

intuit.

Getting Started

- Connect your bank accounts securely
- Create customized invoices
- See how you're doing with reports
- Run your business from anywhere

QuickBooks
Online

Learn how to get the most out of
QuickBooks Online

What's in this guide

- 1 Get started right away
- 2 Connect your bank accounts
- 3 Create and customize invoices
- 4 Track your expenses
- 5 Import and manage contact information
- 6 See how you're doing with reports
- 7 Get more from QuickBooks Online
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Get started right away



Sign in with a web browser, wherever you are

Access your QuickBooks Online account from any PC or Mac with an Internet connection*—whether you're at home, in the office, or visiting a customer.

1. Go to QBO.intuit.com
2. Enter your user ID and password to securely sign in to your account.

TIP! Add QBO.intuit.com to your browser bookmarks for faster access.

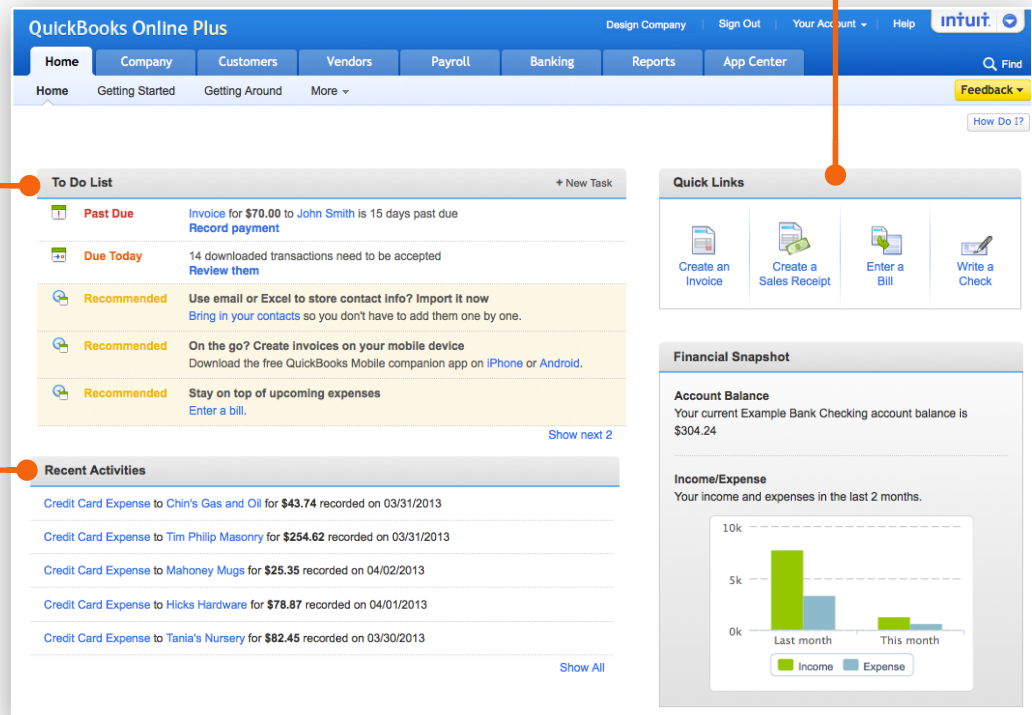


Check your home page for quick access to your finances and To Do List

Get to work quickly with just a click.

