

## Section 1.1

### QBO SET UP NEW COMPANY

As a student enrolled in a QBO course, you can obtain free access to QBO to use with your text. If you were an entrepreneur, you would need to subscribe to QBO, paying a monthly fee for access.

Next, we want to create a new QBO company for Mookie the Beagle Concierge using your free QBO access.

#### CREATE NEW QBO COMPANY USING INSTRUCTOR INVITATION

To obtain your free QBO access, your instructor will need to send you an email invitation. This invite will permit you to create your own QBO company for Mookie the Beagle Concierge.

**! Important Note:** If you have not received an email invitation from your instructor to create your QBO company:

1. Check your email Spam mailbox to verify that the email was not flagged as Junk mail.
2. Contact your instructor to obtain an email invitation. Your instructor must send you the email invitation in order for you to have free access to create a QBO company.

**! When setting up a QBO company and completing Chapter 1 activities, if the following steps do not match your QBO screen, then check for QBO 3e Text Updates.**

- Go to [www.my-quickbooksonline.com](http://www.my-quickbooksonline.com) > QBO 3e > QBO 3e Updates.
- If you are using a digital ebook, you can find updates in the ebook on the Additional Student Resources (ASR) page.

**! Warning!** When setting up a QBO company, it is important to complete the following steps exactly as specified. QBO uses the steps you complete to create a QBO company with specific settings. If the specified steps are not completed, then the QBO company will not have the necessary settings to complete your assignment. Often there is no workaround to fix this later. So the easiest approach is to take your time and stay laser focused while setting up the QBO Company.

Complete the following steps to use the Instructor Invitation for free QBO access:

- 1 When you receive an email invitation from your instructor to create your own QBO company, select **Accept invitation**. (Note: Intuit recommends using Google Chrome web browser.)
- 2 To create your account, **enter** the requested information in the appropriate fields. Note: If the Create Account screen doesn't appear automatically, select **Need an account? Sign Up**.  
**⚠️ Keep a record of your User ID and Password. You will need this later.**  
(If you already have an account established, use your User ID and password to sign in.)
- 3 Select **Create Account**
- 4 When Welcome! We're glad you're here. appears, select **Start**
- 5 When What do you call your business? appears, enter the name of your business:  
**[LastNameFirstInitial] Mookie the Beagle Concierge**. (Example: KayD Mookie the Beagle Concierge.)  
  
**⚠️ Remember to include your name before Mookie The Beagle Concierge. This will assist your instructor in identifying your QBO file.**
- 6 Check **This is my legal business name**
- 7 Select **Next**
- 8 When How have you been managing your finances? appears, select **Nothing, I'm just getting started**
- 9 Select **Next**. Note: If What does your business do? appears, select Skip for Now, and proceed to Step 10.
- 10 When What's your main role? appears, select **Bookkeeper or Accountant**.  
  
**⚠️ This selection determines your view of QBO and the instructions you will see onscreen. Before proceeding, double check that you have selected Bookkeeper or Accountant.**
- 11 Select **Next**
- 12 When What should we do first? appears, select **Track receipts & expenses**
- 13 Select **Next**
- 14 When How do you track your receipts today? appears, select **Skip for now**
- 15 When Power up QuickBooks to stay organized automatically appears, select **Skip for now**

- 16 When Start getting paid with invoices appears, select **Skip for now**
- 17 When Download the app to use QuickBooks on the go, select **Next**
- 18 When Next step — share some basic info appears, select **Next**
- 19 When Who works at this business? appears, select:
- **Contractors**
  - **Employees**
  - **A few partners and owners**
- 20 Select **Next**
- 21 If Want to add QuickBooks Online Payroll Premium? appears, select **No, I don't want to add payroll.**
- !** *If payroll is turned on, it may deactivate the time tracking features used in Chapter 8 of this text and you will be unable to complete those activities. Be sure to select **No, I don't want to add payroll.** If you make the incorrect selection for payroll, please contact your instructor and ask for another QBO company invitation and restart the new QBO company setup.*
- 22 Select **Next**
- 23 When How long has Mookie The Beagle Concierge been in business? appears, select **Under a year**
- 24 Select **Next**
- 25 When What kind of business is this? appears, and you are asked: Is it an LLC? select **No**
- 26 When asked: How is the business set up for taxes? select **Sole proprietor**
- 27 Select **Next**
- 28 When What's your industry? appears, leave the field **blank**. This field determines the accounts that will auto-populate the Chart of Accounts. Because we will enter our own Chart of Accounts in Chapter 2, we leave this field blank so that fewer accounts are auto-populated. Otherwise, we would select an industry and QBO would automatically add more accounts to our Chart of Accounts specifically for the industry selected.
- 29 Select **Skip for now**

