



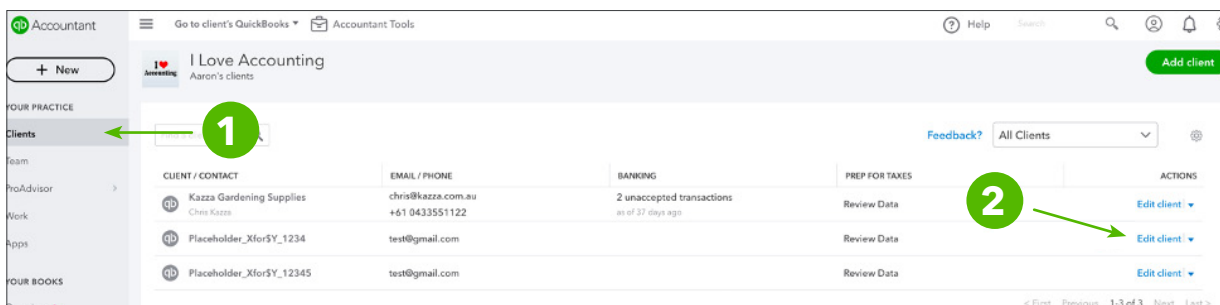
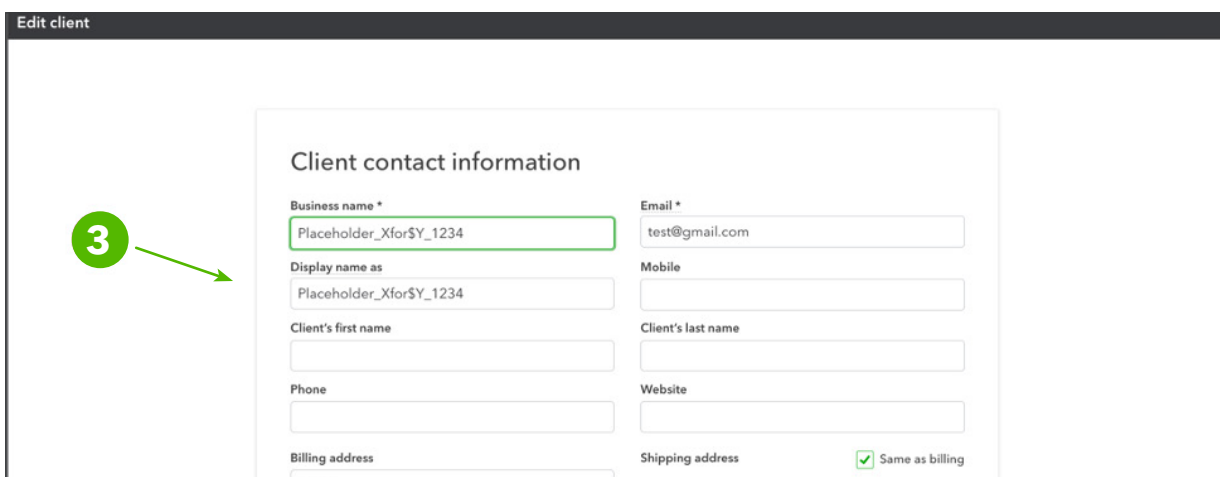
How to add your clients to placeholder subscriptions

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.

Client contact information

Business name *	Email *
<input type="text" value="Placeholder_Xfor\$Y_1234"/>	<input type="text" value="test@gmail.com"/>
Display name as	Mobile
<input type="text" value="Placeholder_Xfor\$Y_1234"/>	<input type="text"/>
Client's first name	Client's last name
<input type="text"/>	<input type="text"/>
Phone	Website
<input type="text"/>	<input type="text"/>
Billing address	Shipping address <input checked="" type="checkbox"/> Same as billing
<input type="text"/>	<input type="text"/>

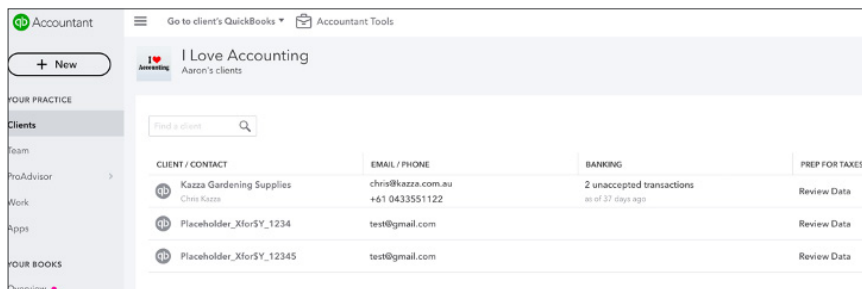
Step 2

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.



