



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.

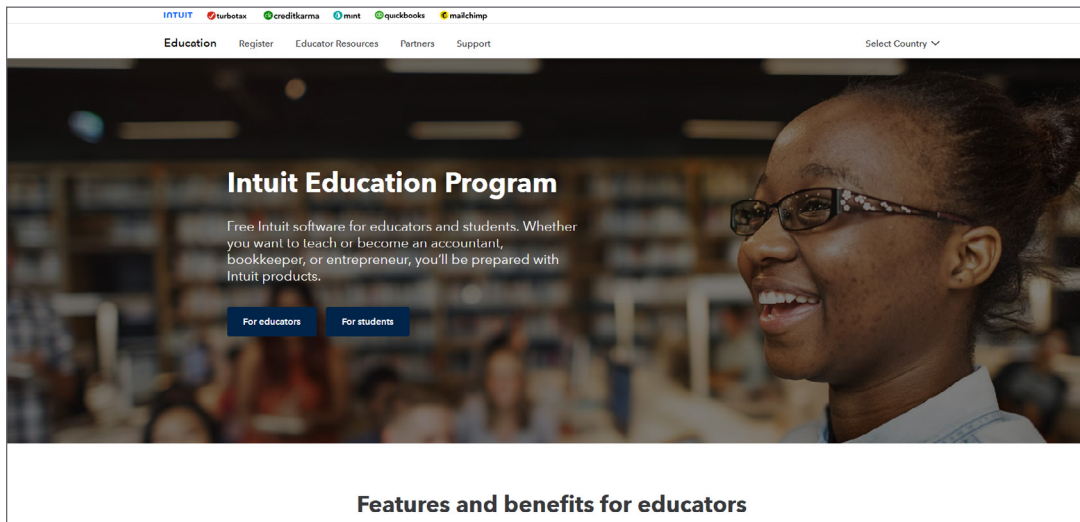
To work with their accountant, the small business invites their accountant to access their file and when the accountant accepts the invitation the client is added to their client list.

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.

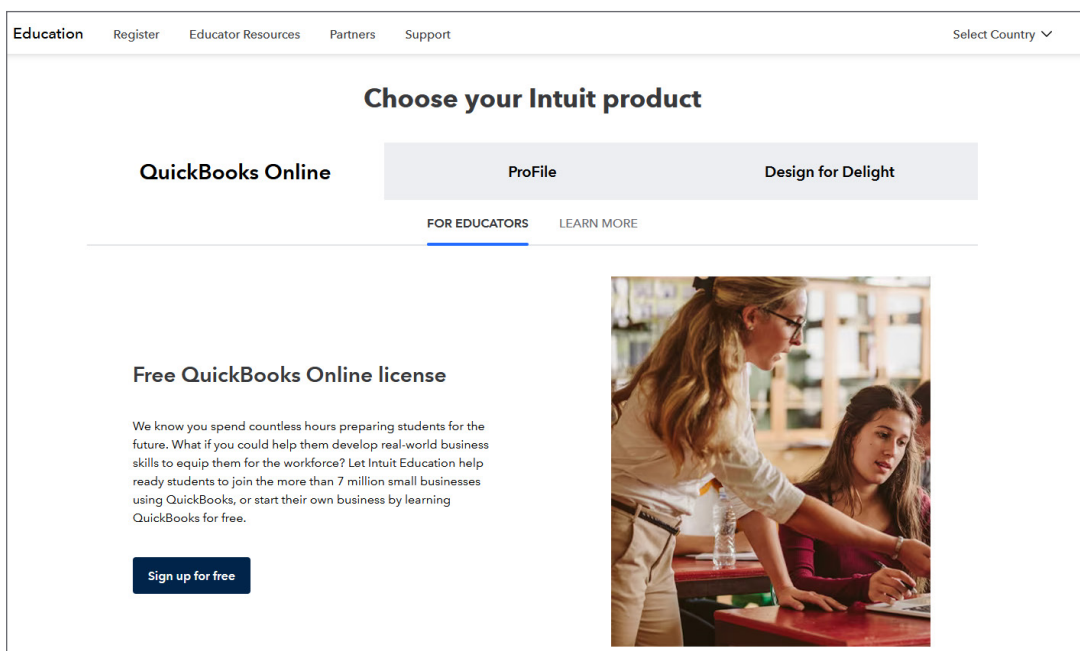
# QuickBooks Online Education Program Sign Up

