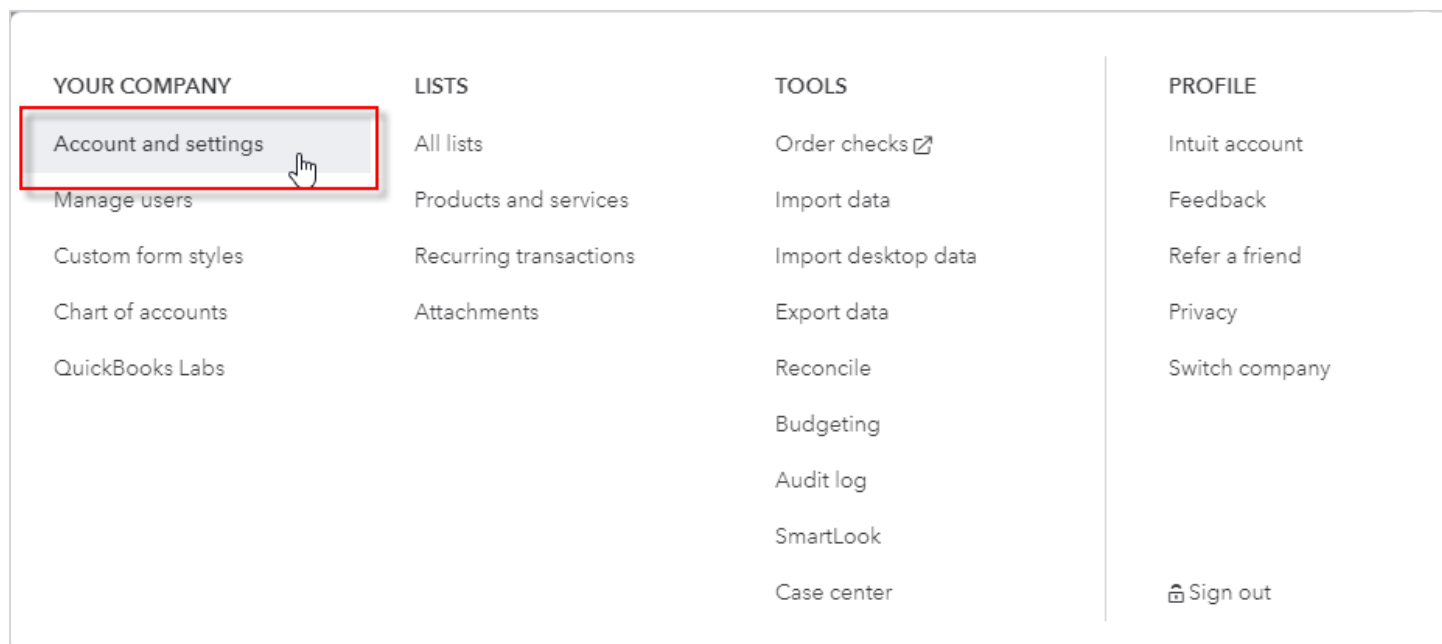
QuickBooks Online Interface



The Gear icon

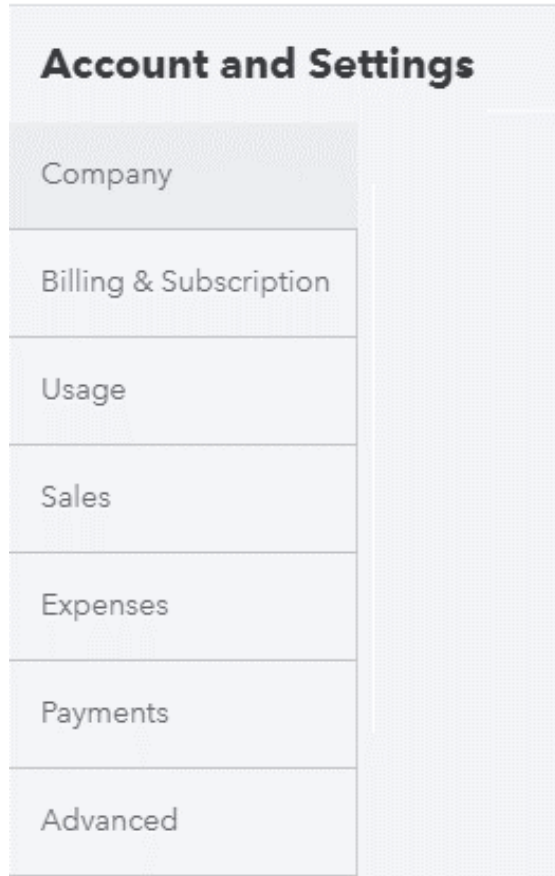


and this Appears



Setting Up Your Company Books

Account and Settings



Click on the appropriate tab to set up your features.

Company

Company name		<div>logo</div>
Company name		Esther's Earrings
Legal name		Same as company name
EIN/SSN		-
Company type	Tax form	-
	Industry	Jewelry, watch, precious stone, and precious metal
Contact info	Company email	esther.us@e-compubooks.com
	Customer-facing email	Same as company email
	Company phone	-
	Website	-
Address	Company address	-
	Customer-facing address	Same as company address
	Legal address	Same as company address

Type your company information in each box or field.

Billing and Subscription

Company ID9130 3485 2688 9376

QuickBooks Plus

TRIAL Ends in 31 days

We hope you're enjoying your trial. To keep using QuickBooks after 06/25/2020, please subscribe.

[Upgrade your plan](#)

[Downgrade your plan](#)

[Cancel your trial](#)

Subscribe for

\$70/mo

+ applicable taxes

Subscribe

QuickBooks Self Service Payroll

Pay employees with free direct deposit.

- Automatic tax calculations on every paycheck
- File and pay federal and state payroll taxes
- Employees can view pay stubs and W-2s online

Free 30-day trial

TSheets Time Tracking

Track time on any device to streamline payroll, send accurate invoices, and save thousands each year.

- Let employees clock in and out from their devices
- Build, edit, and share schedules by jobs or shifts
- Automatically add employee timesheets for faster, more accurate time entry

Requires paid QuickBooks Online subscription

QuickBooks Live Full-Service Bookkeeping

A dedicated team bookkeeper who handle your QuickBooks bookkeeping for you:

- Keeps your books accurate and up to date.
- Monitor the health of your business by reviewing reports.
- Gets you ready for tax time with a customized year end review.

Requires paid QuickBooks Online subscription

QuickBooks Live Bookkeeping Setup

A bookkeeper gets to know your business and gives you a customized QuickBooks setup.


- Get help setting up the features you'll use most.
- Learn best practices for creating custom reports, invoicing, and more.
- Receive expert answers to your bookkeeping questions.

QuickBooks Online Payments


Accept payments online or in person.


- Customers can pay by credit, debit card, Apple Pay, or bank transfer
- Your books are reconciled automatically

VISA



DISCOVER






BANK

Checks and supplies

Get the products you need to help run your business easily and effectively.

- Choose from popular check styles
- Make tax time less taxing with our tax kits
- Reordering is a snap

 intuit quickbooks.

Intuit Confidential and Proprietary 34

Usage

Usage limits

These are your usage limits for QuickBooks Online Plus. Need more room?
Upgrade to a plan with more capacity.

[Find out more about usage limits.](#)

Billable users

1 OF 5



1 user(s)

Chart of accounts

1 OF 250



1 account(s)

Sales

Customize	Customize the way forms look to your customers	Customize look and feel
Sales form content	Preferred invoice terms	Net 30
	Preferred delivery method	None
	Shipping	Off
	Custom fields	Off
	Custom transaction numbers	On
	Service date	Off
	Discount	Off
	Deposit	Off
	Tips (Gratuity)	Off
Products and services	Show Product/Service column on sales forms	On
	Show SKU column	Off
	Turn on price rules <small>BETA</small>	Off
	Track quantity and price/rate	On
	Track inventory quantity on hand	On
Late fees	Default charge applied to overdue invoices Appears as a line under Product/Service on the invoice, and applies to all customers. Learn more	Off
Progress Invoicing	Create multiple partial invoices from a single estimate	On
Messages	Default email message sent with sales forms	
Reminders	Auto invoice reminders	Off
Online delivery	Email options for all sales forms	
Statements	Show aging table at bottom of statement	On

Expenses

Bills and expenses	Show Items table on expense and purchase forms	On
	Track expenses and items by customer	Off
	Make expenses and items billable	Off
	Default bill payment terms	
Purchase orders	Use purchase orders	Off
Messages	Default email message sent with purchase orders	

Payments

QuickBooks Payments	<p>Get paid more ways, fast!</p> <ul style="list-style-type: none">• Take credit cards or bank transfers• Accept payments through QuickBooks, emailed invoices, and mobile• QuickBooks automatically updates when you're paid	Learn more
Existing account	<p>If you already have a Payments account with Intuit (you may know it as GoPayment or Merchant Services), connect it to your QuickBooks.</p>	Connect

Advanced Settings

Accounting	First month of fiscal year	January
	First month of income tax year	Same as fiscal year
	Accounting method	Accrual
	Close the books	Off
Company type	Tax form	
Chart of accounts	Enable account numbers	Off
	Tips account	
Categories	Track classes	Off
	Track locations	Off
Automation	Pre-fill forms with previously entered content	On
	Automatically apply credits	On
	Automatically invoice unbilled activity	Off
	Automatically apply bill payments	On
Projects	Organize all job-related activity in one place	On
User view	You're viewing QuickBooks in Business View.	
Time tracking	Add Service field to timesheets	Off
	Make Single-Time Activity Billable to Customer	On
Currency	Home Currency	United States Dollar
	Multicurrency	Off
Other preferences	Date format	MM/dd/yyyy
	Number format	123,456.00
	Customer label	Customers
	Warn if duplicate check number is used	On
	Warn if duplicate bill number is used	Off
	Warn if duplicate journal number is used	Off
	Sign me out if inactive for	1 hour

Advanced Settings: Top

Accounting	First month of fiscal year	January
	First month of income tax year	Same as fiscal year
	Accounting method	Accrual
	Close the books	Off
Company type	Tax form	
Chart of accounts	Enable account numbers	Off
	Tips account	
Categories	Track classes	Off
	Track locations	Off

Advanced Settings: Bottom

Automation	Pre-fill forms with previously entered content	On
	Automatically apply credits	On
	Automatically invoice unbilled activity	Off
	Automatically apply bill payments	On
Projects	Organize all job-related activity in one place	On
User view	You're viewing QuickBooks in Business View.	
Time tracking	Add Service field to timesheets	Off
	Make Single-Time Activity Billable to Customer	On
Currency	Home Currency	United States Dollar
	Multicurrency	Off
Other preferences	Date format	MM/dd/yyyy
	Number format	123,456.00
	Customer label	Customers
	Warn if duplicate check number is used	On
	Warn if duplicate bill number is used	Off
	Warn if duplicate journal number is used	Off
	Sign me out if inactive for	1 hour

Time tracking

☐ Add Service field to timesheets ?

Off

☒ Make Single-Time Activity Billable to Customer ?

On

☐ Show billing rate to users entering time ?

First day of work week

Sunday

Cancel

Save

Customers

Clients

Customers

Donors

Guests

Members

Patients

Tenants

Manage Users

YOUR COMPANY

Account and settings

Manage users

Custom form styles

Chart of accounts

QuickBooks Labs

Manage users

Give Feedback

Users 1 Accounting firms 0

1 You're using 1 of 5 billable users included in your plan. Find out how to manage your usage or upgrade to Advanced

Find by name

Add user

NAME	EMAIL	USER TYPE	STATUS	DATE ADDED	BILLABLE 1	ACTION
Esther Friedberg Karp	esther.us@e-compubooks.com	Master admin	Active	05/25/2020	Yes	Edit

Add a new user

Select user type

These count toward your user limit.

- ☒ Standard user
You can give them full or limited access, without admin privileges.
- ☐ Company admin
They can see and do everything. This includes sending money, changing passwords, and adding users. Not everyone should be an admin.

These don't count toward your user limit.

- ☐ Reports only
They can see all reports, except ones that show payroll or contact info.
- ☐ Time tracking only
They can add their own time sheets.

Custom Form Styles

YOUR COMPANY

Account and settings

Manage users

Custom form styles

Chart of accounts

QuickBooks Labs

Edit invoices that turn heads and open wallets

Share feedback

Design

Content

Emails

Esther's Invoice Template #1

Dive in with a template

Add your unique logo

Splash on some color

Get choosy with your font

When in doubt, print it out

Esther's Earrings

esther.us@e-compubooks.com

INVOICE

BILL TO

Smith Co.

123 Main Street

City, CA 12345

INVOICE

12345

DATE

01/12/2016

TERMS

Net 30

DUE DATE

02/12/2016

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
12/01/2016	Item name	Description of the item	2	\$225.00	\$450.00
01/12/2016	Item name	Description of the item	1	\$225.00	\$225.00
BALANCE DUE					\$675.00

Page 1 of 1

Preview PDF

Done

Chart of Accounts

qb

intuit

quickbooks

+ New

Dashboard

Transactions >

Expenses >

Invoicing >

Projects

Payroll >

Reports

Taxes

Mileage

Accounting >

My Accountant

Apps

Live Bookkeeping

Cash Flow

Esther's Earnings

Chart of Accounts

Reconcile

Chart of Accounts

[All Lists](#)

Run Report

New

Filter by name

All

NAME	TYPE	DETAIL TYPE	QUICKBOOKS BALANCE	BANK BALANCE	ACTION
Inventory	Other Current Assets	Inventory	0.00		View register
Uncategorized Asset	Other Current Assets	Other Current Assets	0.00		View register
Owner's Investment	Equity	Owner's Equity	0.00		View register
Owner's Pay & Personal Expenses	Equity	Owner's Equity	0.00		View register
Retained Earnings	Equity	Retained Earnings			Run report
Billable Expense Income	Income	Sales of Product Income			Run report
Sales	Income	Sales of Product Income			Run report
Uncategorized Income	Income	Sales of Product Income			Run report
Cost of Goods Sold	Cost of Goods Sold	Supplies & Materials - COGS			Run report
Shipping	Cost of Goods Sold	Shipping, Freight & Delivery - COS			Run report
Advertising & Marketing	Expenses	Advertising/Promotional			Run report
Ask My Accountant	Expenses	Utilities			Run report

QuickBooks Labs

YOUR COMPANY

Account and settings

Manage users

Custom form styles

Chart of accounts

QuickBooks Labs

Come play in our high-tech playground

Be the first to try our best QuickBooks experimental plug-ins. Check back often to see what's new!

Note: Sometimes experiments break or disappear. (And sometimes they grow up to be real, live features!)

Have ideas for new features? We'd love to hear them.

[Tell us!](#)



Cash Flow Dashboard Widget **NEW**

Want to make smarter decisions about how you spend money? Get a clearer picture of money coming in and going out over the last 12 months. Find this graph on the dashboard to help you make better choices for the future.

[See demo](#) | [Give feedback](#)

OFF

The screenshot shows a sample invoice design titled 'Import Styles'. It includes a header with company information, a 'SHIP TO' section, and an 'INVOICE # 1234' section. Below this is a table with columns: Item, Description, Quantity, Rate, and Amount.

Item	Description	Quantity	Rate	Amount
Cupcake	Vanilla Cupcake with Strawberry Topping	12	\$2.00	\$24.00

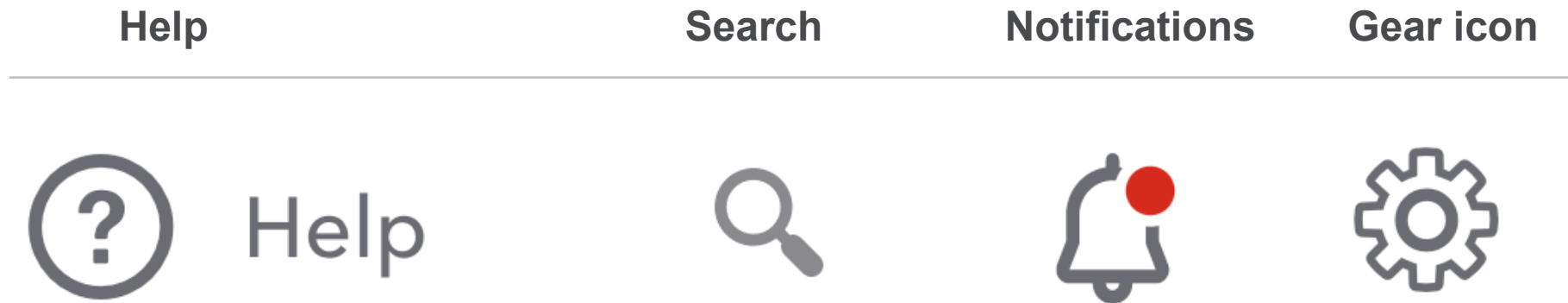
Import Style

Now you can spice up your brand with your own invoice design. Import your .docx file from Word, tell us which fields to replace, and voila! Your brand is yours again.

[See demo](#) | [Give feedback](#)

OFF

Top Navigation Bar



Lists

Chart of Accounts

Displays your accounts. Balance sheet accounts track your assets and liabilities, and income and expense accounts categorize your transactions. From here, you can add or edit accounts.

Recurring Transactions

Displays a list of transactions that have been saved for reuse. From here, you can schedule transactions to occur either automatically or with reminders. You can also save unscheduled transactions to use at any time.

Attachments

Displays the list of all attachments uploaded. From here you can add, edit, download, and export your attachments. You can also see all transactions linked to a particular attachment.

Lists

All Lists

Products and Services

Recurring Transactions

Attachments



- Your Company
- Account and Settings
- Manage Users
- Custom Form Styles
- Chart of Accounts
- QuickBooks Labs

- Lists
- All Lists
 - Products and Services
 - Recurring Transactions ↗
 - Attachments

- Tools
- Import Data
 - Export Data
 - Reconcile
 - Budgeting ↗
 - Audit Log
 - Order Checks ↗

- Profile
- User Profile
 - Feedback
 - Refer a Friend
 - Privacy
 - Switch Company
 - Sign Out

Tools

YOUR COMPANY

Account and settings

Manage users

Custom form styles

Chart of accounts

QuickBooks Labs

LISTS


All lists

Products and services

Recurring transactions

Attachments

TOOLS

Order checks 

Import data

Import desktop data

Export data

Reconcile

Budgeting

Audit log

SmartLook

Case center

PROFILE

Intuit account

Feedback

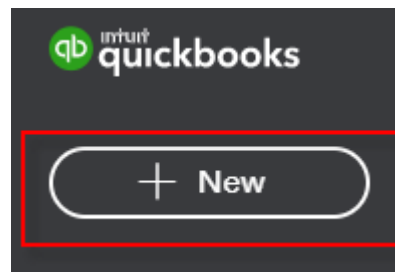
Refer a friend

Privacy

Switch company

 Sign out

+ New



CUSTOMERS

Invoice
Receive payment
Estimate
Credit memo
Sales receipt
Refund receipt
Delayed credit
Delayed charge

VENDORS

Expense
Check
Bill
Pay bills
Purchase order
Vendor credit
Credit card credit
Print checks

EMPLOYEES

Payroll ↗
Single time activity
Weekly timesheet

OTHER

Bank deposit
Transfer
Journal entry
Statement
Inventory qty adjustment
Pay down credit card

[Show less](#)

Search



Help



Invoice

Recent Invoices

Invoice No.1037	04/29/2020	\$362.07	Sonnenschei...
Invoice No.1036	04/29/2020	\$477.50	Freeman Sp...
Invoice No.1031	02/13/2020	\$387.00	Freeman Sp...
Invoice No.1004	04/17/2020	\$2,369.52	Cool Cars
Invoice No.1035	04/29/2020	\$314.28	Mark Cho
Invoice No.1017	04/13/2020	\$80.00	



Search



SEARCH TIPS

💡 Search for **transactions** by transaction number, **amount** (\$340.00), or **date** (MM/DD/YYYY)

RECENT TRANSACTIONS

Credit Card Expense | 05/24/2020 | \$34.00
Credit Card Expense | Hicks Hardware | 05/05/2020 | \$42.40
Credit Card Expense | Squeaky Kleen Car Wash | 05/11/2020 | \$19.99
Credit Card Expense | Squeaky Kleen Car Wash | 05/04/2020 | \$19.99
Credit Card Expense | Bob's Burger Joint | 05/04/2020 | \$18.97
Credit Card Credit | 05/13/2020 | \$900.00

Check Debit | Squeaky Kleen Car Wash | 04/27/2020 | \$19.99
Cash Expense | Bob's Burger Joint | 04/25/2020 | \$3.86
Cash Expense | Squeaky Kleen Car Wash | 04/20/2020 | \$19.99
Cash Expense | Bob's Burger Joint | 04/20/2020 | \$5.66

[View more](#)

⌘ to navigate

enter to select

esc to dismiss

[Advanced Search](#)

Left Navigation Bar

qb

intuit

quickbooks

+ New

Dashboard

Transactions >

Expenses >

Invoicing >

Projects >

Payroll >

Reports >

Taxes >

Mileage >

Accounting >

My Accountant >

Apps >

Live Bookkeeping >

Cash Flow >

Esther's Earrings

Esther's Earrings

PRIVACY

Start invoicing

See how much you're making

Connect with an accountant

Add the finishing touches

1

2

3

Set up payments

Send your first invoice

Swipe cards in person with our mobile app

BANK ACCOUNTS

Bank account

Bank balance

In QuickBooks

\$0

\$0

Bank account

Bank balance

In QuickBooks

\$0

\$0

Connect accounts

CASH FLOW

SAMPLE

Track how your money is doing

Seeing how money flows over time can help you plan for the future. Link your bank account to get started.