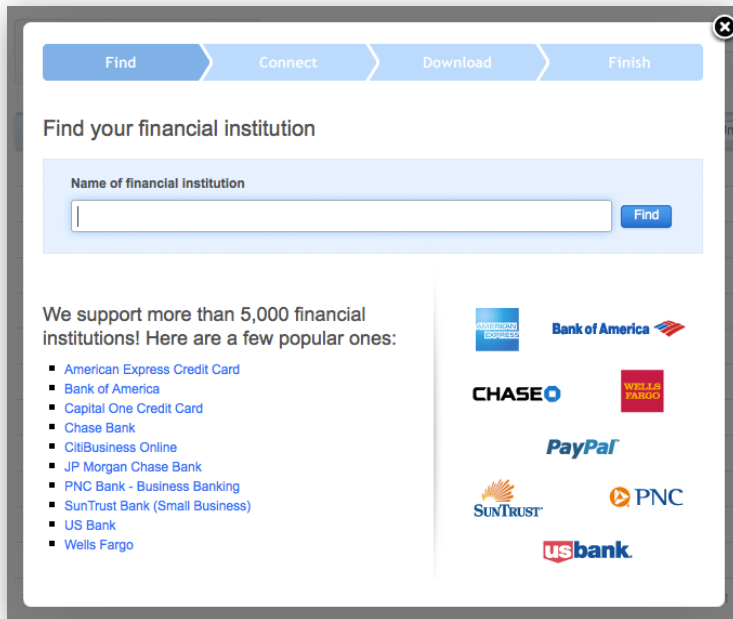
View important tasks in your To Do List right away.

See your most recent transactions at a glance.



*QuickBooks Online requires a computer with either Microsoft Windows (XP, Vista, or Windows 7) or Mac OS 10.5 or newer, an Internet connection (high-speed connection recommended), and at least FireFox 14, Chrome, or Safari 5.0.6 for Mac or Windows. Microsoft Internet Explorer 8 and newer work with QuickBooks Online but performance may not be as fast as with other browsers. QuickBooks Online works on iPhone and Android OS; mobile devices sold separately. A data plan is required. Not all features are available on mobile versions of QuickBooks Online.

Connect your bank accounts securely



1. Find your financial institution in QuickBooks Online.
2. Connect your bank or credit card account to QuickBooks Online.
3. Let QuickBooks Online do the rest!

Don't type, just download

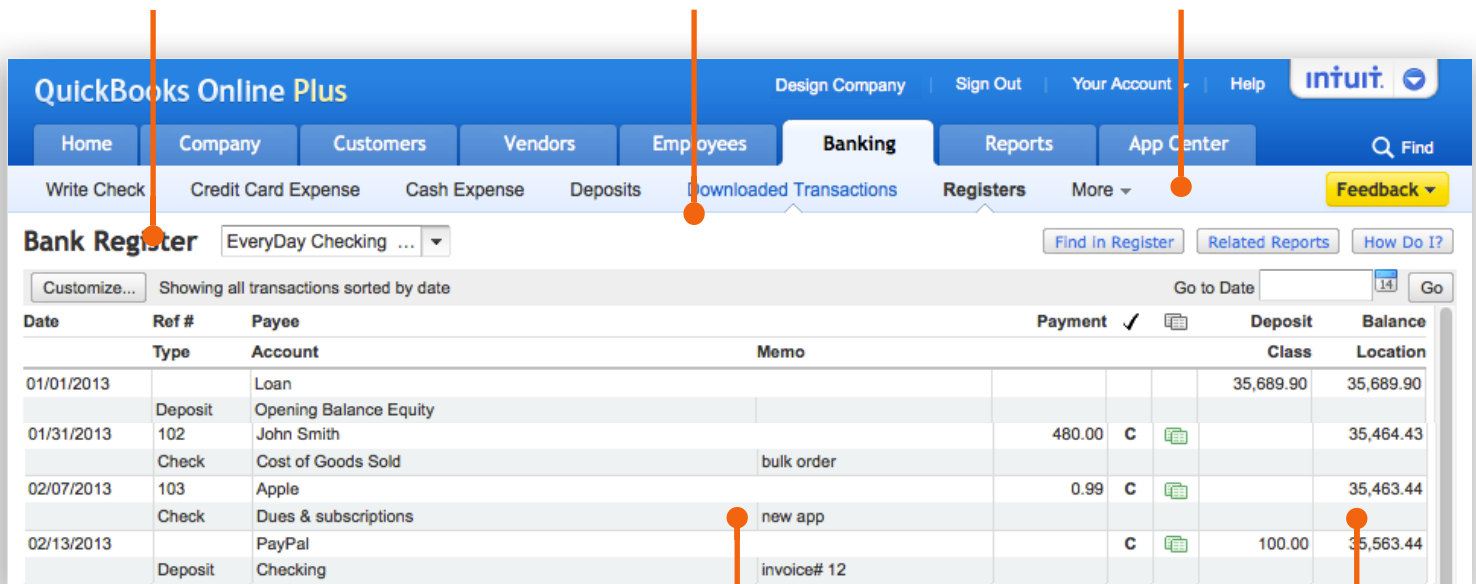
Once you connect your accounts, all your transactions are downloaded automatically every day through a secure Internet connection with bank-level encryption.

