

QUICKBOOKS ONLINE PLUS: A COMPLETE COURSE 2016

Chapter 2:
Create a
Company

Lecture Focus

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- ❑ Create a QuickBooks Online Email Account
- ❑ Activate Educational Trial Version of QuickBooks Online Plus
- ❑ Provide Basic Company Information
- ❑ Download Data Files

Lecture Notes

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- ❑ Lectures may not match text material
- ❑ Lectures designed to illustrate key points in chapter
- ❑ Examples and coverage may not encompass everything in chapter
- ❑ Your Name's Beach Barkers is used in this lecture to illustrate information
- ❑ Lecture for illustration purposes only—not to be completed by students
- ❑ Do not record transactions illustrated in lecture
- ❑ Google Chrome used for Web browser



Create QuickBooks Online Email Account

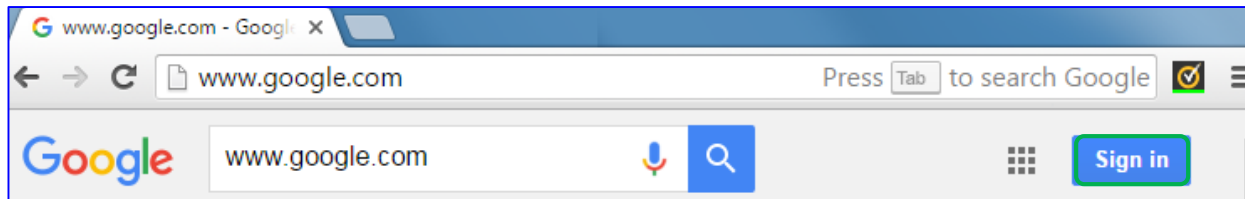
4

- Need prior to using QuickBooks Online
- Email is Intuit ID
 - Used to Login to Program and Company
 - May be used to Authenticate Access

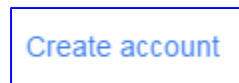
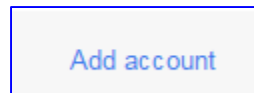
Create QuickBooks Online Email Account

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- Open Internet Browser
 - ▣ Use Google Chrome in Text
- Go to Google.com
- Click **Sign in**



- Click
 - ▣ **Add account**
 - ▣ **Create account**



Create QuickBooks Online Email Account

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- Enter Information
 - Your Real First and Last Name
 - Choose Username
 - Use Test as part of the name
 - Create and Confirm Password
 - Enter
 - Birthday
 - Gender
 - Mobile Phone
 - Current Email

The screenshot shows a registration form for a QuickBooks Online email account. The form is divided into several sections, each with a title and input fields. Green boxes highlight specific fields: 'First' and 'Last' name fields, the 'Choose your username' field containing 'YourNameTestQBO', the '@gmail.com' domain, the 'Create a password' and 'Confirm your password' fields, the 'Day' and 'Year' dropdowns in the 'Birthday' section, the 'I am...' dropdown in the 'Gender' section, the country dropdown and phone number field in the 'Mobile phone' section, and the 'Your current email address' field.

Name

First Last

Choose your username

YourNameTestQBO @gmail.com

I prefer to use my current email address

Create a password

.....

Confirm your password

.....

Birthday

January Day Year

Gender

I am...

Mobile phone

USA []

Your current email address

[]

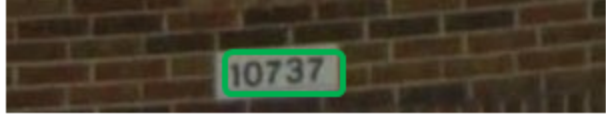
Create QuickBooks Online Email Account

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- Enter Verification
- Select Location
 - United States
- Agree to Terms

Prove you're not a robot

Skip this verification (phone verification may be required)



Type the text:

Location

I agree to the Google [Terms of Service](#) and [Privacy Policy](#)