Money in

Money out

TODAY

JUN

JUL

AUG

SEP

OCT

NOV

DEC

JAN

FEB

MAR

APR

MAY

Link a bank account to see your cash flow

Expenses Center

+ New

Dashboard

Banking

Expenses

Sales

Projects

Payroll

Reports

Taxes

Mileage

Accounting

My Accountant

Sample Company

Expenses

Vendors

Vendors

Prepare 1099s

New vendor

Unbilled Last 365 Days

Unpaid Last 365 Days

Paid

\$125

1 PURCHASE ORDER

\$848

4 OVERDUE

\$1,603

5 OPEN BILLS

\$3,892

21 PAID LAST 30 DAYS

Batch actions

Find a vendor or company

<input type="checkbox"/>	VENDOR / COMPANY	PHONE	EMAIL	OPEN BALANCE	ACTION
<input type="checkbox"/>	Bob's Burger Joint			\$0.00	Create bill
<input type="checkbox"/>	Books by Bessie	(650) 555-7745	Books@Intuit.com	\$0.00	Create bill
<input type="checkbox"/>	Brosnahan Insurance Agency	(650) 555-9912		\$241.23	Make payment
<input type="checkbox"/>	Cal Telephone	(650) 555-1616		\$0.00	Create bill
<input type="checkbox"/>	Chin's Gas and Oil			\$0.00	Create bill

Sales Center

qb

intuit

quickbooks

+ New

Dashboard

Transactions >

Expenses >

Invoicing >

Projects

Payroll >

Reports

Taxes

Mileage

Accounting >

My Accountant

Apps

Live Bookkeeping

Cash Flow

Esther's Earrings

Overview

Invoices


Customers

All Sales

Products and Services

Get ready to get paid

When it's all in QuickBooks, it's easy to see how much you're making and when it's in the bank.



1 Set up online and in-person payments

Let customers pay you with Apple Pay, credit cards, and bank transfers.

Not now

Start

2 Get paid anywhere

Download the QuickBooks GoPayment app so you're always ready to get paid with credit or debit cards.

3 Send an invoice that your customer can pay online

Get instant updates when they view and pay the invoice.

SETUP

0% Done

✓ Set up ways for customers to pay you

Start

✓ Get paid anywhere

Start

✓ Send an invoice that your customer can pay online


Start

DISCOVER MORE

Got Feedback?

Help us make this Overview more useful by providing feedback

Provide feedback



SHORTCUTS

53

QuickBooks Online Seminar

TOPIC 4: CHART OF ACCOUNTS

Topic 4: Chart of Accounts

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Establish, edit, and work with the Chart of Accounts

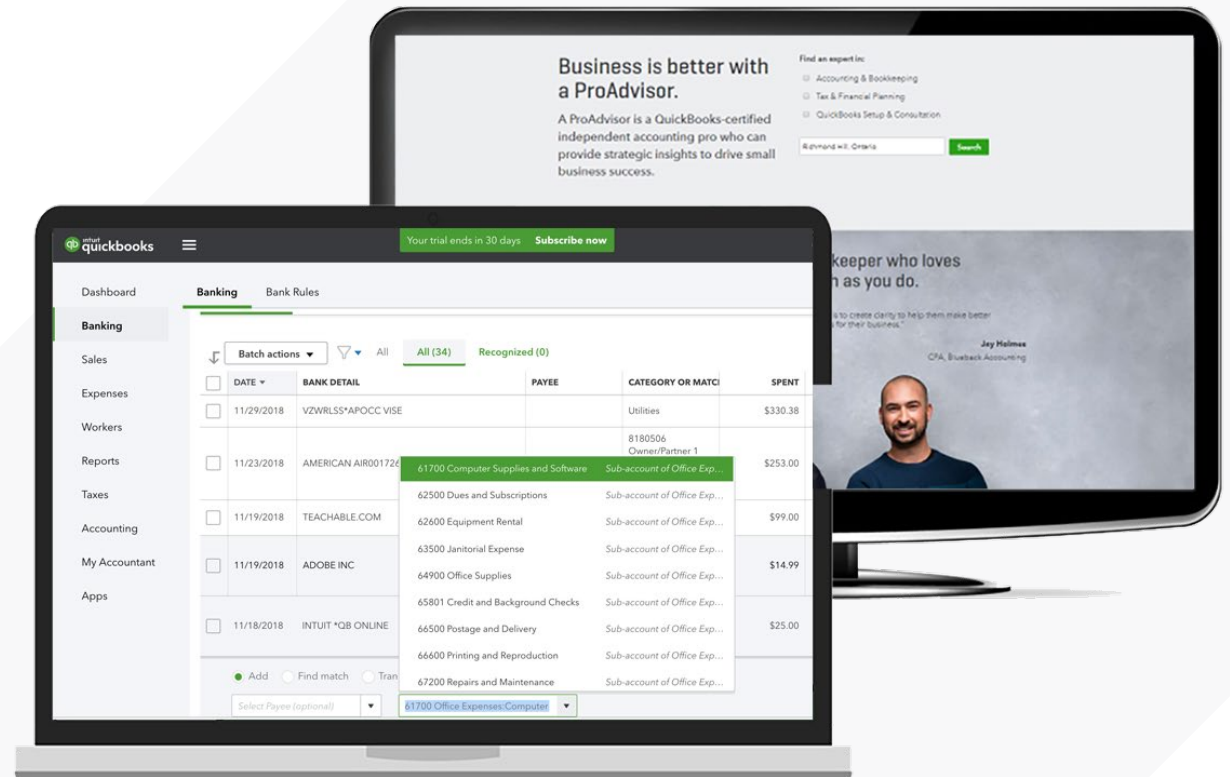


Chart of Accounts Demo

POLL QUESTION AND BREAK

QuickBooks Online Seminar

TOPIC 5: PRODUCTS AND SERVICES

Topic 5: Products and Services

LEARNING OBJECTIVES

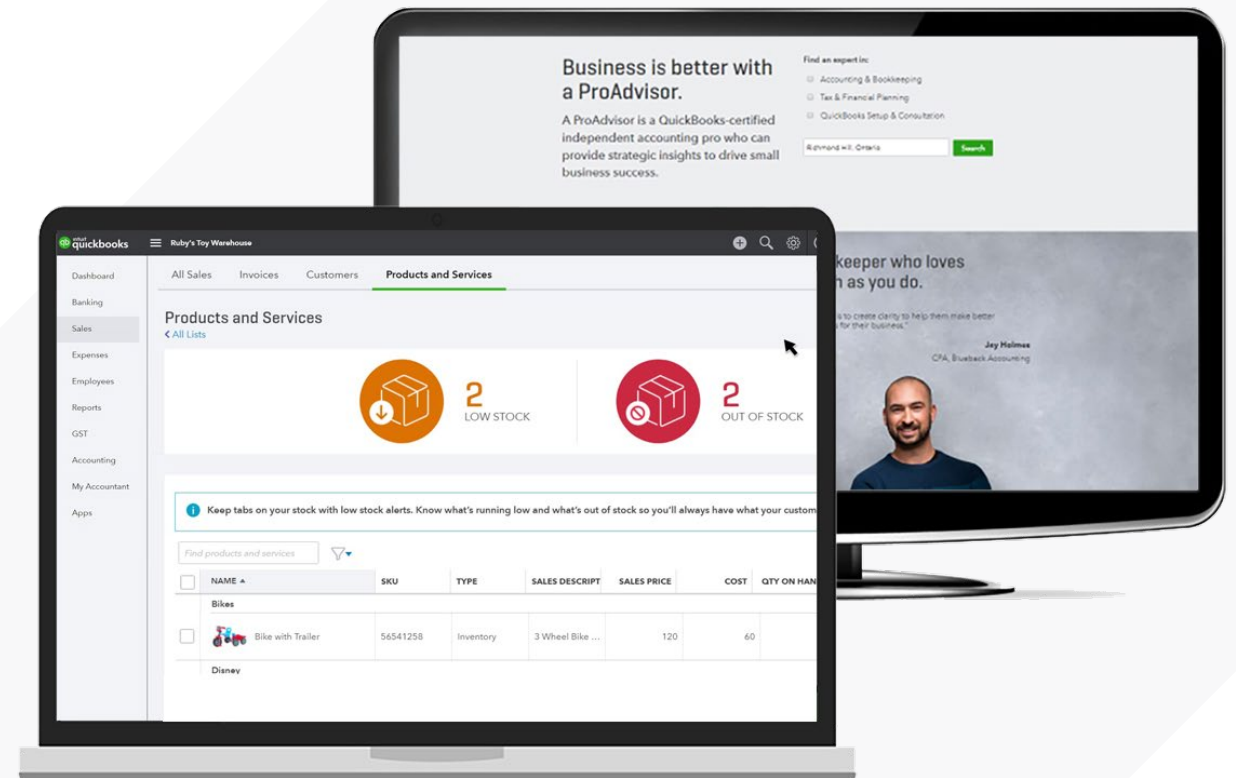
Upon completion of this topic, you should be able to:

Set up Products and Services

Map to the Chart of Accounts

Edit two-sided Products and Services

Add SKUs and pictures



Products and Services Demo

QuickBooks Online Seminar

TOPIC 6: VENDORS, EXPENSES, AND PURCHASES

Topic 6: Vendors, Expenses, and Purchases

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

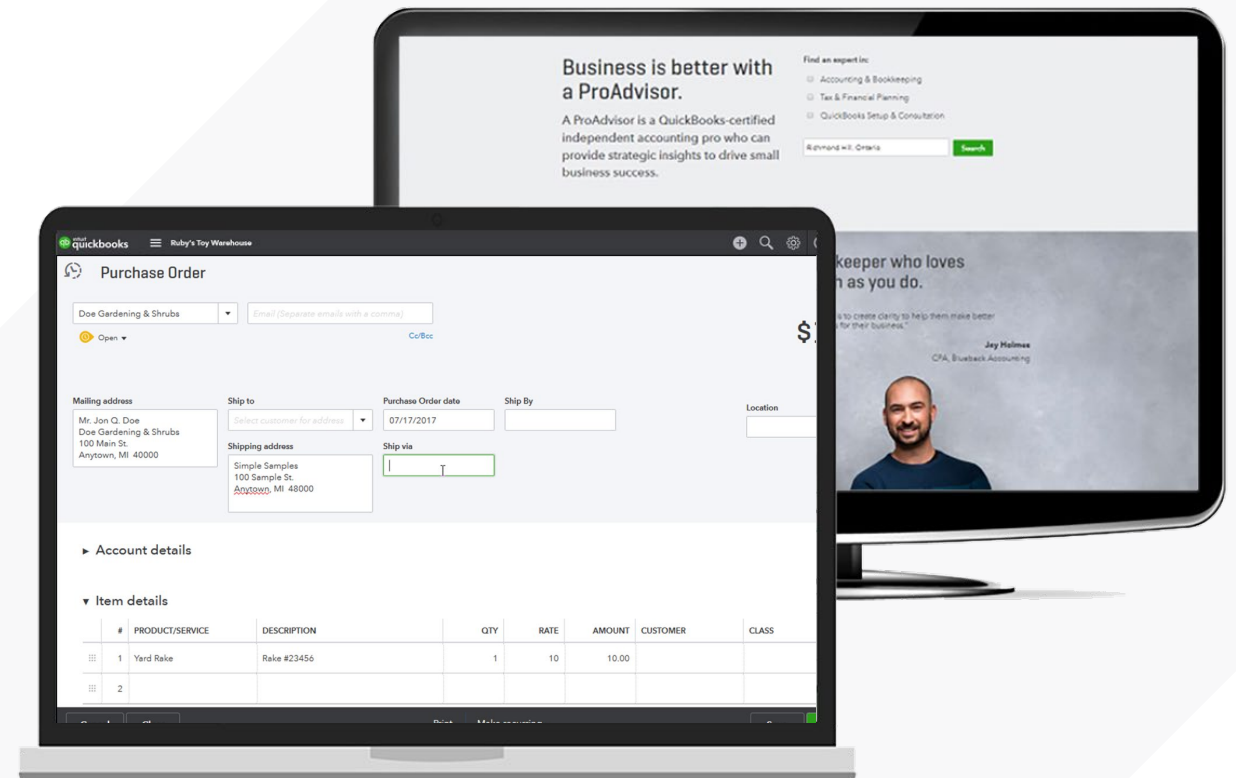
Establish a new Vendor

Identify best practices using QuickBooks Online to record expenditures

Determine appropriate expense-related settings

Recognize alternative entry points for entering purchase transactions

Pay bills and print checks



Expenses Center Demo

Expenses Center Demo

Paying Bills and Printing Checks

QuickBooks Online Seminar

TOPIC 7: TIME TRACKING, EMPLOYEES, AND SUBCONTRACTORS

Topic 7: Time Tracking, Employees, and Subcontractors

LEARNING OBJECTIVES

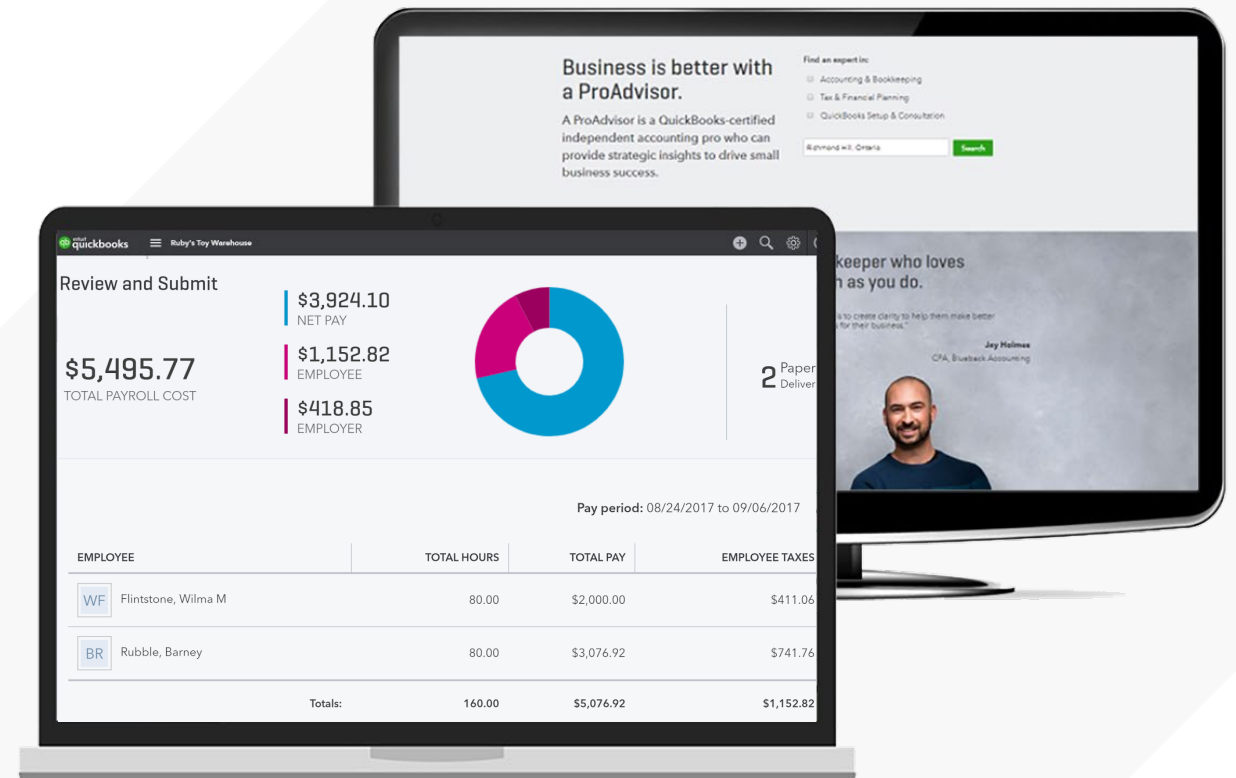
Upon completion of this topic, you should be able to:

Enter time on a daily or weekly basis

Process payroll from a time entry

Determine if time entered is billable

Understand if billable time is available for invoicing



Time Tracking

POLL QUESTION

QuickBooks Online Seminar

TOPIC 8: CUSTOMERS AND SALES TRANSACTIONS

Topic 8: Customers and Sales Transactions

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

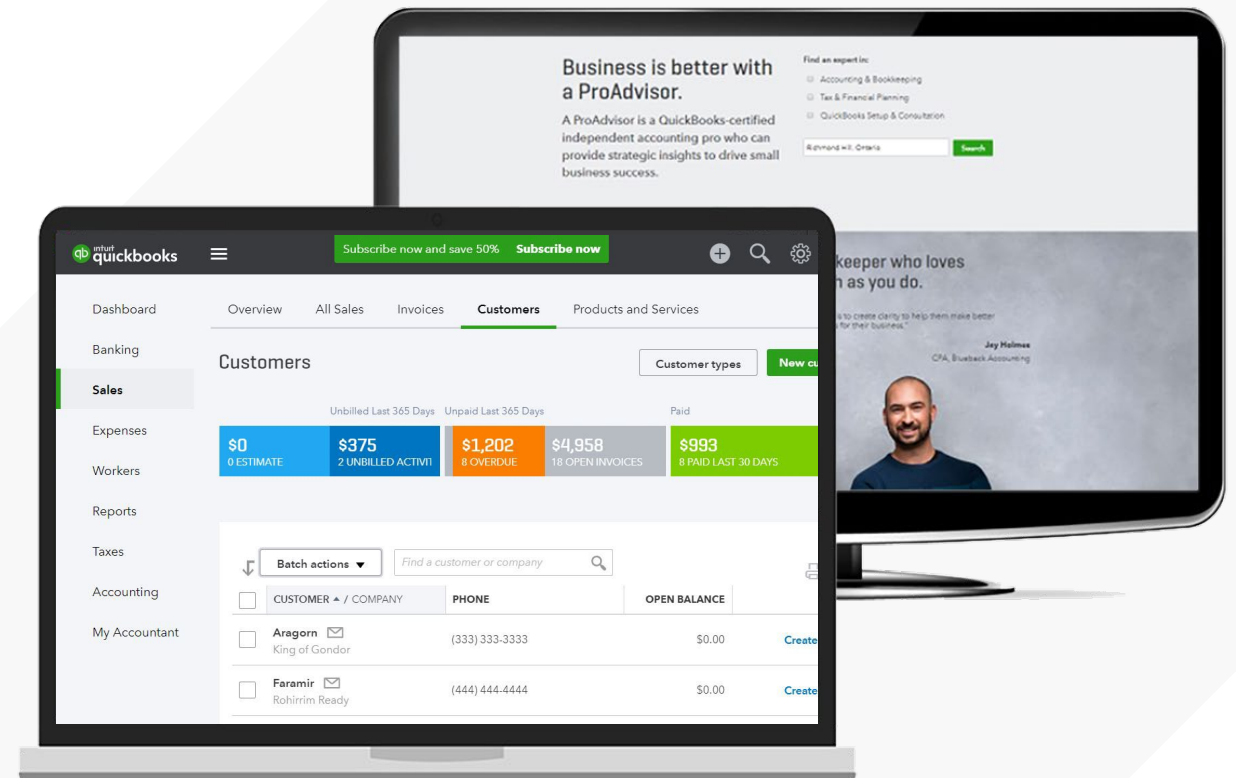
Create a Customer

Use QuickBooks Online to record revenue

Determine appropriate sales-related settings

Recognize options for entering sales transactions

Recognize the features of online invoices



Sales Center

qb

intuit

quickbooks

+ New

Dashboard

Transactions >

Expenses >

Invoicing >

Projects

Payroll >

Reports

Taxes

Mileage

Accounting >

My Accountant

Apps

Live Bookkeeping

Cash Flow

Overview

Invoices

Customers

All Sales

Products and Services

Overview

All Sales

Invoices

Customers

Products and Services

Customers

Customer types

New customer

Unbilled Last 365 Days

Unpaid Last 365 Days

Paid

\$0

0 ESTIMATE

\$750

3 UNBILLED ACTIVITY

\$1,526

10 OVERDUE

\$5,282

20 OPEN INVOICES

\$3,136

12 PAID LAST 30 DAYS

Customer information

Company

Email

Search

Separate multiple emails with commas

Title

First name

Middle name

Last name

Suffix

Phone

Mobile

Fax

Display name as

Other

Website

Print on check as

Use display name

Is sub-customer

Enter parent customer

Bill with parent

Address

Notes

Tax info

Payment and billing

Language

Attachments

Additional info

Billing address

Shipping address

Street

City/Town

State/Province

ZIP code

Country

Street

City/Town

State/Province

ZIP code

Country

Same as billing address

Cancel

Privacy

Save

Create Sales Receipt or Invoice Demo

Sales Receipt

Help

Customer

Email

☐ Send later
 [Co/Bcc](#)

Billing address

Sales Receipt date

Crew #

Payment method

Reference no.

Deposit to

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1						
2						

Add lines

Clear all lines

Message displayed on sales receipt

Thank you for your business and have a great day!

