



QuickBooks Online in the Classroom

A Quick Start Guide for Instructors



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Introduction

Welcome to Intuit's QuickBooks Online education program. We are thrilled to have you as the newest member of our growing Intuit Education program.

With QuickBooks Online you can provide your students an opportunity to learn and master Canada's leading accounting software, giving them an edge in the competitive job market.

This guide will walk you through the setup process for instructors and give you the details on how to setup QuickBooks Online for you and your student. This guide will provide you with details on the resources available to you and how to get the most out of your QuickBooks Online teaching experience.

We really hope this getting started guide makes your job easier and that you feel comfortable teaching and using QuickBooks Online in your classroom.



Before You Use QuickBooks Online

Before you use QuickBooks Online, it's important that you optimize your learning environment to make sure you're ready to get started. Here are few items for your review before getting started. Usually you won't have to worry about these items, but we provide them just in case.

Minimum System Requirements

- **Windows PC:** Windows 7 or newer, Intel Core i3 or a comparable processor (2013 or newer) with at least 2GB of RAM
- **Mac:** OS X "El Capital" 10.11 or newer
- **Internet connection:** 1.5 Mbps

Supported Browsers – QuickBooks Online is accessed and used in a web browser. QuickBooks Online supports the following browsers:

- Google Chrome
- Mozilla Firefox (Note: To preview and print forms on Mac OS, you'll also need the Firefox PDF plugin.)
- Microsoft Edge
- Safari 11 or newer (Mac only)

What Is QuickBooks Online?

QuickBooks Online is accounting software designed for small business. It helps small businesses complete full cycle accounting including sales, expenses, banking, reporting and much more. There are three different versions of QuickBooks Online. As part of the Intuit Education program your students will use the QuickBooks Online Plus version. This version includes the following features, transactions, and tools:

Setup Tools and Lists

- Easy to follow setup in just a few steps
- Complete chart of accounts to categorize transactions
- Product and service list to track what you sell
- Sales tax tracking for GST, HST, QST and all PST

Sales Transactions

- Sales invoices to track accounts receivable
- Sales receipts for cash sales
- Receive customer payments against invoices

Expenses and Accounts Payable

- Expense tracking for debit and credit card transactions
- Expense tracking for all other payment methods like Interac, direct payments, and more
- Enter bills for accounts payable tracking

Banking

- Deposits of customer payments
- Transfer between accounts
- Bank reconciliations

Payroll

- As part of the program you have access to QuickBooks Standard payroll
- Setup employees and pay items including wages, additions, deductions, and taxable benefits
- Paying employees and payroll taxes
- Creating payroll reports
- Create T4's and Records of Employment

Reporting

- Preset standard reports like the Profit & Loss, Balance Sheet, AR Aging, AP Aging and much more
- Customization options for report display and filtering information on reports

Advanced Features

- Estimating and progress invoicing
- Job costing
- Budgeting
- Class tracking (departments)
- Multiple currencies



What Is QuickBooks Online Accountant?

QuickBooks Online Accountant is designed for accountants to work with their clients directly in QuickBooks Online. It includes full access to the client file and all the features available to their client. Plus, it includes advanced features only available to accountants like undoing bank reconciliations, reclassifying batches of transactions, and other advanced features.

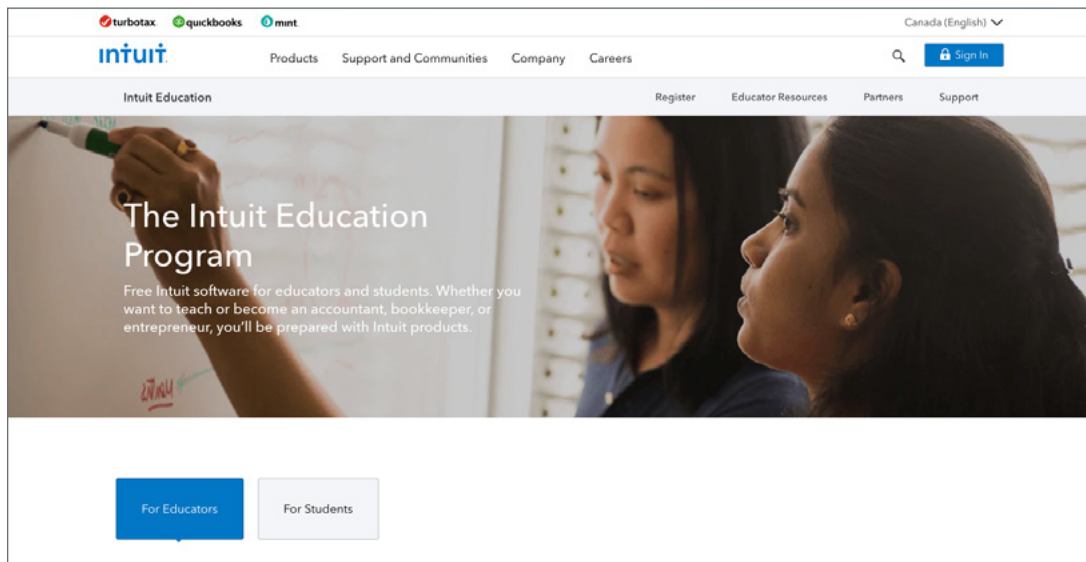
To work with their accountant, the small business invites their accountant to access their file and when the accountant accepts the invitation the client is added to their client list.

Working with clients through QuickBooks Online Accountant lets the accountant have single sign-in access to all of their clients.

For the purposes of this course, you'll use the QuickBooks Online Accountant to access and work with your student's accounts.