The first step is to get signed up. To get started visit [www.intuit.com/ca/partners/education-program/](http://www.intuit.com/ca/partners/education-program/)



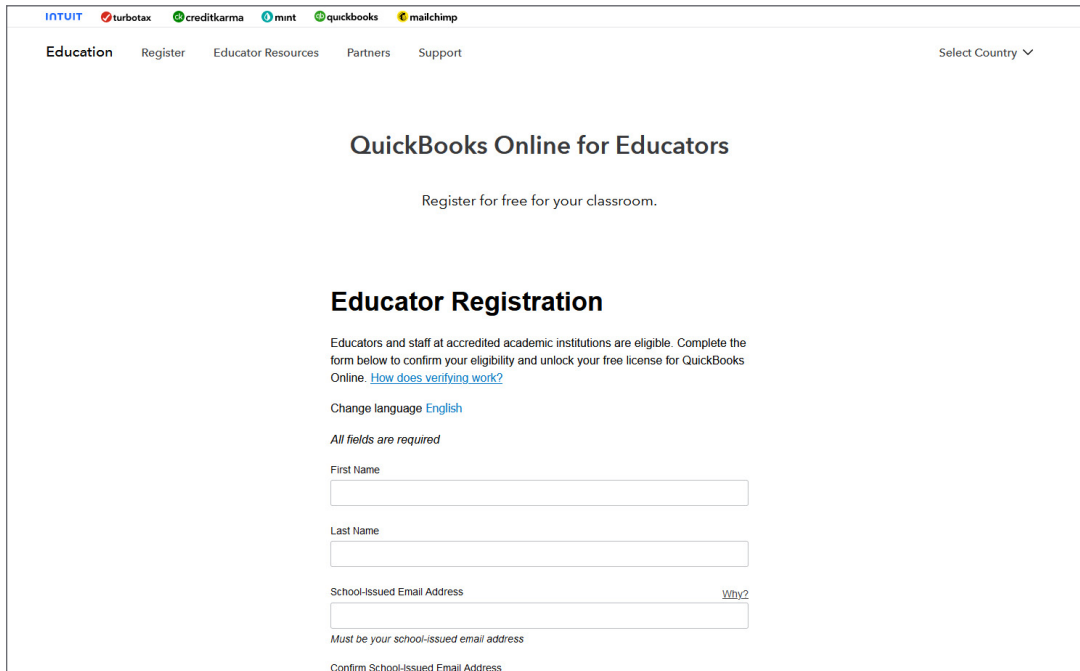
The screenshot shows the top of the Intuit Education Program website. The navigation bar includes the Intuit logo and social media icons for TurboTax, Credit Karma, Mint, QuickBooks, and MailChimp. The main header has links for Education, Register, Educator Resources, Partners, and Support, along with a 'Select Country' dropdown. The main content area features a large image of a smiling woman in a classroom. The text reads: 'Intuit Education Program' followed by '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 are two buttons: 'For educators' and 'For students'. At the bottom of the section, it says 'Features and benefits for educators'.

Scroll down and click **Sign up for free**.



The screenshot shows the 'Choose your Intuit product' section. The navigation bar is the same as in the previous screenshot. The main heading is 'Choose your Intuit product'. Below this are three tabs: 'QuickBooks Online', 'ProFile', and 'Design for Delight'. The 'QuickBooks Online' tab is selected. Below the tabs are two buttons: 'FOR EDUCATORS' and 'LEARN MORE'. Below this is a section titled 'Free QuickBooks Online license'. The text reads: 'We know you spend countless hours preparing students for the future. What if you could help them develop real-world business skills to equip them for the workforce? Let Intuit Education help ready students to join the more than 7 million small businesses using QuickBooks, or start their own business by learning QuickBooks for free.' Below this text is a 'Sign up for free' button. To the right of the text is an image of a woman in a white shirt helping a student at a desk.

