QuickBooks Online Series

Week 1

POWERED BY

U.S. Small Business Administration

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QuickBooks Online Sample

https://qbo.intuit.com/redir/testdrive

Your QuickBooks Options

Find a plan that's right for you

Enjoy **70% off** for your first 3 months.*

1 **Select plan** — 2 Add Payroll (optional) — 3 Checkout

Simple Start

~~$30~~
$9/mo

Choose plan

- Free guided setup
- Income and expenses
- Tax deductions
- General reports
- Receipt capture
- Mileage tracking
- Cash flow
- Sales and sales tax
- Estimates
- Contractors
- Connect 1 sales channel

Bookkeeping support

LIVE
Assisted bookkeeping OFF
Add $50 per month

Essentials

~~$60~~
$18/mo

Choose plan

- Free guided setup
- Income and expenses
- Tax deductions
- Enhanced reports
- Receipt capture
- Mileage tracking
- Cash flow
- Sales and sales tax
- Estimates
- Contractors
- **Connect 3 sales channels**
- **Includes 3 users**
- **Bill management**
- **Enter time**

Bookkeeping support

LIVE
Assisted bookkeeping OFF
Add $50 per month

Plus

CUSTOMER FAVORITE

~~$90~~
$27/mo

Choose plan

- Free guided setup
- Income and expenses
- Tax deductions
- Comprehensive reports
- Receipt capture
- Mileage tracking
- Cash flow
- Sales and sales tax
- Estimates
- Contractors
- **Connect all sales channels**
- **Includes 5 users**
- Bill management
- Enter time
- **Inventory**
- **Project profitability**

Bookkeeping support

LIVE
Assisted bookkeeping OFF
Add $50 per month

Advanced

~~$200~~
$60/mo

Choose plan

- Free guided setup
- Income and expenses
- Tax deductions
- Powerful reports
- Receipt capture
- Mileage tracking
- Cash flow
- Sales and sales tax
- Estimates
- Contractors
- Connect all sales channels
- **Includes 25 users**
- Bill management
- Enter time
- Inventory
- Project profitability
- **Data sync with Excel**
- **Employee expenses**
- **Batch invoices and expenses**
- **Custom access controls**
- **Workflow automation**
- **Data restoration**
- **24/7 support & training**
- **Revenue recognition** NEW

Bookkeeping support

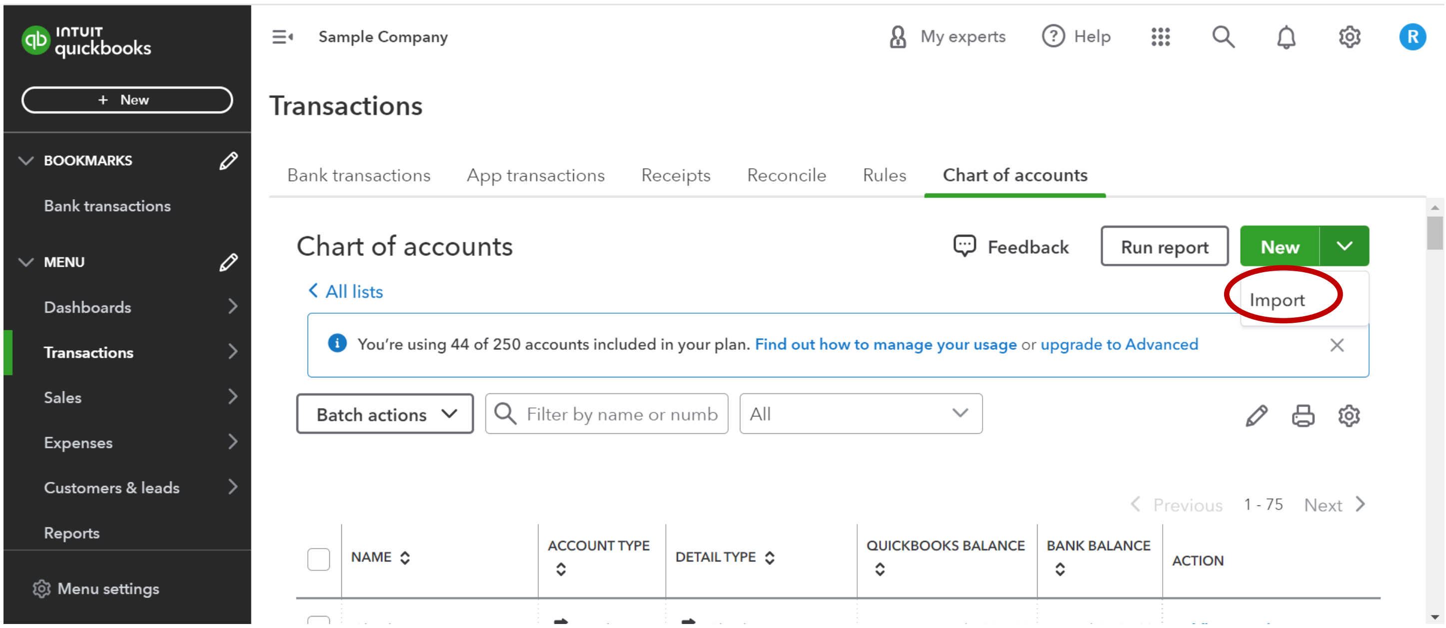
LIVE
Assisted bookkeeping OFF
Add $50 per month

