

# ΙΠΤUΙΤ

# **QuickStart** to Intuit QuickBooks Online

Welcome to the QuickStart Guide for Intuit QuickBooks Online! This step-by-step guide will walk you through the registration and setup process for your free Intuit QuickBooks Online account, how to set up your class and invite students to create their own QuickBooks Online account.

#### 02 STEP 01 **STEP** STEP 03 Sign up for access Login to the educator Watch the "How the to a QuickBooks portal using your new **Educator Portal** educator license Works" video login credentials, and be sure to **bookmark** this page! Create an account Watch video Sign up for free Access the portal

#### How to sign-up for access to a free QuickBooks Educator License

**\*To be eligible for this offer, you must currently be employed as a teacher, faculty or staff at a K-12 school or university.** Intuit Inc. uses SheerID, a trusted partner, to verify that you are a current teacher, faculty or staff member. SheerID only collects information that assists in verifying your eligibility. Additional information or documentation may be requested.



## How to add a class within the QuickBooks Online Educator Portal

Step 1: Sign into the <u>QuickBooks Online Educator portal</u>



Step 2: Add class, select "+Add Class" > name your class (e.g. 2024 Honors Accounting).
Step 3: Add students, select "+Add a Student".

(you will need their first name, last name, and email address)

🕸 quickbooks	Educator Portal for Jay Fishman (Region: US)	🖸 FAQs and support 🔃	
Home	Welcome to the Intuit Educator Portal! QuickBooks teaching resources		
Demo Companies	Create your own demo QuickBooks Online Plus companies With these teaching tools, you can: • Plan your courses or create a course key by adding data • Screenshare the company for your students while teaching	Additional links          QuickBooks Online test drive (demo landscape company)         Your QuickBooks Accountant         Pro Advisor training materials	
	3 Unique curricula for teaching QuickBooks Online Use <u>QuickBooks Online Curricula</u> to teach your students, it includes: • Different curricula for beginner, intermediate and advanced students • Corresponding teacher guides presentations and utident handbooks II teamsmicrosoft.com is sharing your screen. Stop sharing Hide Ia	QuickBooks certifications QuickBooks Certified User (QBCU) Entrepreneurship and Small Business (ESB)	

Step 4: Click "Send invitation to [student name]".

#### How to create a QBO account: Learner's Guide

Step 1: Student receives email, accepts invitation.



Step 2: Student will set-up their account. Select "Get started".



Step 3: Enter First name, select "Next".

ith this, we'll make s	ure your legal busine	ss name shows up in	the right places.	
ur legal business name OR y	our own name if you are joinin	g QuickBooks for personal use	2	
lathalie				
Back Next				

Step 4: Select "Nothing, I'm new to this". Select "Next".

Nothing, I'm new to this	QuickBooks Desktop™
Sage 50 or Peachtree	Another bookkeeping software
Spreadsheets	Something else (like pen & paper)

## Other questions and selections to finish setting up QuickBooks Online

- 1. Business Type? Select "Sole proprietor".
- 2. What's your role? Select "CEO or Owner".
- 3. How many employees? Select "2-5".

Step 7: Select "Do this first" on any of the three icons. Then select "Not right now".

SUGGESTED		
\$1,250 <b>(+)</b>		\$2,500
•Pay VISA 🌒 pace 🔂	Payroll ran automatically for June.	
Personalize your invoices	Learn how to start paying	Link a bank or credit card
and make them payable	yourself and your team	start getting organized
Do this first	Do this first	Do this first
Find out more	Find out more	Find out more

Step 8: Congratulations! You are signed into QuickBooks Online.

← ♂ (Ô https://app.qt	o.intuit.com/app/homepage?locale=en-us			A* 🟠 🛱	¢@@~~ 🔇
op intuit quickbooks	≡• Bob's Garage		Contact experts	q1 (?) Help III Q	û 🕸 🗈 🤉
+ New	Bob's Garage				6
V BOOKMARKS 🖉					
Bank transactions	Home Cash flow Planner				+
V MENU 🖉				It Customize layou	at Privacy
Dashboards >					
Transactions >	SETUP CHECKLIST	E	SHORTCUTS		0
Sales >	-	I			
Expenses >	<ul> <li>Basic business info</li> </ul>	100% 🗸			
Customers & leads >	Get ready to invoice	^			
Reports			Get paid Create Recor online invoice expen	rd Add bank ise deposit	create check
Payroll >	Send personalized invoices and track them from viewed to paid	@ au abooks			•
Time >			Samuel		
Projects		See how it works 2:57	JTD W HE		
Budgets	<ol> <li>Make invoices personalized &amp; payable Personalize your template and make it easy for customers to pay online.</li> </ol>	Go	BANK ACCOUNTS Hide	PROFIT & LOSS	Last month in M
Taxes >	0.111		Link your bank	Net profit for April	cast monon · ·
My accountant	Add your customers Add your repeat customers so they're easy to invoice.		See where your money is headed so you can take	\$0 😐	
Live Experts	(3) Add your products & services		control or your mances.	→ Same from prior month	
Lending & banking >	Get the things you sell ready to add to invoices quickly.		GO GoBank +	S0 Income	
Commerce >	Tailor your invoice settings		Chase Bank +	50	
Apps >	Customize fields, set payment reminders, and more.		American Express Business Credit Car +	Expenses	
> More (0)			Find your bank	Bring in transactions automatically	I

# How to Log Back into Intuit QuickBooks Online

Go to accounts.intuit.com

#### **Resources:**

#### **Frequently asked questions**

Intuit Education live chat support

Issues obtaining a trial license: <u>https://verify.sheerid.com/intuit-us-student/feedback.html?token=8ZPEfX</u> Installation or registration issues: Contact <u>education@intuit.com</u>