Getting started
with QuickBooks Online Accountant

Your success starts here.
Your ideal practice begins with the basics - from adding a client to finding your favorite tools. We’ll walk through the steps and resources you need to get up and running, and preview the power that QuickBooks Online Accountant puts at your fingertips.

1. Sign up for QuickBooks Online Accountant
   - Discover why moving to the cloud will take it to the next level
   - Watch a short introductory video or attend an on-demand introductory webinar
   - Sign Up or Sign In - QuickBooks Online Accountant is free and so is Firm Books
   - Get comfortable with QuickBooks Online with 10 how-to tips from an expert

2. Add your first client
   - See which of your clients are best fit for the cloud
   - Understand QuickBooks discounts with your ProAdvisor Preferred Pricing
   - Learn how to add any type of client to your QuickBooks Online list
   - Migrate your first QuickBooks Desktop client in a few easy steps

3. Meet QuickBooks Online (and the rest of our family)
   - Take a QuickBooks Online Test Drive or watch a short video
   - Access self-paced or over-the-web QuickBooks Online training from the ProAdvisor Tab
   - Get your clients up to speed with QuickBooks Online client training and tutorials.
   - Learn about our extended ecosystem of offerings: Apps, Payroll, Payments, and ProConnect Tax

4. Fine-tune your workflow
   - Work on your clients’ books with accountant-only tools
   - Manage any and all clients directly from the Clients Tab
   - Supervise your team’s roles and permissions from the Team Tab
   - Create projects and tasks with ‘Quickstart project templates’ inside the Work Tab
   - Use these handy shortcuts and hacks to navigate like a pro

5. Grow your practice
   - See the rewards of being part of our ProAdvisor Program
   - Get certified to get your profile listed on “Find a ProAdvisor”
   - Use ‘Client Overview’ to get up to speed on the state of prospect client’s books
   - Build better relationships with simplified client communication

Have a question?
We have answers.
Call 1.888.333.3451 for help setting up QuickBooks Online Accountant
Call 1.888.236.9501 to learn about how to make the most of QuickBooks Online Accountant
Visit the QuickBooks Customer Service page to connect with a QuickBooks expert