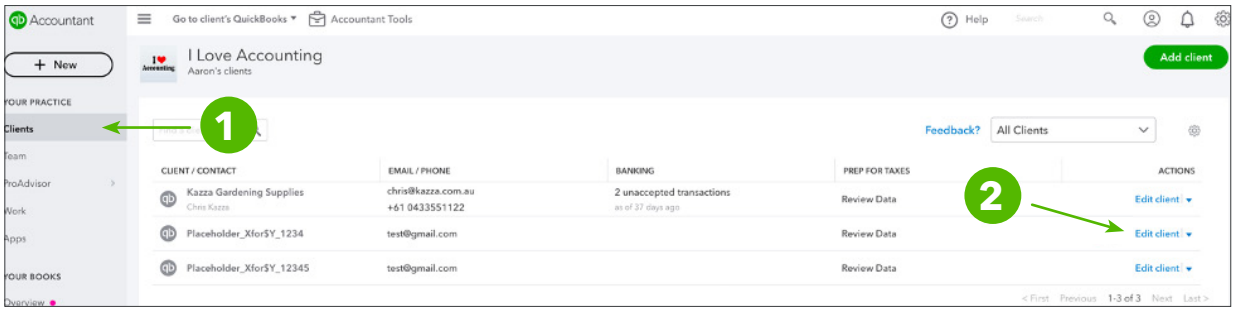
How to add your clients to placeholder subscriptions

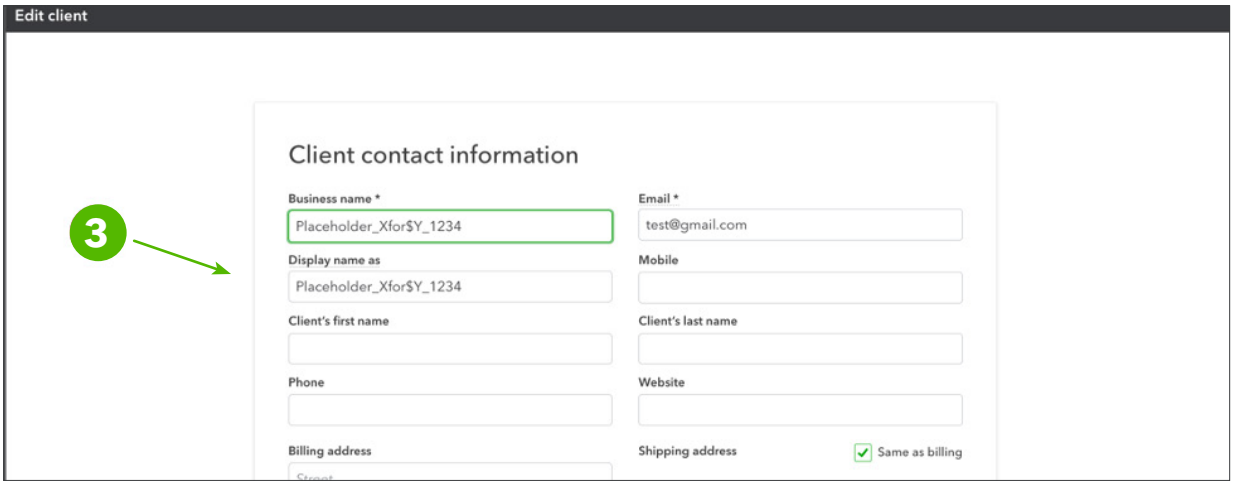
Step 1

Change the subscription name in your Client List

This will help you keep track of which placeholder subscriptions you have started work on.

1. In your QuickBooks Online Accountant *(QBOA)* dashboard – within the **'Clients'** list - choose one of the placeholder subscriptions you wish to start using for/with your client.
2. Click on the **'Edit'** button to the far right of the screen associated with that QBO subscription.
3. You can now see the **'Display name'** option on the screen – change this value to whatever you like. This is the name that you will see internally within your QBOA Clients list.
    a. This name doesn't have to match your client's Business Name *(the name on the businesses invoices and displayed on Reports)* – this value is for your reference. It can be useful when keeping track of multiple entities in the same client group within your firm. For example: *'Smith – Family Trust, Smith – Plumbing Business'* etc. or if you use codes to track these clients – AA123 etc.