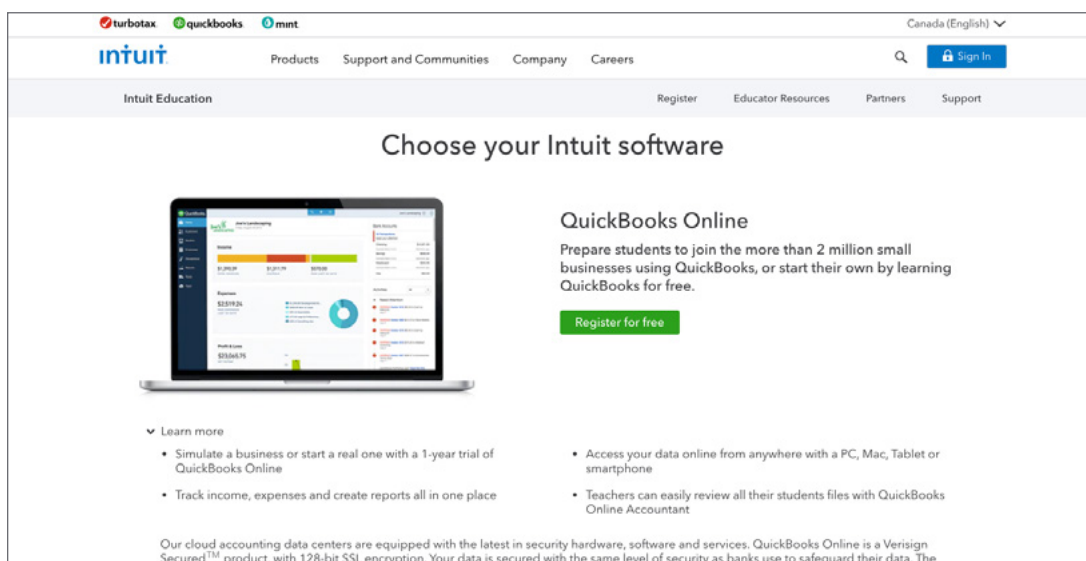
QuickBooks Online Education Program Sign Up

The first step is to get signed up. To get started visit intuiteducation.ca



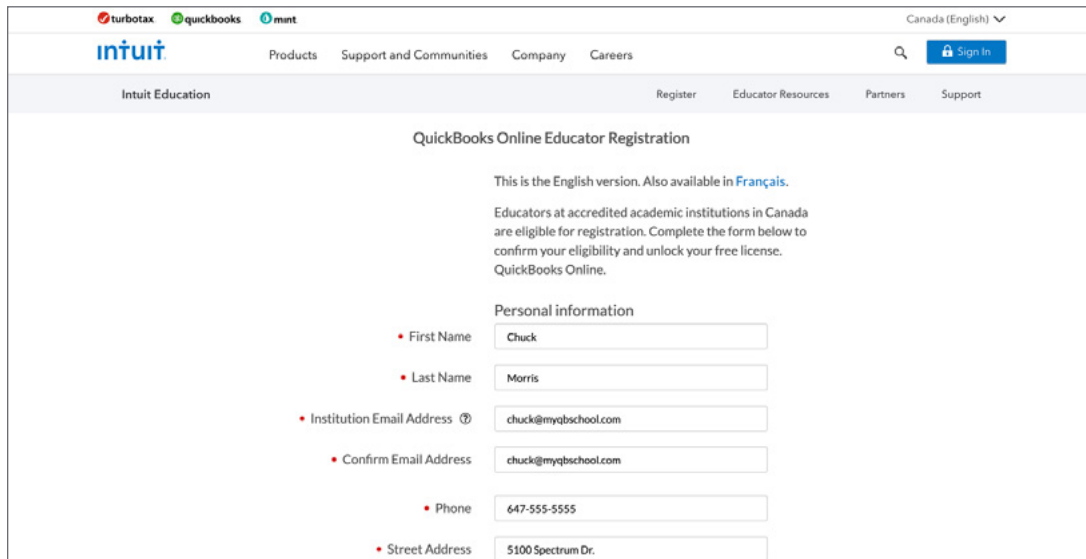
The screenshot shows the Intuit Education Program landing page. At the top, there are logos for TurboTax, QuickBooks, and Mint, along with the Intuit logo. The navigation menu includes Products, Support and Communities, Company, and Careers. A search icon and a Sign In button are also present. The main heading is "The Intuit Education Program" with a sub-heading "Free Intuit software for educators and students. Whether you want to teach or become an accountant, bookkeeper, or entrepreneur, you'll be prepared with Intuit products." Below this, there are two buttons: "For Educators" and "For Students".

Click **Register for Free**.



The screenshot shows the QuickBooks Online registration page. At the top, there are logos for TurboTax, QuickBooks, and Mint, along with the Intuit logo. The navigation menu includes Products, Support and Communities, Company, and Careers. A search icon and a Sign In button are also present. The main heading is "Choose your Intuit software". Below this, there is a section for "QuickBooks Online" with a sub-heading "Prepare students to join the more than 2 million small businesses using QuickBooks, or start their own by learning QuickBooks for free." A green button labeled "Register for free" is prominently displayed. Below the button, there are two columns of bullet points. The left column lists "Learn more" and "Simulate a business or start a real one with a 1-year trial of QuickBooks Online" and "Track income, expenses and create reports all in one place". The right column lists "Access your data online from anywhere with a PC, Mac, Tablet or smartphone" and "Teachers can easily review all their students files with QuickBooks Online Accountant". At the bottom, there is a small text block about security: "Our cloud accounting data centers are equipped with the latest in security hardware, software and services. QuickBooks Online is a Verisign Secured™ product, with 128-bit SSL encryption. Your data is secured with the same level of security as banks use to safeguard their data. The

Intuit needs to verify that you are part of an educational institution to qualify for the education program. Complete the form to provide verification. Start by entering your **Personal Information**.



The screenshot shows the 'QuickBooks Online Educator Registration' page. At the top, there are logos for 'turbotax', 'quickbooks', and 'mint', along with a language selector for 'Canada (English)'. The Intuit logo is on the left, and navigation links for 'Products', 'Support and Communities', 'Company', and 'Careers' are in the center. A search icon and a 'Sign In' button are on the right. Below the navigation bar, there are links for 'Intuit Education', 'Register', 'Educator Resources', 'Partners', and 'Support'. The main heading is 'QuickBooks Online Educator Registration'. Below this, there is a note: 'This is the English version. Also available in Français.' followed by a paragraph: 'Educators at accredited academic institutions in Canada are eligible for registration. Complete the form below to confirm your eligibility and unlock your free license. QuickBooks Online.' The 'Personal information' section contains the following fields:

- First Name: Chuck
- Last Name: Morris
- Institution Email Address: chuck@myqbschool.com
- Confirm Email Address: chuck@myqbschool.com
- Phone: 647-555-5555
- Street Address: 5100 Spectrum Dr.

Next, Intuit asks for information about your school. Intuit will review this information thoroughly, so provide accurate information. You'll be required to provide your Institution Name, Institution Type, Program or Faculty, Job Title or Role, # of students, and the Name of the Course that you're planning to teach.

After completing the form click **Verify and Continue**.