Importing Chart of Accounts

1. Click **Transactions**

2. Click **Chart of accounts**

3. Click the down arrow by **New,** then **Import**

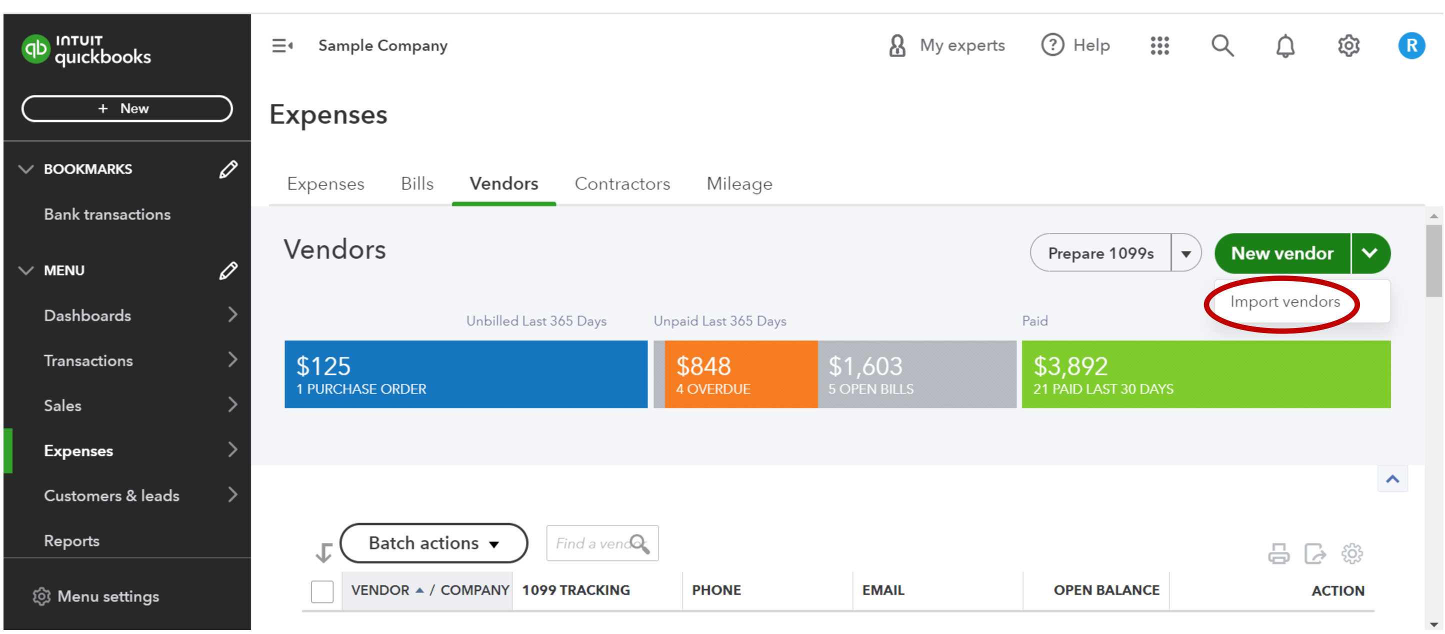


Importing Vendors & Customers