Activate QuickBooks Online Plus

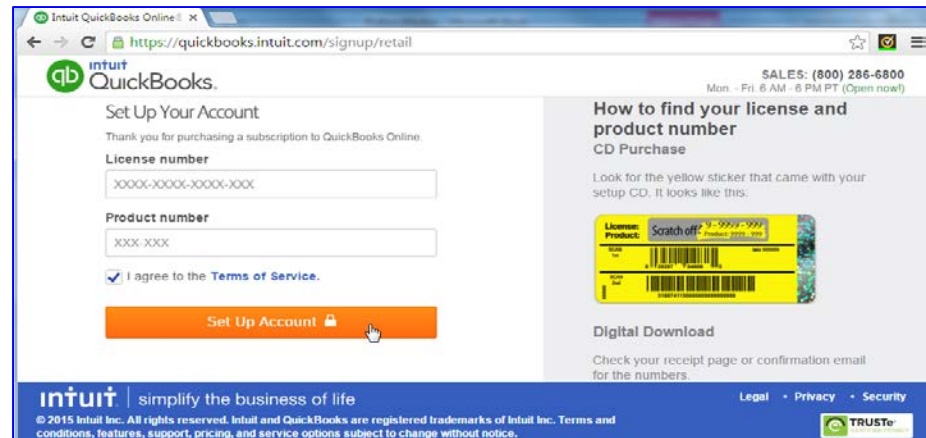
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- Educational Trial Version of QuickBooks Online Plus
 - Use for 5 Months
 - Import Company Data for 60 Days
 - After End of Trial
 - Data in Read Only Mode

Activate QuickBooks Online Plus

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- Enter **quickbooks.intuit.com/start/retail_sui** in the URL of your Web browser
- Use the Access Code card from your text and enter
 - ▣ License Number
 - ▣ Product Number
- Click **Set Up Account**

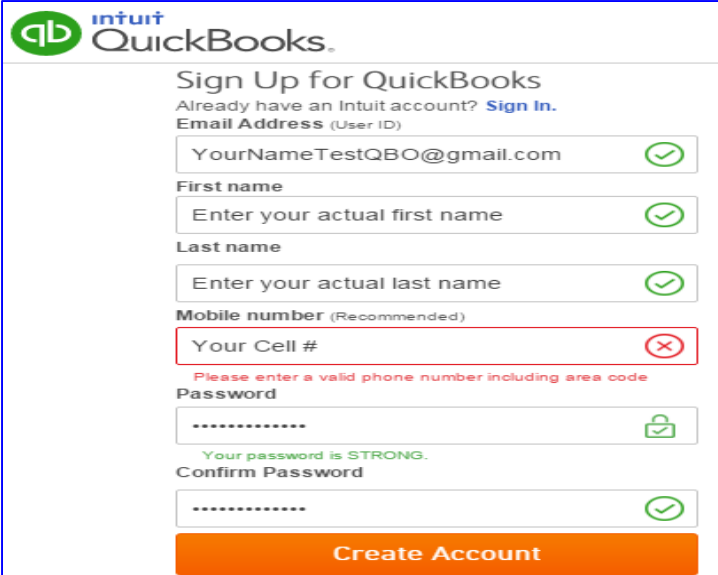


The screenshot shows the 'Set Up Your Account' page on the QuickBooks Online Plus website. The page is titled 'Set Up Your Account' and includes a thank-you message for purchasing a subscription. It features two input fields: 'License number' (with a placeholder 'XXXX-XXXX-XXXX-XXX') and 'Product number' (with a placeholder 'XXX-XXX'). Below these fields is a checkbox labeled 'I agree to the Terms of Service.' and a prominent orange 'Set Up Account' button with a lock icon. To the right, there is a section titled 'How to find your license and product number' with a sub-heading 'CD Purchase'. It instructs users to look for a yellow sticker on their setup CD, showing an image of such a sticker with a 'Scratch off' area and a barcode. Below this is a 'Digital Download' section with instructions to check a receipt page or confirmation email. The footer contains the Intuit logo, the tagline 'simplify the business of life', copyright information for 2015 Intuit Inc., and links for 'Legal', 'Privacy', and 'Security'. A 'TRUSTe' logo is also present in the bottom right corner.