The screenshot shows the Intuit Education registration form. The header includes the Intuit logo, navigation links for Products, Support and Communities, Company, and Careers, and a search bar with a Sign In button. The main content area is titled "Intuit Education" and contains a "School information" section with the following fields:

- Institution Name: Sheridan Institute Of Technology And Advanced Learn
- Institution Type: College
- Program or Faculty: Business
- Job Title or Role: Associate Professor of Commerce
- Estimated number of students in your class: 35
- Name of Course: Entrepreneurship

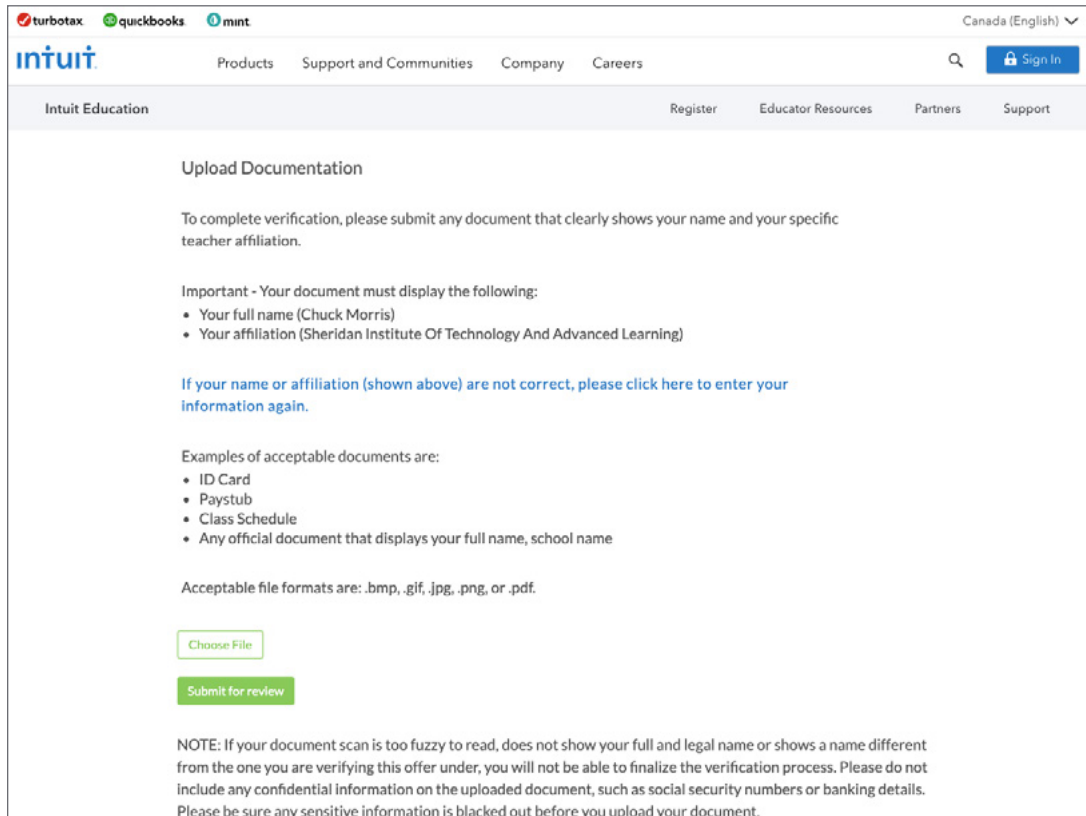
Below these fields are two questions:

- Is your institution new to the Intuit Education Program? (Yes is selected)
- How did you hear about the Intuit Education Program? (Conference/Event is selected)

A green "Verify and Continue" button is located below the questions. At the bottom, a disclaimer states: "Information entered into this web form will be used for verification purposes. The information will be shared with Intuit."

Intuit now asks for documentation verifying your name and your affiliation with the school you're associated with. You can upload an ID card, Paystub, Class Schedule or any other official document that displays you name and school name.

Click **Choose File** to locate the appropriate documents.



The screenshot shows the Intuit Education website's 'Upload Documentation' page. At the top, there are logos for TurboTax, QuickBooks, and Mint, along with a language selector for 'Canada (English)'. The main navigation includes 'Products', 'Support and Communities', 'Company', and 'Careers'. Below this, there are links for 'Intuit Education', 'Register', 'Educator Resources', 'Partners', and 'Support'. The page title is 'Upload Documentation'. The main content area contains the following text:

To complete verification, please submit any document that clearly shows your name and your specific teacher affiliation.

Important - Your document must display the following:

- Your full name (Chuck Morris)
- Your affiliation (Sheridan Institute Of Technology And Advanced Learning)

If your name or affiliation (shown above) are not correct, please [click here to enter your information again](#).

Examples of acceptable documents are:

- ID Card
- Paystub
- Class Schedule
- Any official document that displays your full name, school name

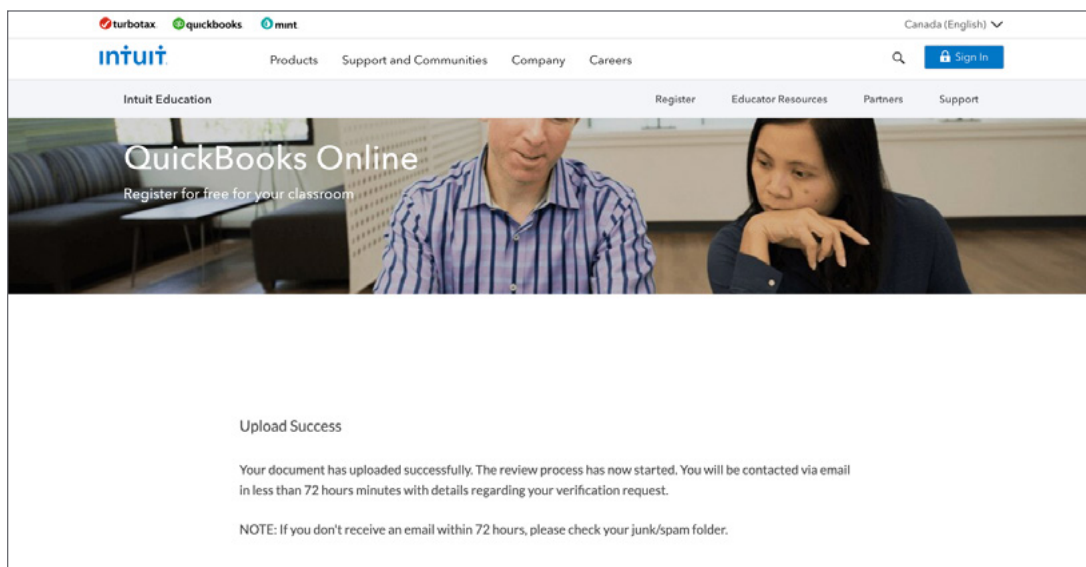
Acceptable file formats are: .bmp, .gif, .jpg, .png, or .pdf.