1. Click **Expenses** for vendors or **Sales** for customers

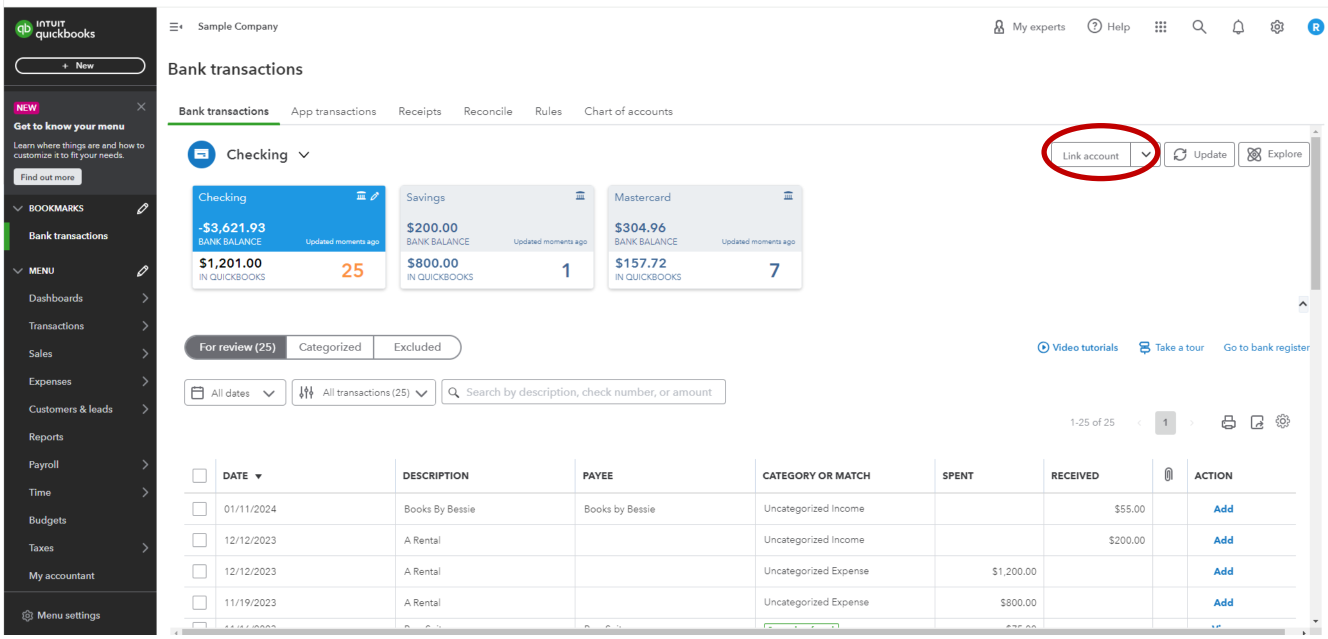
2. Click **Vendors** or **Customers**

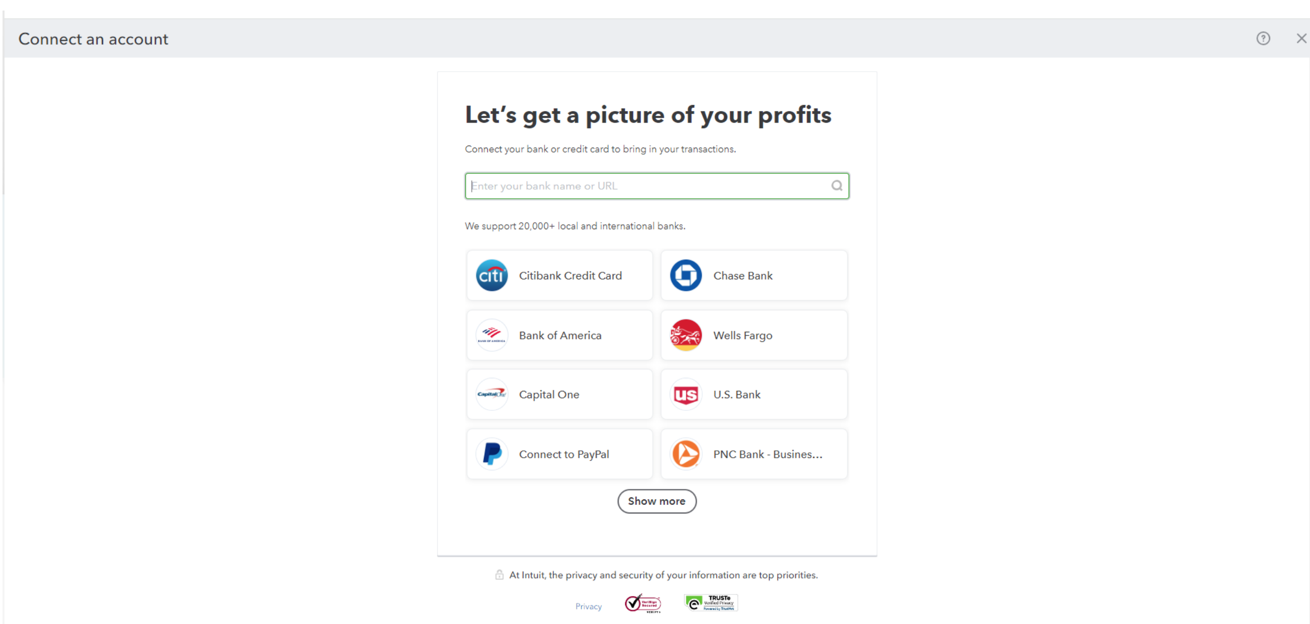
3. Click the down arrow by **New,** then **Import**