Message displayed on statement

Invoice

Customer

Customer email

☐ Send later
 [Co/Bcc](#)

Billing address

Terms

Invoice date

Due date

AMOUNT

\$0.00

Invoice

[Take a tour](#)

Customer

Select a customer

☐ Send later
[Cc/Bcc](#)

Customer email

Separate emails with a comma

Billing address

Terms

Net 30

Invoice date

05/25/2020

Due date

06/24/2020

Crew #

BALANCE DUE

\$0.00

Invoice

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1						
2						

Add lines

Clear all lines

Add subtotal

Subtotal

\$0.00

Message on invoice

Thank you for your business and have a great day!

Let QuickBooks

calculate your sales tax

Taxable subtotal

Select a sales tax rate

Discount percent

\$0.00

Total

\$0.00

Balance due

\$0.00

Message on statement

If you send statements to customers, this will show up as the description for this invoice.

Receiving Payment Demo

Credit Memos & Refund Receipts Demo

Delayed Charges & Credits Demo

Making Deposits Demo

Statements & Estimates Demo

QuickBooks Payments

qb

intuit quickbooks.

Products ▾

Plans & Pricing

How it Works

Support

Talk to Sales: 1-866-697-9600 ▾

Sign in ▾

QuickBooks Payments

Payments pricing

Features ▾

Support


Buy now

Work takes time.
Getting paid shouldn't.

QuickBooks Payments lets you accept credit cards, debit cards, and ACH bank transfers¹. Soon², you can spend money immediately after it hits your QuickBooks Cash account³.

See rates

Have QuickBooks Desktop? [See Payments for QuickBooks Desktop](#)



Overview

Accepting payments

Accepting credit cards



quickbooks.intuit.com/payments

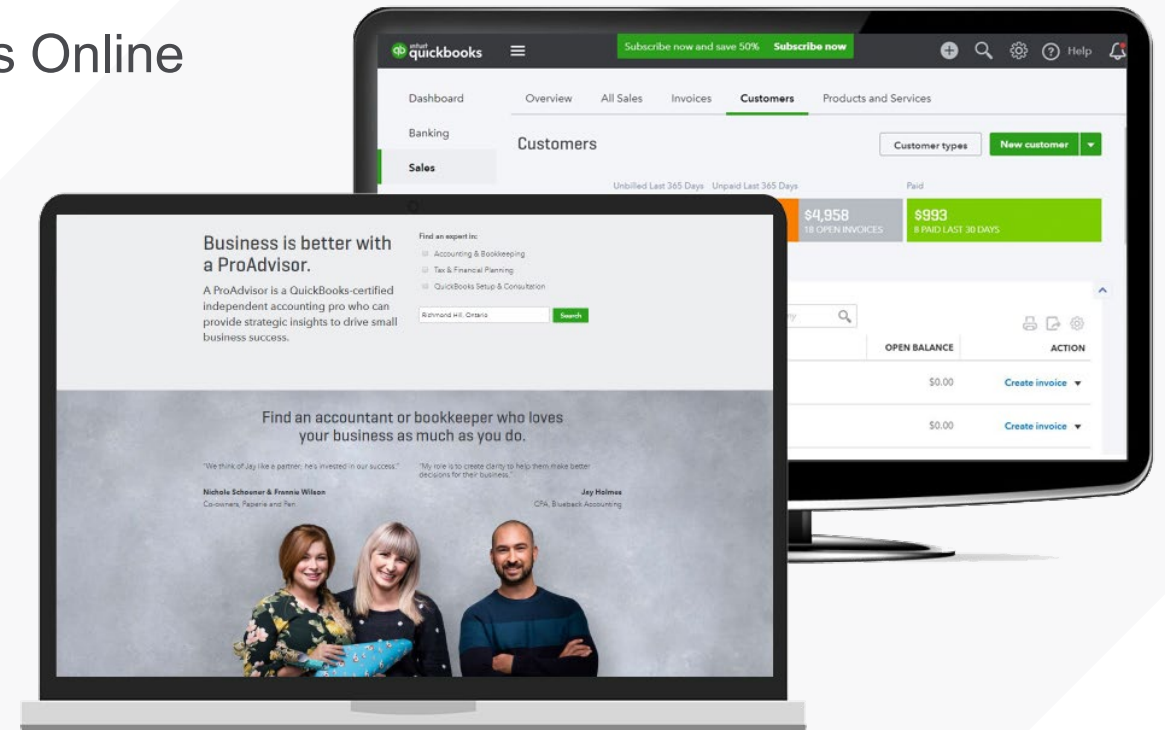
Learning Objectives Summary – Part 1

TOPIC 1: CONVERTING FROM QUICKBOOKS DESKTOP TO QUICKBOOKS ONLINE

You should now be able to:

Convert from QuickBooks Desktop to QuickBooks Online

Find a ProAdvisor



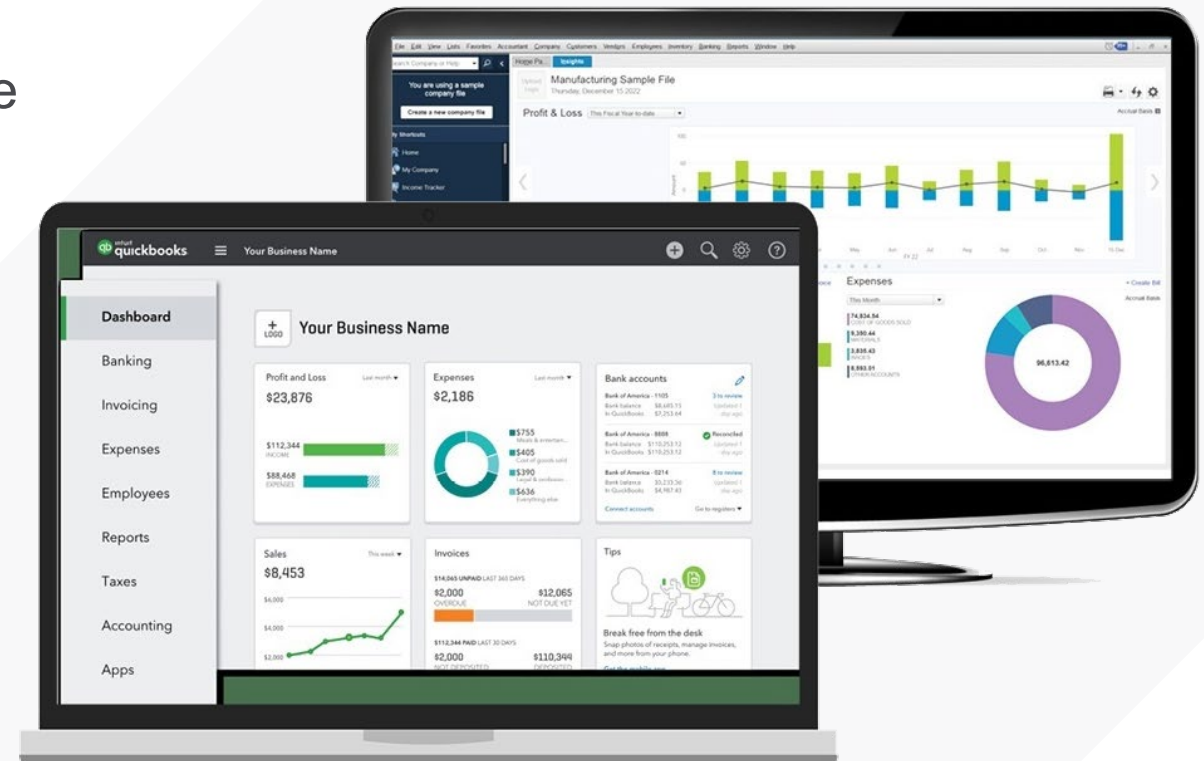
Learning Objectives Summary – Part 1 (continued)

TOPIC 2: INTRODUCING QUICKBOOKS ONLINE

You should now be able to:

Identify the benefits of using QuickBooks Online

Determine which subscription level of QuickBooks Online is the best fit for your business



Learning Objectives Summary – Part 1 (continued)

TOPIC 3: NAVIGATING QUICKBOOKS ONLINE

You should now be able to:

Recognize the steps to manage Account and Settings

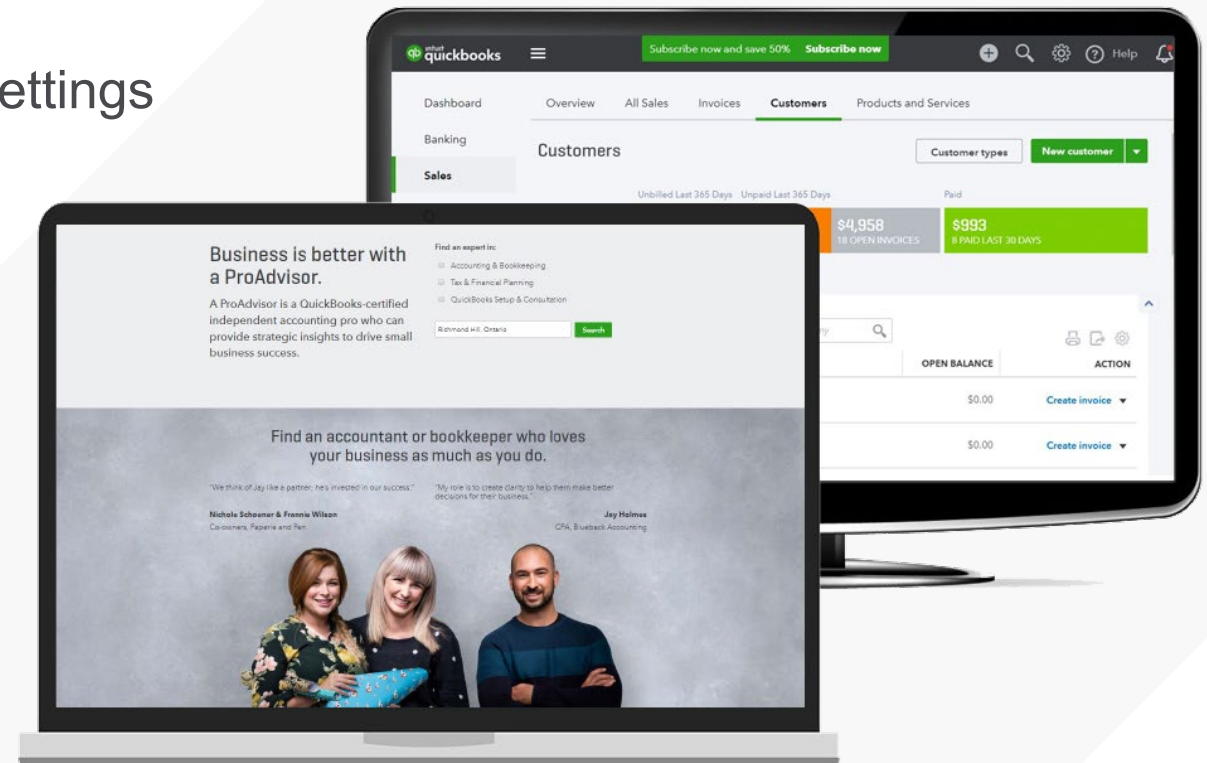
Identify accounting related preferences

Specify the steps to modify Users

Identify additional transactions in the
+ New Menu

Navigate with the Left Navigation Bar

Specify the steps to modify Lists

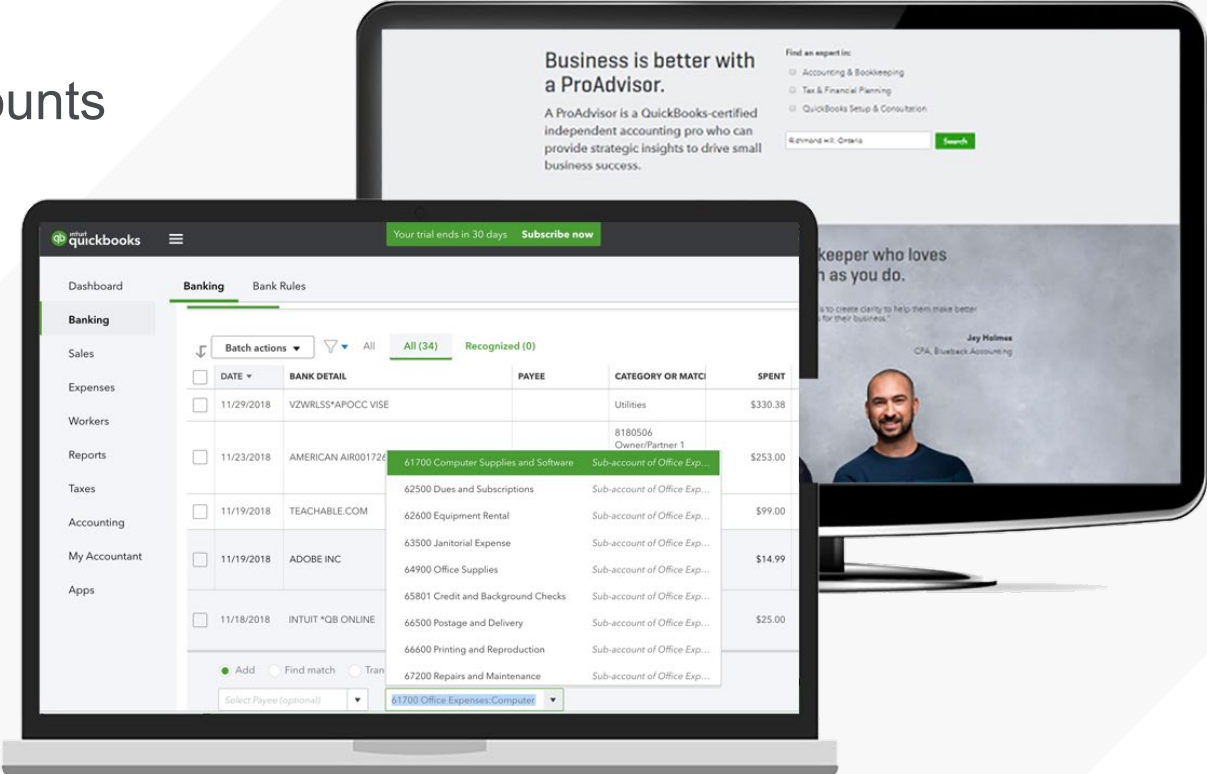


Learning Objectives Summary – Part 1 (continued)

TOPIC 4: CHART OF ACCOUNTS

You should now be able to:

Establish, edit, and work with the Chart of Accounts



Learning Objectives Summary – Part 1 (continued)

TOPIC 5: PRODUCTS AND SERVICES

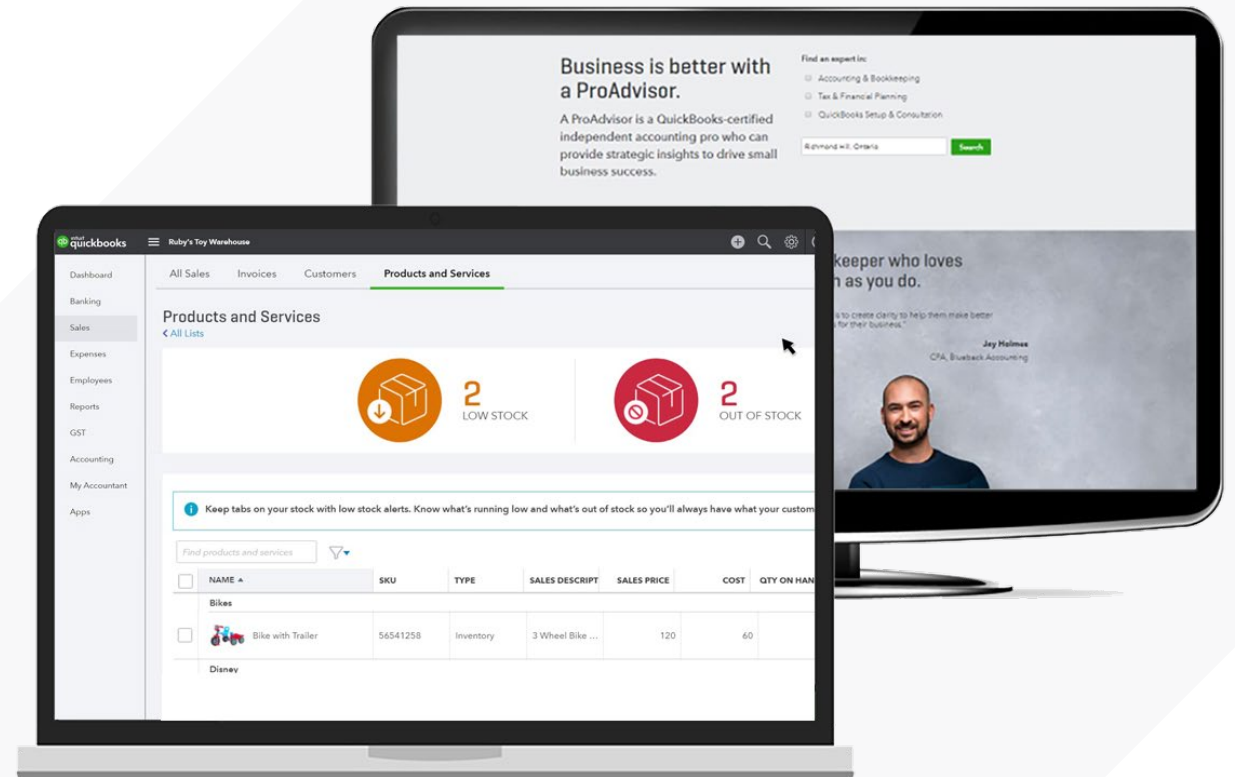
You should now be able to:

Set up Products and Services

Map to the Chart of Accounts

Edit two-sided Products and Services

Add SKUs and pictures



Learning Objectives Summary – Part 1 (continued)

TOPIC 6: VENDORS, EXPENSES, AND PURCHASES

You should now be able to:

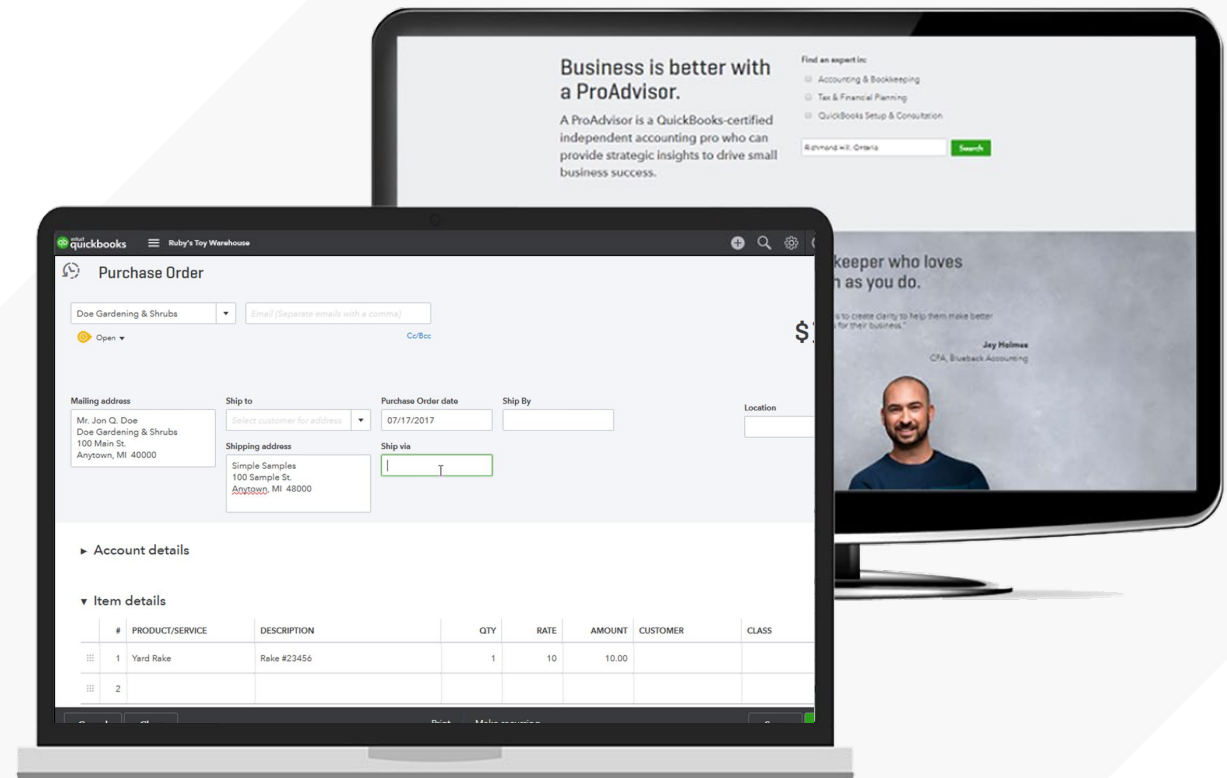
Establish a new Vendor

Identify best practices using QuickBooks Online to record expenditures

Determine appropriate expense-related settings

Recognize alternative entry points for entering purchase transactions

Pay bills and print checks



Learning Objectives Summary – Part 1 (continued)