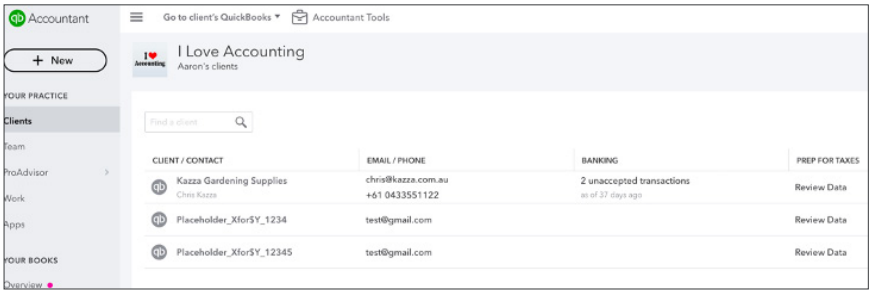
Step 2

Setup the QBO subscription

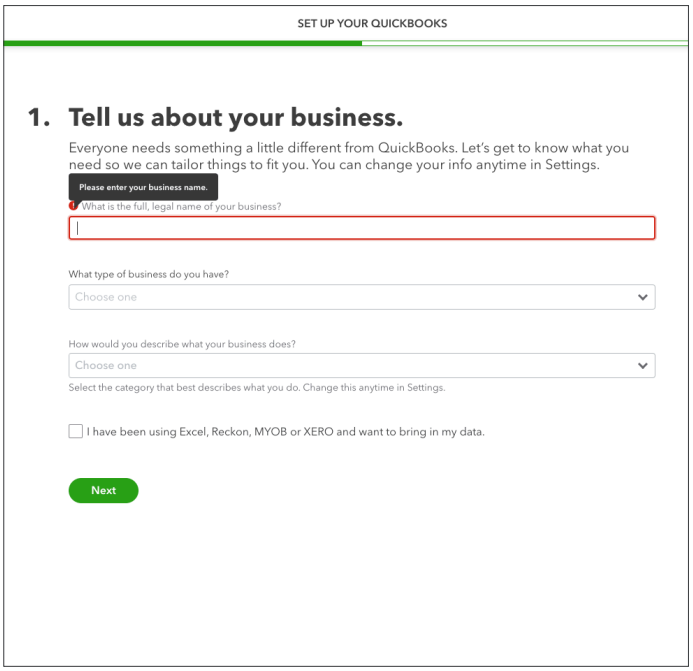
Note: If historical Data Conversion is needed *(Essentials/Plus)* – please refer to following resource for details.

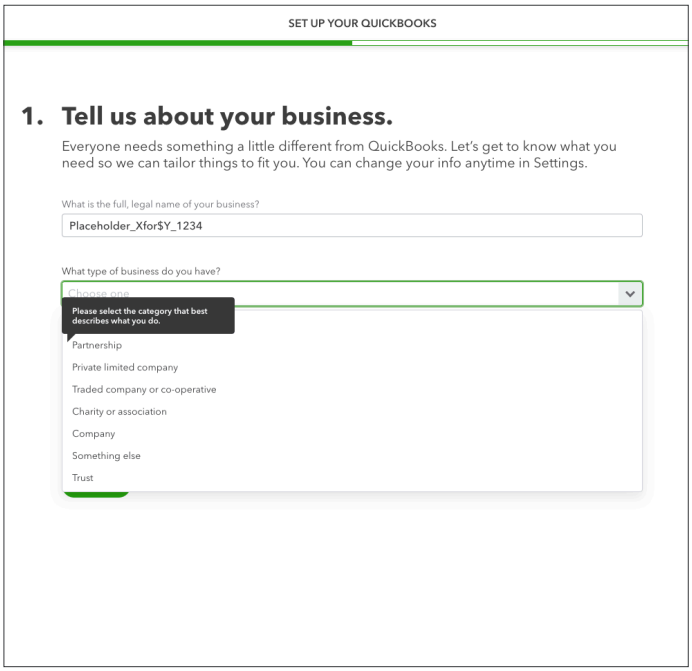
Also: After conversion please follow these post conversion instructions.