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 for Educators' registration page. At the top, there are logos for Intuit, TurboTax, Credit Karma, Mint, QuickBooks, and MailChimp. Below the logos is a navigation menu with 'Education' selected, and links for 'Register', 'Educator Resources', 'Partners', and 'Support'. A 'Select Country' dropdown menu is on the right. The main heading is 'QuickBooks Online for Educators' with the subtext 'Register for free for your classroom.' Below this is the 'Educator Registration' section. It includes a paragraph explaining eligibility for educators and staff at accredited institutions, with a link to 'How does verifying work?'. There is a 'Change language' link set to 'English'. A note states 'All fields are required'. The form contains three input fields: 'First Name', 'Last Name', and 'School-Issued Email Address'. The 'School-Issued Email Address' field has a 'Why?' link and a note below it: 'Must be your school-issued email address'. At the bottom, there is a 'Confirm School-Issued Email Address' label.

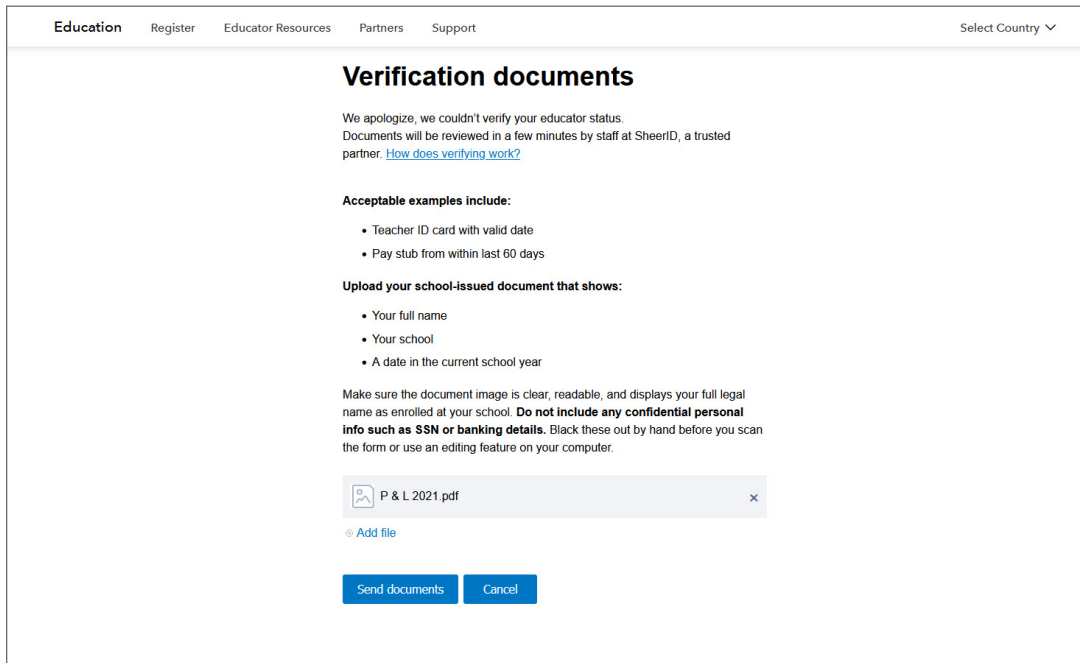
Next, Intuit asks for information about your school. Intuit will review this information thoroughly, so provide accurate information. You'll be required to provide your Institution Name, Institution Type, Program or Faculty, Job Title or Role, # of students, and the Name of the Course that you're planning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

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

The screenshot shows a web form for Intuit's Education registration process. At the top, there is a navigation bar with links for "Education", "Register", "Educator Resources", "Partners", and "Support", along with a "Select Country" dropdown menu. The form itself contains several input fields: a "Last Name" field, a "School-Issued Email Address" field with a "Why?" link, a "Confirm School-Issued Email Address" field, and an "Institution Name" field with a "School not listed?" link. Below these fields is a "Type of course" section with radio button options for "Accounting/Bookkeeping", "Entrepreneurship", "Business", "Tax", "QuickBooks", and "Other". A blue "Verify and continue" button is positioned below the course type options. At the bottom of the form, there is a small disclaimer: "By clicking, I consent to processing my information for the purpose of verifying my eligibility as described within the [Intuit Inc. Privacy Policy](#). I understand that my information will be shared with Intuit Inc. Your information will be transferred to the United States and will be treated according to SheerID's privacy policy."