As you categorize your downloaded transactions, QuickBooks Online remembers the categories and automatically applies them next time. You can easily change your categories whenever you want.

Sort by a selected date range.

View all your account activity.

Search for a payee, account, or amount.

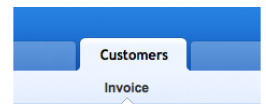


Date	Ref #	Payee	Type	Account	Memo	Payment	Deposit	Balance
01/01/2013		Loan					35,689.90	35,689.90
		Opening Balance Equity	Deposit					
01/31/2013	102	John Smith	Check	Cost of Goods Sold	bulk order	480.00		35,464.43
02/07/2013	103	Apple	Check	Dues & subscriptions	new app	0.99		35,463.44
02/13/2013		PayPal	Deposit	Checking	invoice# 12		100.00	35,563.44

Write custom memos or notes on individual transactions.

QuickBooks Online keeps a running total—no math needed.

Create and customize invoices



Add Your Logo for a Professional Look

1. From your home page, click **Create an Invoice**.
2. Select the **customer** you want to invoice. If you need to add the customer, you'll be guided step by step.
3. (Optional) Click **Change Logo/Theme** to personalize your invoice.
4. Choose your payment **Terms**. The default is Net 30 days.
5. Click the drop-down arrow under **Product/Service** and select **Add New**.
6. Complete the **Item Information** box and click **Save**.

TIP! You can send and receive payments even faster using [Intuit Payment Network](#).

TIP! Click **Customize** to add discounts, show quantities or automatically include sales tax.

You can now Save, Print, or Send your invoice. When you're done, you'll see it listed under Recent Activities on your home page.

Personalize invoices with your own business logo.

Follow the links in your To Do List on the home page to:

- Import your customer list from Microsoft Excel, Microsoft Outlook, or Gmail.
- Import your Products and Services list from Microsoft Excel.

ACTIVITY	AMOUNT
Web site • 1 page	890.00
Logo design • Design	670.00
Business cards • Design	560.00
Printed business cards • Printed cards (1500)	400.73

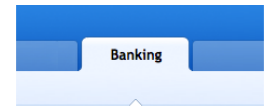
SUBTOTAL	\$2,520.73
TAX (0.8%)	\$3.21
TOTAL	\$2,523.94

Every invoice is automatically tracked, so you know who owes you money and who has paid.

See terms, due dates and invoice details clearly.

Sales tax is calculated for you.

Track expenses



Enter your first expenses

QuickBooks Online helps you set up your credit card and cash accounts.

Just enter a balance for the date you want to start tracking your business. This date can be when you started your business, the first day of the year, or any other day you choose.

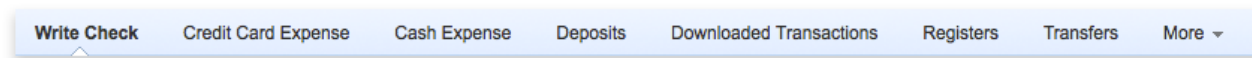
TIP! Select your own account categories to track what's important to your business.

See where your money goes

QuickBooks Online keeps track of each check, credit card transaction, and cash purchase so you can see where your money goes.