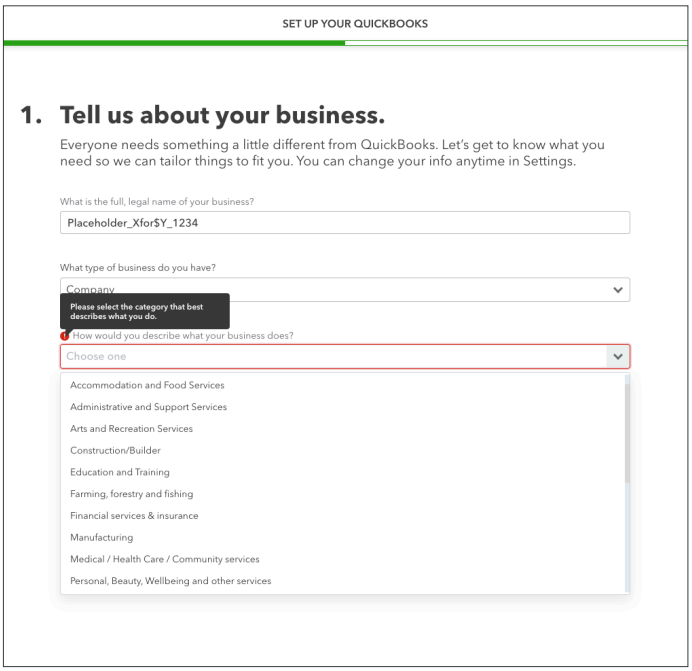
1. Click on the **QB symbol** next to the recently changed name in your QBOA client list to jump into the subscription.

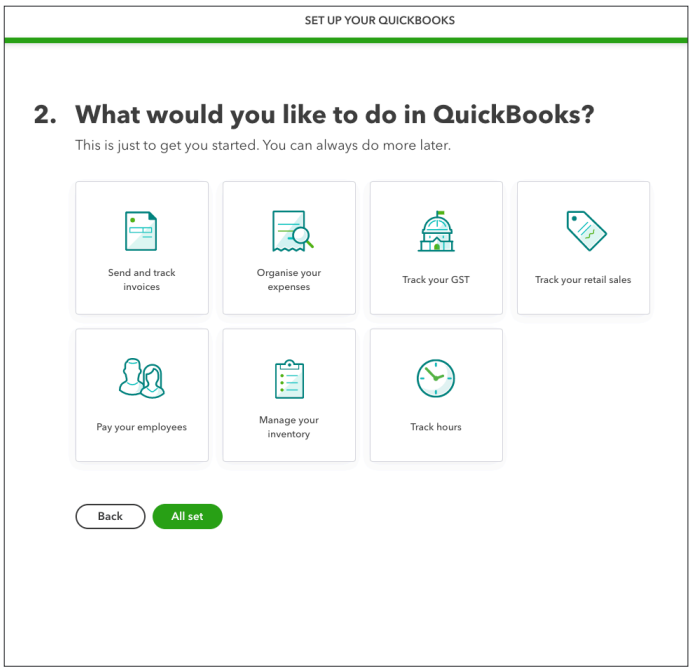


2. Proceed through the set up questionnaire, which will enable you to switch on/off various settings based on your clients' business needs.