Activate QuickBooks Online Plus

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- To Complete Sign Up for QuickBooks form, enter:
 - ▣ Email Address created for QuickBooks Online
 - ▣ First Name
 - ▣ Last Name
 - ▣ Mobile Number
 - ▣ Email Password
 - ▣ Confirm Email Password
- Click Create Account



The screenshot shows the 'Sign Up for QuickBooks' form. The Intuit logo is at the top left. The form title is 'Sign Up for QuickBooks'. Below the title, it says 'Already have an Intuit account? [Sign In.](#)'. The form fields are: 'Email Address (User ID)' with the value 'YourNameTestQBO@gmail.com' and a green checkmark; 'First name' with the placeholder 'Enter your actual first name' and a green checkmark; 'Last name' with the placeholder 'Enter your actual last name' and a green checkmark; 'Mobile number (Recommended)' with the placeholder 'Your Cell #' and a red 'X' icon, indicating an error. Below this field, a red message says 'Please enter a valid phone number including area code'. The 'Password' field has a green checkmark and a lock icon, with a green message below it saying 'Your password is STRONG.'. The 'Confirm Password' field has a green checkmark. At the bottom is an orange 'Create Account' button.

Create Your Name's Beach Barkers

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- Immediately begin to create your company when
 - ▣ Intuit ID is created
 - ▣ QuickBooks Online Educational Trial Version is activated
- Screens and information
 - ▣ Lecture shows screens for Educational Trial Version
 - ▣ 30-Trial or Regular Subscription may have
 - Different screens
 - Ask for different information

Create Your Name's Beach Barkers

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- Enter Contact Information
 - Backspace and remove your email address from the Company Name
 - Enter Your Name's Beach Barkers for Company Name
 - Use your actual name
 - Press Tab, enter the
 - Address
 - City
 - State
 - Zip
 - Business Phone
 - Website
 - Click Next

Let's get started with your contact info


We'll use this to create professional looking receipts and invoices for you.

Business name *

Address

City **State *** **ZIP**

Business phone **Website**

Logo 
Up to 1MB
jpg, gif, bmp,
png

[Next](#)

Create Your Name's Beach Barkers

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□ Enter Business Information

- Industry
- What you sell
- Business type
- Business age

Tell us a bit more about your business
We'll use what we know about businesses like yours to jumpstart your setup.

Industry *

Pet Care (except Veterinary) Services

What do you sell? * **Business type**

Products and services ▾ Sole proprietor ▾

Business age

Less than 1 year ▾

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Create Your Name's Beach Barkers

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- Indicate methods used for tracking business information
- Choices include:
 - Excel
 - Google
 - Pen and paper
 - QuickBooks Desktop
 - Online banking
 - Other software

How do you keep track of your business now?
Choose all that apply. We'll show you how to get everything into your books.

<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> QuickBooks Desktop
<input type="checkbox"/> Google	<input type="checkbox"/> Online banking
<input checked="" type="checkbox"/> Pen and paper	<input type="checkbox"/> Other software

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Create Your Name's Beach Barkers

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- ❑ Select important applications
- ❑ Choose from:
 - ❑ Invoicing
 - ❑ Expense tracking
 - ❑ My accountant
 - ❑ My employees
 - ❑ Point of sale
 - ❑ E-commerce
 - ❑ Mobile office

What matters to your business?
Let's bring it all together so you can manage everything in one place.

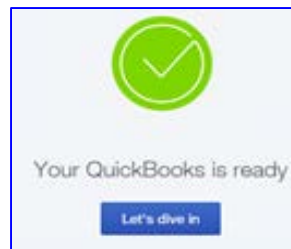
<input checked="" type="checkbox"/> Invoicing	<input type="checkbox"/> Point of sale
<input checked="" type="checkbox"/> Expense tracking	<input type="checkbox"/> E-commerce
<input type="checkbox"/> My accountant	<input checked="" type="checkbox"/> Mobile office
<input type="checkbox"/> My employees	

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Create Your Name's Beach Barkers

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- QuickBooks Online will create your company
- Based on type of industry, QBO will add
 - ▣ Chart of Accounts
 - ▣ List of Products and Services
 - ▣ Company Settings
- When finished, click Let's dive in to access Your Name's Beach Barkers



Download Excel Files

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- Specific company data may be
 - ▣ Entered manually
 - ▣ Imported
- Text imports data using Excel files

Download Excel Files

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- Insert USB drive
- Open Web browser
 - ▣ Chrome used in text
- Enter <http://www.pearsonhighered.com/horne/>
- Click **Excel Import Files**

Books by Janet Horne



QuickBooks® Online Plus: A Complete Course 2016

Janet Horne

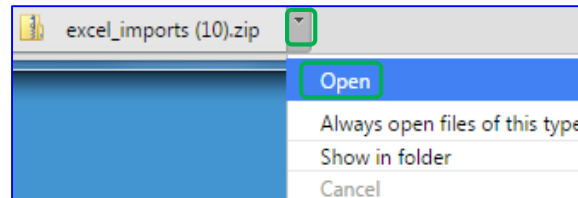
WinZip® or other file compression utility is required to unzip the Company Master Files.