There are two buttons: a light green 'Choose File' button and a dark green 'Submit for review' button.

NOTE: If your document scan is too fuzzy to read, does not show your full and legal name or shows a name different from the one you are verifying this offer under, you will not be able to finalize the verification process. Please do not include any confidential information on the uploaded document, such as social security numbers or banking details. Please be sure any sensitive information is blacked out before you upload your document.

After selecting the documents click **Submit for Review**.

QuickBooks indicates that you have submitted the documents and confirms that you've been successful.



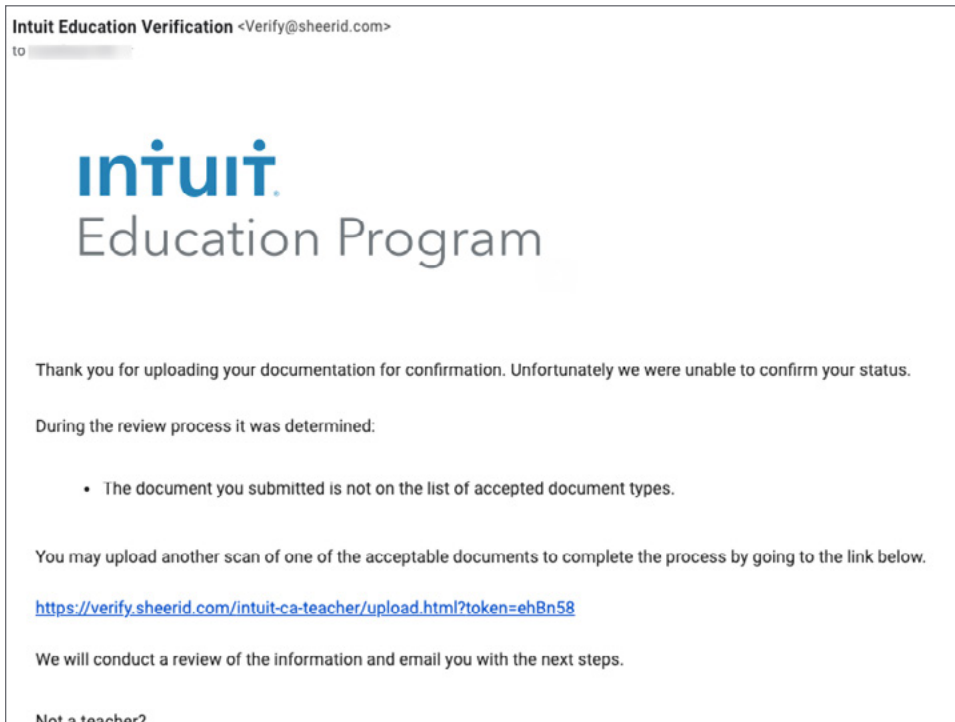
The screenshot shows the Intuit Education website's 'Upload Success' page. At the top, there are logos for TurboTax, QuickBooks, and Mint, along with a language selector for 'Canada (English)'. The main navigation includes 'Products', 'Support and Communities', 'Company', and 'Careers'. Below this, there are links for 'Intuit Education', 'Register', 'Educator Resources', 'Partners', and 'Support'. The page title is 'QuickBooks Online' with the subtitle 'Register for free for your classroom'. The main content area contains the following text:

Upload Success

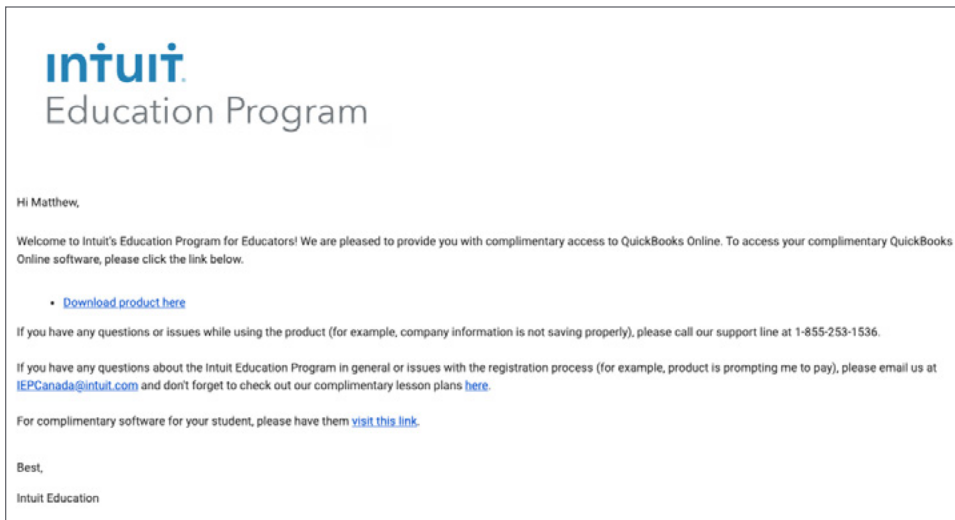
Your document has uploaded successfully. The review process has now started. You will be contacted via email in less than 72 hours minutes with details regarding your verification request.

NOTE: If you don't receive an email within 72 hours, please check your junk/spam folder.

Intuit will now verify your information. In the case where additional information is needed, they'll email you requesting the information.