The screenshot shows the Intuit Accountant interface. On the left is a sidebar with navigation options: '+ New', 'FOUR PRACTICE', 'Clients', 'Team', 'ProAdvisor', 'Work', 'Apps', and 'YOUR BOOKS'. The main area is titled 'I Love Accounting' and 'Aaron's clients'. It features a search bar 'Find a client' and a table of clients. The table has four columns: 'CLIENT / CONTACT', 'EMAIL / PHONE', 'BANKING', and 'PREP FOR TAXES'. The first client is 'Kazza Gardening Supplies' with email 'chris@kazza.com.au' and phone '+61 0433551122'. The next two clients are placeholders.

CLIENT / CONTACT	EMAIL / PHONE	BANKING	PREP FOR TAXES
 Kazza Gardening Supplies Chris Kazza	chris@kazza.com.au +61 0433551122	2 unaccepted transactions as of 37 days ago	Review Data
 Placeholder_XforSY_1234	test@gmail.com		Review Data
 Placeholder_XforSY_12345	test@gmail.com		Review Data

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

SET UP YOUR QUICKBOOKS

1. Tell us about your business.

Everyone needs something a little different from QuickBooks. Let's get to know what you need so we can tailor things to fit you. You can change your info anytime in Settings.

Please enter your business name.

What is the full, legal name of your business?

What type of business do you have?

Choose one

How would you describe what your business does?

Choose one

Select the category that best describes what you do. Change this anytime in Settings.

☐ I have been using Excel, Reckon, MYOB or XERO and want to bring in my data.

Next

SET UP YOUR QUICKBOOKS

1. Tell us about your business.

Everyone needs something a little different from QuickBooks. Let's get to know what you need so we can tailor things to fit you. You can change your info anytime in Settings.

What is the full, legal name of your business?

Placeholder_Xfor\$Y_1234

What type of business do you have?

Choose one

Please select the category that best describes what you do.

- Partnership
- Private limited company
- Traded company or co-operative
- Charity or association
- Company
- Something else
- Trust

SET UP YOUR QUICKBOOKS

1. Tell us about your business.

Everyone needs something a little different from QuickBooks. Let's get to know what you need so we can tailor things to fit you. You can change your info anytime in Settings.

What is the full, legal name of your business?

Placeholder_Xfor\$Y_1234

What type of business do you have?

Company

Please select the category that best describes what you do.

How would you describe what your business does?


Choose one

- Accommodation and Food Services
- Administrative and Support Services
- Arts and Recreation Services
- Construction/Builder
- Education and Training
- Farming, forestry and fishing
- Financial services & insurance
- Manufacturing
- Medical / Health Care / Community services
- Personal, Beauty, Wellbeing and other services


SET UP YOUR QUICKBOOKS

2. What would you like to do in QuickBooks?


This is just to get you started. You can always do more later.