30

When asked, What apps do you use for your business?, select **Skip for now**

31

When asked, What else would you like help setting up?, select:

- **Send & track invoices**
- **Set up time tracking**

32

Select **Next**

33

When We're almost ready to dive in! appears, select **Let's go**

34

Your QBO company for Mookie the Beagle Concierge should now appear. If a Welcome To QuickBooks! screen displays, select **Take a quick tour**.

## Your instructor has invited you to create your own QuickBooks company

Dear [REDACTED],

Your instructor has invited you to create a QuickBooks Online Plus company that you can use for the class for free. Click below to accept the invitation.

1

Accept invitation

**intuit**  
qb quickbooks ✓ turbotax

### Create your account

Already have an account? [Sign In](#)

Email address (will be used as your user ID)

Confirm email

First name

Last name

Phone (Recommended)  
  
Standard call, message, or data rates may apply.

Password

**2** **3** Create Account

**qb** intuit quickbooks GET STARTED

## Welcome! We're glad you're here.

Here's what we'll do together right now.

- Ask a few questions to get to know your business
- Tailor QuickBooks to fit you and your team
- Get started on your goals

**4** Start

I feel ok



## What do you call your business?

We'll use this to get you started in QuickBooks.

Business name

5 [LastNameFirstInitial] Mookie The Beagle Concierge

6  This is my legal business name

Back

7 Next

I feel ok



## How have you been managing your finances?

No matter where you're coming from, we're here to help.

8  Nothing, I'm just getting started

QuickBooks Desktop™

Sage 50/Peachtree

Other bookkeeping software

Spreadsheets or pen & paper

Other

No problem—we'll walk you through setting up your business.

Back

9 Next

I feel ok



## What's your main role at [LastNameFirstInitial] Mookie The Beagle Concierge?

We'll customize QuickBooks based on your answer.



Owner or partner



Employee

10



Bookkeeper or accountant



Other

Back

11 Next



## What should we do first?

12



Track receipts & expenses



Send & track invoices



Sign up for payroll trial



None of these


Back

13 Next




## How do you track your receipts today?


Saving receipts is an important part of running your business. You'll need them for tax time and for good record keeping.




I save paper receipts



I save my receipts digitally



I save paper & digital receipts






I don't save receipts

Back Skip for now 14



## Power up QuickBooks to stay organized automatically

QuickBooks learns how to categorize transactions for you, so you stay organized year round.

-  Create a secure link to your bank account
-  Teach QuickBooks to sort your expenses
-  Forecast your cash flow



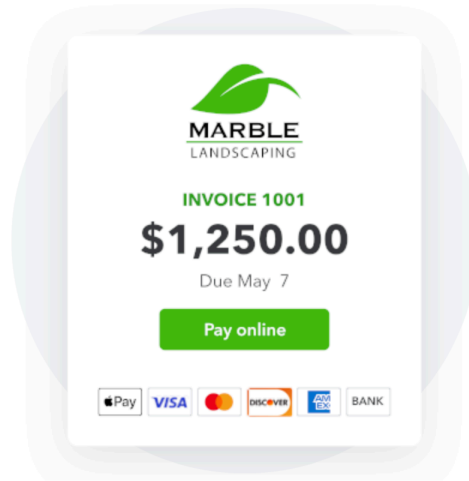
Back Link Accounts

15 Skip for now



## Start getting paid with invoices

- ✎ Give your invoice template a personal touch.
- Send yourself a sample invoice to see what your customers see.
- 🔒 Set up online payments to let customers pay you on the spot.