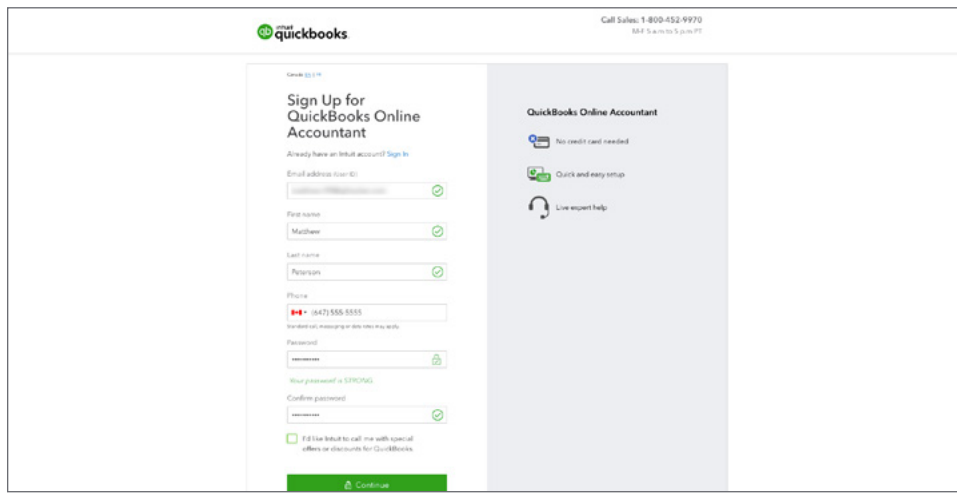


After Intuit successfully verifies you, you'll receive a welcome email as seen here.



Click **Download product here** to proceed.

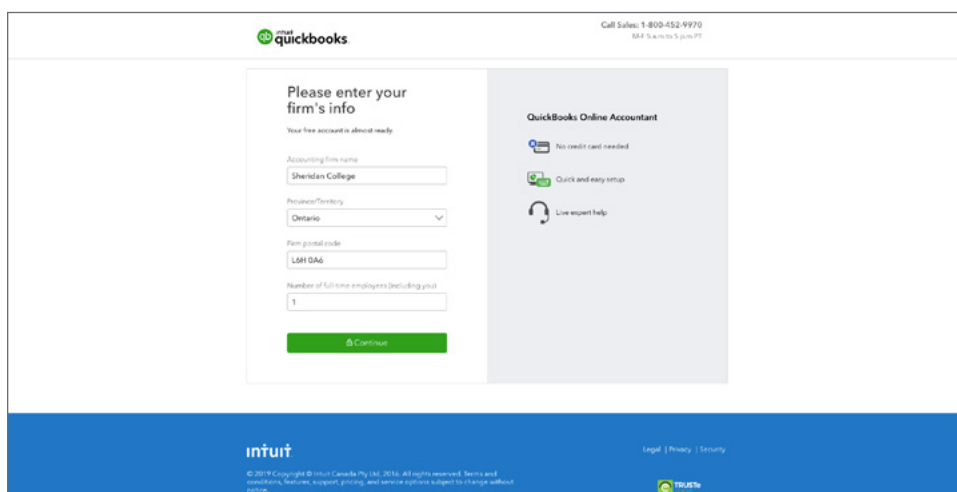
Now you'll sign up for your free QuickBooks Online Accountant account. Enter the required information and then click **Continue**.



The screenshot shows the 'Sign Up for QuickBooks Online Accountant' page. The form includes fields for 'Email address (your ID)', 'First name' (Matthew), 'Last name' (Peterson), and 'Phone' (+1 647 555 5555). There are also fields for 'Password' and 'Confirm password'. A green 'Continue' button is at the bottom. On the right, there's a sidebar with 'QuickBooks Online Accountant' and three icons: 'No credit card needed', 'Quick and easy setup', and 'Live expert help'. The Intuit logo is in the top left, and 'Call Sales: 1-800-452-9970' is in the top right.

The email address and password you set up here will be used from now on as your single sign-in information to access your QuickBooks Online Accountant account.

The next step requires you to enter Firm information. Since you're an educational institution and not a traditional accounting firm, you can enter whatever information makes sense for you. We recommend using your school name. After completing the information click **Continue**.



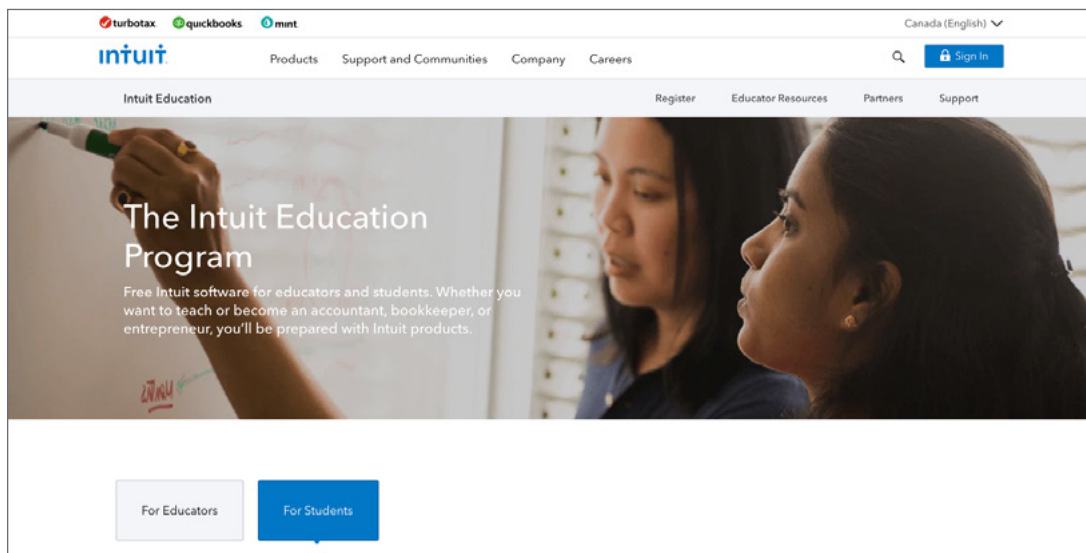
The screenshot shows the 'Please enter your firm's info' page. The form includes fields for 'Accounting firm name' (Sheridan College), 'Province/territory' (Ontario), 'Firm postal code' (L8H 6A6), and 'Number of full-time employees (including you)' (1). A green 'Continue' button is at the bottom. On the right, there's a sidebar with 'QuickBooks Online Accountant' and three icons: 'No credit card needed', 'Quick and easy setup', and 'Live expert help'. The Intuit logo is in the top left, and 'Call Sales: 1-800-452-9970' is in the top right. The footer contains the Intuit logo, copyright information, and 'Legal | Privacy | Security' links.

QuickBooks Online Accountant will display for you. Now you're ready to go.