TOPIC 7: TIME TRACKING, EMPLOYEES, AND SUBCONTRACTORS

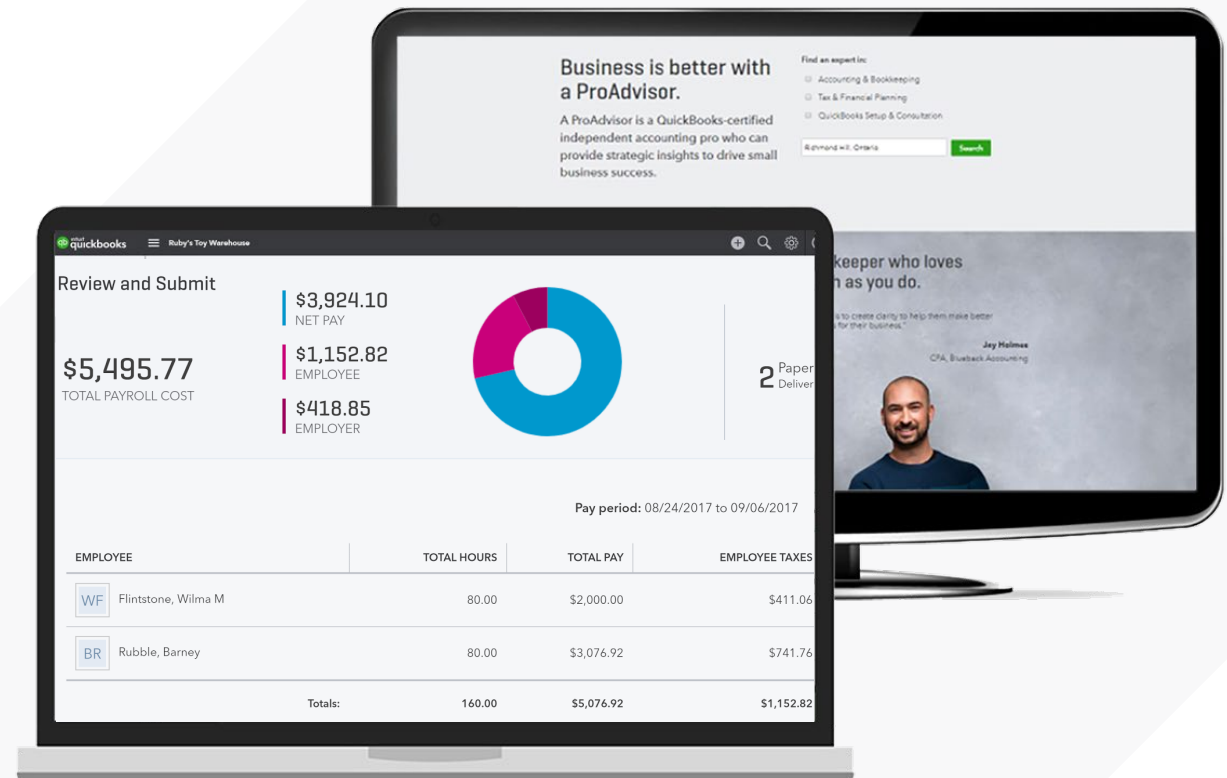
You should now be able to:

Enter time on a daily or weekly basis

Process payroll from a time entry

Determine if time entered is billable

Understand if billable time is available for invoicing



Learning Objectives Summary – Part 1 (continued)

TOPIC 8: CUSTOMERS AND SALES TRANSACTIONS

You should now be able to:

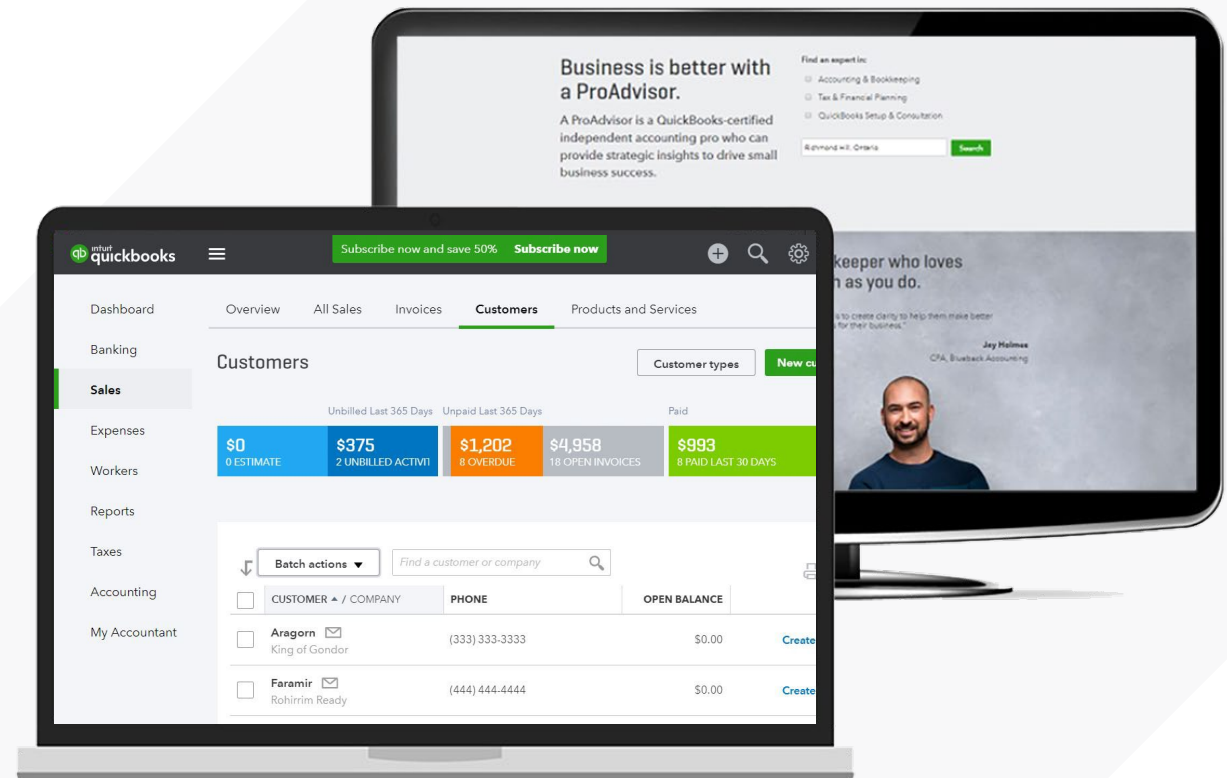
Create a Customer

Use QuickBooks Online to record revenue

Determine appropriate sales-related settings

Recognize options for entering sales transactions

Recognize the features of online Invoices



POLL QUESTION

1 - WEEK Break



Part 2: Topics

Topic 9: Payroll

Topic 10: Bank Feeds and Reconciling

Topic 11: Sales Tax

Topic 12: Extra Information on Transactions

Topic 13: Reporting

Topic 14: Expanded Functionality

Topic 15: Support



QuickBooks Online Seminar

TOPIC 9: PAYROLL

Topic 9: Payroll

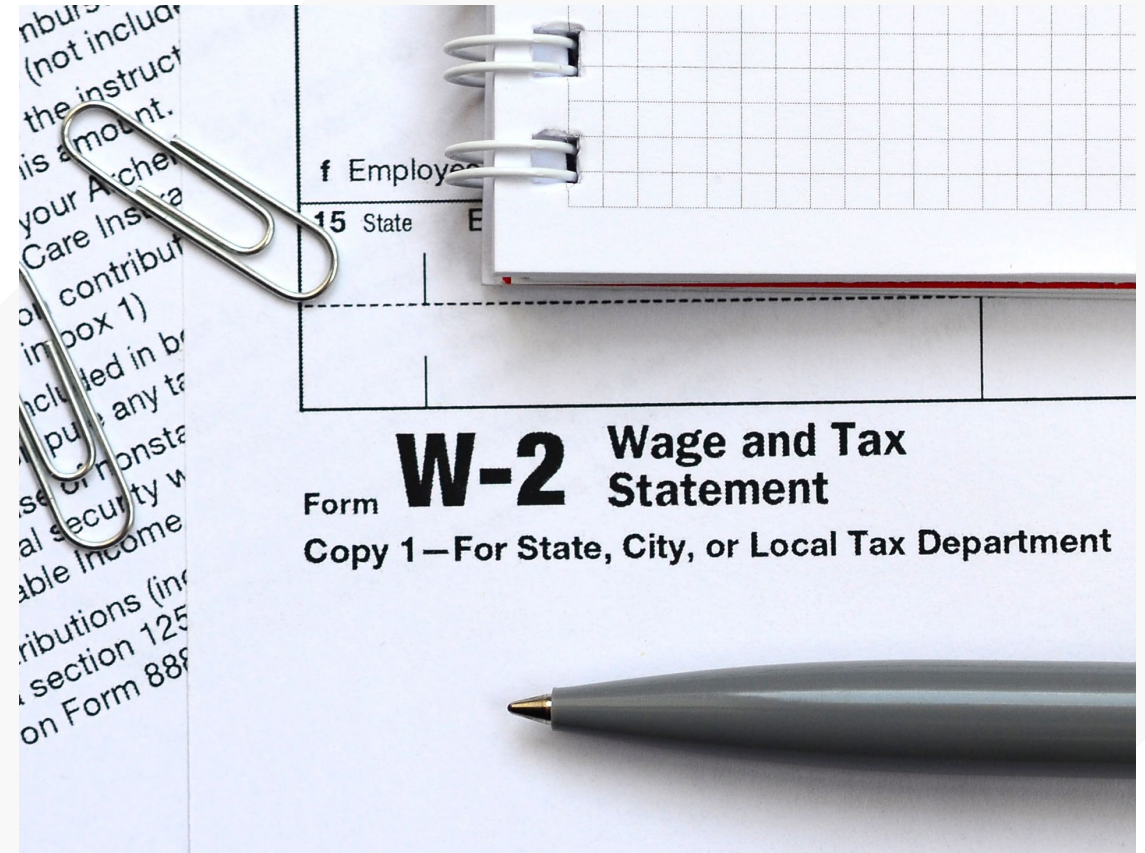
LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Identify the payroll offerings in QuickBooks Online

Navigate the steps to set up QuickBooks Online Payroll

Run common payroll reports in QuickBooks Online



QuickBooks Online Payroll Options

https://quickbooks.intuit.com/payroll/pricing

Core

Cover the basics—easily pay your team and have your payroll taxes done for you.

\$45

\$22⁵⁰

/mo

Save 50% for 3 months*

+\$4/employee per month

Select

Learn more

Payroll features

✓ Full-service payroll

Includes automated taxes and forms

✓ Auto Payroll

✓ Health benefits for your team

✓ Expert product support

✓ Next-day direct deposit

Premium

Manage your team and perfect payday with powerful tools and services.

\$75

\$37⁵⁰

/mo

Save 50% for 3 months*

+\$8/employee per month

Select

Learn more

Payroll features

✓ Full-service payroll

Includes automated taxes and forms

✓ Auto Payroll

✓ Health benefits for your team

✓ Expert product support

✓ Same-day direct deposit

✓ Workers' comp administration

✓ HR support center

✓ Expert setup review

✓ Track time on the go

Elite

Access on-demand experts to simplify payday and protect what matters most.

\$125

\$62⁵⁰

/mo

Save 50% for 3 months*

+\$10/employee per month

Select

Learn more

Payroll features

✓ Full-service payroll

Includes automated taxes and forms

✓ Auto Payroll

✓ Health benefits for your team

✓ Expert product support

✓ Same-day direct deposit

✓ Workers' comp administration

✓ HR support center

✓ White glove customized setup

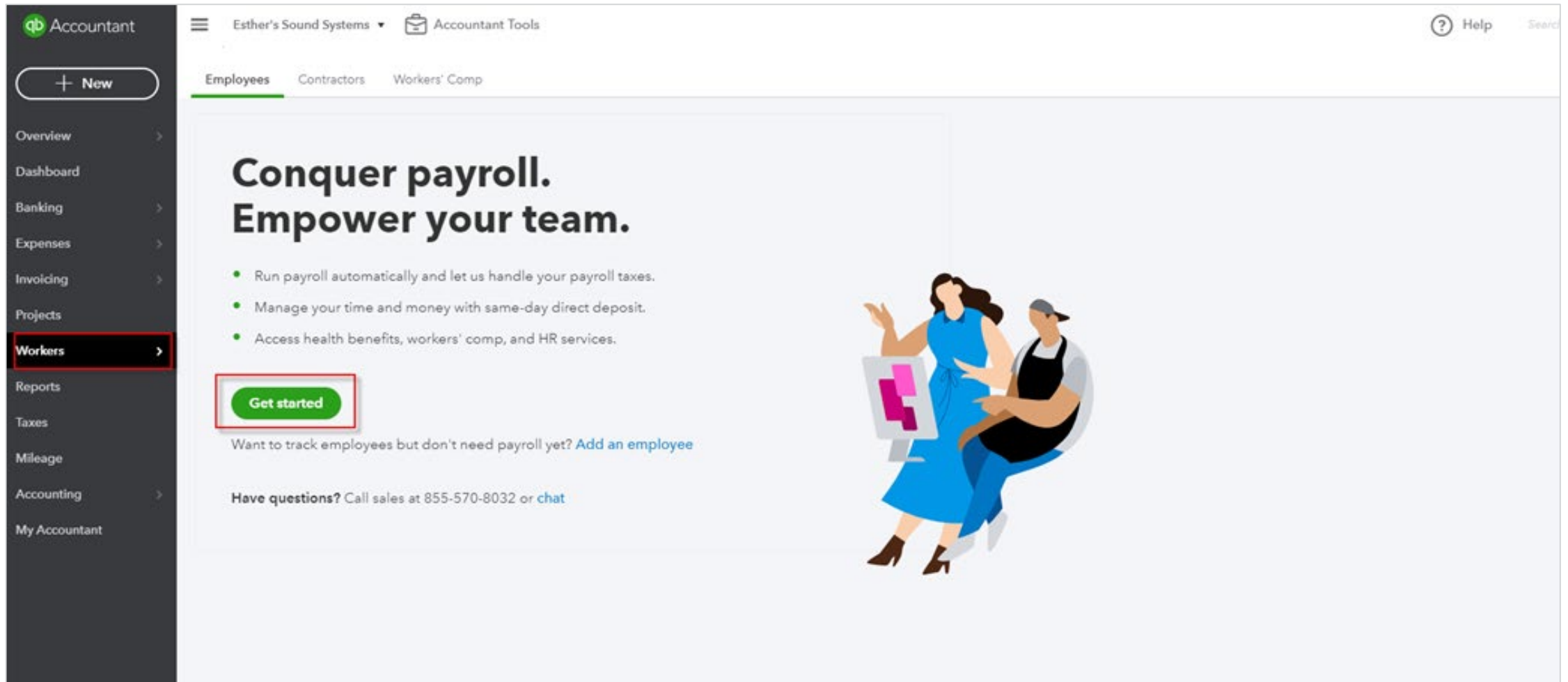
✓ 24/7 expert product support

✓ Track time and projects on the go

✓ Tax Penalty Protection¹

✓ Personal HR advisor

Signing up for QuickBooks Payroll



The screenshot displays the QuickBooks Accountant web interface. On the left is a dark sidebar with navigation links: Overview, Dashboard, Banking, Expenses, Invoicing, Projects, **Workers** (highlighted with a red box), Reports, Taxes, Mileage, Accounting, and My Accountant. The main content area has a header with 'Esther's Sound Systems' and 'Accountant Tools'. Below this is a tab bar with 'Employees', 'Contractors', and 'Workers' Comp'. The 'Employees' tab is active, showing a large heading 'Conquer payroll. Empower your team.' followed by three bullet points: 'Run payroll automatically and let us handle your payroll taxes.', 'Manage your time and money with same-day direct deposit.', and 'Access health benefits, workers' comp, and HR services.' A green 'Get started' button is highlighted with a red box. Below the button is a link: 'Want to track employees but don't need payroll yet? [Add an employee](#)'. At the bottom, it says 'Have questions? Call sales at 855-570-8032 or [chat](#)'. On the right side of the main content area is an illustration of a woman in a blue dress pointing at a computer screen while a man in a black apron looks on.

Setting Up QuickBooks Payroll

3 Options:

Work with Intuit to set up

Complete Form 8655

Convert from other third-party payroll providers – FREE

Complete Company Information

Legal name, bank routing and account numbers

Set up Compensation and Benefit Types

Salary, hourly, retirement and other deductions

Enter Employee Information

Completed W-4, pay rate, deductions, benefit info, YTD pay

Provide Direct Deposit Information

Employee bank account and routing numbers

Enter Tax Information

Company FEIN and State ID numbers, tax rates, filing frequency, EFTPS enrollment, etc.

QuickBooks Payroll Reports

Overview

Employees

Contractors

Workers' Comp

Benefits

HR Adviser

COVID-19 Resources

Run payroll

Next payroll due Monday, 6/15/2020

Paycheck list

PRIVACY

Add an employee

Find an employee

Active Employees

NAME	PAY RATE	PAY METHOD	STATUS
Friedberg, Eleanor	\$120,000.00/year	Check	Active

Payroll

Employee Details

Employee Directory

Multiple Worksites

Paycheck List

Payroll Billing Summary

Payroll Deductions/Contributions

Payroll Details

Payroll Summary by Employee

Payroll Summary

Payroll Tax Liability

Payroll Tax Payments

Payroll Tax and Wage Summary

Recent/Edited Time Activities

Retirement Plans

Time Activities by Employee Detail

Total Pay

Total Payroll Cost

Vacation and Sick Leave

Workers' Compensation

Comparison of Payroll Options

https://quickbooks.intuit.com/payroll/pricing

<div><div>Core</div><div>Cover the basics—easily pay your team and have your payroll taxes done for you.</div><div><div>\$45</div><div>\$22⁵⁰/mo</div><div>Save 50% for 3 months*</div><div>+\$4/employee per month</div></div><div>Select</div><div>Learn more</div></div> <div><div>Payroll features</div><div><div>✓ Full-service payroll</div><div>Includes automated taxes and forms</div></div><div><div>✓ Auto Payroll</div><div>✓ Health benefits for your team</div><div>✓ Expert product support</div><div>✓ Next-day direct deposit</div></div></div>	<div><div>Premium</div><div>Manage your team and perfect payday with powerful tools and services.</div><div><div>\$75</div><div>\$37⁵⁰/mo</div><div>Save 50% for 3 months*</div><div>+\$8/employee per month</div></div><div>Select</div><div>Learn more</div></div> <div><div>Payroll features</div><div><div>✓ Full-service payroll</div><div>Includes automated taxes and forms</div></div><div><div>✓ Auto Payroll</div><div>✓ Health benefits for your team</div><div>✓ Expert product support</div><div>✓ Same-day direct deposit</div><div>✓ Workers' comp administration</div><div>✓ HR support center</div><div>✓ Expert setup review</div><div>✓ Track time on the go</div></div></div>	<div><div>Elite</div><div>Access on-demand experts to simplify payday and protect what matters most.</div><div><div>\$125</div><div>\$62⁵⁰/mo</div><div>Save 50% for 3 months*</div><div>+\$10/employee per month</div></div><div>Select</div><div>Learn more</div></div> <div><div>Payroll features</div><div><div>✓ Full-service payroll</div><div>Includes automated taxes and forms</div></div><div><div>✓ Auto Payroll</div><div>✓ Health benefits for your team</div><div>✓ Expert product support</div><div>✓ Same-day direct deposit</div><div>✓ Workers' comp administration</div><div>✓ HR support center</div><div>✓ White glove customized setup</div><div>✓ 24/7 expert product support</div><div>✓ Track time and projects on the go</div><div>✓ Tax Penalty Protection¹</div><div>✓ Personal HR advisor</div></div></div>
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QuickBooks Online Seminar

TOPIC 10: BANK FEEDS AND RECONCILING

Topic 10: Bank Feeds and Reconciling

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Set up and utilize Bank Feeds

Troubleshoot common Banking Center issues

Reconcile transactions to a bank statement using the Reconcile tool



Banking Center

BankingRulesReceipts

Mastercard

Checking

\$-3,621.93

Bank balance

\$1,201.00

In QuickBooks

Updated moments ago

Review 25 transactions

Savings

\$200.00

Bank balance

\$800.00

In QuickBooks

Updated moments ago

Review 1 transaction

Mastercard

\$304.96

Bank balance

\$157.72

In QuickBooks

Updated moments ago

Review 7 transactions

+ Link account

Update

Connected bank and credit card accounts

For review (7)

Categorized

Excluded

All dates

All transactions

Search by description or check number

Go to register for account that is displayed (Mastercard)

Go to bank register

	DATE	DESCRIPTION	PAYEE	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION
<input type="checkbox"/>	05/25/2020	Lara's Lamination		Uncategorized Expense	\$150.00		Add
<input type="checkbox"/>	05/26/2020	Amazon		Uncategorized Expense		\$89.99	Add
<input type="checkbox"/>	04/24/2020	Tania's Nursery	Tania's Nursery	<div>1 record found</div> Expense 04/24/2020 \$-82.45	\$82.45		Match
<input type="checkbox"/>	04/30/2020	Norton Lumber And		<div>1 record found</div> CC Bill Payment 04/30/2020 \$-103.55	\$103.55		Match
<input type="checkbox"/>	05/05/2020	Bob's Burger		<div>1 record found</div> Credit Card Expense	\$18.97		Match

Setting up the Bank Feed

Upload file

Download data from your bank

1. Open a new tab and sign in to your bank.
2. Download transactions: CSV, QFX, QBO, or OFX format only.
3. Close the tab and return to QuickBooks.