Syncing Bank Accounts

1. Click **Transactions**
2. Click **Bank Transactions**
3. Click **Link Account**





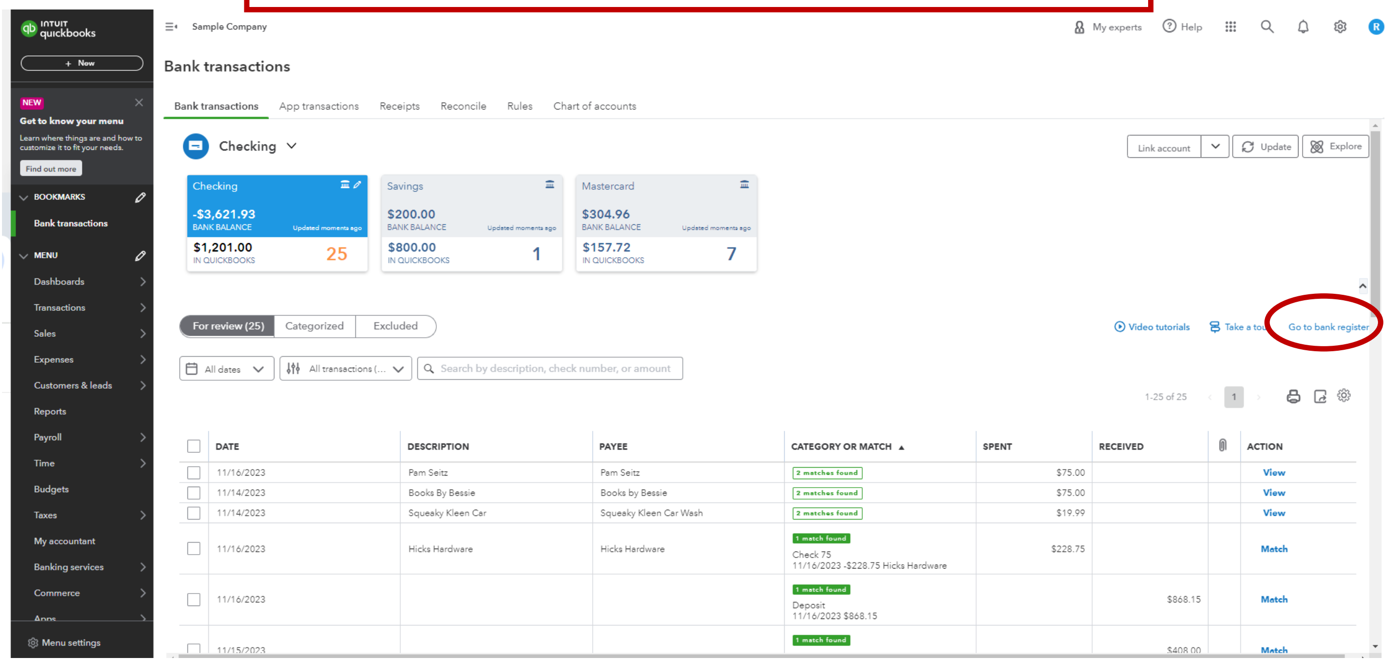
Understanding the Check Register

1. Click **Transactions**