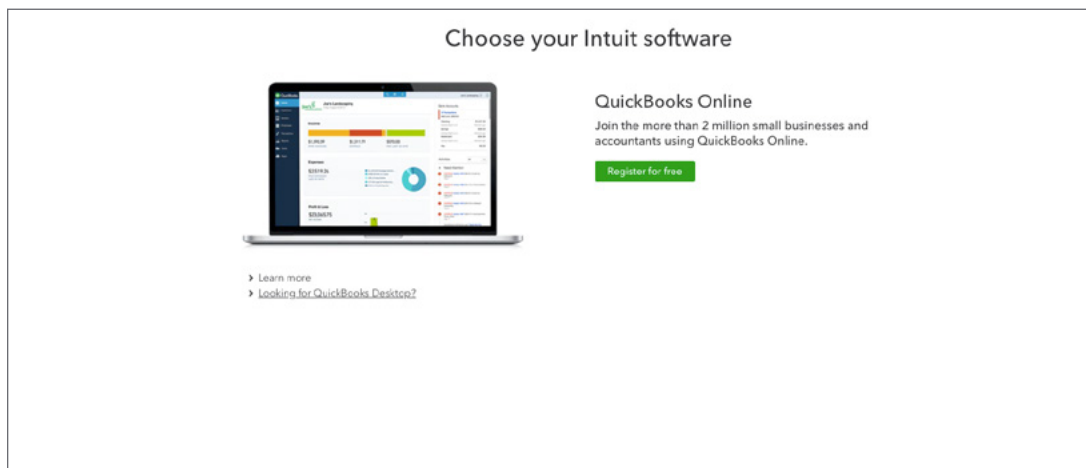
How Does My Student Get Started?

Your student can get started by going to intuiteducation.ca to get signed up.

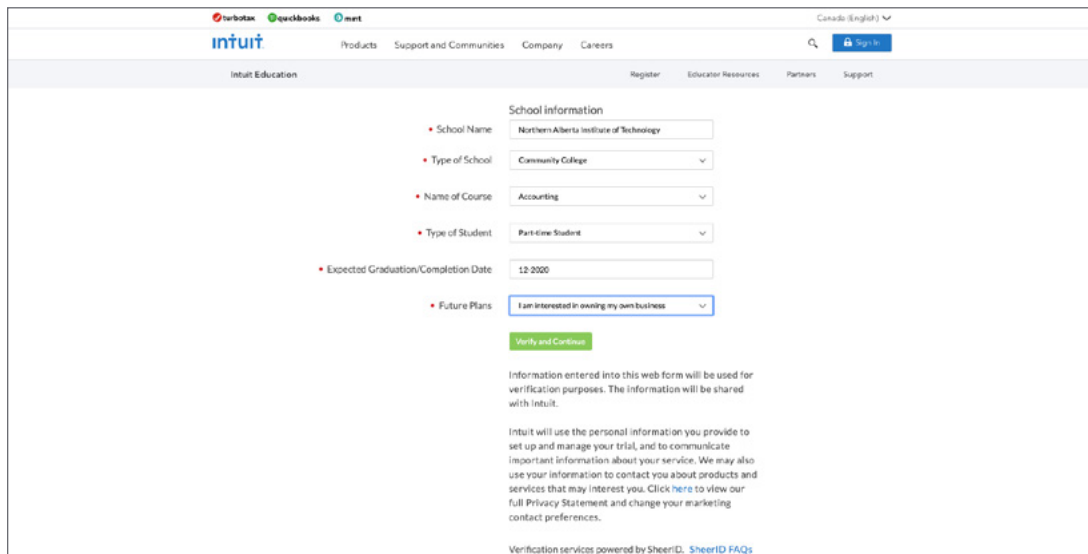
1. Click **For Students**.



2. Under the QuickBooks Online section, click **Register for Free**.



3. Complete the form. Note you must complete all fields indicated.



The screenshot shows the Intuit Education registration page. The header includes the Intuit logo and navigation links for Products, Support and Communities, Company, and Careers. The main content area is titled "School information" and contains the following fields:

- School Name: Northern Alberta Institute of Technology
- Type of School: Community College
- Name of Course: Accounting
- Type of Student: Part-time Student
- Expected Graduation/Completion Date: 12 2020
- Future Plans: I am interested in owning my own business

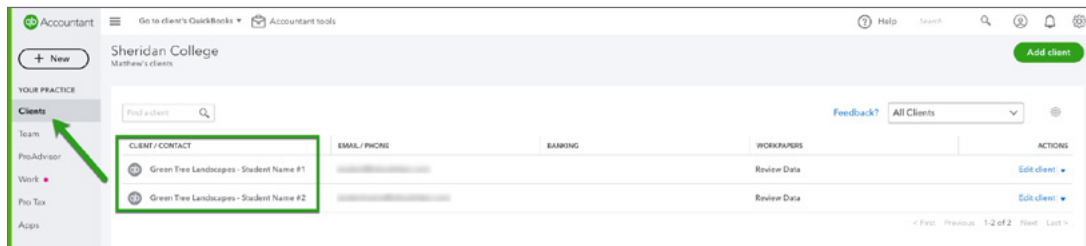
Below the form is a green "Verify and Continue" button. Underneath the button, there is a privacy notice: "Information entered into this web form will be used for verification purposes. The information will be shared with Intuit. Intuit will use the personal information you provide to set up and manage your trial, and to communicate important information about your service. We may also use your information to contact you about products and services that may interest you. Click here to view our full Privacy Statement and change your marketing contact preferences." At the bottom, it states "Verification services powered by SheerID. [SheerID FAQs](#)".