Select a file to upload

No file selected

Browse

Bank Workflow Demo

Adding & Matching Transactions Demo

Troubleshooting Bank Feeds

Troubleshooting Bank Feeds

Rules Demo

Reconcile Demo



Reconcile an account

Chart of accounts > Bank register > Reconcile

Reconcile Checking
Statement ending date: April 30, 2020

\$10,000.00
STATEMENT ENDING BALANCE

\$5,000.00
BEGINNING BALANCE

-

\$5,000.00
CLEARED BALANCE

\$0.00
0 PAYMENTS

+

\$0.00
0 DEPOSITS

Edit info

Save for later

\$5,000.00
DIFFERENCE

Payments Deposits All

DATE ▲	CLEARED DATE	TYPE	REF NO.	ACCOUNT	PAYEE	MEMO	PAYMENT (USD)	DEPOSIT (USD)
01/12/2020		Bill Payment	10	Accounts Payabl...	Robertson & Associates		300.00	
01/20/2020		Receive Payment	1053	Accounts Receiv...	Bill's Windsurf Shop			175.00
02/03/2020		Expense	12	Legal & Professi...	Robertson & Associates		250.00	
02/25/2020		Check	4	Automobile/Fuel	Chin's Gas and Oil		\$4.55	
03/02/2020		Sales Tax Payment		- Split -		Q1 Payment	38.50	
03/02/2020		Sales Tax Payment		- Split -		Q1 Payment	38.40	
03/05/2020		Expense	9	Job Expenses:J...	Tania's Nursery		89.09	
03/05/2020		Check	12	Legal & Professi...	Books by Bessie		55.00	
03/11/2020		Check	5	Automobile/Fuel	Chin's Gas and Oil		62.01	
03/12/2020		Expense	15	Job Expenses	Tania's Nursery		108.09	
03/21/2020		Receive Payment	5664	Accounts Receiv...	Freeman Sporting Goods \$5 Twin...			86.40
03/21/2020		Sales Receipt	1008	Design income	Kate Whelan			225.00
03/23/2020		Receive Payment		Accounts Receiv...	Amy's Bird Sanctuary	Amy claims the pest control did not occur		105.00
03/25/2020		Bill Payment	7	Accounts Payabl...	Hicks Hardware		250.00	
03/28/2020		Expense	8	Landscaping Ser...	Hicks Hardware		24.36	
04/06/2020		Cash Expense		Automobile	Squeaky Klean Car Wash		19.99	

QuickBooks Online Seminar

TOPIC 11: SALES TAX

Topic 11: Sales Tax

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Turn on and set up Sales Tax

Report and file sales tax using the Sales Tax module

Update Customers as well as Products and Services



Sales Tax Center

Sales Tax Center

Sales Tax Owed

Show By	Month▼	For	Current Year▼	Start of Year	Jan▼	Accounting Basis	Accrual▼	i
Agency Name	Gross Sales	i	Taxable Sales	Tax Amount	Adjustments	Payments	Balance	
<input type="checkbox"/> Board of Equalization rename	\$10,280.05		\$5,118.00	\$409.44		\$38.50	\$370.94	
May-20								
Apr-20	\$8,425.80		\$4,556.75	\$364.54			\$364.54	
Mar-20	\$942.00		\$155.00	\$12.40		\$38.50	\$-26.10	
Feb-20	\$521.00		\$275.00	\$22.00			\$22.00	
Jan-20	\$391.25		\$131.25	\$10.50			\$10.50	
<input type="checkbox"/> Arizona Dept. of Revenue rename	\$10,280.05		\$422.00	\$38.40		\$38.40	\$0.00	

Record Tax Payment

View Report

Recent Sales Tax Payments

Agency Name	Tax Period	Tax Amount	Adjustments	Total Paid	Paid Date
Board of Equalization	03/14/2020	\$38.50		\$38.50	03/17/2020
Arizona Dept. of Revenue	03/14/2020	\$38.40		\$38.40	03/17/2020

Delete Payment

View All

QuickBooks Online Seminar

TOPIC 12: EXTRA INFORMATION ON TRANSACTIONS

Topic 12: Extra Information on Transactions

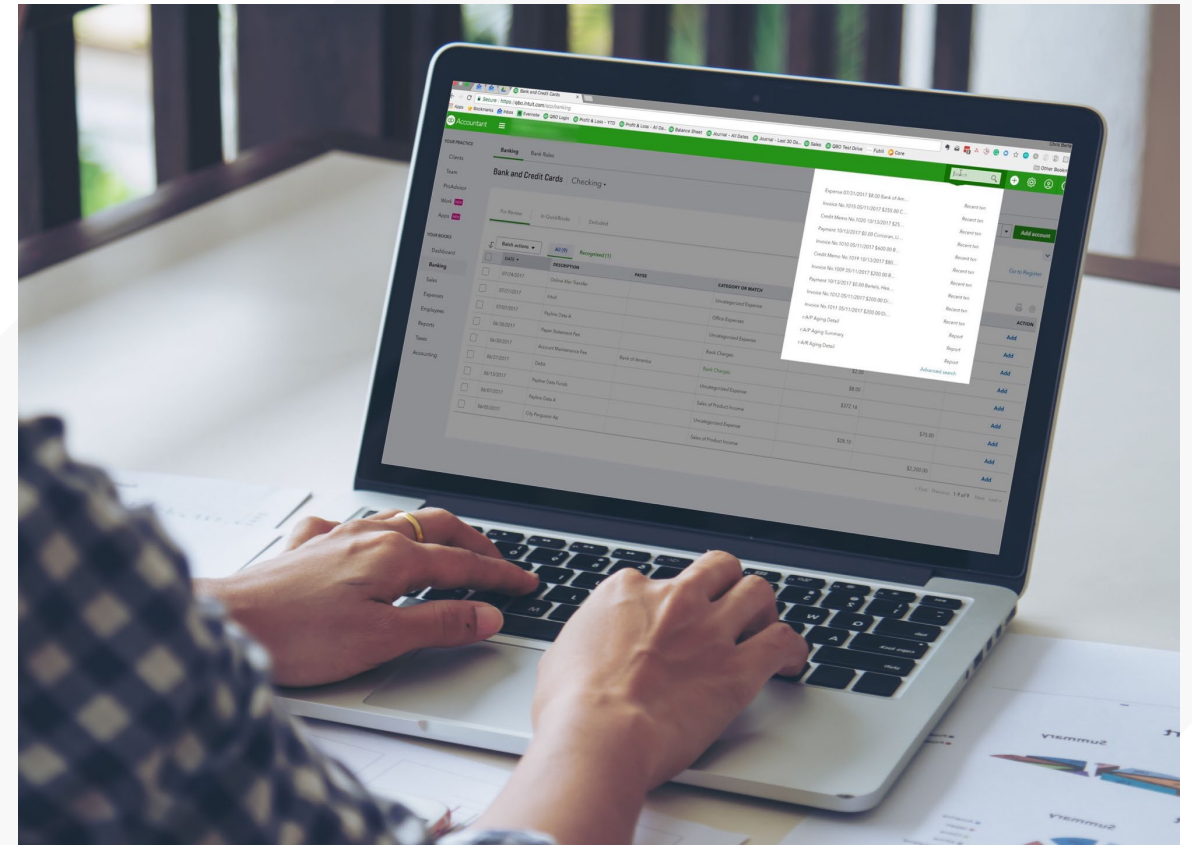
LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Add attachments to QuickBooks Online

Use the Search feature

Generate Custom Fields



Attaching Transactions Demo

Search Transactions Demo

QuickBooks Online Seminar

TOPIC 13: REPORTING

Topic 13: Reporting

LEARNING OBJECTIVES

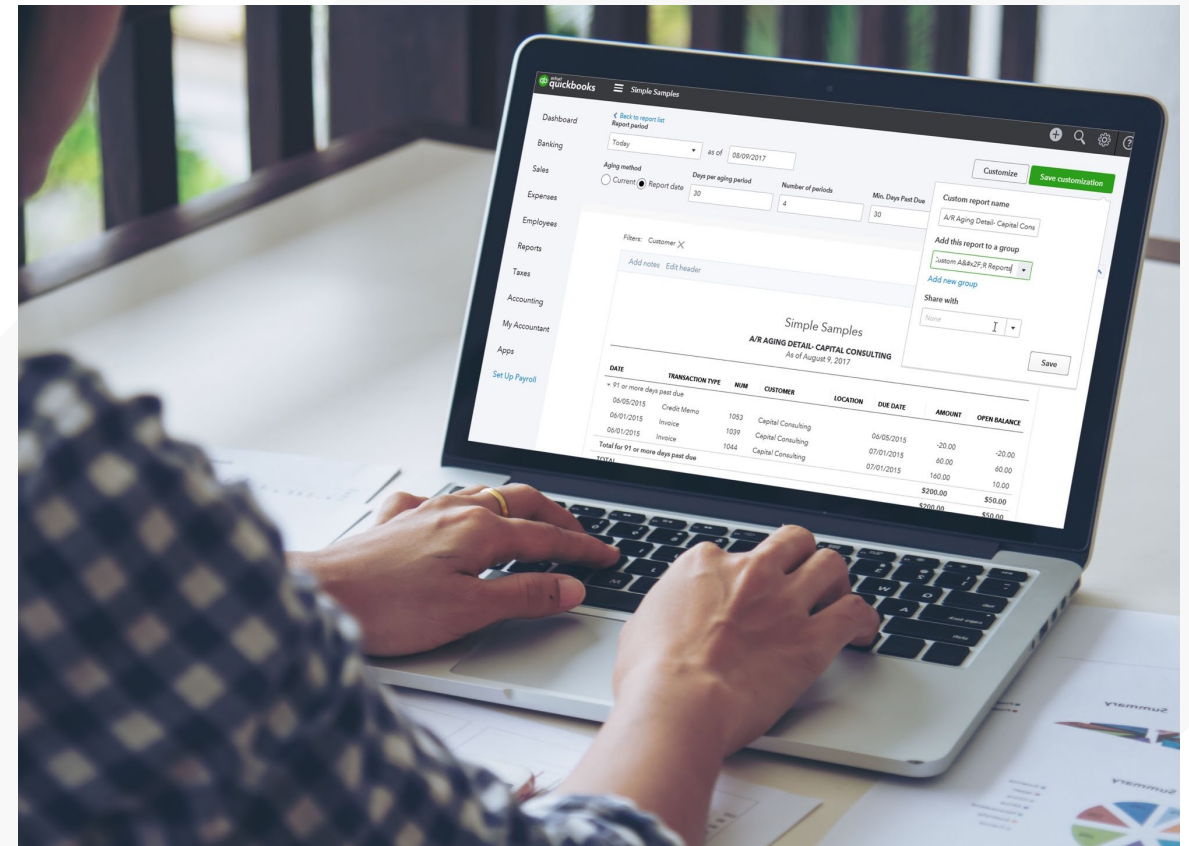
Upon completion of this topic, you should be able to:

Understand the benefits of using QuickBooks Online Reports

Recognize differences in reporting by subscription level

Identify common report settings and browser modifications

Set up Grouped Reports



Reporting Differences

Simple Start:

20+ reports, basic financial reporting, A/R reports

Essentials:

40+ reports, A/P, Products and Services, Company Snapshot

Plus:

65+ reports, Classes, Locations, inventory, time tracking

Advanced:

80+ reports, Smart Reporting by Fathom

Simple Start

~~\$25~~

\$12/mo

Buy now

Essentials

~~\$40~~

\$20/mo

Buy now

Plus

~~\$70~~

\$35/mo

Buy now

Advanced

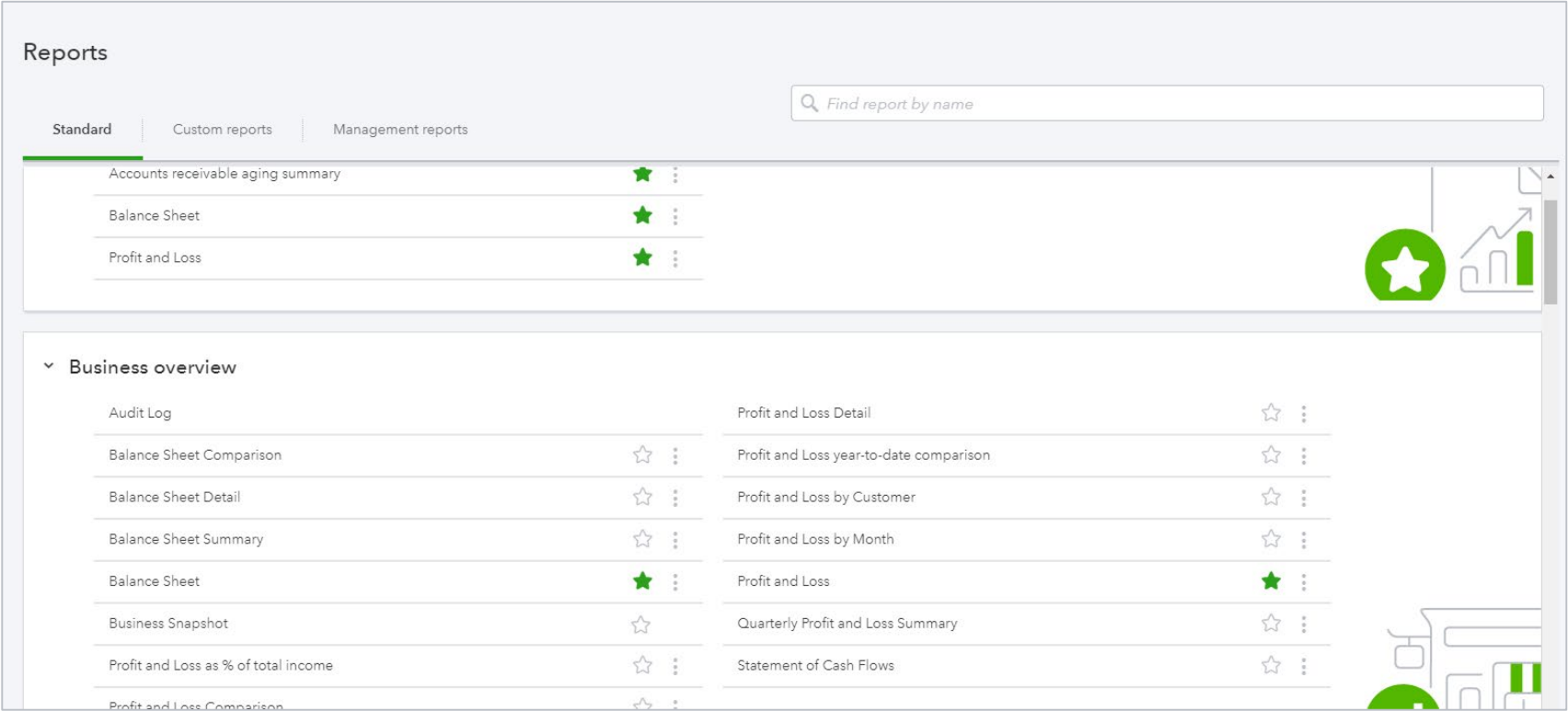
~~\$150~~

\$75/mo

Buy now

Customizing Reports — Report Types

- List Reports
- Summary Reports
- Detail Reports
- Specialized Reports



Customizing Reports Demo

Save Your Customized Reports Demo

QuickBooks Online Seminar

TOPIC 14: EXPANDED FUNCTIONALITY

Topic 14: Expanded Functionality

LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

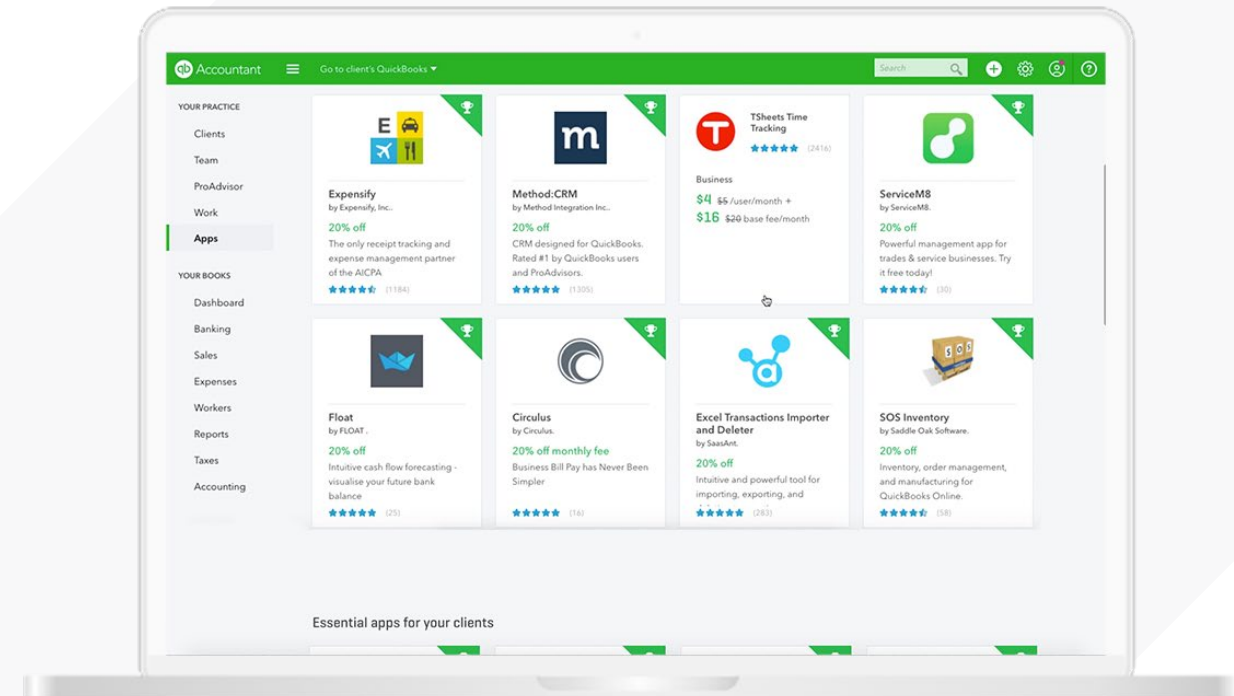
Open and turn on QuickBooks Labs

Use Google Chrome Tabs and Bookmarks

Download the QuickBooks Desktop app

Locate third-party apps

Install QuickBooks Online on mobile devices




QuickBooks Labs Demo





QuickBooks Online For Mac and Windows


<https://quickbooks.intuit.com/online/apps/>

QuickBooks Apps

Overview


Features

Get the Apps

Tech Specs


The most productive way to run
your business on your Mac or Windows.

The power of QuickBooks Online with the speed and ease you expect on your desktop!




Everything you need in one
spot

Track sales and expenses, create estimates, manage customers, collaborate with your accountant, and more.




Get paid faster

Create professional-looking invoices and let customers pay you by credit card or bank transfer.




Anytime, anywhere access

Enjoy QuickBooks on your Mac, smartphone, tablet, and the web. Data syncs automatically so you'll always have the latest information at your fingertips.



Designed for your Mac or Windows

Enjoy quick access to QuickBooks straight from your desktop (or dock), with additional features designed for PC or Mac users! Use multiple windows, keyboard shortcuts and menus to speed through common tasks and workflows.

intuit
quickbooks.

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QuickBooks Online Seminar

TOPIC 15: SUPPORT

Topic 15: Support

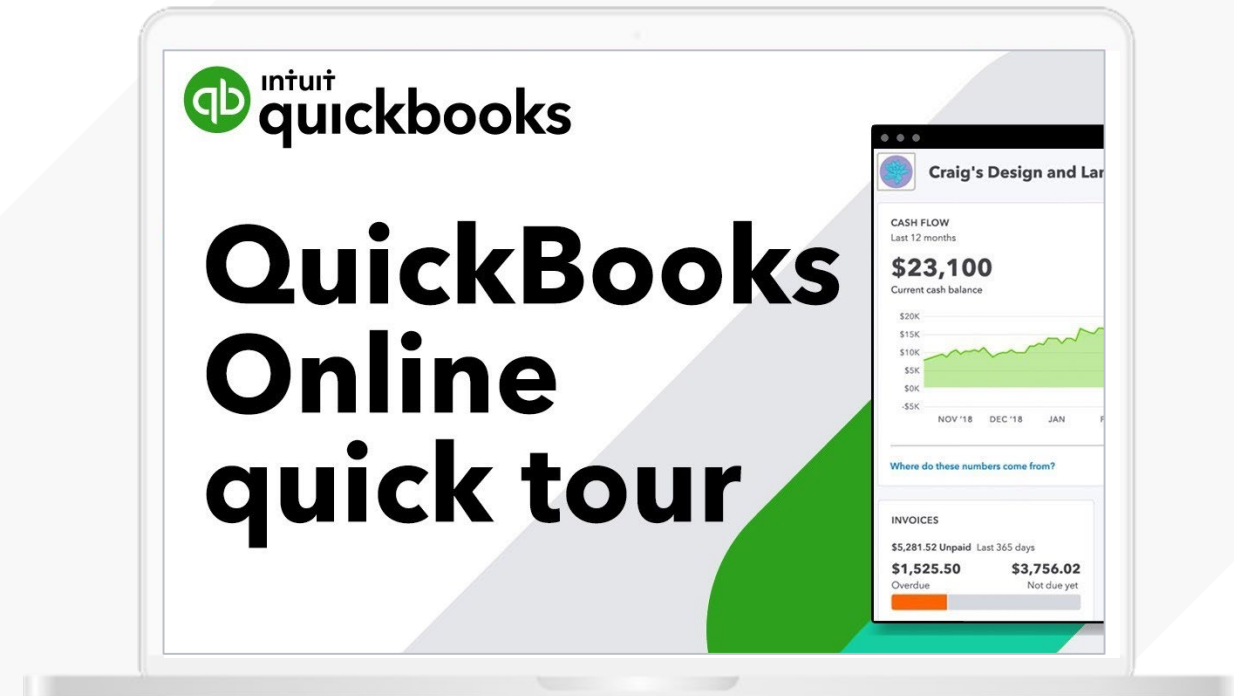
LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Get started with video tutorials


Understand the Help function

Find resources on navigation differences between QuickBooks Desktop and QuickBooks Online




Getting Started

https://quickbooks.intuit.com/tutorials/



Plans & PricingHow It WorksSupport

 For Sales: 1.877.683.3280

Sign in

QuickBooks Support


Get startedTopicsTrainingCommunityResources


Search for anything


Home > Tutorials


Video tutorials for QuickBooks Online


Watch step-by-step videos to learn your way around QuickBooks.