Back

Set up invoices

16 Skip for now

## Download the app to use QuickBooks on the go

Get the free QuickBooks mobile app with your subscription. See real-time alerts when your customers pay you.

Download the QuickBooks mobile app by pointing your camera at the QR code.



Point your camera at the QR code

Back

Next 17



You're off and running

## Next step – share some basic info

Back **Next 18**



## Who works at this business?

Help us understand who's on your team. Select all that apply.

- Only the owner
- Employees **19**
- Contractors **19**
- A few partners and owners **19**
- We plan to hire in the future

Back **Next 20**

I feel ok



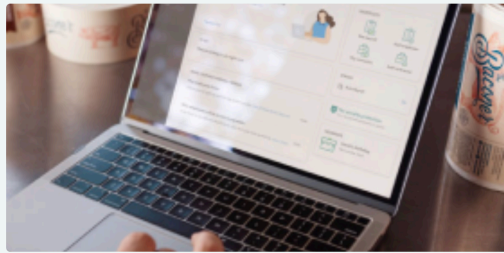
I feel ok



## The effortless way to pay your team

### Free 30 day trial of QuickBooks Payroll

- Breeze through payday with direct deposit
- Payroll taxes are calculated and paid automatically
- 24/7 expert support provides step-by-step help
- Payroll syncs with QuickBooks so your books are always up-to-date



### Want to add QuickBooks Online Payroll Premium?

Yes, I'd like to try Payroll Premium **free for 30 days**

- After 30 days, \$75/mo + \$8 per employee/contractor per month, cancel anytime [Terms & conditions](#)

21

No, I don't want to add payroll

OK, no payroll. Let's get you set up with QuickBooks.

Back

Next

22



## How long has [LastNameFirstInitial] Mookie The Beagle Concierge been in business?

Years in business

Under a year

23



Back

Next

24



## What kind of business is this?

Tell us how your business is set up. We use this to help organize your transactions.





### Is it an LLC?

- Yes
- No
- I'm not sure

25

### How is the business set up for taxes?

26

<input checked="" type="checkbox"/> Sole proprietor	 Partnership
 Non-profit organization	 S Corp
 C Corp	<input type="checkbox"/> I'm not sure

Back   Next 27



## What's your industry?

Start typing and select the option that fits best. You can always change it later.

Industry 28









Back

Skip for now 29



## What apps do you use for your business?

We'll help you connect them later on to bring in your data.

 PayPal	 Square
 Bill.com	 Dext Prepare
 Gusto	 ADP
 Amazon Business	 Mailchimp

Start typing to select other apps you use

Back

Skip for now 30



## Looking good! Based on what you've said, we suggest this setup plan.

★ Continue with

 Track receipts & expenses Change

What else would you like help setting up?

31  Send & track invoices  Sign up for payroll trial

Accept payments  Set up time tracking 31

Back **Next** 32

## We're almost ready to dive in!

- Testing the waters ✓
- Creating transaction categories ✓
- Building your dashboard ✓

33 **Let's go**



## Welcome to QuickBooks!

Let's show you around so you can get down to business.

34 [Take a quick tour](#)

You have now created a QBO Company for Mookie the Beagle Concierge. Later, whenever you need to stop working in your QBO Company, close your browser to log out of the Mookie the Beagle Concierge QBO Company. When you are ready to work again, sign in to QBO using your User ID and Password.

## HOW TO SIGN IN TO QBO COMPANY

After completing the steps to create a QBO company using the Instructor Invitation, the next time you are ready to sign in to your Mookie the Beagle Concierge QBO Company, complete the following steps:

- 1 Using a web browser, go to [qbo.intuit.com](https://qbo.intuit.com)
- 2 Enter **User ID** (the email address you used to set up your QBO Account) > **Sign In**
- 3 Enter **Password** (the password you used to set up your QBO Account)
- 4 Select **Continue**
- 5 If Let's verify your number appears, select **Skip for now**
- 6 When Select Company appears, select [**LastNameFirstInitial**] **Mookie The Beagle Concierge**. Note: this window may not appear.