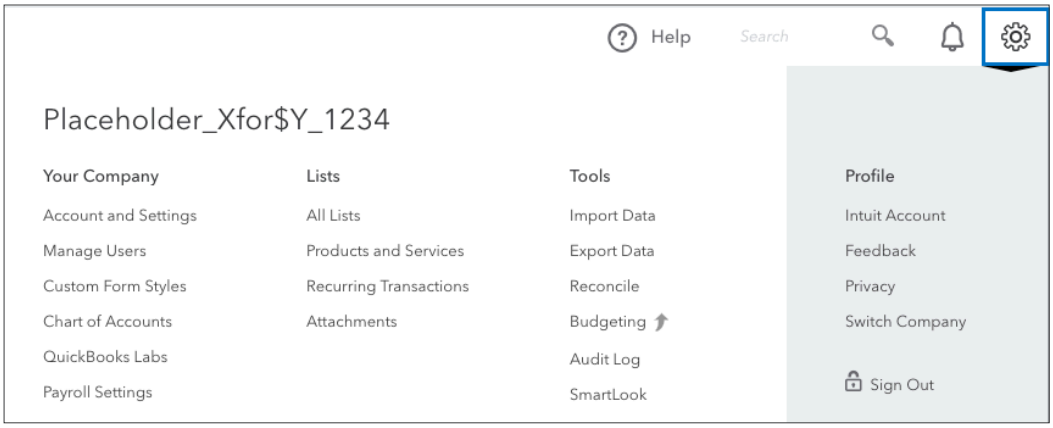






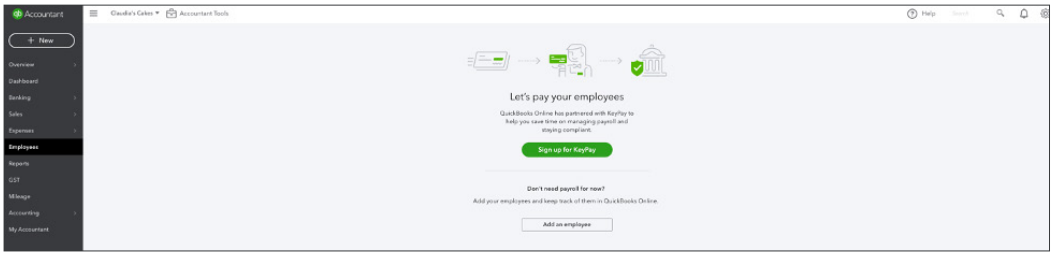


3. Go through all of the subscription settings by clicking on the settings cog wheel in the top right corner, and going through the various options *(Accounts and Settings, Sales, Expenses, Advanced etc.)* to make sure the correct functionality is accessible in-product and the right details will be displayed on reports and invoices *(eg. Business Name, ABN).*

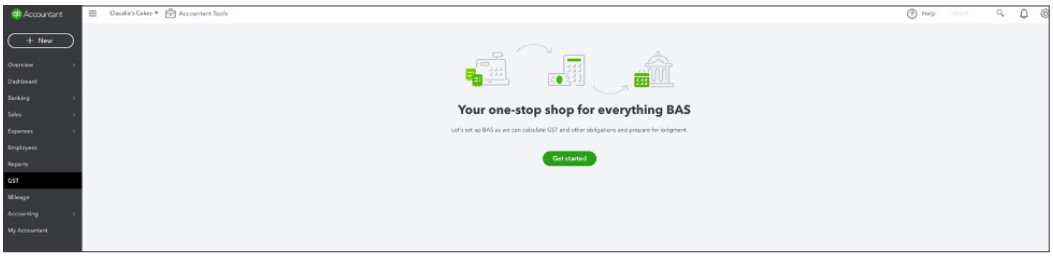


4. Setup Bank Feeds *(choose Direct Feeds over the standard feed if available).*

5. Setup Payroll – click on the **Employees** tab, then sign up to Keypay, and complete setup of any employees.

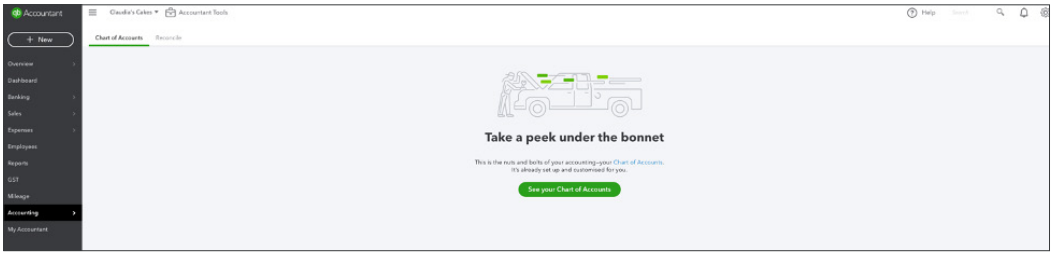


6. Set up the GST/BAS settings *(if applicable)* by clicking on the GST option in the left toolbar. *Please note that once GST is turned on it cannot be turned off.*

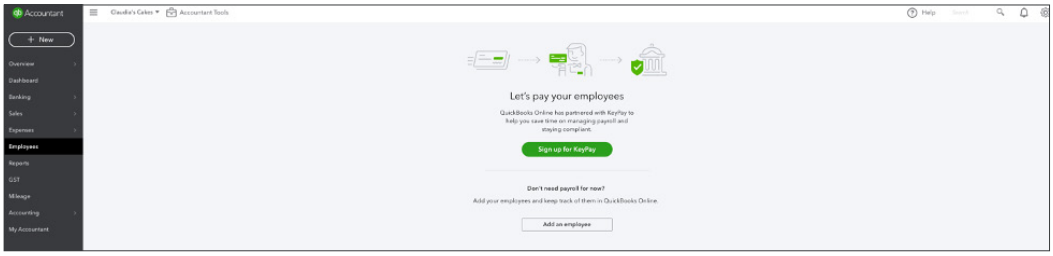


7. Check out your Chart of Accounts – and the associated default GST codes, if applicable.

   a. This is a good time to add accounts, you can also import your own if required *(with account codes)*.



8. Invite your client in as a user by clicking on the settings cog wheel in the top right corner, choosing 'Manage Users' and filling in their details to send an email invitation *(be sure to add them in as a 'user' in the left tab – not as an 'accounting firm')*.



Voilà. Enjoy managing your clients' books using **QuickBooks Online Accountant!**

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