Send and track invoices




Organise your expenses




Track your GST




Track your retail sales



Pay your employees



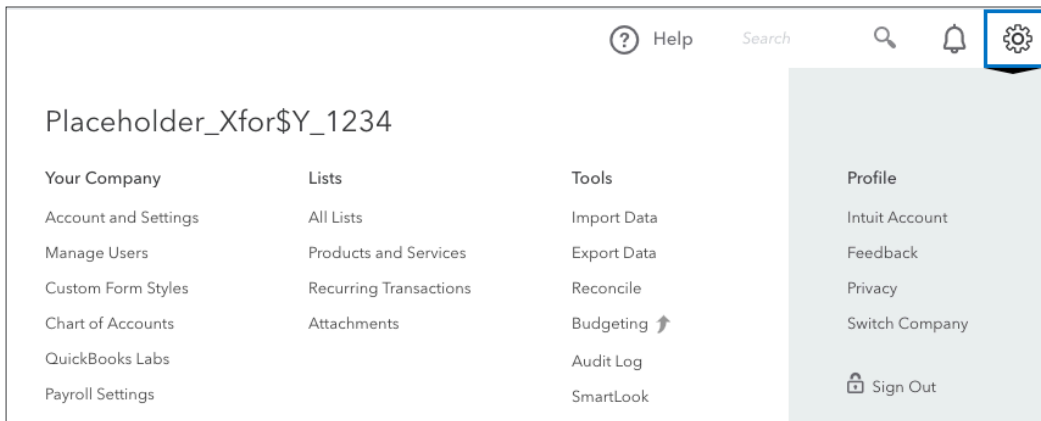
Manage your inventory



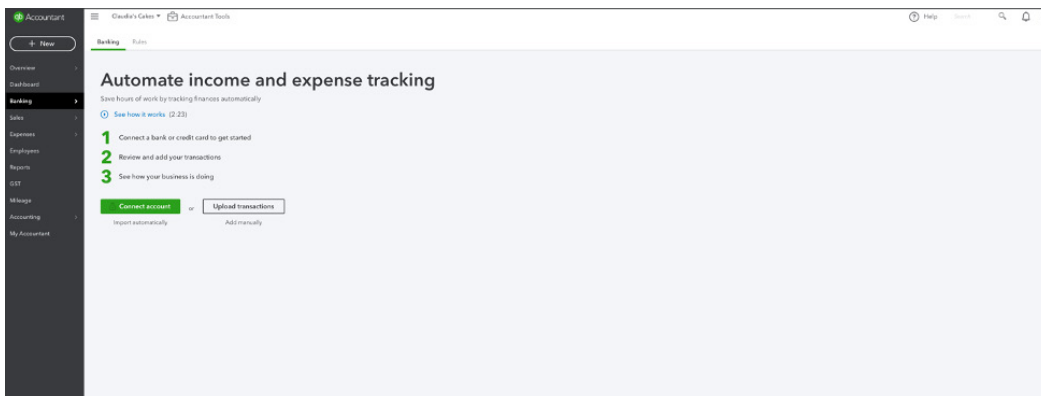
Track hours

Back All set

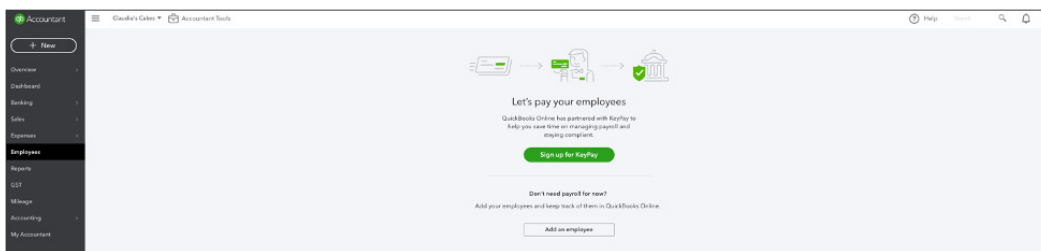
- Go through all of the subscription settings by clicking on the settings cog wheel in the top right corner, and going through the various options (*Accounts and Settings, Sales, Expenses, Advanced etc.*) to make sure the correct functionality is accessible in-product and the right details will be displayed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



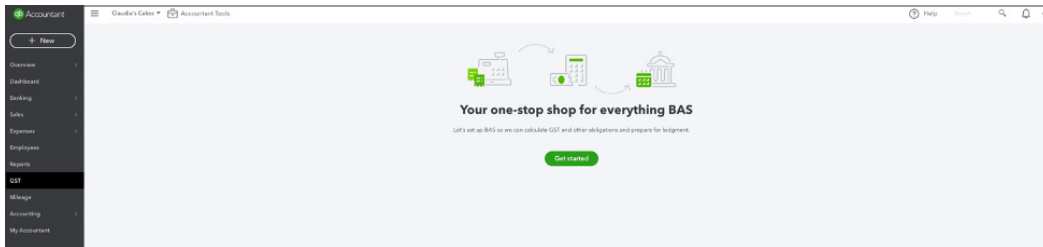
- Setup Bank Feeds (*choose Direct Feeds over the standard feed if available*).



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

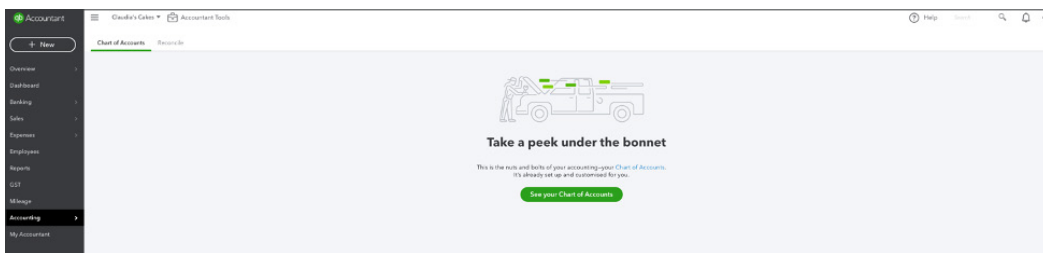


6. Set up the GST/BAS settings (*if applicable*) by clicking on the GST option in the left toolbar. *Please note that once GST is turned on it cannot be turned off.*

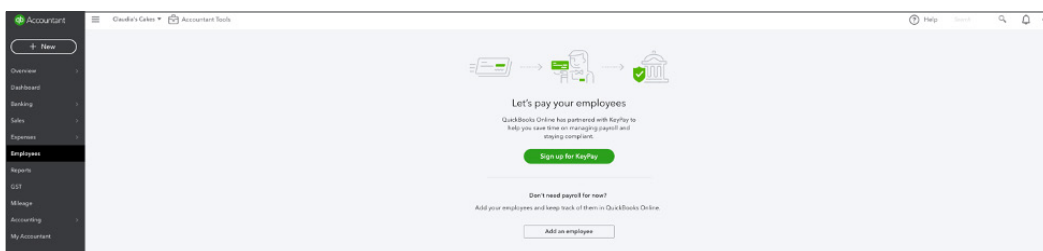


7. Check out your Chart of Accounts – and the associated default GST codes, if applicable.

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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