- [Instructor Resources](#)
- [Excel Import Files \(Student and Instructor Access\)](#)
- [QuickBooks Desktop Import Files \(Student and Instructor Access\)](#)
- [Logo Files \(Student and Instructor Access\)](#)
- [Buy the Book](#)

Download Excel Files

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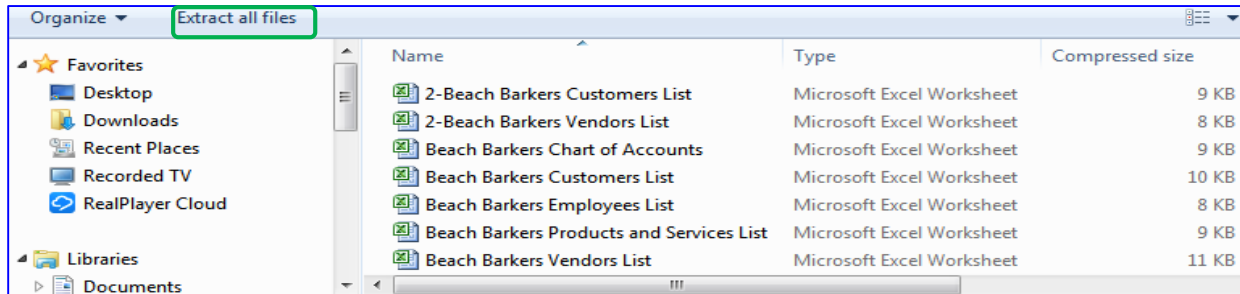
- ❑ At bottom of browser will see **excel_imports.zip**
- ❑ Click drop-down list arrow
- ❑ Click **Open**



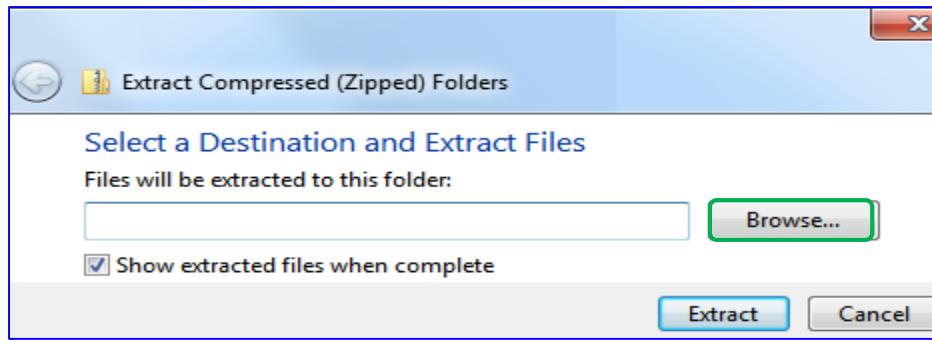
Download Excel Files

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- Click **Extract all files**