To save time, we recommend you connect your bank accounts to QuickBooks Online (see the "Connect your bank accounts securely" section of this guide). But if you want to track your expenses manually, here's how.

Under the Banking tab, select what kind of expense you are tracking—a credit card expense, cash expense, or check you are writing.



Choose the bank account for recording the expense. QuickBooks Online guides you through setting up these accounts.

Select the name of the vendor.

Enter the purchase amount.

Choose the business category for the expense from the drop-down menu.

Bank Account: EveryDay Checking ... Balance: \$35,534.44

Check # 120
Date 03/22/2013
Amount 480.00

Pay to the Order of: John A Smith

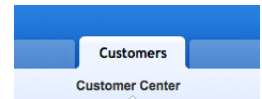
Four hundred eighty and 00/100 *****

Address: John A Smith, 1234 Any Street, Any Town, Ca 90000

Memo: Marketing collateral

#	Account Which?	Amount	Description ?
1	Advertising/Promotional	480.00	
2	Advertising/Promotional-NEW		
3	Dues & subscriptions - Expenses		
4	Equipment Rental - Expenses		
	Purchases - Expenses		
	Travel Meals - Expenses		
	Uncategorized Expense - Expenses		
	Checking - Bank		
	Checking 2 - Bank		
	EveryDay Checking (XXXXXX 3732) - Bank		
	Accounts Receivable (A/R) - Accounts receivable (A/R)		

Manage customer information



See all the details in one spot

The Customer Center lets you see all your customer details in one organized screen. Customer contact information, open invoices, and paid transactions are all there.

TIP! Use the Notes box to enter any special instructions for each customer.

Select a customer.

See contact information for each customer.

Customer Center

Name	Balance
Brian Farwell	570.00
Dividend	0.00
John Smith	265.00
Kathy Silverman	1,540.00
Mac center	-367.90
PayPal	0.00

Brian Farwell Edit

Email Brianfarwell@example.com Open Balance 570.00
Phone (650) 555-4000

Website

Billing Address 456 Broadway, Downtown, MA 33333
Shipping Address (Same as Billing Address)

Preferred Payment Method Check
Terms Net 30

Preferred Delivery Method Print
Tax Resale #

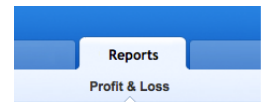
Hide Details

Transactions New Transaction

Date	Type	Num	Memo	Due/Exp Date	Amount
03/25/2013	Invoice	1004		04/24/2013	570.00

See open invoices and payments — click any transaction to show complete details.

See how you're doing with reports



Save hours at tax time

Gain insights into your business with customizable reports. QuickBooks Online organizes all the information for you.

TIP! One click on report totals lets you drill down to see the detail behind the numbers.

Memorize reports to have them automatically available for any given date range.

Run reports for any date range, including custom dates.

View reports with one click.

QuickBooks Online Plus | Design Company | Sign Out | Your Account | Help | intuit.

Home | Company | Customers | Vendors | Payroll | Banking | Reports | App Center | Find

Report List | Company Snapshot | Profit & Loss | Balance Sheet | Memorized Reports | Scorecard | More | Feedback

Report

Print... | Tips | Email... | Excel... | Memorize... | Customize... | Collapse

Transaction Date: This Year-to-date | From: 01/01/2013 | To: 03/25/2013 | Run Report

Accrual Basis

Design Company
Profit & Loss
January 1 - April 4, 2013

	Total
Income	
Services	2,375.00
Total Income	\$2,375.00
Cost of Goods Sold	
Cost of Goods Sold	480.00
Total Cost of Goods Sold	\$480.00
Gross Profit	\$1,895.00
Expenses	
Dues & subscriptions	0.99
Equipment Rental	13.98
Repair & Maintenance	536.90
Travel Meals	41.62
Total Expenses	\$593.49
Net Income	\$1,301.51

Monday, Mar 25, 2013 02:45:48 PM PDT GMT-7 - Accrual Basis

Click any amount to see the detail behind the number.