4. Click **Verify and Continue**.

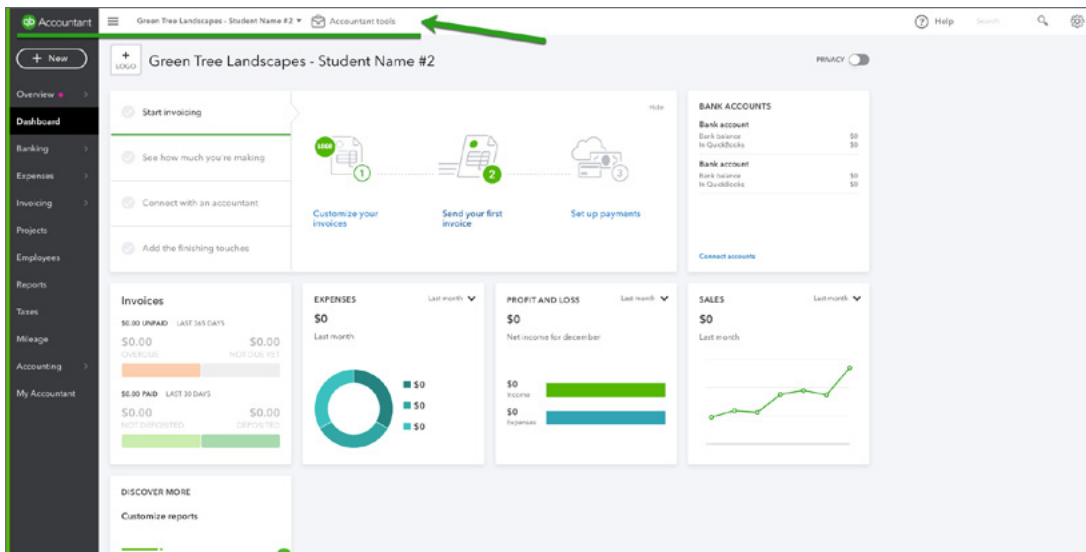
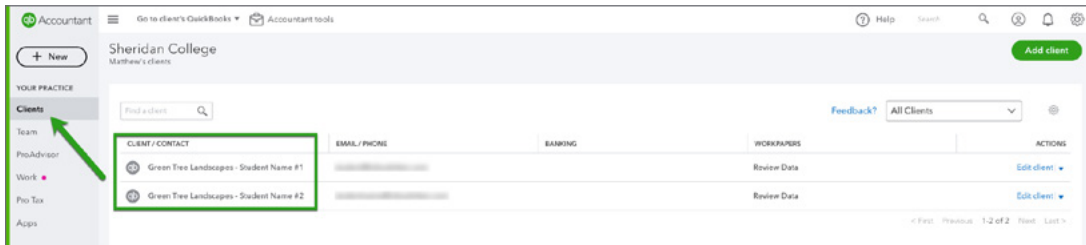
Working with Your Students in QuickBooks Online Accountant

Now let's review how you'll work with your students in QuickBooks Online. For the purposes of this class you are considered as the accountant. This means that you'll use the QuickBooks Online Accountant version. Your students will be considered as your clients and they will use QuickBooks Online Plus.

Each of your students will invite you to be their accountant (you'll learn how to instruct your students to do this in the next section). After accepting their invitation, they'll be added to your client list. Now you have unlimited access to review the work in their QuickBooks company and even make changes if needed.

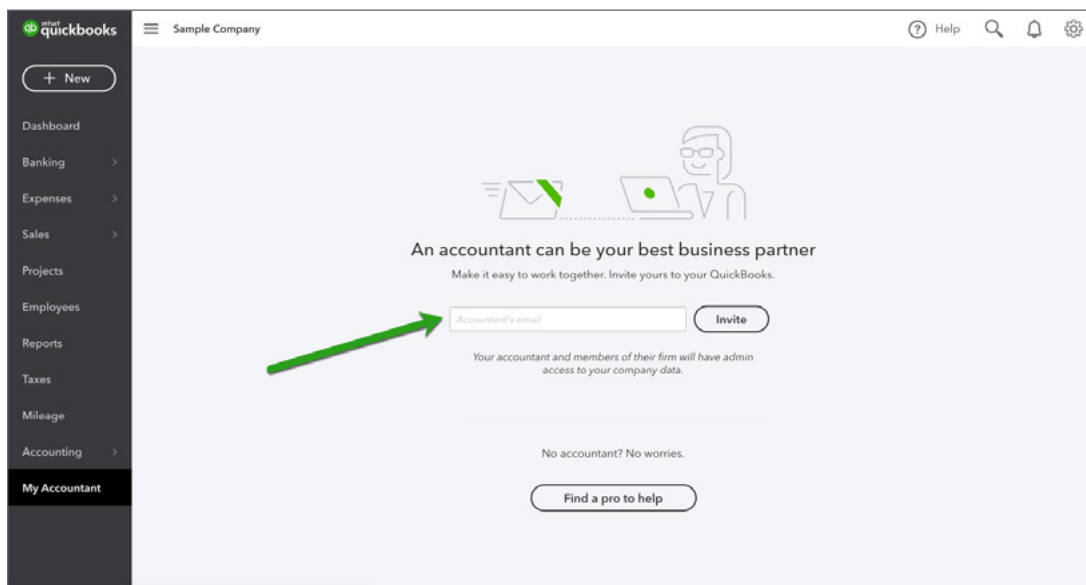


To access a student file, click the green QB icon next to the Client (student) name. Now you see that you have access to their QuickBooks Online Company. You'll see you're using the QuickBooks Online Accountant version but are now in the student file.



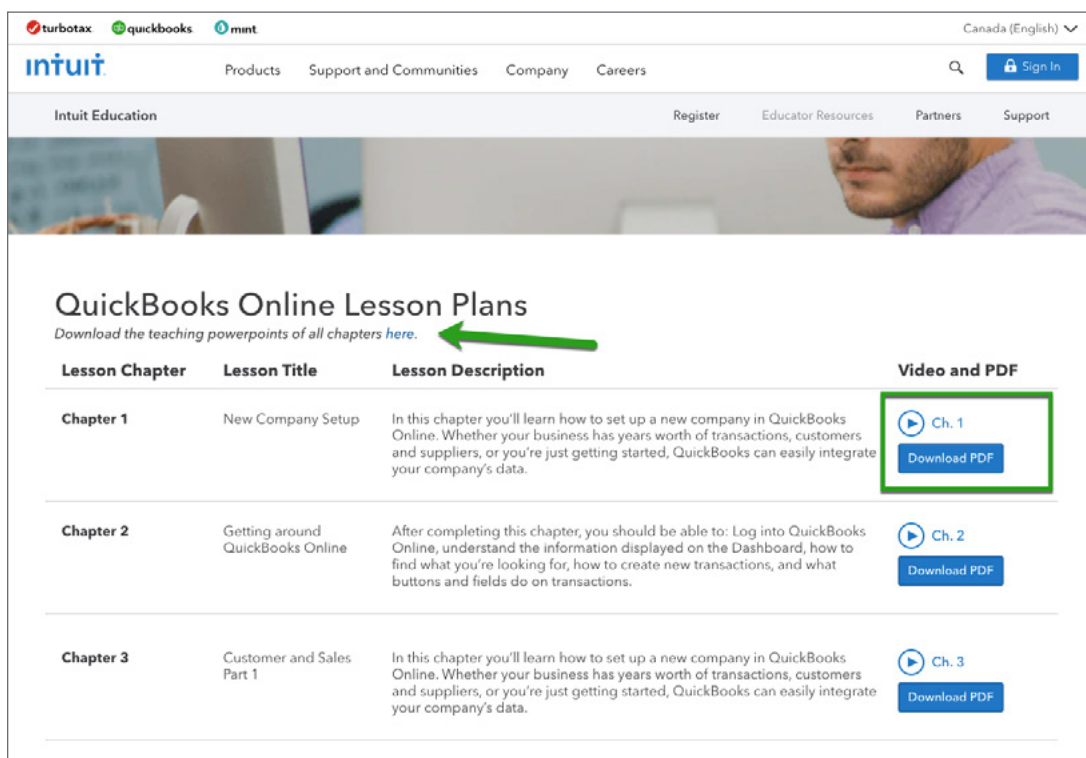
Connecting to Your Students

After your students have signed up for their trial version of QuickBooks Online Plus they can invite you as their instructor to access their QuickBooks company. They do this by clicking the My Accountant page. Then, they enter your email in the space provided and click **Invite**.