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

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



Education Register Educator Resources Partners Support Select Country ▾

### Verification documents

We apologize, we couldn't verify your educator status.  
Documents will be reviewed in a few minutes by staff at SheerID, a trusted partner. [How does verifying work?](#)

**Acceptable examples include:**

- Teacher ID card with valid date
- Pay stub from within last 60 days

**Upload your school-issued document that shows:**

- Your full name
- Your school
- A date in the current school year

Make sure the document image is clear, readable, and displays your full legal name as enrolled at your school. **Do not include any confidential personal info such as SSN or banking details.** Black these out by hand before you scan the form or use an editing feature on your computer.

P & L 2021.pdf ×

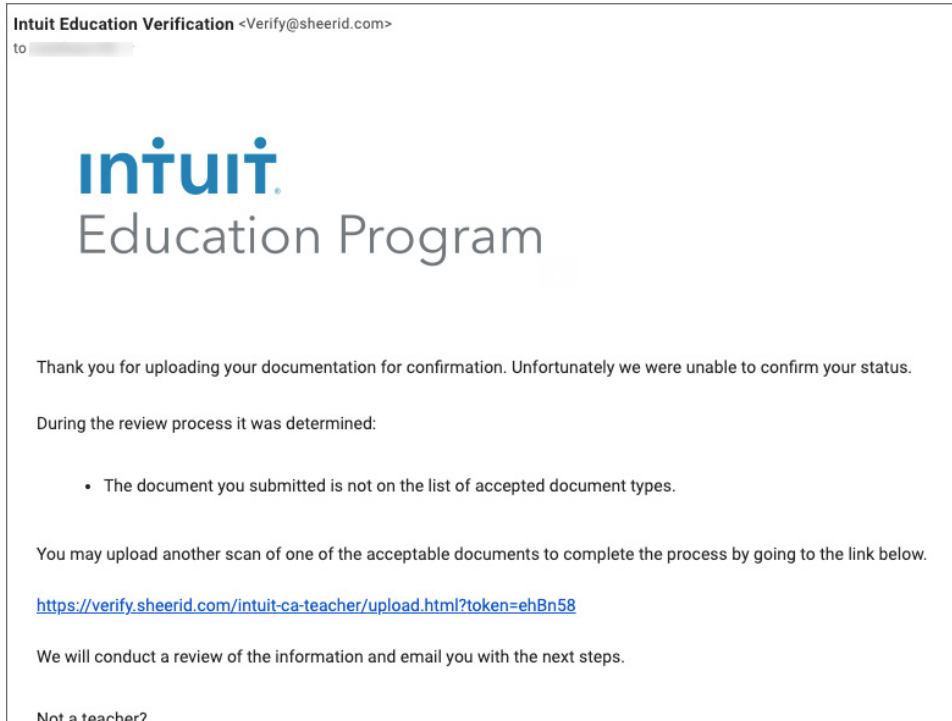
⊕ Add file

Send documents Cancel

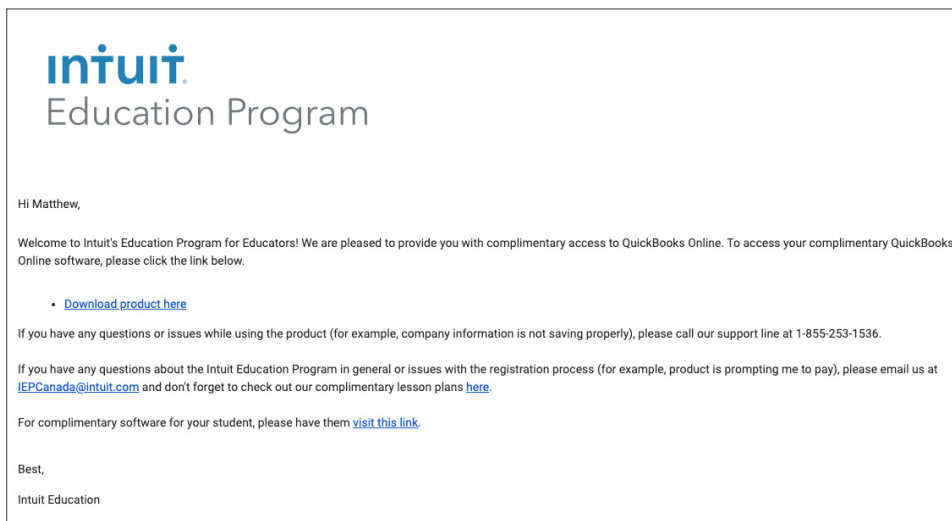
After selecting the documents click **Send documents**.