2. Click **Bank Transactions**

3. Click **Go to bank register**

Items that are already in QuickBooks will say 'Match' to avoid duplicating



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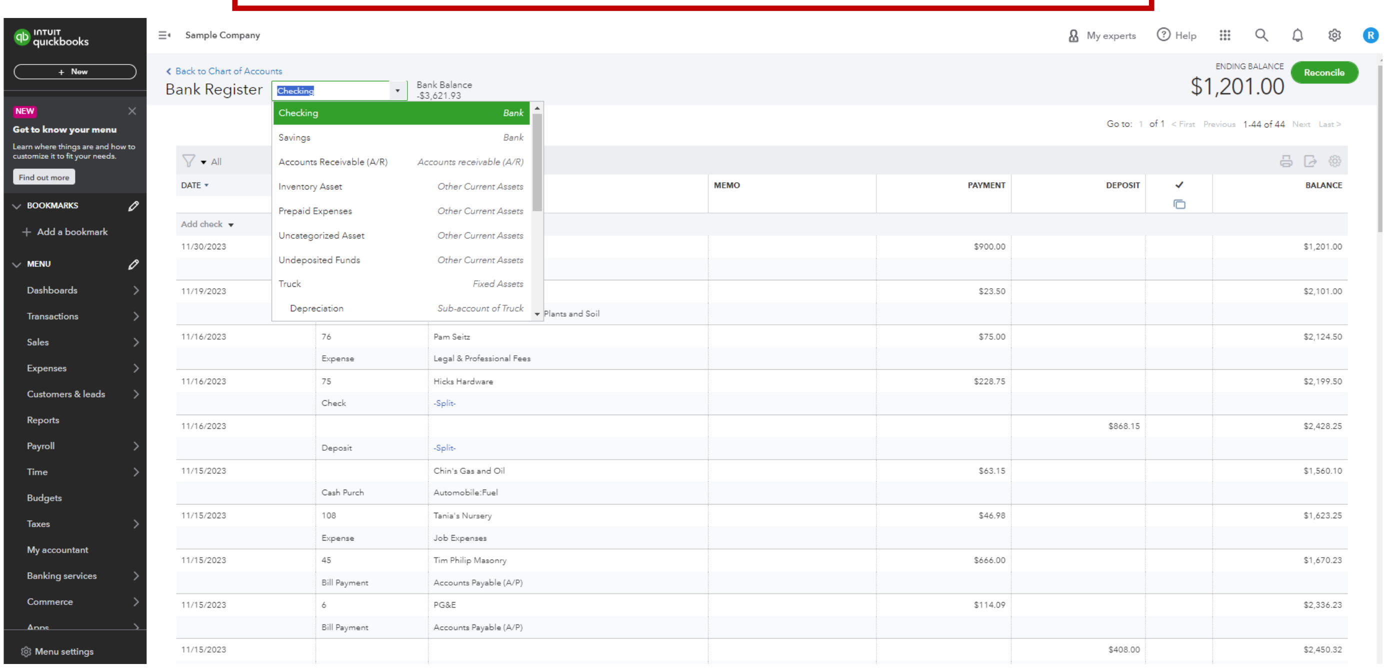