Instructor Resources

To help you succeed in the classroom, we provide you with a variety of instructional resources. When you visit <https://www.intuit.com/ca/partners/education-program/resources/> you'll find PowerPoint presentations, Student Guides (.pdf format), and videos available for your use.



The screenshot shows the Intuit Education website. At the top, there are logos for TurboTax, QuickBooks, and Mint, along with the Intuit logo and navigation links for Products, Support and Communities, Company, and Careers. A search bar and a Sign In button are also visible. Below the navigation, there are links for Intuit Education, Register, Educator Resources, Partners, and Support. The main content area features a banner for 'QuickBooks Online Lesson Plans' with a sub-link 'Download the teaching powerpoints of all chapters here.' highlighted by a green arrow. Below this is a table with three columns: Lesson Chapter, Lesson Title, and Lesson Description. To the right of the table is a 'Video and PDF' section with buttons for 'Ch. 1', 'Ch. 2', and 'Ch. 3', each with a 'Download PDF' button. The first row of the table is highlighted with a green box.

Lesson Chapter	Lesson Title	Lesson Description	Video and PDF
Chapter 1	New Company Setup	In this chapter you'll learn how to set up a new company in QuickBooks Online. Whether your business has years worth of transactions, customers and suppliers, or you're just getting started, QuickBooks can easily integrate your company's data.	Ch. 1 Download PDF
Chapter 2	Getting around QuickBooks Online	After completing this chapter, you should be able to: Log into QuickBooks Online, understand the information displayed on the Dashboard, how to find what you're looking for, how to create new transactions, and what buttons and fields do on transactions.	Ch. 2 Download PDF
Chapter 3	Customer and Sales Part 1	In this chapter you'll learn how to set up a new company in QuickBooks Online. Whether your business has years worth of transactions, customers and suppliers, or you're just getting started, QuickBooks can easily integrate your company's data.	Ch. 3 Download PDF

You can use a combination of any of these resources to help you prepare for and deliver instruction in your classroom. The following resources are available for your use:

Lessons/Chapters

There are 12 lessons/chapters of QuickBooks Online instruction. Each chapter is a standalone chapter that can be used by itself or as part of a larger course. The program is designed in this way so that you can pick and choose the lessons/chapters that work for your specific course.

If you're teaching secondary accounting, you may only choose 1 or 2 chapters as part of your class. If you're teaching a full semester class, you may use all of the chapters. The program is flexible to meet your needs no matter what your situation requires.

The chapters should be used as reference guides for both the instructor and student. Each chapter includes detailed information related to QuickBooks concepts, workflows and step-by-step instructions for set up, date entry and day-to-day workflows in QuickBooks Online.

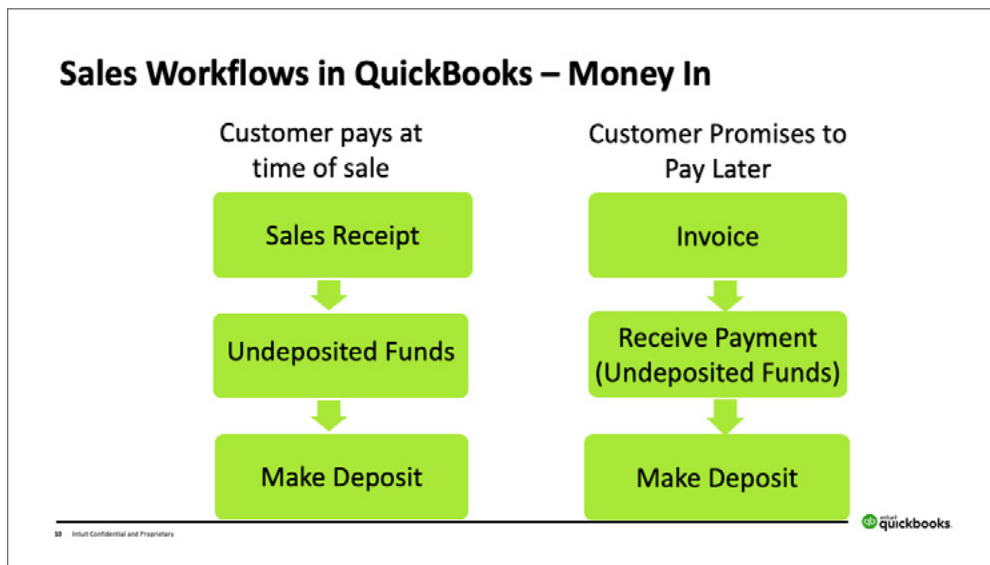
Appendices

There are 3 appendices available for specific topics that include using multiple currencies, project tracking, and using QuickBooks Online Accountant. These can be used as required. Typically, these topics will not be covered in most courses.

Teaching PowerPoint Presentations

To assist you in delivering QuickBooks Online instruction in the classroom, we provide a PowerPoint presentation that helps you introduce topics, QuickBooks Online concepts, and workflows.

The presentation also includes hands on exercises that students can use for in-class practice. The exercises use the QuickBooks Online sample company. This provides students with a practice environment where they can enter transactions, run reports and do other tasks to improve their skills. See sample slide.



Conclusion

Now that you're set up in QuickBooks Online Accountant and are familiar with the resources available, we hope that you're ready to deliver an awesome QuickBooks Online experience for your students. If you need additional assistance with getting started please visit our Education support page at <https://www.intuit.com/ca/partners/education-program/support/>

Call us at **1-833-317-2226**.

Email us at iepcanada@intuit.com