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

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 (User ID), First name (Matthew), Last name (Peterson), Phone ((647) 555-5555), Password, and Confirm password. A green 'Continue' button is at the bottom. On the right, there are links for 'No credit card needed', 'Check 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**.

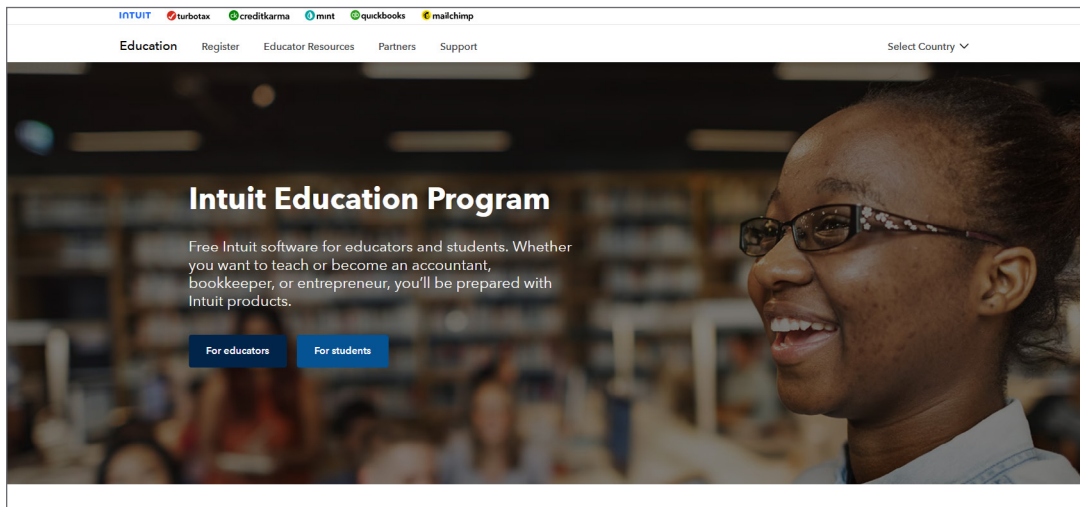
The screenshot shows the 'Please enter your firm's info' page. The form includes fields for Accounting firm name (Sheridan College), Province/Territory (Ontario), Firm postal code (L6H 0A6), and Number of full-time employees (including you) (1). A green 'Continue' button is at the bottom. On the right, there are links for 'No credit card needed', 'Check 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 the Trust logo.

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

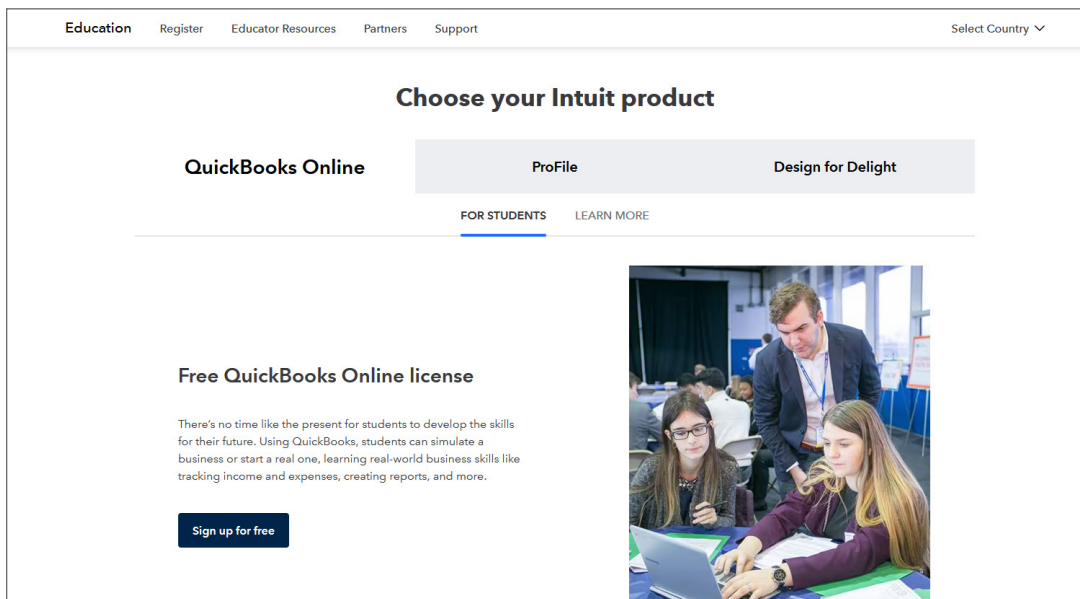
# How Does My Student Get Started?