Setting up Sales Tax

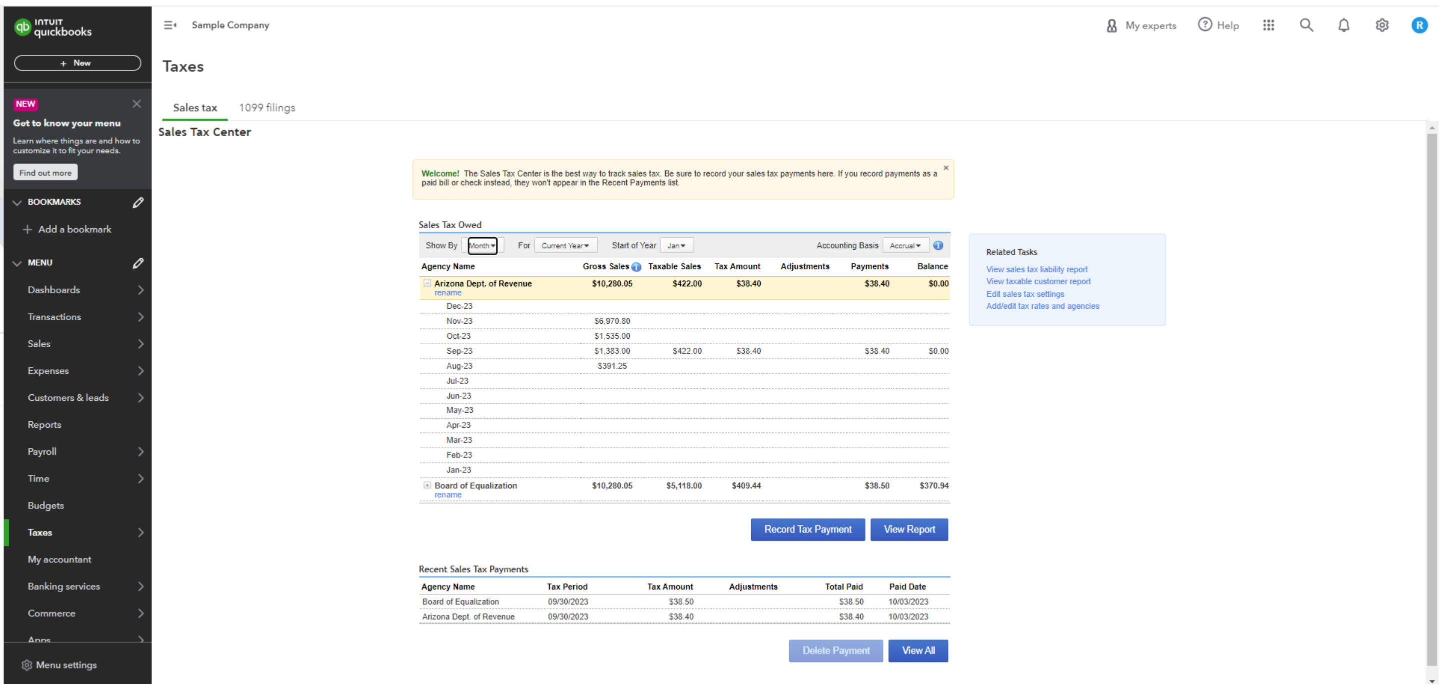
To enable Sales Tax within QuickBooks Online