 Account management


 Advanced accounting


 Banking


 Expenses and vendors

 Get started

 Inventory

 Payroll and workers

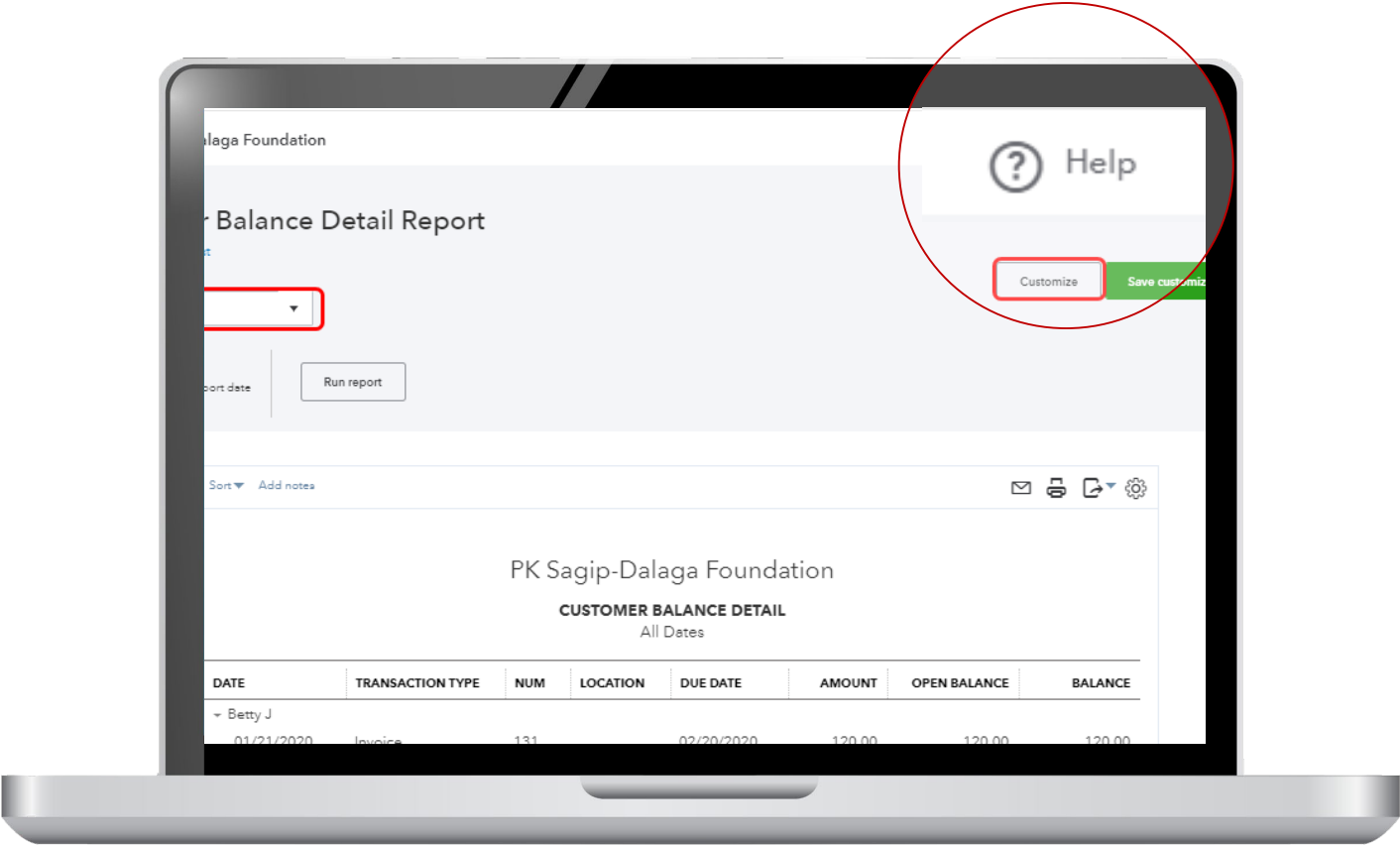
 Reports

 Sales and customers

Need to get in touch?

Contact us

Getting Help



Navigation — QuickBooks Desktop vs. QuickBooks Online

Navigation Guide

This guide highlights where to find the most-used features in QuickBooks Online.

<http://quickbooks.intuit.ca/allaboutqbo/resources/upgrade/navigation-guide.jsp>

<https://quickbooks.intuit.com/tutorials/>

Learning Objectives Summary – Part 2

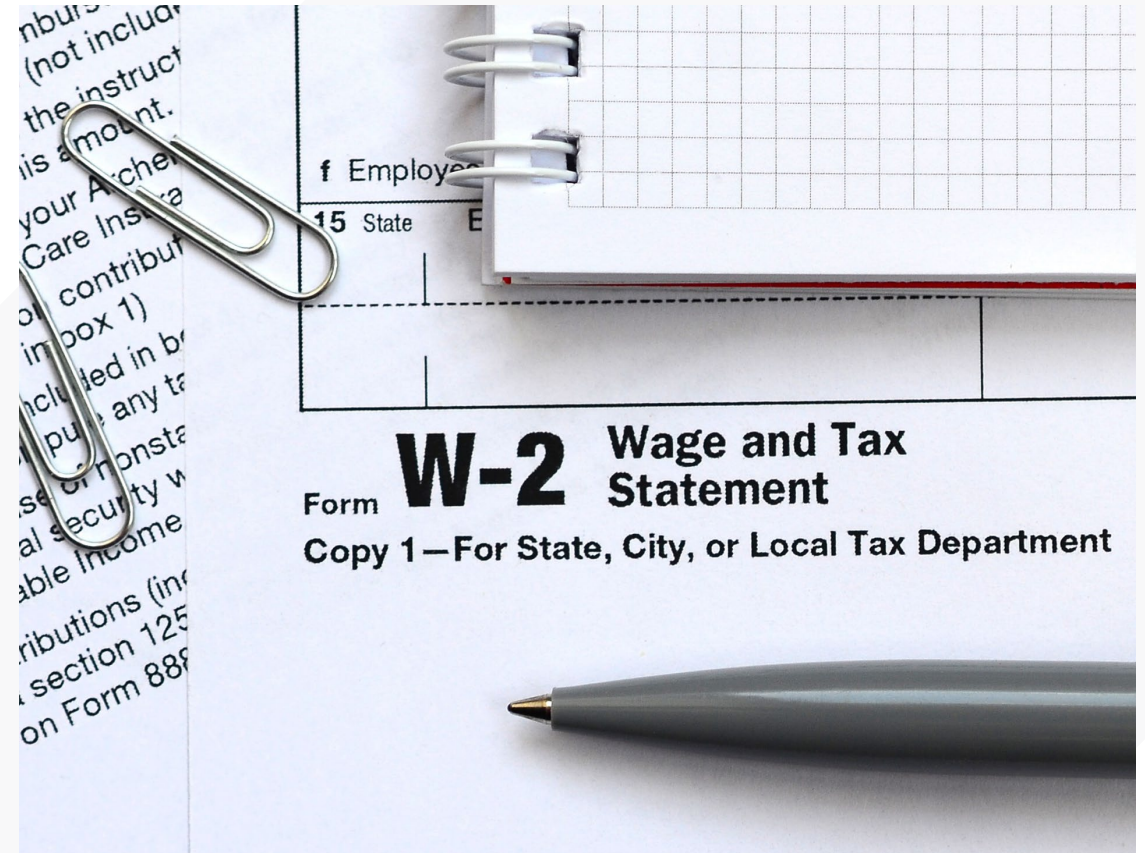
TOPIC 9: PAYROLL

You should now be able to:

Identify the payroll offerings in QuickBooks Online

Navigate the steps to set up QuickBooks Online Payroll

Run common payroll reports in QuickBooks Online



Learning Objectives Summary – Part 2 (continued)

TOPIC 10: BANK FEEDS AND RECONCILING

You should now be able to:

Set up and utilize Bank Feeds

Troubleshoot common Banking Center issues

Reconcile transactions to a bank statement using the Reconcile tool



Learning Objectives Summary – Part 2 (continued)

TOPIC 11: SALES TAX

You should now be able to:

Turn on and set up Sales Tax

Report and file sales tax using the Sales Tax module

Update Customers as well as Products and Services



Learning Objectives Summary – Part 2 (continued)

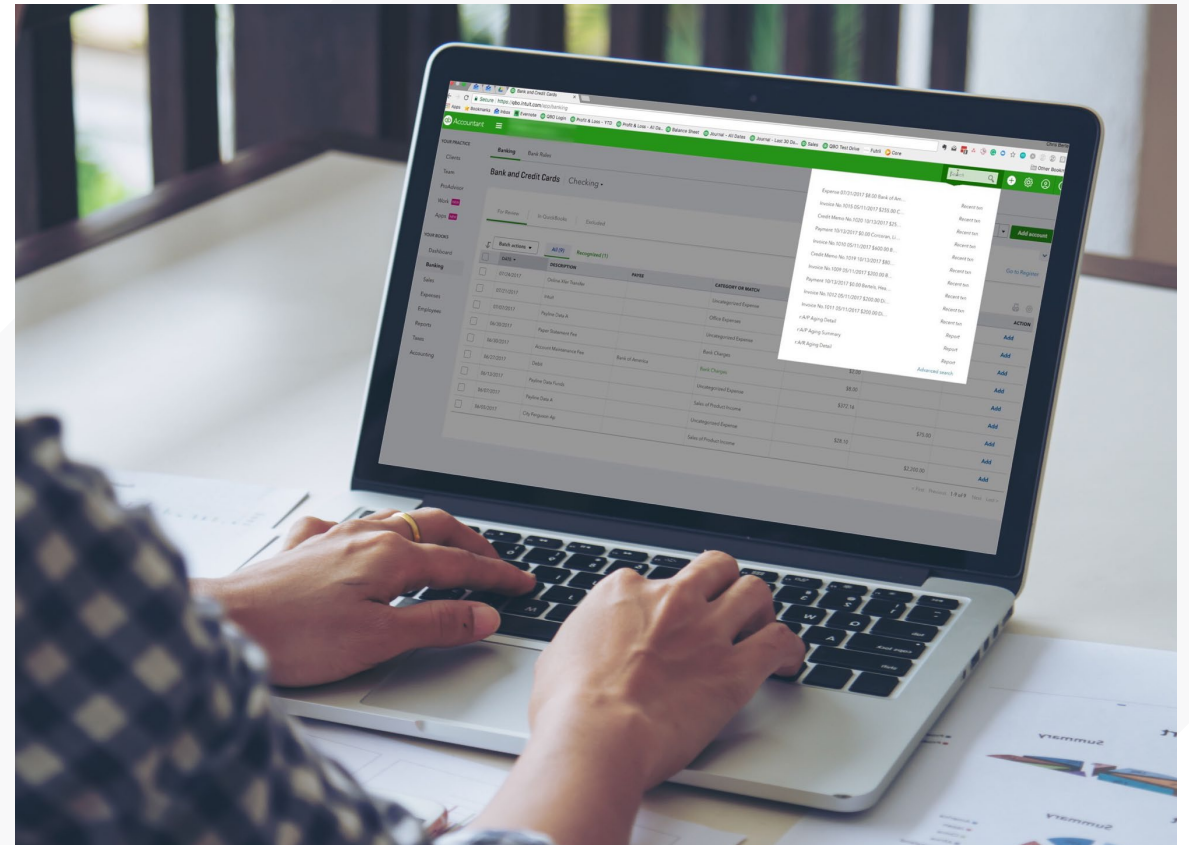
TOPIC 12: EXTRA INFORMATION ON TRANSACTIONS

You should now be able to:

Add attachments to QuickBooks Online

Use the Search feature

Generate Custom Fields



Learning Objectives Summary – Part 2 (continued)

TOPIC 13: REPORTING

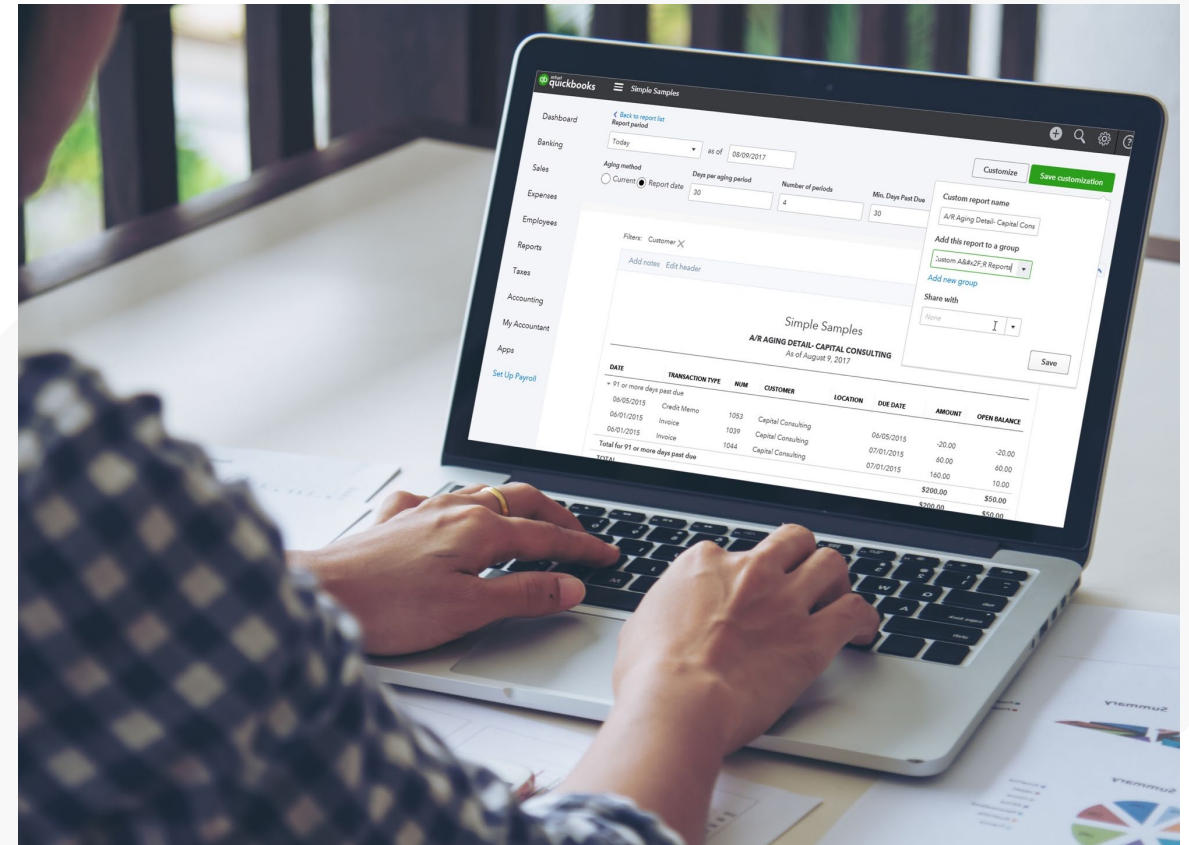
You should now be able to:

Understand the benefits of using QuickBooks Online Reports

Recognize differences in reporting by subscription level

Identify common report settings and browser modifications

Set up Grouped Reports



Learning Objectives Summary – Part 2 (continued)

TOPIC 14: EXPANDED FUNCTIONALITY

You should now be able to:

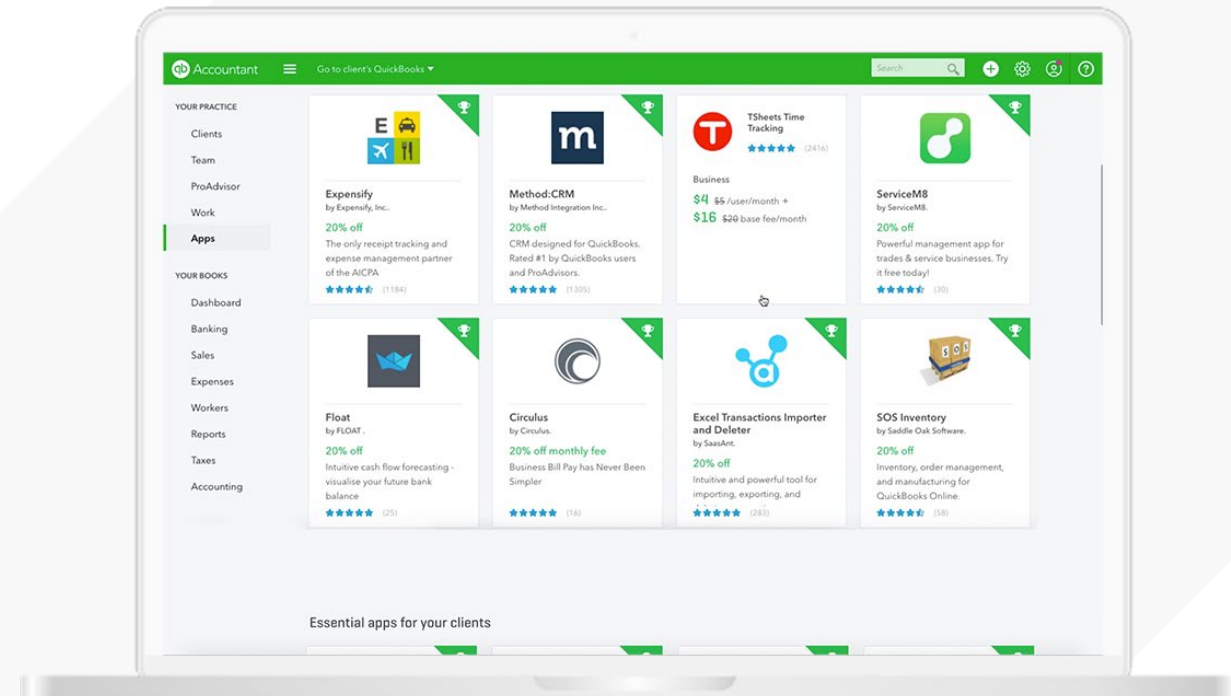
Open and turn on QuickBooks Labs

Use Google Chrome Tabs and Bookmarks

Download the QuickBooks Desktop app

Locate third-party apps

Install QuickBooks Online on mobile devices



Learning Objectives Summary – Part 2 (continued)

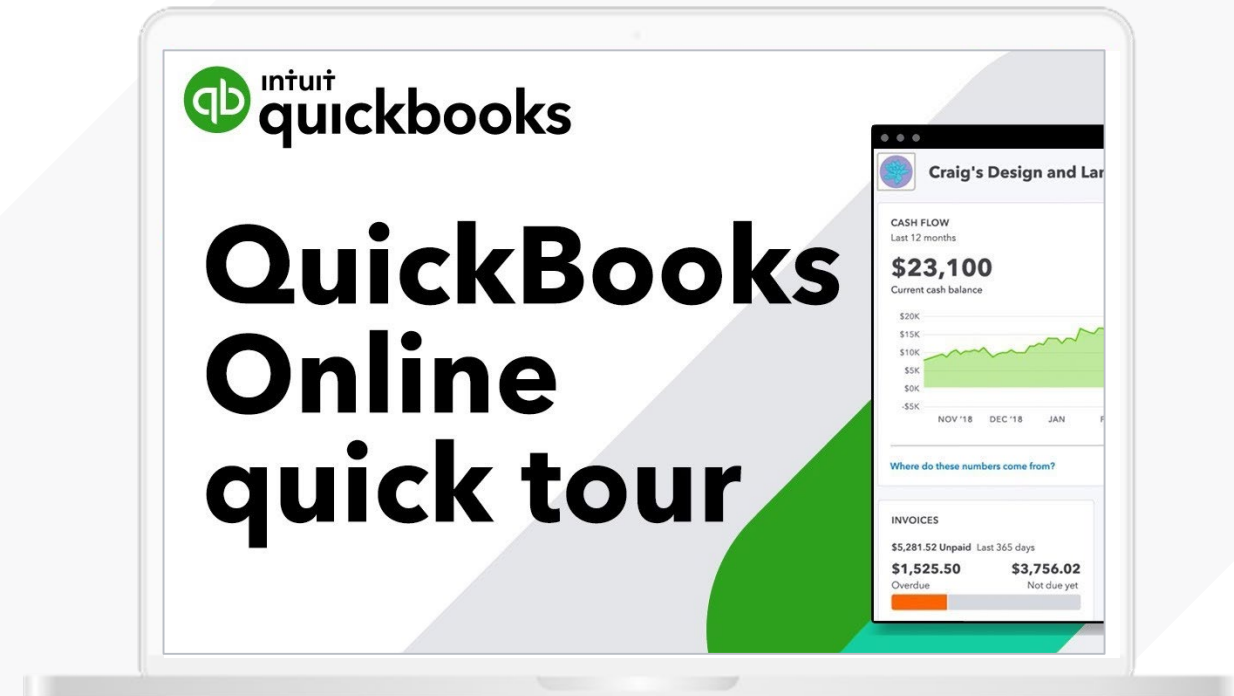
TOPIC 15: SUPPORT

You should now be able to:

Get started with video tutorials

Understand the Help function

Find resources on navigation differences between QuickBooks Desktop and QuickBooks Online



QuickBooks Online Seminar

TOPIC 16: QUICKBOOKS ONLINE ACCOUNTANT

Topic 16: QuickBooks Online Accountant

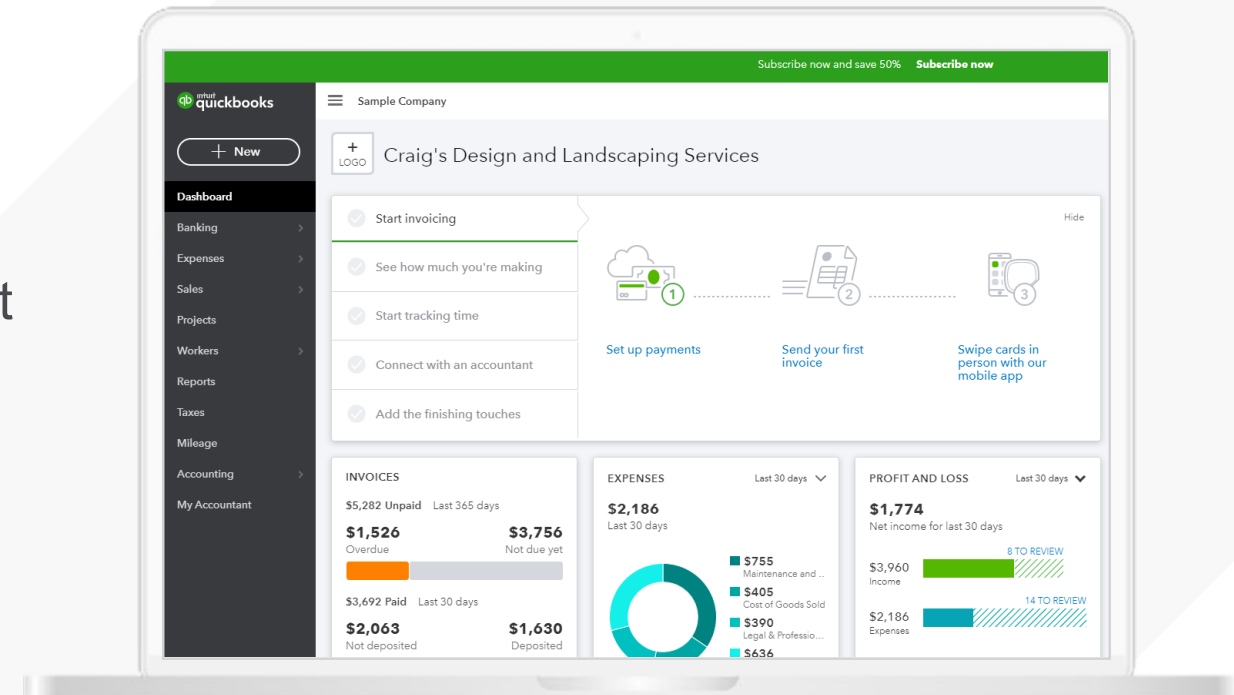
LEARNING OBJECTIVES

Upon completion of this topic, you should be able to:

Access the QuickBooks Online Accountant test drive company

Identify features of QuickBooks Online Accountant

Access QuickBooks Online Accountant



What is QuickBooks Online Accountant (QBOA)?

Provides central access to clients' QBO company files

Offers features for managing your practice

Lets you manage your firm's books

Special accountant-only tools

Free to accountant users

No extra charge to QBO client users (one of the 2 Accountant firms allowed in QBO Simple Start, Essentials, and Plus; one of the 3 allowed in QBO Advanced)

How do I get QBOA?

1. Decide on Intuit ID you want to use for your new QBOA firm
2. Sign up for QBOA using that firm Intuit ID here:
<https://quickbooks.intuit.com/accountant-sign-up/>
3. Give clients the firm's Intuit ID designated email address to invite you to access their QBO company as 1 of the free "Accountant" users
4. Invite staff as Team users
5. Delegate appropriate permissions and access to client QBO companies

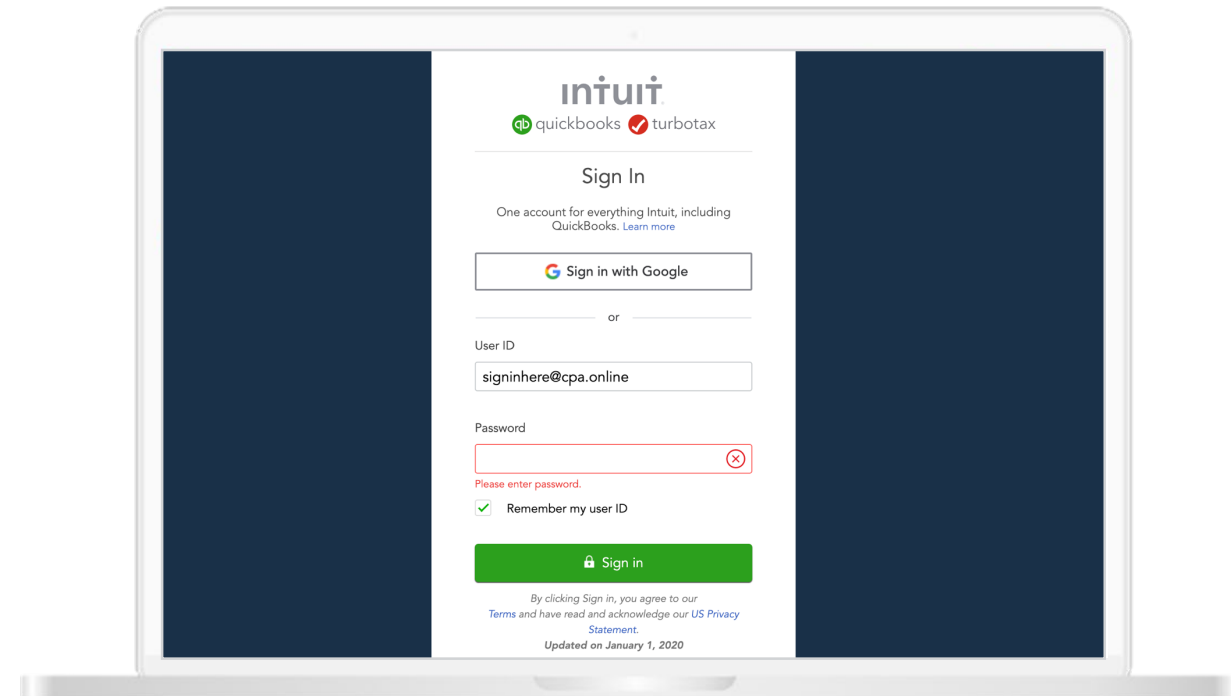
How do I get QBOA?

Then...

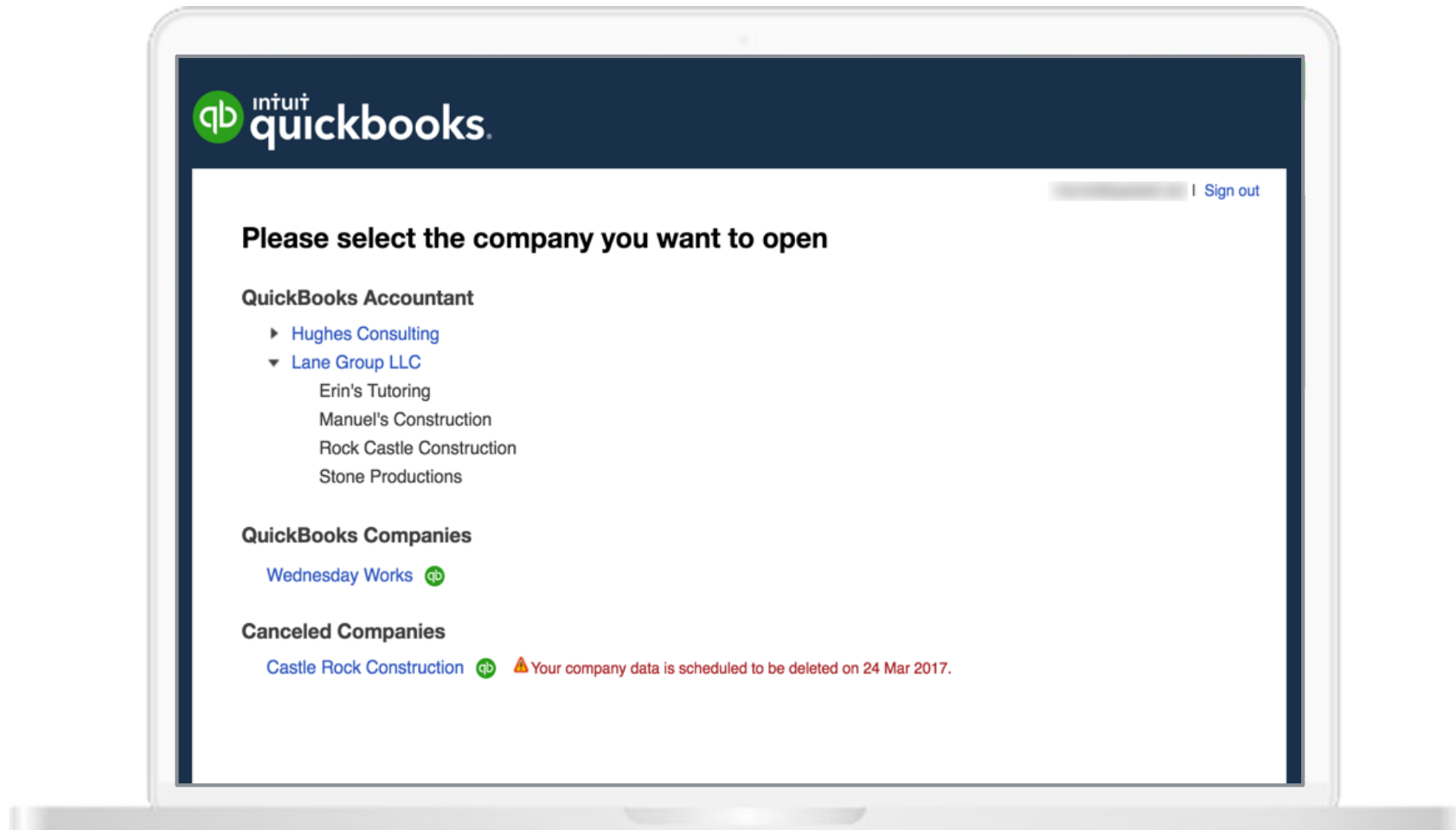
1. Centralize wholesale billing plan for the firm, editing billing info
2. Manage all wholesale client subscriptions
3. Use “Your Books” for firm’s bookkeeping, accessed by Team users (only those with permission)

How do I log into QBOA?

1. Navigate your browser (preferably Chrome) to qbo.intuit.com
2. Sign in
3. You may see these options:
 - QuickBooks Accountant**
 - QuickBooks Companies**
 - Canceled Companies**
4. Select which QBOA firm to open



What do I click on?



What do I see when I log into QBOA?

qb Accountant

+ New

YOUR PRACTICE

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ProAdvisor

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YOUR BOOKS

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Accounting

GO TO QUICKBOOKS

Accountant Tools

Adams Guild Gibson LLC

Esther's clients

Feedback?

Add client

Find a client

All Clients

CLIENT / CONTACT	EMAIL / PHONE	BANKING	PREP FOR TAXES	TAX RETURNS	ACTIONS
<div>Beautiful Landscapes 12</div> <div>Woods Watkins</div>	info@info.com (650) 321-4567	0 unaccepted transactions as of 733 days ago	Review Data	2019: Create tax return 2018: 2 tax returns	<a>Edit client
<div>Brad Hall</div> <div>Brad Hall</div>	hisemail@email.net			Create tax return	<a>Edit client
<div>Bryce Forney</div>				Create tax return	<a>Edit client
<div>Castle Construction Company</div>		2 unaccepted transactions as of 903 days ago	Review Data	Create tax return	<a>Edit client
<div>Clayton Adams, Musician</div>				Create tax return	<a>Edit client
<div>Esther's Elegant Designs Inc.</div>	info@example.com +1 8185555555			Create tax return	<a>Edit client
<div>Esther's Etiquette Studio</div>	estee1001.1@gmail.com +1 4168184269			Create tax return	<a>Edit client
<div>Foreign Home Currency Client</div>	estherfriedbergkarp.foreign@gmail.com +1 4168184269	43 unaccepted transactions as of 341 days ago		Create tax return	<a>Edit client
<div>Full Service Payroll</div>			Review Data	Create tax return	<a>Edit client
<div>General Product Store</div>	(555) 200-9000			Create tax return	<a>Edit client
<div>Heather's Consulting Business</div>	erin@bookkeepersfriend.com			Create tax return	<a>Edit client
<div>Importing Test</div>	qbconsultant@gmail.com			Create tax return	<a>Edit client

qb intuit quickbooks.

Intuit Confidential and Proprietary 145

Client List

qb Accountant

GO TO QUICKBOOKS

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Adams Guild Gibson LLC

Esther's clients

Feedback?

Add client

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Find a client

All Clients

CLIENT / CONTACT	EMAIL / PHONE	BANKING	PREP FOR TAXES	TAX RETURNS	ACTIONS
<div>Beautiful Landscapes 12</div> <div>Woods Watkins</div>	info@info.com (650) 321-4567	0 unaccepted transactions as of 733 days ago	Review Data	2019: Create tax return 2018: 2 tax returns	Edit client
<div>Brad Hall</div> <div>Brad Hall</div>	hisemail@email.net			Create tax return	Edit client
<div>Bryce Forney</div>				Create tax return	Edit client
<div>Castle Construction Company</div> <div>Clayton Adams, Musician</div>		2 unaccepted transactions as of 903 days ago	Review Data	Create tax return	Edit client
<div>Esther's Elegant Designs Inc.</div>	info@example.com +1 8185555555			Create tax return	Edit client
<div>Esther's Etiquette Studio</div>	estee1001.1@gmail.com +1 4168184269			Create tax return	Edit client
<div>Foreign Home Currency Client</div>	estherfriedbergkarp.foreign@gmail.com +1 4168184269	43 unaccepted transactions as of 341 days ago		Create tax return	Edit client
<div>Full Service Payroll</div>			Review Data	Create tax return	Edit client
<div>General Product Store</div>	(555) 200-9000			Create tax return	Edit client
<div>Heather's Consulting Business</div>	erin@bookkeepersfriend.com			Create tax return	Edit client
<div>Importing Test</div>	qbconsultant@gmail.com			Create tax return	Edit client

Client Details: Contact Info

qb Accountant

+ New

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GO TO QUICKBOOKS

Accountant Tools

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Search

Beautiful Landscapes 12 42

Beautiful Landscapes 11

Edit client

Notes

Bookkeeping 3

Payroll 1

Shared documents

Tax

Add a note...

Save

2019

OCT 3

AK

Strongly dislikes Jan in accounting

Alicia Katz Pollock, 1:07 PM

OCT 1

BF

Likes chicken McNuggets

Bryce Forney, 1:16 PM

OCT 1

BF

Close books by end of following month.

Bryce Forney, 1:16 PM

OCT 1

BF

Call Tammy on 5/31/18 for new project

Bryce Forney, 1:16 PM

PINS

Strongly dislikes Jan in accounting

Alicia Katz Pollock,
Oct 3, 2019, 1:07 PM

Client likes the Red Sox, don't EVEN mention the Yankees.

Heather Satterley,
Sep 4, 2019, 2:24 PM

Office will be closed for the second half of September. Roberta will be available in case of emergency or will respond within a few days for non-emergencies.

<http://mypropertymanagement.com/>

Laura Redmond,
Sep 12, 2017, 9:29 PM

Client Details: Notes and Bookkeeping

qb Accountant

Go to client's QuickBooks

Search

+

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Larry's Landscaping & Garden Supply 44

Larry's Landscaping & Garden Supply

Edit client

Notes NEW

Bookkeeping 4

Payroll 116

Shared documents

Tax

Add a note...

Save

JUN 29

BF

This client likes to talk, so call late in the afternoon

Bryce Forney, 12:31 PM

MAY 24

ML

Office will be closed for the second half of September. Roberta will be available in case of emergency or will respond within a few days for non-emergencies.

<http://mypropertymanagement.com/>

Testing editing a note

Michelle Long, 9:33 AM

MAY 24

ML

Don't call before 8:00 am EST

Michelle Long, 9:33 AM

PINS

This client likes to talk, so call late in the afternoon

Bryce Forney,
Jun 29, 2018, 12:31 PM

Don't call before 8:00 am EST

Michelle Long,
May 24, 2018, 9:33 AM

Client Details: Payroll

Accountant

+ New

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GO TO QUICKBOOKS

Accountant Tools

Larry's Landscaping & Garden Supply 47

Larry's Landscaping & Garden Supply

Edit client

Notes

Bookkeeping 3

Payroll 155

Shared documents

Tax

Payroll status Payroll blocked

Next pay date: 04/03/2020

All paychecks | Run payroll

Enhanced

Recent tax payments

TAX PAYMENT	PAID	AMOUNT	PERIOD
Federal Taxes (941/944)	05/14/2019	\$716.25	May 15 to May 17
PA Income Tax	03/26/2019	\$9.82	Apr 6 to Apr 8
PA Income Tax	12/13/2018	\$36.84	Nov 9 to Nov 11
AL Income Tax	12/13/2018	\$12.74	May 1 to May 31
Federal Taxes (941/944)	03/29/2018	\$-815.55	Jul 29 to Jul 31

View all tax payments

Review in QuickBooks

No items for review

Client Details: Shared Documents

qb Accountant

+ New

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Larry's Landscaping & Garden Supply 47

Larry's Landscaping & Garden Supply

Edit client

Notes

Bookkeeping 3

Payroll 155

Shared documents

Tax

These are shared documents

Both you and your client can view, add, and delete these documents.

Upload

Batch actions

DOCUMENT	REQUEST	UPDATED	ACTIONS
<input type="checkbox"/> KiraLeftover_20180621_02.mp4	monthly loan statement	September 4, 2018	...
<input type="checkbox"/> allocation spreadsheet for QBOA.xlsx	Bank Statement request	July 24, 2018	...
<input type="checkbox"/> Westin bill.pdf	Please upload July bank statements	July 23, 2018	...
<input type="checkbox"/> image.jpg	Merchant Svcs Statement	June 28, 2018	...
<input type="checkbox"/> pink flowers.png	Merchant Svcs Statement	June 28, 2018	...
<input type="checkbox"/> pink flowers.png	Memphis request	June 27, 2018	...
<input type="checkbox"/> pink flowers.png	New Client Request	June 26, 2018	...
<input type="checkbox"/> client replies to email.jpg	Questions on expenses	May 17, 2018	...
<input type="checkbox"/> Folio-A-Attachment.pdf	Need copy of invoice	October 20, 2017	...

Client Details: Tax

qb Accountant

+ New

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GO TO QUICKBOOKS

Accountant Tools

Larry's Landscaping & Garden Supply 47

Larry's Landscaping & Garden Supply

Notes

Bookkeeping 3

Payroll 155

Shared documents

Tax

Start tax return

RETURN NAME	TYPE	YEAR	STATUS	E-FILE STATUS	ACTION
Larry's Landscaping & Garden Supply (Form 1040)	1040	2015			View return
Larry's Landscaping & Garden Supply (Form 1040)	1040	2015			View return
Larry's Landscaping & Garden Supply (Form 1040)	1040	2015			View return
Larry's Landscaping & Garden Supply (Form 1040)	1040	2016			View return
Larry's Landscaping & Garden Supply (Form 1040)	1040	2016			View return
Larry's Landscaping & Garden Supply (Form 1040)	1040	2017			View return
Larry's Landscaping & Garden Supply - 1	1120S	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return
Larry's Landscaping & Garden Supply (Form 990)	990	2017			View return

QBOA Team List

qb Accountant

+ New

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Sales >

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Workers >

Reports

Taxes >

Mileage

Accounting >

GO TO QUICKBOOKS

Accountant Tools

Help

Search

?