Your student can get started by going to [intuiteducation.ca](https://intuiteducation.ca) to get signed up.

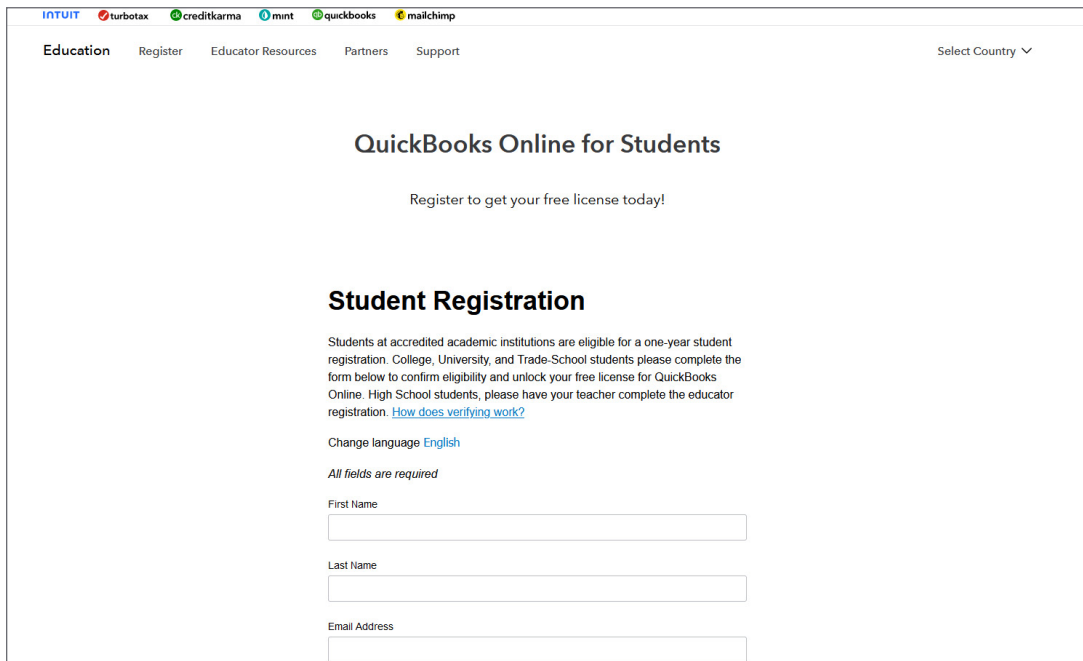
## 1. Click **For students**.



## 2. Scroll down to the section labeled **Free QuickBooks Online license**. Click **Sign up for free**.



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



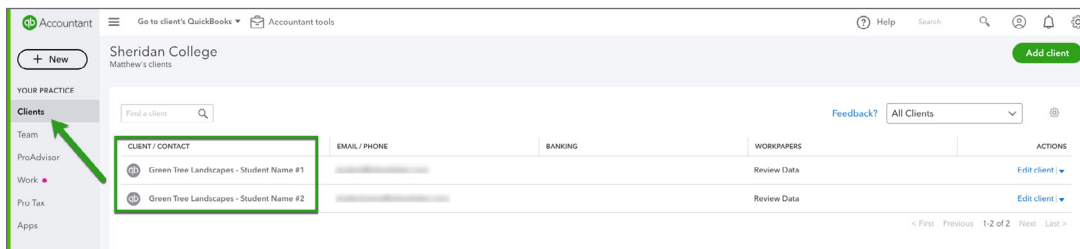
The screenshot shows the 'QuickBooks Online for Students' registration page. At the top, there is a navigation bar with logos for Intuit, TurboTax, Credit Karma, Mint, QuickBooks, and Mailchimp. Below the logos, the navigation menu includes 'Education', 'Register', 'Educator Resources', 'Partners', and 'Support'. A 'Select Country' dropdown menu is located on the right side of the navigation bar. The main heading is 'QuickBooks Online for Students', followed by the text 'Register to get your free license today!'. Below this is the 'Student Registration' section, which includes a paragraph explaining eligibility for a one-year student registration. The text states: 'Students at accredited academic institutions are eligible for a one-year student registration. College, University, and Trade-School students please complete the form below to confirm eligibility and unlock your free license for QuickBooks Online. High School students, please have your teacher complete the educator registration. [How does verifying work?](#)'. Below the text, there is a link to 'Change language English'. A note states 'All fields are required'. There are three input fields: 'First Name', 'Last Name', and 'Email Address', each with a corresponding text box.