1. Click **Taxes**

    2. Click **Sales Tax**

        3. Click **Set Up Sales Tax** or **Edit Sales Tax**

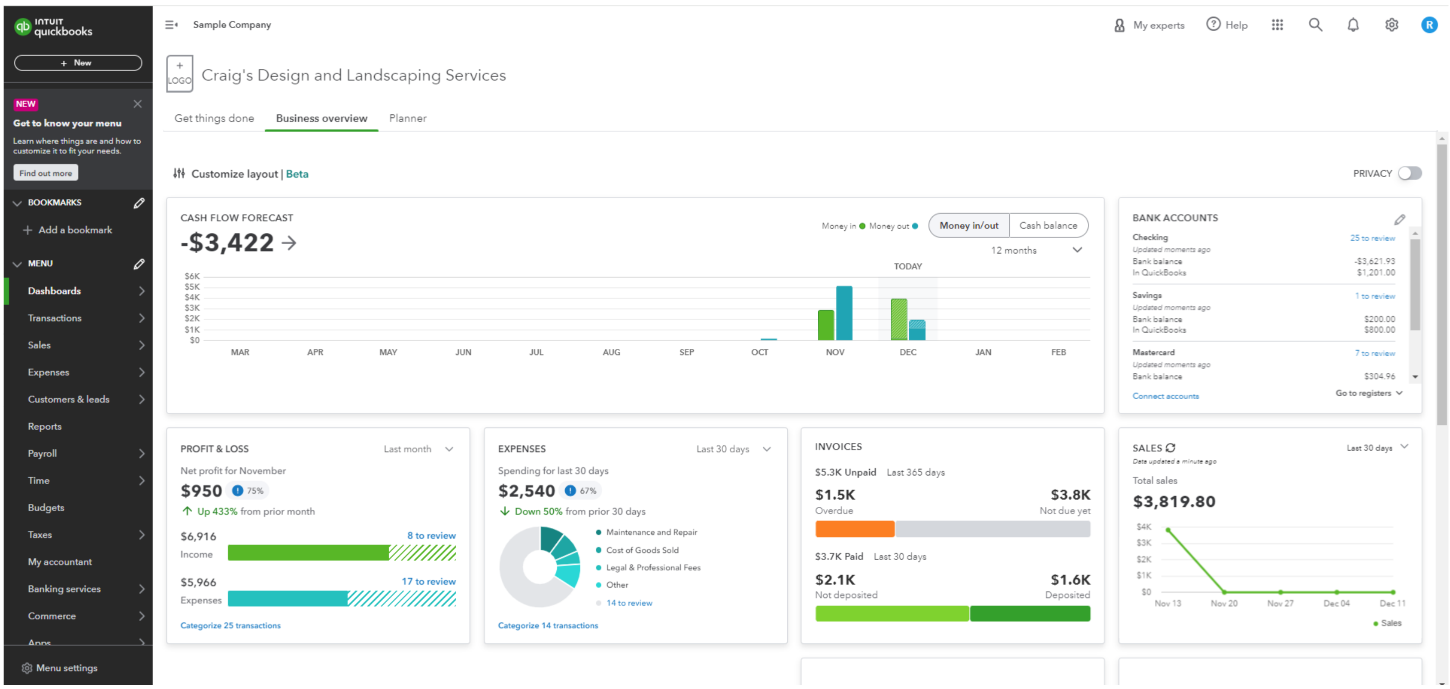
It will ask for your company's physical address, if you sell in other states, and which agency you pay



Dashboard Review

You can change time frame when viewing **Cash Flow Forecast, Profit & Loss, Expenses,** and **Sales**

You can change the order of accounts in **Bank Accounts**



Uploading Desktop Version to QBO

When switching from QuickBooks Desktop to QuickBooks Online (QBO)

1. Log in as an admin to the company file.

2. Click **Company Menu**, select **Export Company File to QuickBooks Online.**

3. Select **Start Your Export**

4. Sign in as an admin to QuickBooks Online

5. Select **Choose online company**, and choose the QuickBooks Online company you want to replace with your company file

6. Select **Continue**

7. If you track inventory in QuickBooks Desktop:

    Select **Yes** to bring them over, then enter the as of date

    Note: Use the first day after your last tax filing period as your inventory start date

    Select **No** if you want to set up new items later in QuickBooks Online

8. Enter **Agree** in the text field, then select **Replace**

9. Select **Yes**, go ahead and replace the data, then select **Replace**