Help

🔍

Search

🔔

👤

⚙️

Team

Access

Certifications **new**

🔍 Find

NAME	JOB TITLE	EMAIL	ACCESS	STATUS
Michelle Long	QB guru	michelle@longforsuccess.com	Full	Active
Eric Randall	IAM	eric_randall@intuit.com	Custom	Active
Valerie Heckman		valerie_heckman@intuit.com	Full	Active
Clay Adams	New Boss	qbclay@gmail.com	Full	Active
Jason Meredith		jason@macfo.com	Basic	Active
Ryan Kelley		ryan_kelley@intuit.com	Full	Active
Erin Walsh Dyer	Trainer	erin@bookkeepersfriend.com	Master Admin	Active
Jonathan Brogan		jonathan_brogan@intuit.com	Full	Active
Laura Redmond		morris@petbell.net	Full	Active
Mary Sheridan	Sheridan CPAs	marysheridan@yahoo.com	Full	Active
Esther Friedberg Karp	TWN Multinational Multicurrency Advocate	esther.us@e-compubooks.com	Full	Active
Chris Freebairn		chrisfreebairn@hotmail.co.uk	Full	Active
Kathryn Humphreys		kathryn.humphreys@volumeglobal.com	Full	Active

🖨️

⚙️

Add user

Team Details: Firm Administration and Books

Edit user

Esther Friedberg Karp

TWN Multinational Multicurrency Advocate

User Profile

Firm Administration and Books

Client Access

Access: Full

YOUR FIRM ADMINISTRATION	ACCESS
Firm information	Edit
Firm users	Edit
Subscriptions and billing	Edit

YOUR FIRM BOOKS	ACCESS
Customers and accounts receivable	Yes
Vendors and creditors	Yes

YOUR CLIENTS	ACCESS
Manage your clients	Yes

Access to firm administration and books

Full

- Full access to administrative functions for your firm
- Full access to managing clients
- Full access to your firm's books
- Administrator access to client QuickBooks

Basic

- Limited access to administrative functions for your firm
- No access to managing clients
- No access to your firm's books
- Administrator access to client QuickBooks

Custom

- Custom access to administrative functions for your firm
- Custom access to managing clients
- Custom access to your firm's books
- Administrator access to client QuickBooks

Cancel

Save

Team Details: Client Access

Edit user

Ginger Vick

Staff Accountant

User Profile

Firm Administration and Books

Client Access

Find a client

CLIENT

Benson Showroom

Bills Windsurf Shop

Blue Dog

Bob's Builders

BUSINESS SAMPLE

Florence Consulting

GD

Genevieve Design

☐

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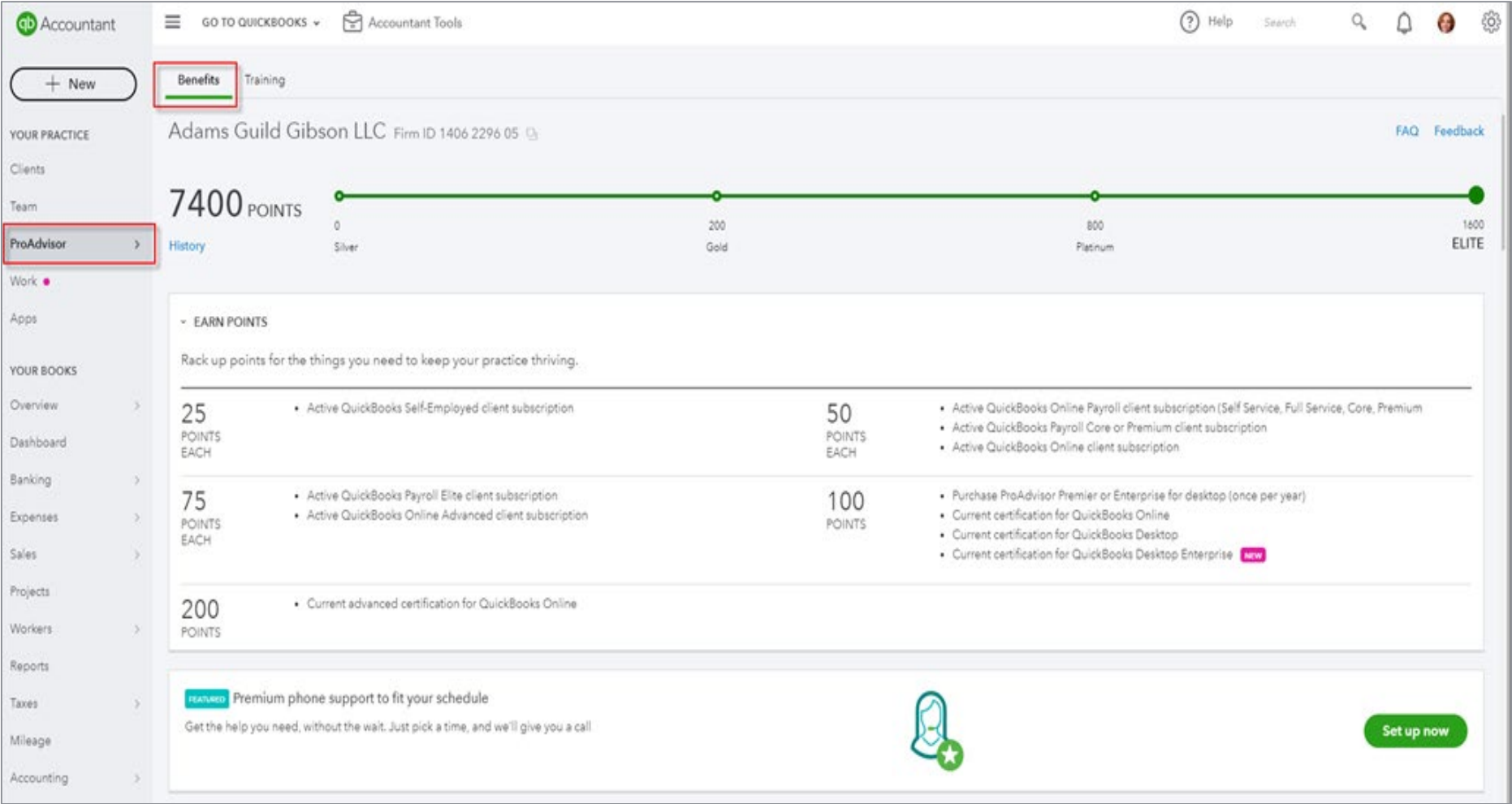
Client access

Granting user access to a client gives them full (admin) permissions to that client's QuickBooks Online file.

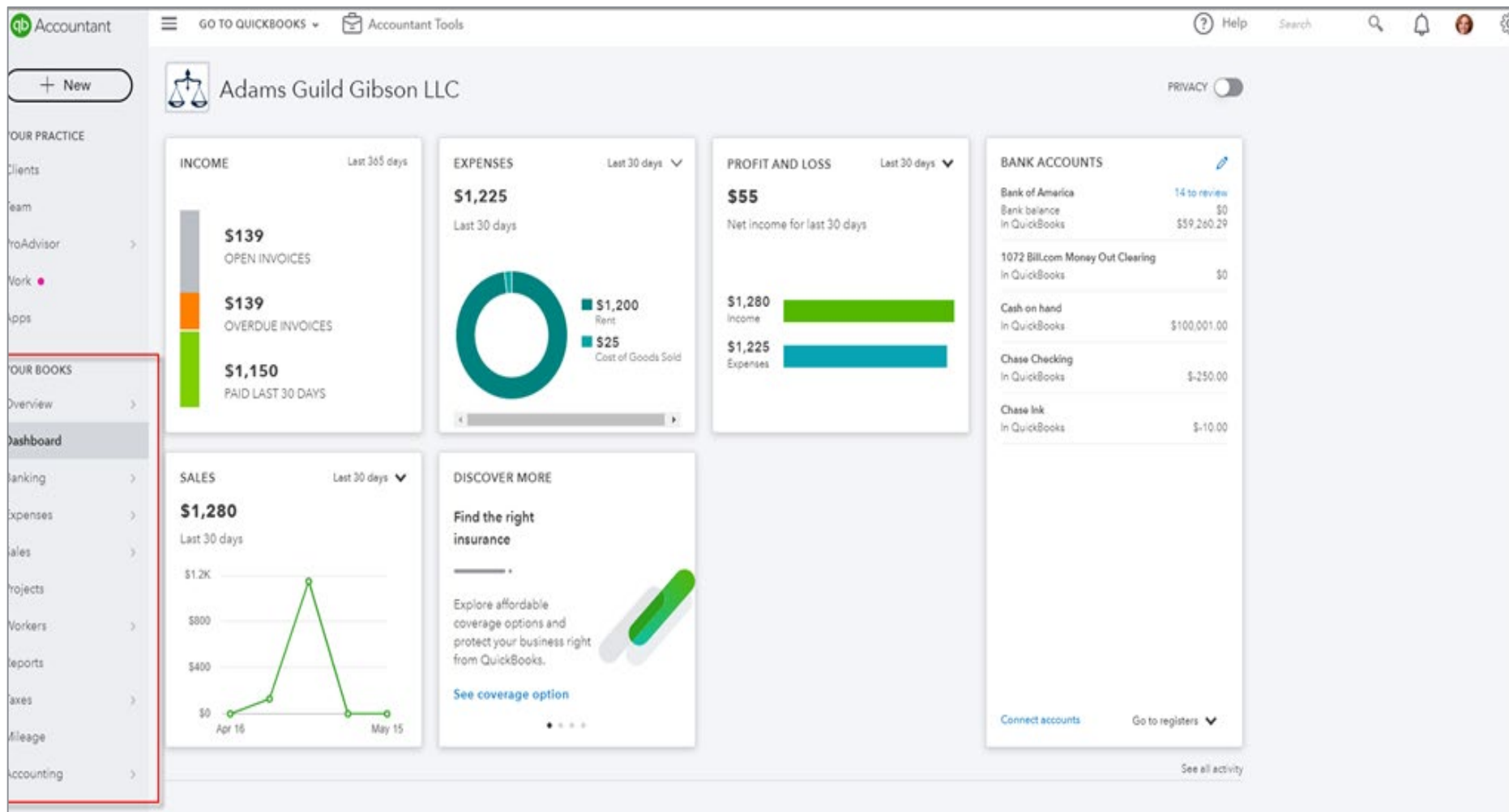
Cancel

Save

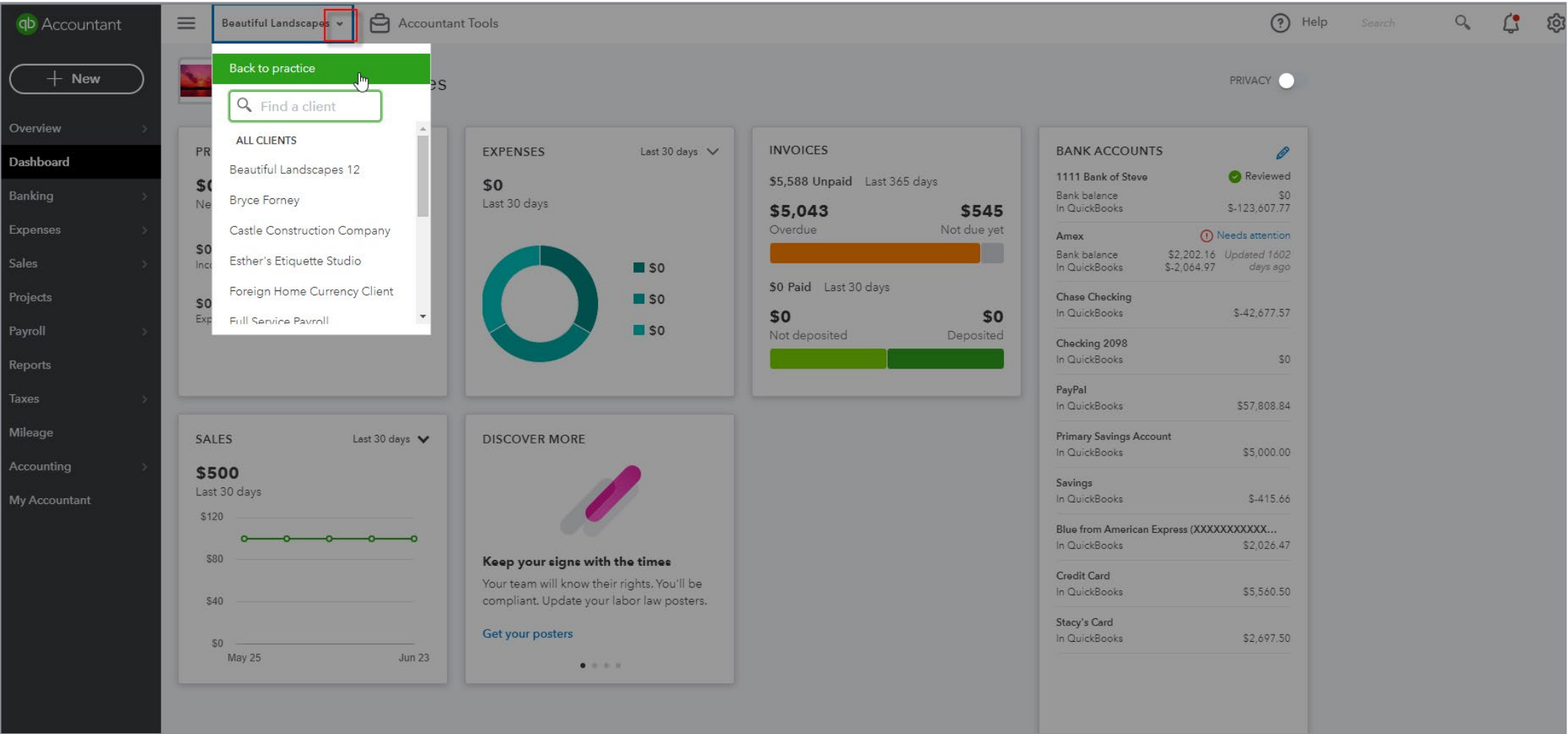
ProAdvisor Tiers



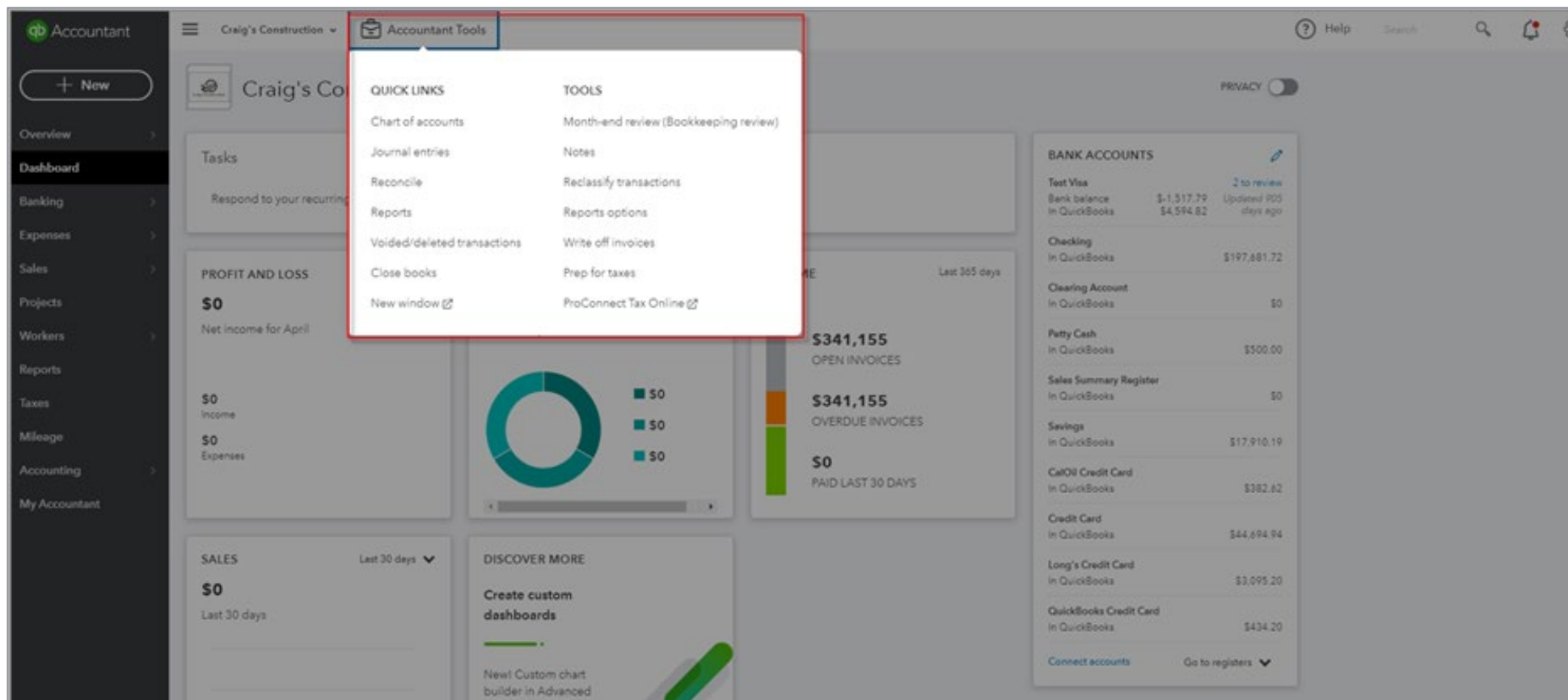
Your Books



QBOA Toolbar and Client Switcher

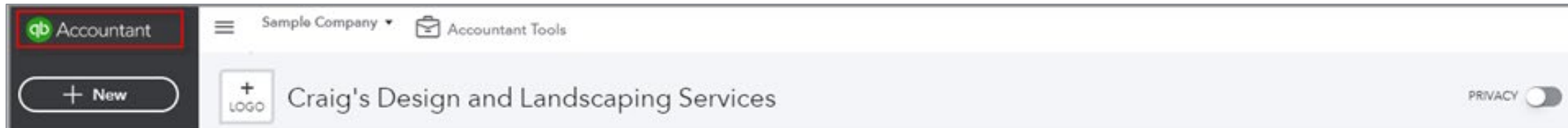


Accountant Tools



QBOA Test Drive Company

[Bookmark this link](#) for direct access to the test drive company
(Craig's Design and Landscaping Services)



Learning Objectives Summary – Part 3

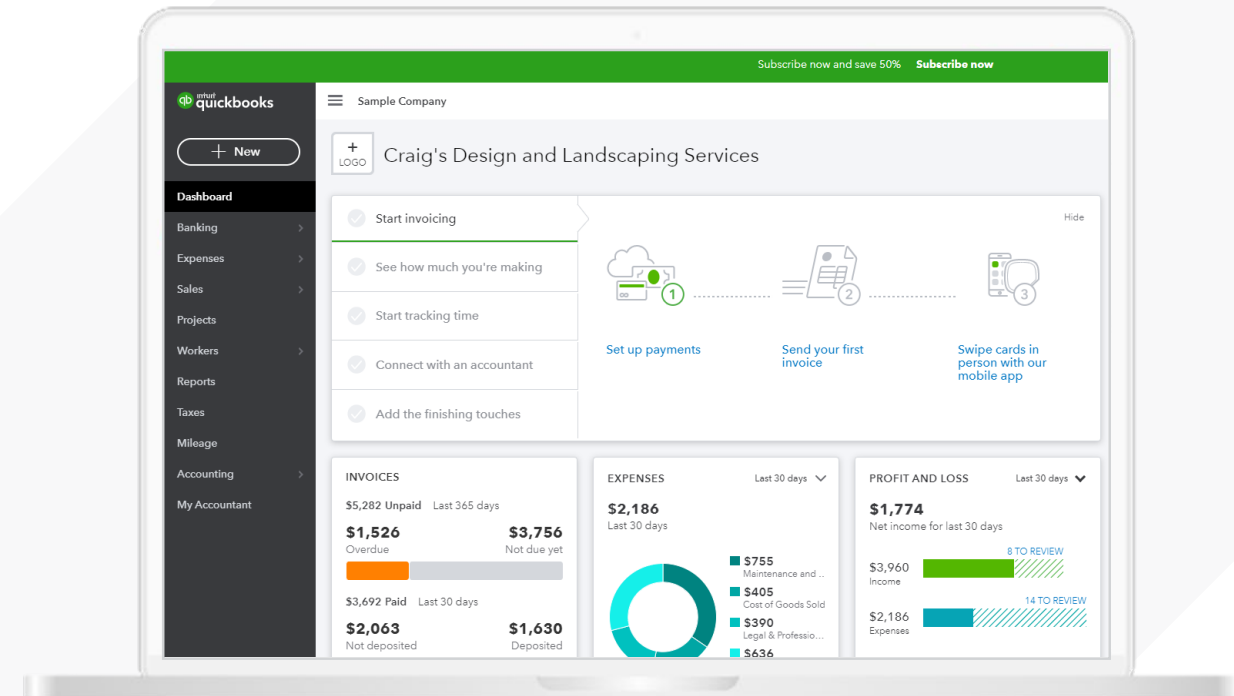
TOPIC 16: QUICKBOOKS ONLINE ACCOUNTANT

You should now be able to:

Access the QuickBooks Online Accountant test drive company

Identify features of QuickBooks Online Accountant

Access QuickBooks Online Accountant



Questions?

thank you!