4. Click **Verify and Continue**.

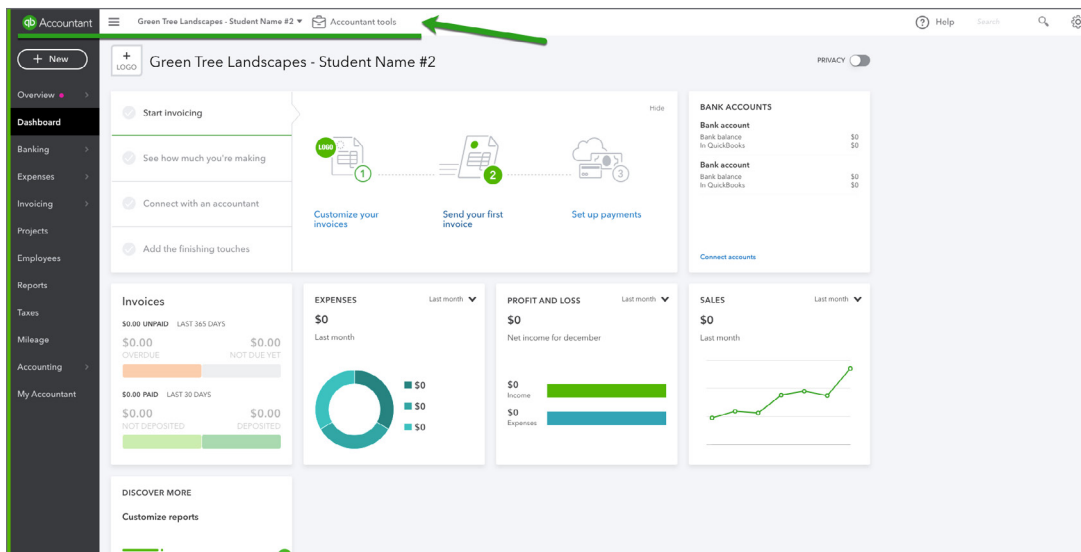
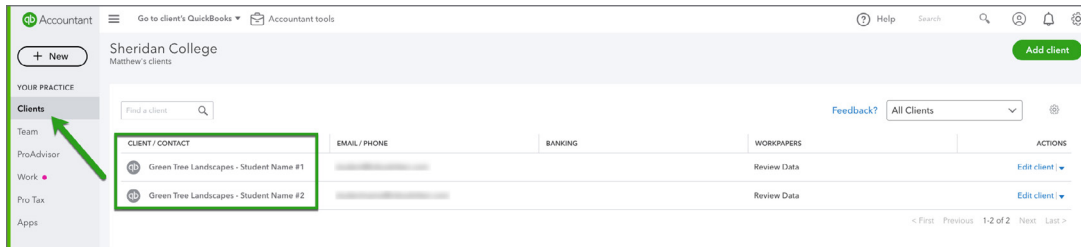
# Working with Your Students in QuickBooks Online Accountant

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.