Get more from QuickBooks Online

Give your accountant access—for free

QuickBooks Online lets you add your accountant as a user for no extra charge.

1. From the **Company** tab, select **Manage Users**.
2. Click **Invite Accountant** to add your accountant.

TIP! Use [Find-A-ProAdvisor](#) to connect with a local expert and get the most out of QuickBooks Online.

Get support whenever you need it

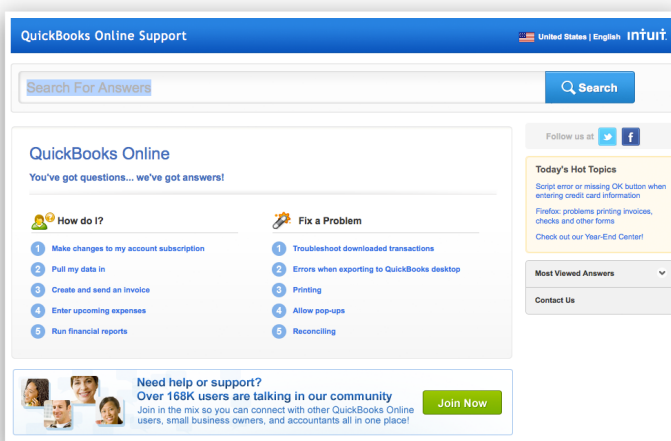
With all the help built into QuickBooks Online, you may not need any support. But if you do, we've got you covered.

- **How Do I?**—From any screen, click **How Do I?** and get targeted help for the task at hand.
- **Support Site**—From any screen, click **Help** to go to our support site. Our 10 most frequently used answers are at your fingertips! You can also access our community to ask questions or view answers.
- **Contact us**—Call us at 1-800-488-7330, Monday through Friday, 6 a.m. to 6 p.m. PT; Saturdays 6 a.m. to 3 p.m. PT.

Getting help is easy with QuickBooks Online

Tip! Save time by viewing the most common answers on a topic. Follow these paths to our custom answer centers:

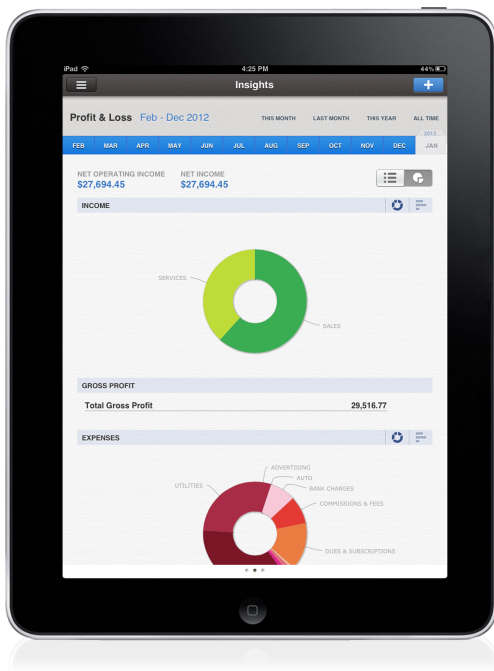
- Banking > Online Banking or Downloaded Transactions > Help
- Company > Sales Tax > Help
- Vendors > Vendor List > Prepare 1099-MISC Forms > Help



Run your business from anywhere

Go mobile with our companion apps

With our mobile feature, you can take your business with you. Working at home? On the road? Visiting a client? No problem. The information you need is at your fingertips.



QuickBooks Online for iPad[®]

- Access your finances from work, home, or on the go.
- View customer information and send invoices.
- Add photos and notes so you don't forget anything.
- Accept electronic signatures to approve estimates.

QuickBooks Online for iPhone[®] and Android[™]

- Easily view and edit customer information.
- Send estimates and invoices on the spot.
- Mark invoices as paid and check customer balances.