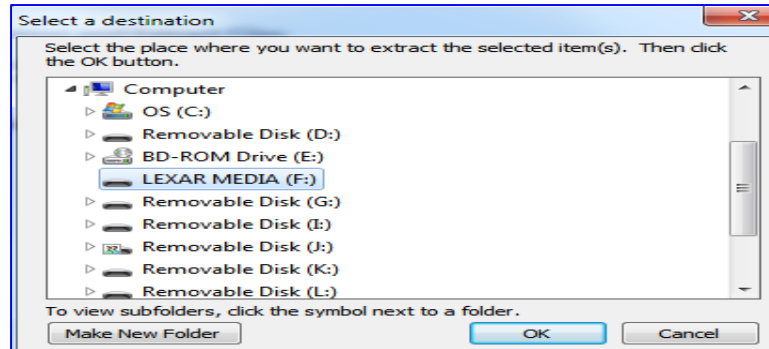
- Click **Browse** button



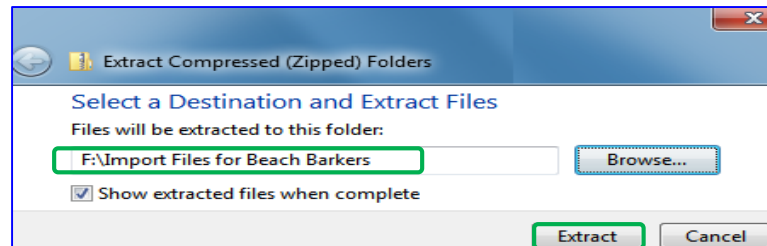
Download Excel Files

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- Click USB location



- Next to USB location enter **Import Files for Beach Barkers**

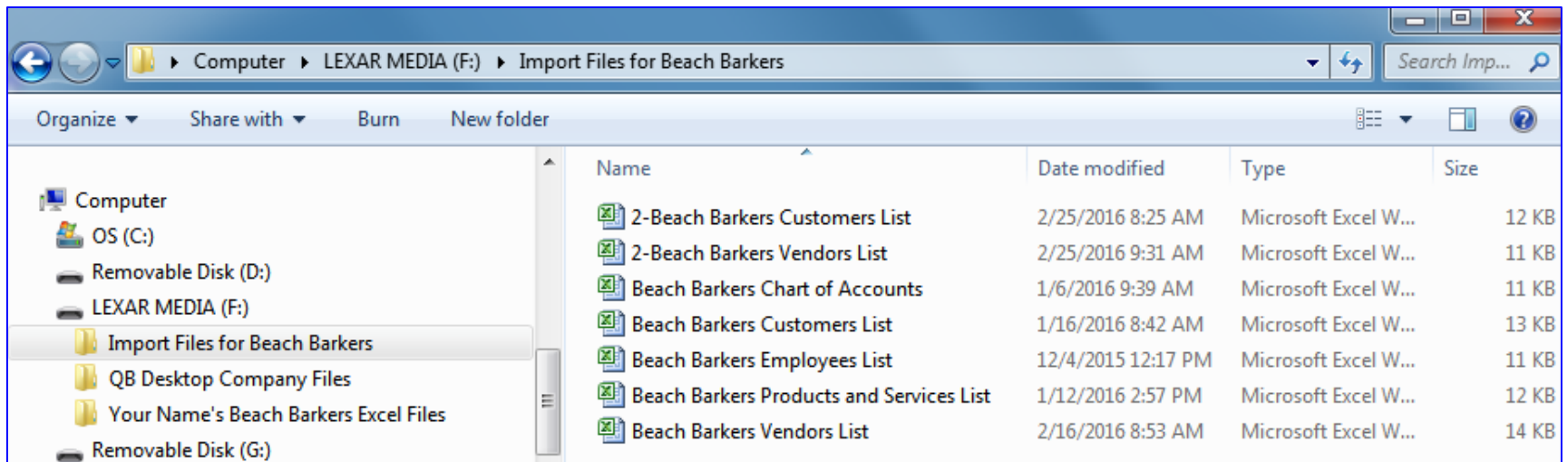


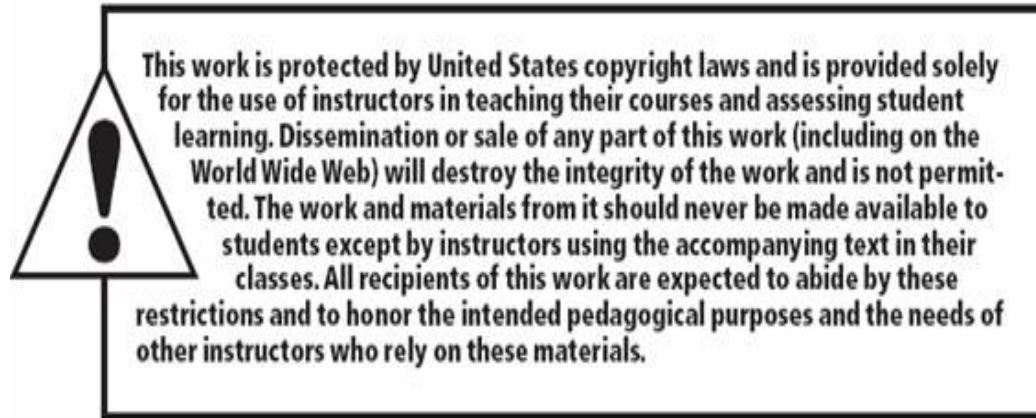
- Click **Extract**

Download Excel Files

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- You will see the Excel import files





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