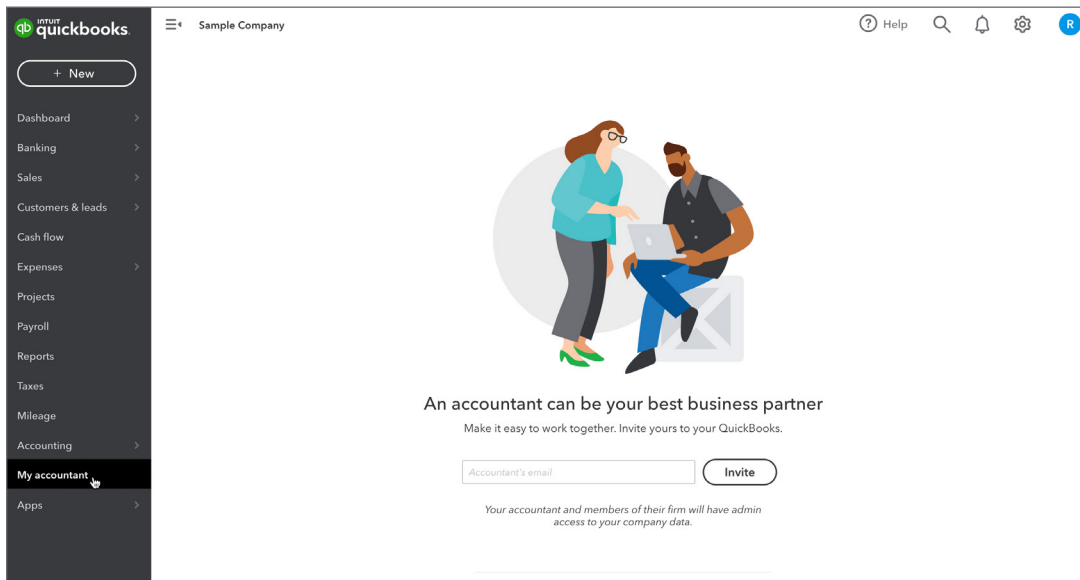


To access a student file, click the green QB icon next to the Client (student) name. Now you see that you have access to their QuickBooks Online Company. You'll see you're using the QuickBooks Online Accountant version but are now in the student file.



# 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 'QuickBooks Online lesson plans for educators' page. At the top, there is a navigation bar with links for 'Education', 'Register', 'Educator Resources', 'Partners', and 'Support', along with a 'Select Country' dropdown. Below the navigation bar, there is a 'Go to' section with links for 'QuickBooks Online', 'QuickBooks Desktop', and 'ProFile'. The main content area is titled 'QuickBooks Online lesson plans for educators' and includes two links: 'Download the teaching powerpoints of all chapters' and 'Learn more about how to get with started as an educator with this guide'. The page is divided into four columns, each representing a chapter:

- Ch. 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.  
Download PDF | Watch now
- Ch. 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.  
Download PDF | Watch now
- Ch. 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.  
Download PDF | Watch now
- Ch. 4: Suppliers and Expenses Part 1**  
In this chapter, you'll learn the steps necessary to set up suppliers, enter expenses, and track bills in QuickBooks Online. Every business is required to spend money to purchase goods and services used in your business to provides your services or products.  
Download PDF | Watch now

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.

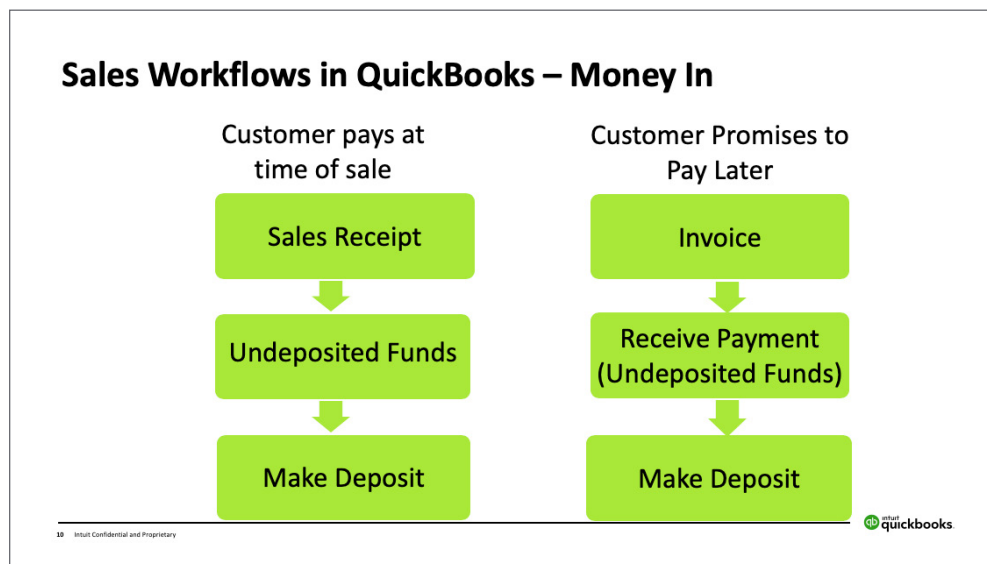
## **Appendices**

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](mailto:iepcanada@intuit.com)